Oracle® Fusion Middleware

Administrator's Guide for Oracle WebCenter Collaboration

10*g* Release 4 (10.3.3.0.0)

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Describes how to perform administration tasks for Oracle
WebCenter Collaboration.

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Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Collaboration, 10*g* Release 4 (10.3.3.0.0)

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Preface

This book describes how to manage Oracle WebCenter Collaboration 10*g* Release 4 (10.3.3.0.0).

Audience

This book is written for Oracle WebCenter Collaboration and Oracle WebCenter Interaction administrators who are responsible for maintaining the portal system, getting information into the portal, creating places for users to collaborate on projects, managing projects, and other tasks that improve the usefulness of the portal.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle WebCenter Collaboration 10*g* Release 4 (10.3.3.0.0) documentation set:

- *Oracle WebCenter Collaboration Release Notes*

- *Oracle Fusion Middleware Installation and Upgrade Guide for Oracle WebCenter Collaboration*

- *Oracle Fusion Middleware Deployment Planning Guide for Oracle WebCenter Interaction*

- *Oracle Fusion Middleware Web Service Developer's Guide for Oracle WebCenter Interaction*

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Overview of Oracle WebCenter Collaboration

This chapter provides an overview of Oracle WebCenter Collaboration and the administrative tasks you perform to manage Oracle WebCenter Collaboration projects and objects. It includes the following topics:

- What is Oracle WebCenter Collaboration
- Overview of Oracle WebCenter Collaboration Components
- Overview of Oracle WebCenter Interaction Components
- Overview of Oracle WebCenter Collaboration Security
- Overview of the Oracle WebCenter Collaboration Browsing User Interface
- Overview of the Oracle WebCenter Collaboration Administrative Objects and Tools

1.1 What is Oracle WebCenter Collaboration

Oracle WebCenter Collaboration is part of the Oracle WebCenter Interaction suite of products. Oracle WebCenter Collaboration integrates directly with the Oracle WebCenter Interaction portal to take advantage of portal functions such as search, user identification and authentication, and group management. Oracle WebCenter Collaboration extends the portal functionality by providing online work spaces that enable users to collaborate on projects.

Some features Oracle WebCenter Collaboration provides include:

- Document management and library services
- Notifications, subscriptions, and alerts
- Project and process management
- Role-based project security
- Task assignment and calendars
- Threaded discussions
- Wikis
- Blogs

1.2 Overview of Oracle WebCenter Collaboration Components

The following table describes the Oracle WebCenter Collaboration components you must install and configure before you can use the procedures provided in this guide to

manage Oracle WebCenter Collaboration projects and objects. For information on installing and setting up these components, see the *Oracle Fusion Middleware Installation and Upgrade Guide for Oracle WebCenter Collaboration*.

Table 1–1   Summary of Oracle WebCenter Collaboration Components

Component	Description
Oracle WebCenter Collaboration Database	Stores Oracle WebCenter Collaboration data such as calendar, task, discussion, and subscription information. It also stores information about the documents used by Oracle WebCenter Collaboration. The Oracle WebCenter Collaboration database does not store these documents; they are stored in the Document Repository Service.
Collaboration Web Application	Enables end users to access Oracle WebCenter Collaboration projects and their contents through the Oracle WebCenter Collaboration portlets. The Oracle WebCenter Collaboration web application also enables some administrative actions, such as configuring access to projects and their objects.
Image Service Files	Include all necessary images, styles, user interface controls, Java applets, and online help for Oracle WebCenter Collaboration. Install these files on the same computer on which the portal's Image Service is installed.
Groupware Service	Enables integration with the following groupware servers: ■ Microsoft Exchange ■ Lotus Domino When Oracle WebCenter Collaboration is integrated with a groupware server, users can synchronize their Oracle WebCenter Collaboration calendar with a groupware calendar and perform various groupware tasks from within Oracle WebCenter Collaboration. For information on groupware integration and groupware server version support, see Section 5.4, "Integrating Oracle WebCenter Collaboration and Groupware."

1.3 Overview of Oracle WebCenter Interaction Components

Oracle WebCenter Collaboration is designed to integrate with the Oracle WebCenter Interaction portal. When Oracle WebCenter Collaboration is installed, several administrative objects, activity rights, and the Collaboration Administration Utility are created in the portal.

The following table describes the Oracle WebCenter Interaction components that are used by Oracle WebCenter Collaboration. For information on installing these components, see the installation and upgrade guides for Oracle WebCenter Interaction.

Table 1–2   Summary of Oracle WebCenter Interaction Components

Component	Description
Portal Database	The portal database stores portal objects, such as user and group configurations, document records, and administrative objects. The portal database does not store the documents available through your portal. Source documents are left in their original locations.
Administrative Portal	The administrative portal handles portal setup, configuration, and content. It enables administrative functions, such as creating and managing portlets and other web services.

Table 1–2   (Cont.) Summary of Oracle WebCenter Interaction Components

Component	Description
Portal	The portal serves end user portal pages and content. It enables end users to access portal content through My Pages, community pages, the Knowledge Directory, and search. The portal also enables some administrative actions, such as setting preferences on portlets or managing communities.
Image Service	The Image Service serves static content used or created by portal components. It serves images, help files, and other static content for use by the Oracle WebCenter Interaction system.
	When you extend the base portal deployment to include additional components, such as portal servers or integration products, you might also have to install additional Image Service files. For information on installing the Image Service files for those components, refer to the documentation included with the component software.
Search Service	The Search Service returns content that is indexed in the Oracle WebCenter Interaction system from the portal and Oracle WebCenter Collaboration. The indexed content includes documents, portlets, communities, users, and many other Oracle WebCenter Interaction objects.
ALUI Directory	ALUI Directory enables Oracle WebCenter Interaction to act as an LDAP server, exposing the user, group, and profile data in the portal database through an LDAP interface.This enables other Oracle WebCenter Interaction products (and other third-party applications) to authenticate users against the portal database.
Automation Service	The Automation Service runs jobs and other automated portal tasks. You run jobs to perform tasks such as crawling documents into the Knowledge Directory, synchronizing groups and users with external authentication sources, and maintaining the search collection.
Document Repository Service	The Document Repository Service stores content uploaded into the portal and Oracle WebCenter Collaboration.
API Service	The API Service provides access to the SOAP API.
Notification Service	The Notification Service sends e-mail notifications to users.
	The Notification Service is not required for users to employ the Email a Project feature. However, if the Notification Service is not running, the Email a Project feature is less useful. For more information about the Email a Project feature, see Section 5.8, "Configuring the E-mail a Project Feature."

1.4 Overview of Oracle WebCenter Collaboration Security

Oracle WebCenter Collaboration security involves managing access to Oracle WebCenter Collaboration functionality and managing access to Oracle WebCenter Collaboration projects and their content. This includes:

- Activity security, in the form of activity rights. For more information, see Section 3.2, "Activity Rights."

- Project roles, which are used to control access to Oracle WebCenter Collaboration projects. For more information, see Section 3.1.1, "Project Roles."

- Access levels, which are used to control access to functional areas and objects in Oracle WebCenter Collaboration projects. For more information, see Section 3.1.2, "Access Levels."

In addition to the security available through Oracle WebCenter Collaboration, you must also secure your hardware and back-end systems (for example, your portal and Oracle WebCenter Collaboration databases) to fully protect your portal. You should follow all security guidance provided in your hardware and software documentation.

1.5 Overview of Oracle WebCenter Collaboration Projects

Oracle WebCenter Collaboration lets portal users work together by sharing documents, calendars, discussions, task lists, wikis, and blogs. These elements are combined to form an Oracle WebCenter Collaboration project, which is the main unit of Oracle WebCenter Collaboration.

Oracle WebCenter Collaboration lets you create multiple projects that are customized to the needs and goals of individual users. After you have set up a series of projects, users can select the projects they must accomplish their work. When a user selects a project, Oracle WebCenter Collaboration displays information about that project and makes the project's functional areas available to the user.

Each Oracle WebCenter Collaboration project has its own set of objects and properties that are not shared with other projects. For example, documents added to Project A belong only to that project. Users in Project B have their own set of documents, and do not see those that belong to Project A. Similarly, each project has its own task lists, discussions, messages, calendar, wikis, and blogs.

Oracle WebCenter Collaboration objects are defined as the following:

Table 1–3   Types of Oracle WebCenter Collaboration Objects

Oracle WebCenter Collaboration Object	Description
Project	Common work spaces for online collaboration for project teams. Projects are the containers for the other Oracle WebCenter Collaboration objects.
Announcement	A way to convey important information to project members.
Discussion	A virtual forum where project users can hold online conversations. Discussions are comprised of messages.
Document Folder	A container used to organize documents, similar to folders on a file system.
Document	A file of any type that have been uploaded to Oracle WebCenter Collaboration.
Event	An occurrence of importance in a project.
Task List	A set of tasks that define units of work to be completed by an assigned user.
Wiki	A collection of pages that contain content that can be added or updated by project users.
Blog	A place where project users can post project commentary or information in a journal entry format. A blog is made up of multiple entries. Entries can be created by project users. Other project users can then comment on the entry.

1.6 Overview of the Oracle WebCenter Collaboration Browsing User Interface

This section describes the user interface for Oracle WebCenter Collaboration browsing users. It includes the following topics:

- Oracle WebCenter Collaboration Portlets
- Project Explorer
- Application View
- Advanced Oracle WebCenter Collaboration Features

1.6.1 Oracle WebCenter Collaboration Portlets

Oracle WebCenter Collaboration contains a set of portlets that provide access to projects and the Project Explorer. Oracle WebCenter Collaboration portlets are available in two forms:

- Community portlets, which are added and configured by Community Managers to reside in portal communities. Members of the community can see projects to which they have been assigned. However, users can customize their view of the community by selecting only projects they want to view.

- My Page portlets reside on a project user's My Page. Users can select the projects they want to view from among all projects to which they have been assigned, thereby customizing their My Page view.

> **Note:** User access to projects and functional areas within a project depend on the roles and access levels assigned to each user. For information on access levels, see Section 3.1.2, "Access Levels."

Table 1–4 lists and describes the available portlets. Most portlets have a community version (for example, Community Tasks) and a My Page version (for example, My Tasks).

Table 1–4   Oracle WebCenter Collaboration Portlets

Portlet Name	Description
Collaboration Profile	The Collaboration Profile portlet is added to user profile pages to add Oracle WebCenter Collaboration functionality. It should not be added to community pages or My Pages.
Community/My Announcements	Displays a list of project announcements.
Community/My Blog Explorer	Displays project blogs in an explorer user interface, with a hierarchical navigation tree on the left, and the selected blog entry and comments on the right.
Community/My Calendar	Displays project events, tasks, and milestones in a calendar user interface.
Community/My Discussion Explorer	Displays project discussions, messages, or threads. When you click a discussion or message, the discussion or message appears in the portlet.
Community/My Discussions	Displays a list of project discussions or a list of the messages within those discussions. When you click a discussion or message, the discussion or message opens in the Oracle WebCenter Collaboration user interface.

Table 1–4   (Cont.) Oracle WebCenter Collaboration Portlets

Portlet Name	Description
Community/My Document Explorer	Displays project folders and documents in an explorer user interface, with a hierarchical navigation tree on the left, and a list of selected folder contents and folder/document details on the right.
Community/My Documents	Displays a list of project documents.
Community/My Excel	Displays a selected Excel document from a project.
	There is also a Global Excel Portlet Template that enables you to create multiple instances of Excel portlets to display more than one Excel file on a particular My Page or community page.
Community/My Projects	Displays projects selected by a community manager.
Community/My Tasks	Displays project tasks and task lists.
Community/My Wiki Explorer	Displays project wiki pages on the left and the selected wiki page and details on the right.
My/Project Search	Lets users search the content of text documents and object properties within a project.

For more information on Oracle WebCenter Collaboration portlets, see the Oracle WebCenter Collaboration online help.

1.6.2 Project Explorer

The Project Explorer lets users view all projects to which they have access in a single window. Based on levels of access, different project functionality is accessible within a universal toolbar. If a user does not have permissions to perform a certain task, that task is unavailable in the toolbar.

The Project Explorer contains the following areas:

Table 1–5   Project Explorer Areas

Project Explorer Area	Description
Toolbar	Provides access to all of the Project Explorer functionality.
Folder Tree Window	Displays the Project Folder hierarchy within Oracle WebCenter Collaboration.
Details Window	Displays information about the selected Project or Project Folder.
List Window	Displays the contents of the selected Project Folder.

Figure 1–1   Project Explorer
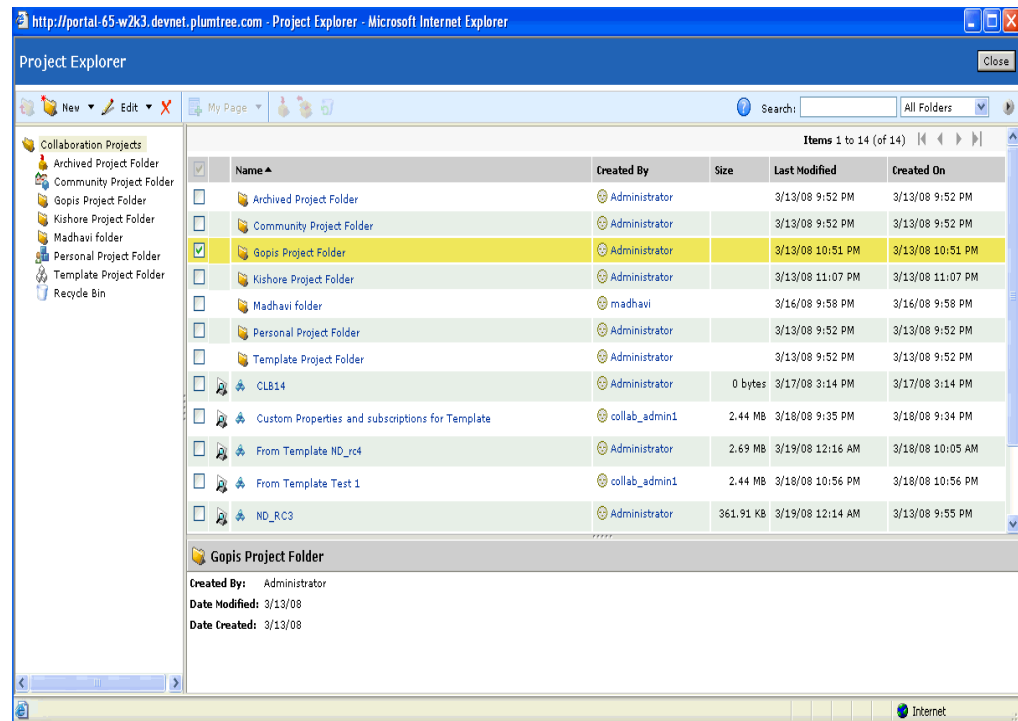
The Project Explorer is accessible from either the **My Projects** portlet or the **Community Projects** portlet. Users can add the My Projects portlet to their My Page. Community Managers can add the Community Projects portlet to a community.

1.6.3 Application View

The application view displays the functional areas and objects of a single project in one window. Selecting a tab changes the view. Each functional area has specific actions that can be enabled or disabled for a given role by assigning an Oracle WebCenter Collaboration access level.

The application view can contain the following tabbed panes corresponding to the functional areas of a project:

Table 1–6   Types of Application View Tabbed Panes

Application View Tabbed Pane	Description
Overview	Displays a summary of the project, including recent announcements, documents, and discussion messages.
Calendar	Displays project events and tasks.
Tasks	Displays the task lists in the project.
Documents	Displays documents that have been uploaded to the project.
Discussions	Displays the discussions in the project.
Wiki	Displays the wiki pages in the project.
Blog	Displays the blog entries in the project.

The following image displays an example of the application view of a project:

Figure 1–2   Example of a Project's Application View
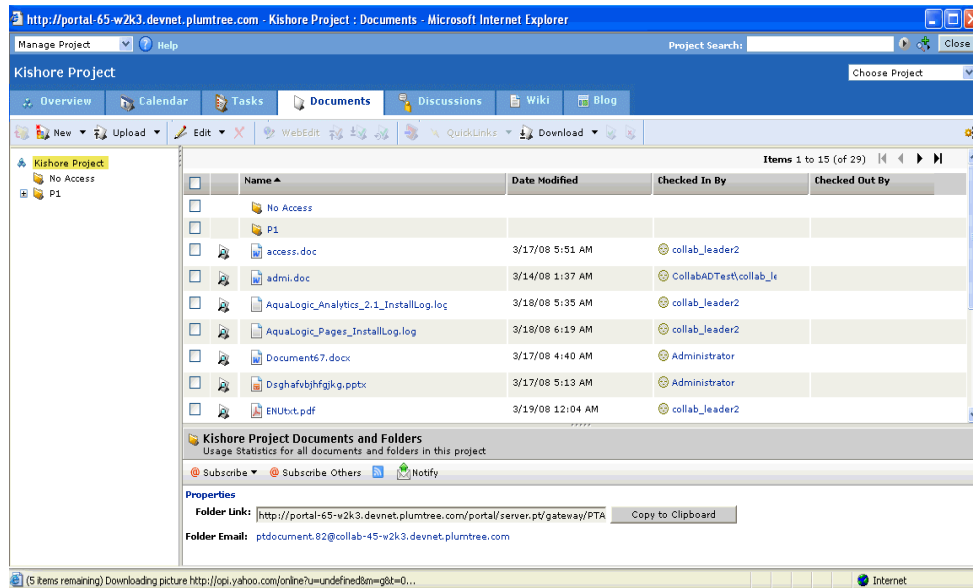
Only the functional areas that are included in the project appear in the project's application view. For more information on setting the functional areas of a project see Section 4.2.1.2, "Selecting the Functional Areas for a Project."

1.6.4 Advanced Oracle WebCenter Collaboration Features

The following advanced features allow Oracle WebCenter Collaboration to be used with the Windows desktop and other common applications:

Table 1–7   Descriptions of Advanced Oracle WebCenter Collaboration Features

Advanced Feature	Description
Groupware Integration	Lets you configure and test a back-end groupware server so users can integrate Microsoft Exchange or Lotus Notes calendars with Oracle WebCenter Collaboration.
Desktop Integration	Lets users integrate Oracle WebCenter Collaboration with the Windows desktop.
Microsoft Project Import	Lets users import Microsoft Project files into an Oracle WebCenter Collaboration calendar.
Office Task Pane	Lets users access key Oracle WebCenter Collaboration project features directly from their Microsoft Office documents.
Oracle Universal Content Management Integration	Lets users export Oracle WebCenter Collaboration projects and documents to Oracle Universal Content Management.

For more information on using and configuring these features, see Section 5, "Integrating Other Products with Oracle WebCenter Collaboration."

1.7 Overview of the Oracle WebCenter Collaboration Administrative Objects and Tools

This section describes the administrative objects, activity rights, and tools that are created in the portal when Oracle WebCenter Collaboration is installed. It includes the following topics:

- Oracle WebCenter Collaboration Administrative Objects
- Oracle WebCenter Collaboration Activity Rights
- Collaboration Administration Utility

1.7.1 Oracle WebCenter Collaboration Administrative Objects

Oracle WebCenter Collaboration uses the following types of administrative objects:

- Content Source
- Group
- Portlet
- Property
- Remote Server
- Web Service

These objects are created when the Oracle WebCenter Collaboration migration package is imported during the installation process and are accessed through the Administration section of the portal. By default, they are created in a folder named **Collaboration**. If you have upgraded from an earlier version of Oracle WebCenter Collaboration, these objects may be located in a different administrative folder.

For information on each object type, see the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Interaction*.

For information on each individual Oracle WebCenter Collaboration administrative object and how it is used, see the description of each object in the portal.

1.7.2 Oracle WebCenter Collaboration Activity Rights

Oracle WebCenter Collaboration uses activity rights to control access to Oracle WebCenter Collaboration functionality. The Oracle WebCenter Collaboration activity rights are created when the Oracle WebCenter Collaboration migration package is imported during the installation process. Activity rights are accessed and managed through the Activity Manager in the Administration section of the portal. For more information on the Oracle WebCenter Collaboration activity rights and how to assign activity rights to portal users, see Section 3.2.1, "Granting Activity Rights to Users."

1.7.3 Collaboration Administration Utility

The Collaboration Administration Utility is used to manage global settings that affect the functionality of Oracle WebCenter Collaboration across all Oracle WebCenter Collaboration projects. The Collaboration Administration Utility is created in the portal during installation and is accessed through the **Select Utility** drop-down list in the Administration section of the portal. For more information on using the Collaboration Administration Utility, see Section 2.2, "Working with the Collaboration Administration Utility."

2

Administering Oracle WebCenter Collaboration

This chapter provides information on the tasks required to administer and maintain Oracle WebCenter Collaboration, such as managing administrators, working with the administration utility, importing files into the Knowledge Directory, setting up logging, backing up and restoring Oracle WebCenter Collaboration, and configuring the Notification Service for experience definitions.

It includes the following sections:

- Default Administrator Groups
- Working with the Collaboration Administration Utility
- Configuring Oracle WebCenter Collaboration for Importing Files into the Knowledge Directory
- Setting Up Oracle WebCenter Collaboration Logging
- Backing Up and Restoring Oracle WebCenter Collaboration
- Configuring the Notification Service for Working with Experience Definitions

For details on assigning moderators to folders and discussions, see Section 3.1.3.3.1, "Assigning Moderators to Folders."

For details on clustering Oracle WebCenter Collaboration, see information about load balancing activity services in the *Oracle Fusion Middleware Networking and Authentication Guide for Oracle WebCenter Interaction*.

2.1 Default Administrator Groups

When Oracle WebCenter Collaboration is installed, two default Oracle WebCenter Collaboration administrator groups are created in the portal as follows:

- **Collaboration Project Administrators**: By default, this group has the following activity right:

  - Manage Collaboration Projects

  Members of this group can create and manage projects and project templates.

  Initially, this group includes the portal Administrators group as a member.

- **Collaboration Administrators**: By default, this group has the following activity rights:

  - Access Administration

- Access Utilities

- Manage Collaboration

- Manage Collaboration Projects

Members of this group can configure global settings that apply to all Oracle WebCenter Collaboration projects by using the Collaboration Administration Utility. They can also manage the Oracle WebCenter Collaboration project folder hierarchy.

Initially, this group does not have any members. An authorized portal administrator must add the first user and/or group to this group.

For more information on the activity rights granted to the default administrator groups, see Section 3.2, "Activity Rights."

2.2 Working with the Collaboration Administration Utility

The Collaboration Administration Utility controls global settings that affect the functionality of Oracle WebCenter Collaboration across all Oracle WebCenter Collaboration projects.

This section outlines the tasks that can be performed using the Collaboration Administration Utility. It includes the following topics:

- Accessing the Collaboration Administration Utility

- Performing Diagnostic Tests

- Configuring Miscellaneous Settings

- Creating, Editing and Deleting Holidays

- Setting Up Oracle WebCenter Collaboration for Publishing to the Portal Knowledge Directory

- Configuring Groupware Servers

- Monitoring Notification Health

- Working with the Search Service

- Granting Portal Access to Oracle WebCenter Collaboration

2.2.1 Accessing the Collaboration Administration Utility

Collaboration Administrators can access the Collaboration Administration Utility through the portal from the Select Utility drop-down list.

To access the Collaboration Administration utility:

1. Log in to the portal.

2. Click the **Administration** tab.

3. In the Select Utility drop-down list, click **Collaboration Administration Utility**.

2.2.2 Performing Diagnostic Tests

The Diagnostics page provides diagnostic and configuration information about the various components of Oracle WebCenter Collaboration. If there is a failure with a component, the Diagnostics page displays the failure, related settings, and a possible resolution. We recommend that you check diagnostics:

- After you have installed Oracle WebCenter Collaboration.

- After the system has failed. For example, you can check the Diagnostics page to confirm that the Notification Service is down if users have stopped receiving notification messages for subscriptions.

Each test returns one of these messages to the Status column:

- **OK:** The installation or startup was successful, or the component is functioning correctly.

- **FAIL:** The installation or startup was not successful, or the component is not functioning correctly.

  The message provides a reason for failure and might provide troubleshooting recommendations.

- **NOT ENABLED:** The component is not enabled. This is not necessarily an error if the component is not being used.

This table describes the diagnostics that are provided for Oracle WebCenter Collaboration's components:

Table 2–1   Oracle WebCenter Collaboration Diagnostics

Test	Description
Collaboration Startup and DB	Verifies that Oracle WebCenter Collaboration started up successfully.
Notification Service	Verifies that the Notification Service is enabled and running.
Document Repository Service	Verifies that the Document Repository Service is running.
Search Service	Verifies that the Search Service is running.
Groupware Exchange SOAP Service	Verifies that the Groupware Exchange SOAP service is running. **Note**: For this test to run, you must enable Groupware Exchange SOAP Service and configure Microsoft Exchange as the back-end server. If Groupware Exchange SOAP Service is not enabled, a Not Enabled message appears.
IM Presence	Verifies that instant messenger integration is configured.
Tagging Server	Verifies that the Tagging Server is enabled and running.
Analytics Server	Verifies that the Analytics Server is enabled and running.
Universal Content Management Server	Verifies that the Universal Content Management Server is enabled and running.
JSControls Configuration and JavaScript Files from the Image Service	Verifies that you have correctly installed the JSControls component.
Portal Connection through PTAPI	Verifies that the API Service is running.
Workflow Integration	Verifies that Workflow Integration is configured and running.

If the portal is down, you can access the Diagnostics page by typing the following URL in a browser's address bar: http://*server_name*:*port_number*/collab/admin/diagnostic/index.jsp. For example: http://portal.company.com:8080/collab/admin/diagnostic/index.jsp.

> **Note:** When you access the Diagnostics page by typing the URL, the JS Controls and Portal Connection tests are not visible.

You can also perform diagnostic tests on the groupware servers that are integrated with Oracle WebCenter Collaboration. For information on testing groupware servers, see Section 2.2.6.1, "Testing Groupware Servers."

2.2.3 Configuring Miscellaneous Settings

The following sections describe configuration options on the Miscellaneous Settings page.

2.2.3.1 Enforcing the Maximum Size of Projects

To limit the size of projects, select **Enforce a Maximum Project Size**, then type the size limit in megabytes. Set the storage space according to the anticipated number and size of documents or files and their revisions.

By default, Oracle WebCenter Collaboration does not limit the size of projects. If a project size limit was previously set and you want to go back to the original setting of unlimited project sizes, clear the check box.

The size limit is for individual projects, not the entire collection of projects in Oracle WebCenter Collaboration. This setting affects every project in Oracle WebCenter Collaboration. A Project Leader can define the maximum size for a specific project in that project's General Settings page. Project Leaders with the Manage Collaboration Projects activity right can set a project size that exceeds the maximum set here.

> **Note:** Oracle WebCenter Collaboration includes objects in the Project Recycle Bin in its calculation of a project's memory usage.

2.2.3.2 Enabling Personal Projects

The personal projects feature lets users create and maintain their own personal project. A personal project contains documents, task lists, notes, and calendar features. To enable this feature, select **Enable Personal Projects**. To restrict the size of each personal project, type the size in megabytes.

By default, Oracle WebCenter Collaboration does not limit the size of personal projects. If a project size limit was previously set and you want to go back to the original setting of unlimited project sizes, clear the check box.

2.2.3.3 Enabling Add to My Page

If you want your users to be able to add projects to their My Page, select the **Enable Add To My Page** check box. By default, this check box is selected.

2.2.3.4 Enabling Portal Group Notifications

If you want your users to be able to select individual users within portal groups or entire portal groups at once to receive notifications, select the **Enable portal group notifications** check box. By default, this check box is cleared.

2.2.3.5 Hiding Unused Project Folders

To hide project folders that contain only projects that users cannot access, select **Hide project folders that contain only projects a user cannot access**. By default, this check box is cleared.

Enabling this option might cause the Project Explorer to perform more slowly due to the added security checks.

2.2.3.6 Enabling WebDAV

If you want your users to use Oracle WebCenter Collaboration's desktop integration features, select **Enable WebDAV**. To be able to select and clear this check box, you must set the `<fullWebDAVAccessToThisServer>` node in the config.xml file to `yes`. Config.xml also includes other nodes that you must set for WebDAV. Changes that you make to this option are never carried over to config.xml.

2.2.3.7 Enabling WebEdit

WebEdit simplifies the process of editing a document in Oracle WebCenter Collaboration. Using this feature a user can edit a Microsoft Office document "in-place," without having to perform check-ins, check-outs, uploads, and downloads.

If you want your users to edit Microsoft Office documents on their desktop, select **Enable WebEdit**. To be able to select and clear this check box, you must set the `<webEdit enabled>` node in the config.xml file to `yes`. Config.xml also includes other nodes that you must set for WebEdit. Changes that you make to this option are never carried over to config.xml.

To use WebEdit, an end user's browser must **not** be configured to disable Microsoft ActiveX controls. Users can still employ the features of WebEdit without having the Collaboration Office Tools Add-In installed on their computers.

2.2.3.8 Enabling Bulk Upload

The Bulk Upload feature allows users to upload multiple documents or to copy a directory hierarchy from a local computer to Oracle WebCenter Collaboration. To enable this feature:

1. If you did not choose to enable the Bulk Upload feature during installation, you must edit **config.xml** and set the **bulkUpload.enabled** element to **yes**.

   Alternatively, you may enable Bulk Upload by using the Collaboration Administration utility.

   a. Click the **Administration** tab.

   b. Select the **Collaboration Administration** utility.

   c. Click **Miscellaneous Settings**.

   d. Click **Enable bulk upload**.

2. Grant the corresponding activity rights by performing the following:

   a. Click the **Administration** tab.

   b. Select the **Activity Manager** utility.

   c. Click **Enable bulk upload**.

   d. Click **Add Group**.

   e. Select the groups you want to add.

    f. Click **OK**.

    g. Click **Finish**.

2.2.3.8.1 Client Requirements for Using Bulk Upload This section describes the client settings required to use the Bulk Upload feature. After Bulk Upload has been enabled, the following software must be installed on the client computer:

- Java Runtime Environment (JRE), version 1.4.2 or higher, JRE 1.5 or higher, and JRE 1.6 or higher

- Java Plug-in, version 1.4 or higher

- The Bulk Upload Applet

When a user attempts to use the Bulk Upload feature, the browser verifies if the Java Runtime Environment and the Java Plug-in are installed. If they are not, the user is prompted to download and install them.

If they are installed, the Java Plug-in attempts to load the Bulk Upload applet. If the applet is not found, it is downloaded from the Image Service. The user is then prompted to trust the applet. Users should answer "Always" when prompted to trust the applet.

2.2.3.9 Enabling Zip Download

If you want your users to be able to download folders and multiple documents as .zip files, select **Enable zip download**. Type the size limit for the .zip file in the box. The download aborts if the .zip file exceeds the size limit.

2.2.3.10 Setting the Number of Document Versions

To limit the number of document versions that Oracle WebCenter Collaboration manages, select the **Enable system-wide control of document versions** check box and type a number from 3 to 999 into the **Maximum number of versions allowed** box. Oracle WebCenter Collaboration keeps the most recent specified number of versions and permanently removes the extra versions.

For example: Oracle WebCenter Collaboration has 25 versions of a document. You specify 10 as the maximum number of versions allowed. Oracle WebCenter Collaboration removes versions 1-15 of the document, keeping versions 16-25 (which are the 10 most recent versions). A user creates version 26 of the document. As a result, Oracle WebCenter Collaboration removes version 16, keeping versions 17-26 (again, Oracle WebCenter Collaboration keeps the 10 most recent versions). This process continues for as long as users create new versions of the document.

> **Note:** Oracle WebCenter Collaboration removes versions on a nightly basis. For this reason, users can access all versions before Oracle WebCenter Collaboration removes them. You cannot recover document versions after Oracle WebCenter Collaboration has removed them.

In addition, Oracle WebCenter Collaboration always keeps:

- The working version of the document. If the working version is older than the first version that you allow, Oracle WebCenter Collaboration keeps the number of versions that you specify, plus the working version.

The version of the document that has been published to the Knowledge Directory. If it is older than the first version that you allow, Oracle WebCenter Collaboration keeps the number of versions that you specify, plus the published version.

> **Note:** This setting does not affect document versions that are in the Project Recycle Bin.

2.2.3.11 Restricting the Size of Single File Uploads

If you want the maximum size of an uploaded file to be anything other than the default, type a number from 1 to 999 into the **Maximum single file upload in MB** box. This setting applies to all individual files that are uploaded, whether using the Upload, Single File or Upload, Multiple Files options. The default is 10 MB. Oracle WebCenter Collaboration always uses the setting that you configure here except during upgrade, when it uses the `<maxUploadMegabytes>` node in config.xml. Changes that you make to this option are never carried over to config.xml.

2.2.3.12 Restricting the Size of Discussion Messages

If you want the maximum number of characters in a message to be anything other than the default, type a number from 1000 to 99999 into the **Maximum number of characters in a discussion message** box. The default is 16000. Oracle WebCenter Collaboration always uses the setting that you configure here except during upgrade, when it uses the `<maxMessageChars>` node in config.xml. Changes that you make to this option are never carried over to config.xml.

2.2.3.13 Enabling Custom Properties

To allow users to add custom properties to Oracle WebCenter Collaboration documents, select **Enable Custom Properties**. When an Oracle WebCenter Collaboration document is crawled or published to the Knowledge Directory, custom properties are attached to the corresponding document in the Knowledge Directory. Project leaders can define project-wide properties that exist for all documents in a project. Additionally, a project-wide property can be designated as required for publishing to the Knowledge Directory.

2.2.3.14 Enabling RSS Feeds

To allow users to view RSS feeds for objects in Oracle WebCenter Collaboration, select **Enable RSS**. Users can view RSS feeds for all objects that they have permission to access. Users also have a personal RSS feed which lets them view the contents of all RSS feeds to which they have subscribed.

2.2.4 Creating, Editing and Deleting Holidays

The Holidays page lets you create, change the properties of and delete holidays from Oracle WebCenter Collaboration's calendar. You can create a maximum of one holiday per day. Holidays appear on and affect every project calendar in Oracle WebCenter Collaboration. You cannot create, edit or delete holidays from the Calendar portlets or projects.

2.2.5 Setting Up Oracle WebCenter Collaboration for Publishing to the Portal Knowledge Directory

You can set up Oracle WebCenter Collaboration so that users can manually publish files into the Knowledge Directory by configuring the Collaboration Publishing

Content Source. The Collaboration Publishing content source must be configured before any publishing activity can take place. This section discusses how to configure the Collaboration Publishing content source. For more information on setting up crawlers for automatic importing of files into the Knowledge Directory, see Section 2.3, "Configuring Oracle WebCenter Collaboration for Importing Files into the Knowledge Directory."

To configure a content source for publishing to the Knowledge Directory:

1. Go to the **Collaboration Administration** utility.

2. Click **Publish to Directory**.

3. Click **Configure a Content Source**.

4. In the Content Source dialog box, select **Collaboration Publishing**.

   This data source is preconfigured when the Collaboration.pte file is loaded into the portal.

5. Click **OK**.

6. Click **Finish**.

> **Note:** After a document is published to the Knowledge Directory, access to the published version from the Knowledge Directory inherits the access settings of the parent Knowledge Directory folder. For example, if the Everyone group has Read access to the Knowledge Directory folder, the version of the Oracle WebCenter Collaboration document published is accessible from the Knowledge Directory by all users, including Guest Users.

2.2.6 Configuring Groupware Servers

To configure a new groupware server:

1. Go to the **Collaboration Administration** utility.

2. Click **Groupware Servers**.

3. Click **Add Server**.

4. Enter the configuration information:

   If you are configuring a Microsoft Exchange back-end server, enter the following configuration information:

Table 2–2   Microsoft Exchange Configuration Parameters

Parameter	Description
Server Name/IP/URL	The server name, IP address, or URL of the groupware server.
Alias	An optional descriptive name for this groupware server.

If you are using a Lotus Domino back-end server, enter the following configuration information:

Table 2–3   Lotus Domino Configuration Parameters

Parameter	Description
Server Name/IP/URL	The server name, IP address, or URL of the groupware server.
Alias	An optional descriptive name for this groupware server, which is available to end users. **Example:** MyCompany Exchange Server
Server Port	If your server port number is other than 80, type a port number; otherwise leave this blank.
Proxy Host/Firewall Port	If you are using a proxy server or a firewall, type the host name; otherwise leave this blank.
Use SSL	If you are using https, select the check box.
HTTPS Port	If you are using an https port number other than 443, type the port number; otherwise leave this blank.
Session Based Authentication	If you are using form-based authentication (cookies), select this; if you are using basic authentication, clear the check box.
Notes Server Temp Dir	Type the local directory of the Lotus Domino server that stores the attachments.
Notes Server Temp UNC	Type the UNC path of the directory of the Lotus Domino server that stores the attachments. This should be the same directory that you typed in the Notes Server Temp Dir box. For example: *Lotus_Domino_server_name**directory_name*.

> **Note:** Other tasks are required for groupware integration besides configuring this page. For complete information, see Section 5.4, "Integrating Oracle WebCenter Collaboration and Groupware."

2.2.6.1 Testing Groupware Servers

You can perform a diagnostic test on all of the groupware servers that are integrated with Oracle WebCenter Collaboration.

To test groupware servers:

1. Go to the **Collaboration Administration** utility.

2. Click **Groupware Servers**.

3. Click **Test Servers**.

> **Note:** This button does not appear in Linux and other UNIX platforms.

Test results appear in the Status column for each groupware server. Each test returns one of these messages:

- **OK**: The groupware server is functioning correctly.

- **FAIL**: You incorrectly added the groupware server, or the groupware server is not functioning correctly.

The message provides a reason for failure and might provide troubleshooting recommendations. The detailed error information can be found in the Oracle WebCenter Collaboration log. You can find the log at:

- The top of the Diagnostics page in the Collaboration Administration Utility (click the **here** link)

- For Microsoft Windows: *install_ dir*\ptcollab\10.3.3\settings\logs\collaboration.log

- For UNIX/Linux: *install_dir*/ptcollab/10.3.3/settings/logs/collaboration.log

By default, *install_dir* is C:\Oracle\Middleware\wci for Microsoft Windows or /opt/oracle/middleware/wci for UNIX and Linux. However, if you upgraded to Oracle WebCenter Collaboration 10.3.3, *install_dir* is the same as in the previously installed version of Oracle WebCenter Collaboration.

2.2.7 Monitoring Notification Health

The Notification Health Monitor sends a notification e-mail to an administrator when there is a problem contacting or using the Notification Service. The administrator at the specified e-mail address is alerted when the Notification Service experiences an error, requires a restart, or can be contacted after a failure.

To configure notification health monitoring:

1. Go to the **Collaboration Administration** utility.

2. Click **Collaboration Notification**.

3. Specify the e-mail host used by the Notification Service, the e-mail address of the administrator to be contacted, and the frequency at which the notification health check is performed.

4. Click **Finish**.

2.2.8 Working with the Search Service

The Collaboration Administration utility lets you monitor the status of the Search Service and rebuild its data.

2.2.8.1 Viewing Search Service Status

Oracle WebCenter Collaboration provides the following information about the Search Service:

Table 2–4   Descriptions of Search Service Statuses

Status	Description
Uptime	The length of time the Search Service has been running.
Installation Directory	The location where the Search Service is installed.
Objects Currently Indexed	The number of Oracle WebCenter Collaboration items in the Search Service index.
Pending Index Requests	The number of requests outstanding for indexing Oracle WebCenter Collaboration objects.

2.2.8.2 Rebuilding the Search Collection

Rebuilding reconciles data between the Oracle WebCenter Collaboration database and Search Service index. Since this is a lengthy and computationally expensive process, use the rebuild operation only when absolutely necessary.

To rebuild the Search Service database:

1. Go to the **Collaboration Administration** utility.

2. Click **Search Service**.

3. Click **Rebuild Search Collection**.

4. Click **OK**.

2.2.9 Granting Portal Access to Oracle WebCenter Collaboration

When Oracle WebCenter Collaboration is configured, it is associated with a primary portal, known as the *owning portal*. Oracle WebCenter Collaboration has a direct relationship with its owning portal, including access to the owning portal's database.

Every portal accessing Oracle WebCenter Collaboration sends an authentication name and password. Oracle WebCenter Collaboration uses this authentication information to ensure that the attempted access is coming from the owning portal. The owning portal is assigned a unique authentication identifier so that Oracle WebCenter Collaboration can identify each portal.

Unless there is a specific must make changes on this page, you should choose the default option, **Automatically capture value**.

2.2.9.1 Changing the Owning Portal

Oracle WebCenter Collaboration determines its owning portal based on the values specified in config.xml for the Web Service ID, Gateway Page URL, and Collaboration Service URL. However, you can also change the owning portal using the Collaboration Administration utility by performing the following:

1. Access the **Collaboration Administration** utility.

2. Click **Portal Access**.

3. Select **Manually enter value** for any value you want to change, and manually enter the value.

4. Click **Finish**.

2.3 Configuring Oracle WebCenter Collaboration for Importing Files into the Knowledge Directory

You can configure content crawlers to automatically import files from Oracle WebCenter Collaboration into the Knowledge Directory. You must have the proper activity rights in the portal to be able to create and configure content crawlers. For information on the necessary activity rights, see the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Interaction*.

This section discusses:

- Configuring Content Crawlers for Importing Files
- Configuring Oracle WebCenter Collaboration Document Properties

For more information on setting up Oracle WebCenter Collaboration so that users can manually publish files into the Knowledge Directory, see Section 2.2.5, "Setting Up Oracle WebCenter Collaboration for Publishing to the Portal Knowledge Directory."

2.3.1 Configuring Content Crawlers for Importing Files

You create content crawlers from the Collaboration Crawler Content Source to import files from Oracle WebCenter Collaboration into the Knowledge Directory. You must use the Collaboration Crawler Content Source with Oracle WebCenter Collaboration content crawlers. The authentication settings for the Collaboration Crawler Content Source must match the authentication settings in the Collaboration Remote Server object.

The API Service and the Automation Service must be installed for Oracle WebCenter Collaboration files to be imported into the Knowledge Directory. For more information about installing them, see the *Installation Guide for Oracle WebCenter Interaction*.

To configure a content crawler for importing files from Oracle WebCenter Collaboration into the Knowledge Directory, perform the following on the content crawler's Main Settings page:

- Click **Browse** next to the Project icon to choose the project that contains the folder the content crawler to access. You can only select projects for which you are a Project Leader.

- Click **Browse** next to the Folder icon to choose a folder. You must have Admin access to the folder. Additionally, you must make this folder content crawler-accessible by selecting **Accessible to Content Crawlers** in the folder's properties. Content crawler accessibility settings are passed down to child folders.

By default, the maximum number of levels within the folder that the content crawler can access is unlimited. You can change this number using the **Maximum number of levels to crawl** drop-down list.

We recommend the following settings for content crawlers that import files into the Knowledge Directory:

- On the content crawler's Main Settings page, select the **Mirror the source folder structure** option

- On the content crawler's Advanced Settings page:
  - Select the **from this Content Source** option.
  - Select the **refresh them** option.
  - Select the **regenerate deleted links** option.

Error information about content crawler jobs can be found in:

- The job history for each content crawler job.

- The Collaboration log, which can be found at:
  - The top of the Diagnostics page in the Collaboration Administration Utility (click the **here** link)
  - For Microsoft Windows: *install_dir*\ptcollab\10.3.3\settings\logs\collaboration.log
  - For UNIX/Linux: *install_dir*/ptcollab/10.3.3/settings/logs/collaboration.log

For more information about creating content crawlers, see *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Interaction*.

2.3.2 Configuring Oracle WebCenter Collaboration Document Properties

Documents that are published and crawled into the Knowledge Directory contain the Checked In By property, which is an Oracle WebCenter Collaboration property that contains the name of the user who checked in the version of the document that is accessible in the Knowledge Directory. In order for the Checked In By property to be displayed, you must add it to the Global Document Property Map by performing the following:

1. Log in to the portal.

2. Click the **Administration** tab.

3. From the Utilities drop-down list, select **Global Document Property Map**.

4. The Global Document Property Map appears.

5. Click **Add Property**.

6. In the Add Property window, select **Checked In By**.

7. Click **OK**.

8. The Checked In By property is added to the Global Document Property Map page.

9. Click the **Checked In By** link.

10. In the Document Attributes column of the Checked In By Row, type: CheckedInBy.

11. Click **Finish**.

2.4 Setting Up Oracle WebCenter Collaboration Logging

Oracle WebCenter Collaboration writes log messages to:

- Collaboration.log, which is the local Oracle WebCenter Collaboration log file. No setup is required to enable logging to the Collaboration log file:

  - For Microsoft Windows, collaboration.log is located in *install_dir*\ptcollab\10.3.3\settings\logs.

  - For UNIX/Linux, collaboration.log is located in *install_dir*/ptcollab/10.3.3/settings/logs.

- Logging Spy, which is the primary log message receiver in the Logging Utilities. Logging Spy provides a graphical user interface for displaying log messages as they stream in from Oracle WebCenter Collaboration and other log message senders (such as the portal or Publisher).

This section discusses:

- Setting Up Logging Utilities for Oracle WebCenter Collaboration Logging

- Viewing Collaboration Logs

- Configuring Logging Spy to Display Oracle WebCenter Collaboration Messages

> **Note:** You must set up logging utilities for Oracle WebCenter Collaboration logging before you configure Logging Spy to display Oracle WebCenter Collaboration messages.

2.4.1 Setting Up Logging Utilities for Oracle WebCenter Collaboration Logging

To set up Oracle WebCenter Collaboration logging, you use the Logging page of the Collaboration Administration Utility.

1. Log in to the portal.

2. Click the **Administration** tab.

3. From the Utilities drop-down list, select **Collaboration Administration**.

4. On the left, under Settings, click **Logging**.

5. Configure the logging levels for each type of entry.

6. Click **Finish**.

2.4.2 Viewing Collaboration Logs

To view the logs created by Oracle WebCenter Collaboration, you use the Log Viewer page of the Collaboration Administration Utility.

1. Log in to the portal.

2. Click the **Administration** tab.

3. From the Utilities drop-down list, select **Collaboration Administration**.

4. On the left, under Settings, click **Log Viewer**.

5. In the drop-down list, select the log you want to view, then click **View Log Contents**.

2.4.3 Configuring Logging Spy to Display Oracle WebCenter Collaboration Messages

This section discusses how to configure Logging Spy to display Oracle WebCenter Collaboration messages.

> **Note:** You must set up logging utilities for Oracle WebCenter Collaboration logging before you configure Logging Spy to display Oracle WebCenter Collaboration messages. For more information, see Section 2.4.1, "Setting Up Logging Utilities for Oracle WebCenter Collaboration Logging."

To configure Logging Spy to display Oracle WebCenter Collaboration messages:

1. Launch Logging Spy by clicking **Start**, **All Programs**, **Oracle**, **WebCenter Logging Utilities**, then **Logging Spy**. For more information on using Logging Spy, see the online help provided with Logging Spy.

> **Note:** If you upgraded to Oracle WebCenter Collaboration 10.3.3, the path to Logging Spy is the same as in the previously-installed version of Oracle WebCenter Collaboration.

2. Open the Filter Settings dialog box by clicking **View**, then **Set Filters**.

3. To add a logging server, right-click anywhere in the Filter Settings window.

   The context menu appears.

4. Select **Add Message Sender**.

   The Add Message Sender dialog box appears.

5. Type a server name or select it from the list of names and click **OK**.

   Server names exists in the `<serverName>` nodes of the openLog section in the audit.xml file.

   When you add a server as a message sender, it appears as a tree structure in the Filter Settings window. Click the plus sign to expand the server and see a list of its message-sending components.

6. In the Filters Settings window, expand each component under a server to see the selected logging levels for that component.

   The check box next to each component has three states:

   - Gray with a check mark: the initial four logging levels (listed above) are selected.

   - Clear with a check mark: all of the logging levels are selected.

   - Clear: none of the logging levels are selected.

   You can toggle through these states by clicking the check box next to the component.

7. You can perform the following additional actions in the Filter Settings window:

   - To remove a message-sending server and its components, right-click the server name, and select **Remove Message Sender**.

   - To enable a selected logging level for all components of a server, right-click the server name, and select Enable *LoggingLevel*, for example, **Enable Performance**.

   - To enable or disable logging levels for a single component, expand the component, and select or clear the check box next to the logging level.

   - To clear all logging levels for all components of a server, right-click the server name, and select **Clear All Filters**. Then click **OK** when asked to confirm. This prevents those components from sending logging messages to this instance of Logging Spy.

   - To reset logging levels for all components of a server to the original four levels, right-click the server name, and select **Reset Filters**. Then click **OK** when asked to confirm.

8. Click **OK** when finished.

2.4.3.1 Filter Settings and Debugging

The filter settings in Logging Spy are independent of the logging levels specified in Oracle WebCenter Collaboration's audit.xml file. The settings in audit.xml affect only the messages written to the collaboration.log file and do not affect the messages that appear in Logging Spy. Conversely, the settings in Logging Spy have no effect on the messages written to the collaboration.log file.

Because the filter settings in Logging Spy are independent of the settings in audit.xml, you can use Logging Spy to debug problems with Oracle WebCenter Collaboration without changing the logging level in audit.xml and restarting Oracle WebCenter Collaboration. To debug problems, launch Logging Spy and enable the Debug logging level on all relevant components to view debug messages from Oracle WebCenter Collaboration.

> **Note:** When you enable the Debug logging level in Logging Spy, you affect Oracle WebCenter Collaboration performance. Do not leave debug logging enabled in Logging Spy for long periods of time when it is used with an installation of Oracle WebCenter Collaboration that is used in a production context.

2.5 Backing Up and Restoring Oracle WebCenter Collaboration

This section discusses how to back up and restore Oracle WebCenter Collaboration.

2.5.1 Backing Up Oracle WebCenter Collaboration

To back up Oracle WebCenter Collaboration:

1. Ensure that the Oracle WebCenter Collaboration database, portal database, and Document Repository are synchronized by performing the following at the same time:

   - Back up the Oracle WebCenter Collaboration database that you created when you installed Oracle WebCenter Collaboration. For details, refer to the instructions for your database type.

   - Back up the portal database.

   - Back up all of the Document Repository files.

     – For Microsoft Windows, the Document Repository files are located in *install_dir*\ptdr\documents\PTCollab.

     – For UNIX/Linux, the Document Repository files are located in *install_dir*/ptdr/documents/PTCollab.

2. Back up Oracle WebCenter Collaboration's configuration files.

3. **(Optional)** Back up the Search index, which you can rebuild when you restore Oracle WebCenter Collaboration.

4. **(Optional)** Back up any customizations that exist in your deployment.

2.5.2 Restoring Oracle WebCenter Collaboration

To restore Oracle WebCenter Collaboration:

1. Shut down the portal and Oracle WebCenter Collaboration.

2. Restore the Oracle WebCenter Collaboration and portal databases.

3. Restore the Document Repository files.

4. Restore Oracle WebCenter Collaboration's configuration files.

5. **(Optional)** If you backed up the Search index, restore the Search index.

6. **(Optional)** If you backed up any customizations that exist in your deployment, restore them.

7. Restart the portal and Oracle WebCenter Collaboration.

2.6 Configuring the Notification Service for Working with Experience Definitions

Notification Service-generated e-mails can include user-specific URLs that point to Experience Definitions. To enable the Notification Service to include links to Experience Definitions, edit the Notification Service's config.xml and set the `<experience-definitions enabled>` node to `yes`.

> **Note:** You must restart the Notification Service for this change to take effect.

3

Working with Oracle WebCenter Collaboration Security

This chapter describes the security model used by Oracle WebCenter Collaboration. Oracle WebCenter Collaboration security is based on the use of roles and access levels. Additionally, activity rights are used to manage access to Oracle WebCenter Collaboration functionality. These concepts are described in the following sections.

- Project Security
- Activity Rights

3.1 Project Security

Access to Oracle WebCenter Collaboration projects is set and managed through project roles. Roles control access levels and permissions for Oracle WebCenter Collaboration objects. Users are assigned to a project role, and the access level of the role determines the actions that the user can perform.

3.1.1 Project Roles

A portal user can access a project only when assigned a role in that project.

Oracle WebCenter Collaboration contains the following roles:

Table 3–1   Descriptions of Project Roles

Role	Description
Project Leader	The Project Leader role has Admin access for the project and its objects. Project Leaders can: - Create, edit, and delete project objects. - Set permissions for project objects. - Perform all project tasks. **Note**: Portal administrators are default members of the Project Leader role and cannot be removed.
Project Member	By default, the Project Member role has Write access for the project and its objects.
Project Guest	By default, the Project Guest role has Read access for the project and its objects.

Role assignments are project-specific, and the same portal user can have different roles in different projects. Additionally, under the same role, users can have different

permissions in different projects, because the role itself can have one set of permissions in one project and a different set of permissions in another.

3.1.2 Access Levels

All Oracle WebCenter Collaboration objects have five levels of access that can be assigned to them. These access levels are:

- Admin
- Edit
- Write
- Read
- No Access

Each access level includes the rights of all lower access levels.

Each role in a project has an associated access level for each object type. A user's access level to an object or functional area is determined by his or her assigned role in the project.

3.1.2.1 Access Level Permissions Matrix

The following table shows what permissions each access level allows for each object type:

Table 3–2   Permissions Matrix

Object Type	Read	Write	Edit	Admin
Projects	- View project - View announcements	- View project - View announcements	- View project - View announcements	- Create, edit and delete announcements - Subscribe others
Events	- View events - Notify other users about an event	Create events	- Attach files, task lists, and discussions - Edit event properties	- Configure event security - Delete events
Tasks	- View task lists - Notify other users about a task list or task	- Claim tasks (assign tasks to self) - Create tasks - Order tasks - Update task status for assigned tasks	- Assign owners to tasks - Attach files and discussions - Copy task lists - Create task lists - Import and export task lists - Edit task list and task properties	- Configure task list security - Delete task lists and tasks - Generate overdue task alerts - Move task lists - Subscribe others

Table 3–2   (Cont.) Permissions Matrix

Object Type	Read	Write	Edit	Admin
Document Folders	- View folders - Notify other users about changes to folder contents	- Create new Microsoft Office documents directly in the project - Upload documents to folders	- Assign a moderator to a folder - Copy folders - Create folders - Edit folder properties - Rename folders	- Moderate a folder even though a different user is assigned as the moderator. **Note**: Users with Admin access to document folders cannot perform this task on document folders that are not moderated. - Configure folder security - Delete folders - Move folders within the project - Subscribe others
Document Files	- View documents - Notify other users about documents - View versions	- Check documents in and out - Undo check-out - WebEdit	- Attach task lists and discussions - Copy documents - Create shortcuts - Edit document properties - Publish documents to the Knowledge Directory - Revert documents to previous versions	- Configure document security - Delete documents - Delete previous versions of the document - Move documents - Remove owner security settings from a document - Subscribe others

Table 3–2   (Cont.) Permissions Matrix

Object Type	Read	Write	Edit	Admin
Discussions	■ View discussions ■ Notify other users about discussions	■ Post messages ■ Reply to messages	■ Assign a moderator to a discussion ■ Attach task lists and files ■ Copy discussions ■ Create new discussions ■ Export discussions ■ Edit discussion properties	■ Moderate a discussion even though a different user is assigned as the moderator **Note**: Users with Admin access to discussions cannot perform this task on discussions that are not moderated. ■ Configure discussion security ■ Delete discussions and messages ■ Edit messages ■ Subscribe others
Wikis	■ View wiki pages	■ Create wiki pages ■ Add/remove attachments to/from wiki pages ■ Edit wiki pages ■ Revert wiki page to a previous revision ■ Delete revision of wiki page	N/A	No additional permissions
Blogs	■ View blog entries	■ Create blog entries ■ Add/remove attachments to/from own blog entries ■ Edit own blog entries ■ Delete own blog entries ■ Comment on blog entries ■ Delete comment on own blog entries	N/A	■ Edit any blog entry ■ Delete any blog entry ■ Delete comment on any blog entry

3.1.2.2 Default Project Security Settings

Oracle WebCenter Collaboration provides default security settings for the Project Members and Project Guests roles that are automatically applied to a project when it is created. However, Project Leaders can change the default security settings for their individual projects. For more information, see Section 4.2.1.1.2, "Changing Default Permissions for Roles."

3.1.2.3 Object-Level Security Settings

By default, all Oracle WebCenter Collaboration objects derive their security from the project security settings. Changes made to the project security settings apply immediately to all objects that are configured to inherit the default settings. Project Leaders can choose to disable project security inheritance and configure security directly on an object. When this project security is not inherited, an object retains its object-level security setting regardless of any changes made to the project security settings.

> **Note:** Blogs and wikis do not have object-level security settings. They always inherit the project security settings.

The access levels that can be assigned to Oracle WebCenter Collaboration objects are the same as those that can be set as the default security settings. Object-level security can be set for events, task lists, document folders, documents, and discussions.

To set security on an Oracle WebCenter Collaboration object:

1. Navigate to the object in the project application view.

2. Select the object in the table pane.

3. Click **Edit Properties** in the action bar.

4. Click the **Security** tab.

5. Clear the **Inherit Default Security Settings** check box.

6. Select the access level for Project Members and Project Guests.

7. Click **Finish**.

3.1.3 Object Properties

This section discusses:

- Default Document Owner Security
- Setting Content Crawler Access to Folders
- Assigning Moderators

3.1.3.1 Default Document Owner Security

A user who uploads a document, or other file, to a document folder is the owner of that file. By default, an owner has full control of the file and can perform all actions on the file.

Project leaders can remove default owner security settings from any file in the project. Additionally, users with Admin access to a file can remove default owner security settings from the file. You may want to remove owner security settings from a file if the owner is no longer participating in the project and consequently should not have high-level access privileges to the file.

To remove owner security settings from a file:

1. In the Documents application view page, select the check box of a file in the table pane.

2. From the Edit menu, select **Properties**.

   The Property Editor appears.

3. Click the **Security** tab.

4. Select **Permanently remove owner security settings from this document**.

5. Click **Finish**.

3.1.3.2 Setting Content Crawler Access to Folders

By default, the contents of a folder -- including the contents of all of its subfolders -- are visible to Oracle WebCenter Collaboration content crawlers for importing into the Knowledge Directory. When a folder is inaccessible to content crawlers, its contents can still be manually published to the Knowledge Directory.

To set content crawler accessibility for a folder:

1. Select a project in the My Projects or Community Projects portlet.

2. Click the **Documents** tab in the application view.

3. Select the check box of a folder in the table pane.

4. From the Edit menu, select **Properties**.

5. Perform one of the following tasks:

   - To make the document folder accessible to content crawlers, select **Accessible to Content Crawlers**.

   - To make the document folder inaccessible to content crawlers, clear **Accessible to Content Crawlers**.

6. Click **Finish**.

3.1.3.3 Assigning Moderators

This section discusses:

- Assigning Moderators to Folders

- Assigning Moderators to Discussions

3.1.3.3.1 Assigning Moderators to Folders To manage the contents of a folder, you can assign a collection of users or a single user to moderate the folder. Folder moderators can approve or reject documents. Folder moderators with Admin access to the folder can edit documents before approving them. Documents in a moderated folder do not become publicly available unless approved by a moderator.

If a user has checked in changes to a document in a moderated folder, those changes are not visible until a moderator approves the changes. If a user has uploaded a document to a moderated folder, the document is not visible until a moderator approves the document.

When at least one moderator is set for a folder, that folder is marked as a moderated folder and anyone with Admin access to the folder can also act as a moderator.

When you assign moderators to a parent folder, all subfolders inherit the moderator list. If a subfolder of the parent folder already has a moderator list, the subfolder inherits changes made to the parent folder's moderator list. If all moderators are removed from a parent folder, the parent folder and all of its subfolders are no longer moderated.

When you add or remove a moderator from a folder, the moderator is subscribed to or unsubscribed from that folder.

To assign a moderator:

1. In the **Documents** application view page, right-click a folder in the navigation pane.

2. Click **Edit Properties**.

3. Make sure the **Properties** tab is selected in the Folder Editor.

4. Click **Moderators**.

5. In the Choose Users dialog box, select the project personnel whom you want to make moderators of this folder and click **Finish**.

6. In the Folder Editor, click **Finish**.

3.1.3.3.2 Assigning Moderators to Discussions To manage the posting of messages in a discussion, you can assign a collection of users or a single user to moderate the discussion. Discussion moderators can approve or reject messages. Discussion moderators with Admin access to a discussion can edit messages before approving them. Messages posted in moderated discussions do not appear to users in the discussions unless approved by a moderator.

If a user has posted a message to a moderated discussion, that message is not visible until a moderator approves the message. If a user has edited a message in a moderated discussion, the changes is not visible until a moderator approves the change.

When at least one moderator is set for a discussion, that discussion is marked as a moderated discussion and anyone with Admin access to the discussion can also act as a moderator.

To assign a moderator to a discussion:

1. In the **Discussions** application view page, right-click a discussion in the navigation pane.

2. Click **Edit**.

3. Make sure the **Properties** tab is selected in the Folder Editor.

4. Click **Moderators**.

5. In the Choose Users dialog box, select the project personnel whom you want to make moderators of this folder and click **Finish**.

6. In the Folder Editor, click **Finish**.

3.2 Activity Rights

Access to certain Oracle WebCenter Collaboration functionality is managed with portal activity rights. Collaboration Administrators who have been granted the **Create Activities** and **Delegate Activities** activity right can assign the Oracle WebCenter Collaboration activity rights to users.

Oracle WebCenter Collaboration uses the following activity rights to grant access to various functionality:

Table 3–3   Descriptions of Activity Rights

Activity Right	Description
Ability to View Instant Messaging Presence	Allows users to see the instant messaging presence icon on Oracle WebCenter Collaboration pages.

Table 3–3   (Cont.) Descriptions of Activity Rights

Activity Right	Description
Bulk Upload to Collaboration	Allows users to: ■ Upload multiple files and directories at the same time ■ Map Web folders to Oracle WebCenter Collaboration
Manage Collaboration	Allows users to perform the following tasks: ■ Access the Collaboration Administration utility (when the necessary Oracle WebCenter Interaction activity rights are also granted). ■ Manage Oracle WebCenter Collaboration project folder hierarchy. This includes the ability to perform the following operations on the Oracle WebCenter Collaboration project folders: Create, Delete, MOve, Edit, Use the Project Recycle Bin.
Manage Collaboration Projects	Allows users to perform the following tasks: ■ Create Collaboration projects. ■ Archive Collaboration projects. ■ Remove projects from the Recycle Bin System Folder. ■ Restore (undelete) projects from the Recycle Bin System Folder.

3.2.1 Granting Activity Rights to Users

To grant an activity right to a user:

1. Log in to the portal.

2. Click the **Administration** tab.

3. From the Select Utility drop-down menu, select **Activity Manager**.

4. Click the activity right you want to edit.

5. Click **Add Groups**.

6. Select the group you want to add.

7. Click **OK**.

8. Click **Finish**.

For more information on using activity rights, see the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Interaction*.

4

Managing Projects

This chapter outlines the basic steps required for Collaboration Project Administrators to create and manage projects.

It includes the following sections:

- Creating Projects
- Managing Project Settings
- Managing the Project Application Overview
- Using Project Explorer
- Working with Community Projects
- Working with Project Templates
- Exporting Projects

4.1 Creating Projects

To create a project, a user must be granted the **Manage Collaboration Projects** activity right. For general information on activity rights, see the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Interaction*. For information on granting Oracle WebCenter Collaboration activity rights, see Section 3.2, "Activity Rights."

To create a new project:

1. Go to the **Project Explorer**.

2. Click **New**, then **Project**.

3. Click **General Settings**.

4. Decide if you want to base your new project on an existing Project Template.

   > **Note:** After you have created a project, you cannot change the project template.

   - If you do not, click **Create empty project**.
   - If you do, click **Create template-based project**. Then click **Browse**. Then choose a project template. Then click **Finish**.

5. Enter a name for the project.

6. Choose the default language for the project.

The Search Server uses this information when indexing Oracle WebCenter Collaboration objects.

7. Configure additional properties on the General Settings page. For more information on the General Settings page, see Oracle WebCenter Collaboration Online Help.

8. Under Settings on the left-hand side of the Project Editor, click **Roles and Permissions**.

9. Configure project roles and default access levels. For more information on configuring project access, see Section 4.2.1.1, "Providing Access to Projects."

10. Under Settings on the left-hand side of the Project Editor, click **Functional Areas**.

11. Choose the functional areas you want to include in the project. If a functional area has content associated with it, you cannot hide its tab. For more information on enabling functional areas for a project, see Section 4.2.1.2, "Selecting the Functional Areas for a Project."

12. Click **Finish**.

4.2 Managing Project Settings

After a Collaboration Project Administrator has created a project, Project Leaders can edit the project's properties and update the access levels and permissions of the project. Project Members and Project Guests with Admin access to the project cannot change project settings.

4.2.1 Editing Project Properties

After a project has been created, Project Leaders can edit the following project properties:

Table 4–1   Descriptions of Project Properties

Project Property	Description
General Settings	Modify basic project settings.
Roles and Permissions	■ Add and delete portal users, groups, and community members to and from the project.
	■ Set default access levels and permissions for the roles: Project Members and Project Guests.
	■ Manually synchronize the project's user information keep it current with the portal database. By default, Oracle WebCenter Collaboration synchronizes user information with the portal once a day.
Functional Areas	Customize what functional areas are used in the project. If a functional area has content associated with it, you cannot hide its tab.

To edit project properties:

1. Go to the **Project Explorer**.

2. Select the check box of the project you want to edit.

3. Click **Edit**, then **Edit Properties**. The Project Editor is displayed.

4. Configure properties on each of the Project Editor pages.

5. Click **Finish**.

4.2.1.1 Providing Access to Projects

This section outlines the procedures required to provide access to an Oracle WebCenter Collaboration project. For more information about project security, see Chapter 3, "Working with Oracle WebCenter Collaboration Security."

4.2.1.1.1 Adding Users to Projects This section describes the procedures to control who has access to a project. Oracle WebCenter Collaboration lets you assign users to each of the project roles. Each role has its own set of permissions.

To grant access to a project:

1. Go to the **Project Explorer**.

2. Select the check box of the project you want to edit.

3. Click **Edit**, then **Edit Properties**.

4. Click **Roles and Permissions**.

5. Determine the role to which you want to add users.

    For more information on roles, see Section 3.1.1, "Project Roles."

6. Click the appropriate button for the type of user you want to add. You can choose one of the following:

    –   Add Users

    –   Add Groups

    –   Add Community Members

    For more information about Community Members, see Section 4.2.1.1.4, "About Community Members."

7. Select the users you want to add.

8. Click **OK**.

4.2.1.1.2 Changing Default Permissions for Roles Oracle WebCenter Collaboration lets you change the default security settings for Project Members and Project Guests.

1. Go to the **Project Explorer**.

2. Select the check box of the project you want to edit.

3. Click **Edit**, then **Edit Properties**.

4. Click **Roles and Permissions**.

5. Click **Edit Permissions**.

6. Select the desired access levels.

7. Click **Finish**.

4.2.1.1.3 Removing Users From Projects To remove a portal user, group, or community member:

1. Go to the **Project Explorer**.

2. Select the check box of the project you want to edit.

3. Choose **Edit**, then **Edit Properties**.

4. Click **Roles and Permissions**.

5. Click **Delete** next to the user, group, or community member you want to remove.

6. Click **OK**.

7. Click **Finish**.

4.2.1.1.4   About Community Members Community Members are groupings generated by Oracle WebCenter Collaboration and are defined as follows:

Community Managers: Portal users who have either the Admin or the Edit access privilege for a selected community.
Community Members: Portal users who have the Select access privilege for a selected community.
Community Guests: Portal users who have the Read access privilege for a selected community.
On the Roles and Permissions page of the Project Editor, you can add, as a group, Community Managers, Community Members, or Community Guests to a role.

4.2.1.2 Selecting the Functional Areas for a Project

Project Leaders can select the functional areas to be displayed in a project's application view. If a functional area has content associated with it, you cannot hide its tab. In community projects, if the community portlet corresponding to a functional area is used by the community, you cannot hide the tab for the functional area.

To select the functional areas for a project:

1. Go to the **Project Explorer**.

2. Select the check box of the project you want to edit.

3. Click **Edit**, then **Edit Properties**.

4. Click **Functional Areas**.

5. Select the check box next to each functional area you want to display in the project application view.

6. Click **OK**.

7. Click **Finish**.

4.3 Managing the Project Application Overview

The Overview tab of a project's application view is composed of modules. Project Leaders can select which modules are displayed and how the modules are arranged on the page.

4.3.1 Project Overview Modules

The following modules are available for use on the Overview tab:

Table 4–2   Descriptions of Project Overview Modules

Module	Description
Project Information	Displays the project name, description, and status.
Announcements	Displays the announcements for the project.
Updated Documents	Displays the five most recently updated documents.
Recent Messages	Displays the five most recently modified messages.
Project Image	Displays an image selected by the Project Leader.

Table 4–2   (Cont.) Descriptions of Project Overview Modules

Module	Description
Upcoming Tasks	Displays the next five upcoming tasks.
Project Members	Displays the Project Leaders, Project Members, and Project Guests.
Overdue Tasks	Displays the five most overdue tasks.

If a functional area has been disabled for a project, the corresponding modules cannot be added to the Overview tab. For example, if the Documents tab has been disabled, the Updated Documents module cannot be added to the Overview tab.

To select which modules are displayed in the Overview tab:

1. Open a project's application view.

2. On the Overview tab, click **Add Module**.

3. Select the modules to display.

4. Click **Finish**.

4.3.2 Overview Layout

Project Leaders can choose where the modules are placed on the Overview tab. Any module can be placed in any position. To reposition a module on the page, drag the module to the desired position (by clicking the title bar of the module, holding down the mouse button, and moving the mouse), then release the mouse button. A red dashed line indicates where the module will be placed.

4.4 Using Project Explorer

After Collaboration Project Administrators have created and set up projects, you can manage them using the Project Explorer. This section describes the tasks you might must perform to manage projects. The **Manage Collaboration Projects** activity right is required for all tasks unless otherwise noted.

4.4.1 Creating Project Folders

Users with the **Manage Collaboration** activity right can organize projects in a hierarchical series of folders and subfolders. To create a new project folder:

1. Go to the **Project Explorer**.

2. Click **New**, then **Project Folder**.

3. Enter the name of the new project folder.

4. Click **Finish**.

4.4.2 Moving Projects to Project Folders

To move a project to a project folder:

1. Go to the **Project Explorer**.

2. Select the project you want to edit.

3. Click **Edit**, then **Move**.

4. Click **Browse**.

5. Choose a project folder.

6. Click **Finish**.

7. Click **Finish**.

You can use the same procedure to move a project folder to another project folder.

4.4.3 Deleting Projects and Project Folders

Only users with the **Manage Collaboration** activity right can delete project folders. To delete a project or a project folder:

1. Go to the **Project Explorer**.

2. Select the check box of the project or project folder to delete.

3. Click **Delete**.

4. Click **OK**.

Oracle WebCenter Collaboration places deleted projects in the Recycle Bin System Folder, which you use to remove and undelete projects that have been deleted.

To disable a project that you might must access later, you should archive the project instead of delete it. For more information on archiving projects, see Section 4.7, "Exporting Projects."

4.4.4 Removing and Undeleting Projects from the Recycle Bin System Folder

Oracle WebCenter Collaboration stores deleted projects in the Recycle Bin System Folder. This folder lets you remove and undelete projects that have been deleted.

Projects that are removed from the Recycle Bin System Folder are permanently removed from the system. Projects that are undeleted from the Recycle Bin System Folder are made available to users.

> **Note:** Oracle WebCenter Collaboration contains two types of recycle bins. Project Leaders use the Project Recycle Bin to remove and restore specific items that were deleted from projects, rather than specific projects.

To remove and restore deleted projects from the Recycle Bin System Folder:

1. Go to the **Project Explorer**.

2. Click the **Recycle Bin** button in the navigation pane of Project Explorer.

3. Choose one or more projects in the table pane.

4. Perform one of the following tasks:

   - Click **Delete**.

   - Click **Undelete**.

4.4.5 Archiving and Restoring Projects

Collaboration Project Administrators can archive a project to make it inaccessible to project users. When a project is archived, it cannot be searched and notifications referencing it cannot be sent.

Archiving a project lets you remove inactive or completed projects without losing project data. When a project is archived, it is not removed from the Oracle WebCenter Collaboration database. You can restore projects from the Archived Project folder to make them accessible to users.

4.4.5.1 Archiving Projects

To archive a project:

1. Go to the **Project Explorer**.

2. Select the check box of the project you want to archive.

3. Click **Archive**.

4. Click **OK**.

The project is moved to the Archived Project folder.

4.4.5.2 Restoring Projects from the Archived Project Folder

To restore a project from the Archived Project folder:

1. Go to the **Project Explorer**.

2. Click the Archived Project folder.

3. Click the check box of the project you want to restore.

4. Click **Restore**.

5. Click **OK**.

The project is restored to top level of the Oracle WebCenter Collaboration folder hierarchy.

4.5 Working with Community Projects

The first time a Community Manager adds an Oracle WebCenter Collaboration portlet to a community, a community project with the same name as the community is automatically created. By default, auto-detect is enabled on the Functional Areas page of the Community Project Editor. When this setting is enabled, only the functional areas pertaining to the community portlets that are used in the community are enabled. Project Leaders can choose to disable this setting and manually select which functional areas are displayed for the community project. If a functional area has content associated with it, or if the corresponding community portlet is used in the community, the functional area cannot be disabled.

4.6 Working with Project Templates

Project templates facilitate the creation of projects that are similar. Users with the Manage Collaboration Projects activity right can use project templates to maintain consistency among the projects used within an organization.

4.6.1 Creating Project Templates

To create a project template:

1. Go to the **Project Explorer**.

2. Choose the **Template Project Folder**.

3. Click **New**, then **Project Template**.

4. Click **General Settings**.

5. Decide if you want to base your new project template on an existing one.

   – If you do not, click **Create empty project**.

   – If you do, click **Create template-based project**. Then click **Browse**.Then choose the project template you want to use. Then click **Finish**.

6. Enter a name for the project template.

7. Choose the default language for the project template.

   The Search Server uses this information when indexing Oracle WebCenter Collaboration objects.

8. Select the date-shifting method you want to use.

9. Enter the template base day.

   For more information on date-shifting methods and template base dates, see Section 4.6.2, "Setting Project Template Base Dates."

10. Click **Finish**.

4.6.2 Setting Project Template Base Dates

The dates of tasks, milestones, and events in a project template are not significant on their own; their importance is based on the relative position between the dates in the template and the base date.

When a new project is created from a project template, you specify a project start date. When the tasks, milestones, and events from the project template are copied to the new project, their dates are set relative to the project start date. This process is called *date-shifting*.

Oracle WebCenter Collaboration lets you specify the following types of date-shifting when creating a project template:

Table 4–3   Types of Date Shifting Methods

Date Shifting Method	Description
Copy dates directly from the project template	This method copies the dates directly from the project template into the new project.
Specify project start day: skip weekends and holidays	This method is used when the number of working days from the start of the project is important.
Specify project start week: preserve day of the week	This method is used when the number of weeks from the start of the project and the day of the week is important.
Specify project start month: preserve working day of the month	This method is used when the number of months from the start of the project and the working day of the month is important.

4.6.3 Defining Security for Project Templates

As with regular projects, project templates are associated with three roles:

- Project Leader

- Project Member

- Project Guest

In a project template, these roles are used to control access in the projects that are created from the template. For example, if a user has the Project Member role on a project template, the user then has the Project Member role on any project created from the template. Project Leaders can modify access levels on projects created from project templates at any time.

It is also necessary to control access to the project template itself. Only users with the Project Leader role on a project template can edit the template. Additionally, only users with the Project Leader role on a project template can create projects from the template. A user must have the **Manage Collaboration Projects** activity right to manage project templates.

4.7 Exporting Projects

The Collaboration Resources page lets Collaboration Administrators choose projects to export, and whether to export either all of their content (including their metadata) or their metadata only. Metadata includes the project's security information and other data such as the project's name, description, date created, and so on.

After you have configured this page and clicked **Finish**, the system generates .pte and .zip files of the projects. After this process has completed, a dialog box appears that contains a link to the .pte file, which contains portal and Oracle WebCenter Collaboration objects. Click this link to download the .pte file to your computer. The .zip file contains only Oracle WebCenter Collaboration objects.

- For Microsoft Windows, the .zip file is located in *install_dir*\ptcollab\10.3.3\settings\migration\export.

- For UNIX/Linux, the .zip file is located in *install_dir*/ptcollab/10.3.3/settings/migration/export.

To access the Collaboration Resources page:

1. Click **Administration**.

2. From the Select Utility drop-down list, choose **Migration - Export**.

3. Under Resources on the left, click **Collaboration Resources**.

> **Note:** You cannot use the ptmigration command line tool to create migration packages that contain Oracle WebCenter Collaboration objects.

5

Integrating Other Products with Oracle WebCenter Collaboration

This chapter describes the features that let you use Oracle WebCenter Collaboration with other Oracle and third-party products, helping users work more efficiently by integrating these products into a single work environment.

It includes the following sections:

- Integrating Oracle WebCenter Collaboration and the Desktop
- Configuring the Office Task Pane Feature
- Making the Collaboration Office Tools Add-In Installer Available to End Users
- Integrating Oracle WebCenter Collaboration and Groupware
- Integrating Oracle WebCenter Collaboration and Instant Messaging
- Configuring Excel Portlets
- Configuring Microsoft Project Import
- Configuring the E-mail a Project Feature
- Integrating Oracle WebCenter Collaboration and Oracle WebCenter Analytics
- Integrating Oracle WebCenter Collaboration and Oracle Business Process Management
- Integrating Oracle WebCenter Collaboration and the Tagging Engine
- Integrating Oracle WebCenter Collaboration and Oracle Universal Content Management

5.1 Integrating Oracle WebCenter Collaboration and the Desktop

This section describes the configuration and administration of Oracle WebCenter Collaboration features that provide integration with the Microsoft Windows desktop. It includes the following sections:

- Overview of WebDAV Protocol
- Configuring Web Folders
- Configuring WebEdit

5.1.1 Overview of WebDAV Protocol

Oracle WebCenter Collaboration's desktop integration features require the Web-Based Document Authoring and Versioning (WebDAV) protocol. WebDAV is an extension to the HTTP protocol. During installation, the Oracle WebCenter Collaboration installer lets you install and configure a WebDAV service.

5.1.2 Configuring Web Folders

Oracle WebCenter Collaboration lets users manage Oracle WebCenter Collaboration documents directly from their desktop using Microsoft Windows Explorer. After mapping a Web folder, users can access, edit, and share documents in an Oracle WebCenter Collaboration project or create new Oracle WebCenter Collaboration projects. The Web Folder Settings page in Collaboration Settings lets users select the projects whose documents they want to access with Microsoft Windows Explorer.

Documents opened through Windows Explorer are automatically opened in edit mode and checked out in Oracle WebCenter Collaboration. This helps users work more efficiently by removing the must check out and download the document. All security and version control operations are performed by Oracle WebCenter Collaboration.

To configure the Web folders, perform the following steps:

- Section 5.1.2.1, "Adding Activity Rights"

- Section 5.1.2.2, "Using IIS with Web Folders"

  This step is necessary only if you are using IIS.

5.1.2.1 Adding Activity Rights

To map a Web folder to Oracle WebCenter Collaboration, users must belong to a group that is granted the **Bulk Upload to Collaboration** activity right. This activity right also lets users employ the Bulk Upload feature.

To add this activity right to a group:

1. Click the **Administration** tab.

2. From the Select Utilities menu, select **Activity Manager**.

3. Click **Bulk Upload to Collaboration**.

4. Click **Add Group**.

5. Select the groups you want to have this activity right.

6. Click **OK**.

7. Click **Finish**.

For more information on managing activity rights, see the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Interaction*.

5.1.2.2 Using IIS with Web Folders

If you are using the Map a Web Folder feature when the portal is deployed on IIS, you must ensure that the FrontPage server extensions are disabled (if they are installed) and that WebDAV is prohibited on the IIS Web site where the portal is deployed.

1. In Windows, from the **Start** menu, select **All Programs**, **Administrative Tools**, **Internet Information Services**.

2. In the navigation tree, display the local computer list, then display the Web sites list.

3. Right-click the Web site used by the portal.

4. Select **Properties**.

5. If you have installed the FrontPage Server Extensions you see the **Server Extensions** tab. Click the tab and ensure that the **Enable authoring** check box is not selected. If it is selected, clear the check box. Click **OK** to close the properties dialog box.

> **Note:** If you did not install the optional FrontPage Server Extensions when you installed IIS, the **Server Extensions** tab does not appear.

6. In the local computer tree, select **Web Service Extensions**.

7. In the Web Service Extensions pane, select **WebDAV**, then click **Prohibit**.

5.2 Configuring the Office Task Pane Feature

When the Office Task Pane feature is enabled, clicking the **WebEdit** button lets users access key Oracle WebCenter Collaboration project features directly from their Microsoft Office documents. For more detailed end user information, see *Oracle WebCenter Collaboration Online Help*.

> **Note:** When the Office task Pane is enabled, some of its features are not functional because they do not serve a purpose in Oracle WebCenter Collaboration. Due to compatibility issues between Oracle and Microsoft products, some non-functioning features are grayed out, while others can be clicked on but serve no purpose.

To configure the Office Task Pane feature, you must perform the following:

- Section 5.2.1, "Ensuring that the Office Task Pane Feature is Enabled in Oracle WebCenter Configuration Manager"

- Section 5.2.2, "Configuring Your Application Server for Office Task Pane Integration"

5.2.1 Ensuring that the Office Task Pane Feature is Enabled in Oracle WebCenter Configuration Manager

By default, the Office Task Pane is disabled in Oracle WebCenter Configuration Manager. To ensure that the Office Task Pane feature is enabled, launch Oracle WebCenter Configuration Manager. If you change the setting, restart Collaboration.

1. Launch Oracle WebCenter Configuration Manager.

2. Click **Collaboration**, then **Collaboration Settings**.

3. Under Enable Office Task Pane for WebEdit, ensure that **Enabled** is selected.

5.2.2 Configuring Your Application Server for Office Task Pane Integration

Perform the procedure that is appropriate to your application server:

- Section 5.2.2.1, "Configuring Tomcat for Office Task Pane Integration"

- Section 5.2.2.2, "Configuring Oracle WebLogic Server for Office Task Pane Integration"

- Section 5.2.2.3, "Configuring IIS 6 for Office Task Pane Integration"

- Section 5.2.2.4, "Configuring IIS 7 for Office Task Pane Integration"

5.2.2.1 Configuring Tomcat for Office Task Pane Integration

To configure Tomcat to work with the Office Task Pane, you must specify the root web application on Tomcat. To do so:

1. On the computer on which Oracle WebCenter Interaction is installed, stop Tomcat.

2. On the computer on which Oracle WebCenter Interaction is installed, navigate to the directory to which Tomcat is installed, then open the webapps directory.

3. If a directory named ROOT exists in the webapps directory, rename the folder to a different name.

4. Navigate to:

   - For Microsoft Windows: *install_dir*\ptcollab\10.3.3\rootwebapp\java

   - For UNIX/Linux: *install_dir*/ptcollab/10.3.3/rootwebapp/java

5. Copy the root.war file.

6. On the computer on which Oracle WebCenter Interaction is installed, paste the root.war file into the webapps directory, which is in the same directory into which Tomcat is installed.

7. Restart Tomcat.

5.2.2.2 Configuring Oracle WebLogic Server for Office Task Pane Integration

To configure Oracle WebLogic Server to work with the Office Task Pane, you must specify the root web application on Oracle WebLogic Server. To do so:

1. On the computer on which Oracle WebCenter Collaboration is installed, navigate to:

   - For Microsoft Windows: *install_dir*\ptcollab\10.3.3\rootwebapp\java

   - For UNIX/Linux: *install_dir*/ptcollab/10.3.3/rootwebapp/java

2. Copy the root.ear file.

3. On the computer on which Oracle WebCenter Interaction is installed, paste the root.ear file into the following directory:

   - For Microsoft Windows: *install_dir*\ptportal\10.3.3\webapp

   - For UNIX/Linux: *install_dir*/ptportal/10.3.3/webapp

   This should be the same directory that contains the portal.war file

4. Deploy the root.ear file.

5. Restart the portal.

5.2.2.3 Configuring IIS 6 for Office Task Pane Integration

To configure IIS 6 to work with the Office Task Pane feature:

1. In Windows, from the **Start** menu, select **All Programs**, **Administrative Tools**, **Internet Information Services**.

2. In Internet Information Services (IIS) Manager, stop the Web site that contains the portal virtual directory.

3. Access the Web site's properties and click the Documents tab.

4. Ensure that the **Enable default content page** option is selected.

5. On the Home Directory tab, change the application name to `Root`.

6. Click the **Configuration** button.

The Mappings tab appears.

7. Click the **Insert** button.

8. In the Add/Edit Application Extension Mapping dialog box, click **Browse**.

9. Browse to and open the aspnet_isapi.dll file, located at: C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727

You are returned to the Add/Edit Application Extension Mapping page.

10. Ensure that the **Verify that file exists** option is not selected.

11. Click **OK** to close the Add/Edit Application Extension Mapping dialog box.

12. Click **OK** to close the Application Configuration dialog box.

If the Inheritance Overrides dialog box appears, do not select any options, then click **OK**.

13. Click **OK** to close the Web site properties dialog box.

14. In Windows Explorer, navigate to *install_dir*/ptcollab/*version*/rootwebapp/.net, then copy the following:

- Web.config

- Default.htm

- The bin directory

15. In IIS, right-click the portal Web site (with the globe and hand icon) and choose **Open**.

The portal Web site explorer window appears.

16. Paste the files you copied in Step 14 into the top level of the portal Web site explorer window.

The path should be one of the following, depending on the option that was chosen when Oracle WebCenter Interaction was installed:

- If Oracle WebCenter Interaction was installed into the default Web site, the path is C:\inetpub\wwwroot.

- If Oracle WebCenter Interaction was installed into a nondefault Web site, the path is *install_dir*\iisweb\Root.

17. In IIS, right-click the portal virtual directory (with the gear icon) and choose **Open**.

18. In the portal virtual directory explorer window, open the Web.config file in a text editor.

The Web.config file should be located in the following path: *install_dir*/ptportal/*version*/webapp/portal/web.

19. In the `<httpHandlers>` section of the Web.config file, add the line `<clear/>` in between the lines `<httpHandlers>` and `<add verb="*" path="*.pt"`, so that the code appears like the following:

```
<httpHandlers>
<clear/>
<add verb="*" path="*.pt"
```

20. Save and close the Web.config file.

21. Restart IIS.

22. After IIS is restarted, ensure that the Web site that contains the portal is started.

> **Note:** Desktop integration will not work if the Microsoft WebDAV service in IIS has been enabled.

5.2.2.4 Configuring IIS 7 for Office Task Pane Integration

To configure IIS 7 to work with the Office Task Pane feature:

1. In Windows, from the **Start** menu, select **All Programs**, **Administrative Tools**, **Internet Information Services**.

2. In Internet Information Services (IIS) Manager, stop the Web site that contains the portal virtual directory.

3. In IIS Manager, click the default web site where the portal is installed, then, in the Actions pane, click **Explore**. Windows Explorer opens, displaying the portal installation directory.

4. In Windows Explorer, navigate to *install_dir*/ptcollab/*version*/rootwebapp/.net, then copy the following:

- Web.config
- Default.htm
- The bin directory

5. In IIS, right-click the portal Web site (with the globe and hand icon) and choose **Open**.

The portal Web site explorer window appears.

6. Paste the files you copied in Step 14 into the top level of the portal Web site explorer window.

The path should be one of the following, depending on the option that was chosen when Oracle WebCenter Interaction was installed:

- If Oracle WebCenter Interaction was installed into the default Web site, the path is C:\inetpub\wwwroot.
- If Oracle WebCenter Interaction was installed into a nondefault Web site, the path is *install_dir*\iisweb\Root.

7. In IIS, right-click the portal virtual directory (with the gear icon) and choose **Open**.

8. In the portal virtual directory explorer window, open the Web.config file in a text editor.

The Web.config file should be located in the following path: *install_dir*/ptportal/*version*/webapp/portal/web.

9. In the `<httpHandlers>` section of the Web.config file, add the line `<clear/>` in between the lines `<httpHandlers>` and `<add verb="*" path="*.pt"`, so that the code appears like the following:

```
<httpHandlers>
<clear/>
<add verb="*" path="*.pt"
```

10. Save and close the Web.config file.

11. Restart IIS.

12. After IIS is restarted, ensure that the Web site that contains the portal is started.

> **Note:** Desktop integration will not work if the Microsoft WebDAV service in IIS has been enabled.

5.3 Making the Collaboration Office Tools Add-In Installer Available to End Users

The Collaboration Office Tools Add-In lets end users choose from several check-in options and type additional check-in comments. The Add-In dialog appears after users edit and close a document either from WebEdit or within the Web folder on their personal computer.

The Collaboration Office Tools Add-In must be installed on the computer of each user who may want to use the Add-In. WebEdit, however, still functions correctly without the installation of the Add-In. You can either push out the Add-In's installer to your users or have them download it.

To push out the installer to end users, use the file appropriate to your language:

- ALICollaborationOfficeTools.exe (English and other European languages)
- ALICollaborationOfficeTools_ja (Japanese)
- ALICollaborationOfficeTools_ko (Korean)
- ALICollaborationOfficeTools_zh (Chinese)
- ALICollaborationOfficeTools_zh-tw (Traditional Chinese)

All .exe files are located in:

- Microsoft Windows: *install_dir*\ptimages\imageserver\plumtree\collab\private\applets
- UNIX and Linux: *install_dir*/ptimages/imageserver/plumtree/collab/private/applets

To make the installer available to be downloaded by end users, set the **installOfficeToolsPopUp enabled** parameter in config.xml to **yes**.

5.3.1 Mapping Web Folders

This section describes how to map a Web folder. You should test these procedures before rolling out a production version of Oracle WebCenter Collaboration.

The Map a Web Folder feature allows a user to map a Network Place on their personal computer running Microsoft Windows to the document hierarchy in Oracle WebCenter Collaboration. This allows the user to view the document hierarchy using

Windows Explorer. Folders and files on Oracle WebCenter Collaboration appear as directories and files in Explorer.

> **Note:** Mapped Web folders should not contain Windows folders whose names include the **#** or **:** characters. Windows folder names that include these characters appear incorrectly within Oracle WebCenter Collaboration projects.

> **Note:** When you move a Windows folder within a project subfolder, a Windows dialog prompts you to confirm whether you want to delete the folder. Click **Yes**. The folder is moved to the desired location, even though a message appears that Windows cannot delete the folder. This is expected Windows behavior.

To map a Web folder in Windows XP or Windows 2003:

1. In the portal, click **My Account**.

2. Click **Collaboration Settings**.

3. Under Settings on the left, click **Web Folders**.

4. Copy the URL in the **Web Folder Location** box.

5. Open **My Network Places** on your desktop.

6. Double-click **Add Network Place**.

   The Add Network Place Wizard appears.

7. Click **Next**.

8. Select **Choose another network location**.

9. In the **Internet or network address** box, paste the URL, then click **Next**.

10. If prompted, enter your name and password, then click **OK**.

11. In the **Type a name for this network place** box, type a name, then click **Finish**.

    A new network place is created and Oracle WebCenter Collaboration is mapped on Windows Explorer.

To map a Web Folder in Microsoft Vista:

1. In the portal, click **My Account**.

2. Click **Collaboration Settings**.

3. Under Settings on the left, click **Web Folders**.

4. Copy the URL in the **Web Folder Location** box.

5. Open **Map Network Drive** on your desktop.

6. Click **Connect to a Web site that you can use to store your documents and pictures**.

7. Click **Next**.

8. Select **Choose a custom network location**, then click **Next**.

9. In the **Internet or network address** box, paste the URL; then click **Next**.

10. If prompted, enter your name and password, then click **Next**.

11. In the **Type a name for this network place** box, type a name, then click **Next**.

12. Click **Finish**.

    A new network place is created and Oracle WebCenter Collaboration is mapped on Windows Explorer.

5.3.2 Configuring the Web Folder Feature in config.xml

Table 5–1 describes the settings for web folder feature contained in config.xml under `webDAV`.

Table 5–1   Configuration Parameters for Web Folder Feature

Parameter	Description
fullWebDAVAccessToThisServer	Enables or disables the use of WebDAV. Valid values are:
	yes: Causes Oracle WebCenter Collaboration to accept WebDAV requests. This is the default.
	no: Causes Oracle WebCenter Collaboration to reject WebDAV requests.
requestsAreGatewayed	Enables or disables WebDAV communication between Windows Explorer and Oracle WebCenter Collaboration. Valid values are **true** and **false**.
fuiDisplaysServerConfigInfo	Controls how Oracle WebCenter Collaboration displays the **New**, then **Web Folder** dialog in the **Documents** tab. Valid values are:
	yes: Displays the Web Folder dialog box. This is the default.
	no: Does not display the Web Folder dialog box.
useNonGatewayedURL	Determines whether the Web Folder dialog box displays instructions for mapping a gatewayed network drive.
	Valid values are:
	no: Cause the Web Folder dialog to display information for mapping between Windows Explorer and Oracle WebCenter Collaboration through the gateway. This is the default.
	yes: Causes the Web Folder dialog to display information for mapping directly between Windows Explorer and Oracle WebCenter Collaboration.
	Note: If the connection between Windows Explorer and Oracle WebCenter Collaboration is gatewayed, this instance of Oracle WebCenter Collaboration continues to function as the WebDAV service. Therefore, this instance of config.xml must have **fullWebDAVAccessToThisServer.enabled** set to **true** and **fullWebDAVAccessToThisServer.requestsAreGatewayed** set to **true**.
serverURL	Provides the base URL to Oracle WebCenter Collaboration that acts as the WebDAV service if Oracle WebCenter Collaboration is configured to communicate directly with Windows Explorer.

5.3.3 Configuring WebEdit

WebEdit lets Oracle WebCenter Collaboration users directly edit Microsoft Office documents on their desktop. Users can edit a document directly without having to

explicitly check out and download the document to their computer. Oracle WebCenter Collaboration handles the process of checkouts and security.

Users must be running Microsoft Internet Explorer 6.0 or above.

When the Office Task Pane feature is enabled, clicking the **WebEdit** button lets users access key Oracle WebCenter Collaboration project features directly from their Microsoft Office documents. For more detailed end user information, see *Oracle WebCenter Collaboration Online Help*. For configuration information, see Section 5.2, "Configuring the Office Task Pane Feature."

5.3.3.1 Using IIS with WebEdit

If you are using the WebEdit feature when the portal is deployed on IIS, you must ensure the Front Page server extensions are disabled on the IIS Web site where the portal is deployed.

1. In Windows, from the **Start** menu, select **All Programs**, **Administrative Tools**, **Internet Information Services**.

2. Right-click the Web site used by the portal.

3. Select **Properties**.

4. Select the **Server Extensions** tab.

   If you receive a message stating that the server has not been configured to use server extensions, then IIS is configured correctly.

   If the **Enable authoring** check box exists, ensure that it is not checked.

5.3.3.2 Configuring WebEdit in config.xml

Table 5–2 describes the settings for the WebEdit feature contained in config.xml under `webEdit`.

Table 5–2   Configuration Parameters for the WebEdit Feature in config.xml

Parameter	Description
webEdit	Enables or disables WebEdit. Valid values are **yes** and **no**.
nonGatewayedAccess	Determines if HTTP communication between Microsoft Office and Oracle WebCenter Collaboration is gatewayed through the portal. Valid values are:
	yes: HTTP communication is gatewayed through the portal. This is the default.
	no: HTTP communication is not gatewayed through the portal.
serverURL	The base URL Microsoft Word uses to communicate with Oracle WebCenter Collaboration. This attribute is used if enable is set to **true**.
	Example: http://collab.myco.com:8080/collabserver
tokenBasedAuthentication	Determines if token-based authentication is used. In a normal Oracle WebCenter Collaboration implementation, there is no must change these values. Valid values are:
	true: Enables token-based authentication. This is the default.
	false: Disables token-based authentication. This setting can only be used when HTTP communication is gatewayed and some other authentication method is being used.

Table 5–2   (Cont.) Configuration Parameters for the WebEdit Feature in config.xml

Parameter	Description
useClustering	Controls the use of message clustering (also known as *load balancing*) with token-based authentication. Valid values are:
	yes: Enables message clustering. This is the default.
	no: Disables message clustering. This setting should only be used when message clustering is not required and would degrade performance.
	Note: This setting has no effect if general clustering functionality has been disabled for Oracle WebCenter Collaboration. Therefore we recommend that you always enable **useClustering**.
maxWaitSeconds	Determines how long Oracle WebCenter Collaboration waits for a response from other servers in the cluster. This setting is applicable only if token-based authentication and message clustering/load balancing are enabled.
	Default: 30
truncateFileNames	The number of characters that are allowed in the file name displayed in WebDAV before the characters are truncated.
clsid	Specifies the class ID of the COM object.
	Note: This value should not be modified.
fileSpec	Specifies the name of the distribution file and information about the component.
	Note: This value should not be modified unless a more recent version of the object needs to be deployed.
installOfficeToolsPopUp enabled	Enables or disables the Collaboration Office Tools Add-In installer. Valid values are **yes** and **no**.

5.3.3.3 Configuring WebEdit in filetypes.xml

Table 5–3 describes the settings for the WebEdit feature contained in filetypes.xml under `webEdit`.

Table 5–3   Configuration Parameters for the WebEdit Feature in filetypes.xml

Parameter	Description
webEdit	Specifies whether this type of file is WebEditable. Unless serious modifications are made to the code, only Microsoft Office applications are WebEditable. Valid values are **yes** and **no**.
appCode	Represents the application that opens the document in a WebEdit session. Valid values are:
	■ **1** (for Microsoft Word)
	■ **2** (for Microsoft Excel)
	■ **3** (for Microsoft PowerPoint)

5.4 Integrating Oracle WebCenter Collaboration and Groupware

Oracle WebCenter Collaboration lets you integrate back-end groupware servers. The Groupware Integration feature lets users:

■   Access items on a groupware calendar using the My Calendar portlet.

■   Create appointments and meeting requests.

■ Synchronize an Oracle WebCenter Collaboration calendar with a groupware calendar.

> **Note:** Groupware Integration is not necessary for users to employ the E-mail a Project feature. For more information about the E-mail a Project feature, see Section 5.8, "Configuring the E-mail a Project Feature." Additionally, the Notification Service, which is used to generate and send e-mail notifications from projects to users, is not required to employ Groupware Integration capabilities (however, if the Notification Service is not running the E-mail a Project feature is less useful).

Back-end groupware connections are configured by Oracle WebCenter Collaboration administrators. If no groupware server is configured, no Groupware Integration functionality is available to end users.

The following groupware servers are supported:

■ Microsoft Exchange 2000 SP3 and above

■ Microsoft Exchange 2003

■ Lotus Domino 5.0.11

5.4.1 Performing Basic Groupware Integration Tasks

This section describes the basic configuration required for enabling groupware integration. Groupware integration tasks include the following procedures:

■ Section 5.4.1.1, "Enabling Groupware Integration"

■ Section 2.2.6, "Configuring Groupware Servers"

■ Section 5.4.1.2, "Setting Up User Accounts for Groupware Integration"

This section describes how to enable groupware integration and set up user accounts. See Section 2.2.6, "Configuring Groupware Servers" for details on configuring groupware servers.

5.4.1.1 Enabling Groupware Integration

This section describes how to use Oracle WebCenter Configuration Manager to enable groupware integration.

> **Note:** Groupware integration is disabled by default. Do not enable groupware integration until you have configured your back-end servers. This prevents the integration-related graphical user interface elements from appearing to end users.

To enable groupware integration:

1. Launch Oracle WebCenter Configuration Manager.

2. In the application list on the left, under Collaboration, click **Groupware**.

3. Under Enable Groupware with Collaboration, select **Enabled**.

4. Under General Groupware, select the type of groupware server you are using.

5. In the Server URL box, type the SOAP Server URL of the groupware server.

6. Click **Save**.

For more information on these fields and config.xml, see Section 5.4.2, "Working With Auto-Synchronization."

5.4.1.2 Setting Up User Accounts for Groupware Integration

to use groupware integration, each user must perform the following steps to configure their account:

1. Log in to the portal.

2. Click **My Account**.

3. Click **Collaboration Settings**.

4. Click **Calendar Synchronization**.

5. Enter the required account information.

6. Click **Finish**.

5.4.2 Working With Auto-Synchronization

Oracle WebCenter Collaboration can perform automatic synchronization between groupware and Oracle WebCenter Collaboration calendars for individual users. When groupware appointments are imported or calendar items are exported, Oracle WebCenter Collaboration creates a link between them and updates the entries on the groupware server if they are different from the Oracle WebCenter Collaboration calendar entries.

Users can manually synchronize the groupware and calendar entries using the **Synchronize** button on the calendar toolbar. Oracle WebCenter Collaboration administrators can also enable automatic synchronization by setting the **calendarAutoSynch** element to **yes**. After this feature is enabled, users can specify which calendar items are auto-synchronized from the My Account page.

When automatic synchronization is enabled, Oracle WebCenter Collaboration runs a nightly process to update the specified entries for each user.

> **Note:** For Microsoft Exchange, the speed at which users' free/busy information is updated to the groupware server and made available to the Oracle WebCenter Collaboration calendars is dependent on the interval that the user sets in their Microsoft Exchange calendar's free/busy options.

5.4.3 Limiting Attachment Size

Oracle WebCenter Collaboration administrators can set a size limit on the attachments each appointment or meeting request can have. This limit applies to the total size of all attachments, not individual attachments. When the total size of the attachments exceeds the size limit, a warning is displayed and the upload process is canceled.

5.4.4 Working with Groupware Integration Configuration File Settings

Table 5–4 describes the settings for groupware integration contained in config.xml under `groupware`. Enable or disable groupware integration and configure groupware server settings using Oracle WebCenter Configuration Manager.

Table 5–4   Configuration Parameters for Groupware Integration

Parameter	Description
timeoutInMilliSecond	The amount of time, in milliseconds, that Oracle WebCenter Collaboration waits for responses from the SOAP server. If the SOAP server does not respond in this amount of time, the current operation is aborted and an exception is returned.
	Note: Due to the performance constraints and the fact that large attachments might be transferred between Oracle WebCenter Collaboration through Exchange, the attribute should be set to a value greater than 10000 (10 seconds).
calendarCachePeriod	The cache time-out period, in seconds, for groupware items on the My Calendar portlet. When the My Calendar portlet is refreshed, Oracle WebCenter Collaboration checks if the current items have timed out. If they have, Oracle WebCenter Collaboration retrieves the entries from the back-end server. Otherwise, the entries are retrieved from memory.
addressBookReturn	The maximum number of returned addresses from the address search operation.
maxAttachmentSizeinKB	The maximum attachment file size, in kilobytes, that a meeting request or appointment can contain.
	Note: This limit is the total file size of all attachments an item can have.
calendarAutoSynch	The following values are supported:
	yes: Enables automatic synchronization between a user's project calendar and their Exchange or Notes calendar.
	no: Disables automatic synchronization between a user's project calendar and their Exchange or Notes calendar.
monthRange	The range of months auto-synchronization covers, starting from the current month.

5.5 Integrating Oracle WebCenter Collaboration and Instant Messaging

The Instant Messaging feature allows users who have been assigned the **Ability to View Instant Messaging Presence** activity right to see which project collaborators are currently logged in to their Yahoo! Instant Messaging client. For details on assigning activity rights to users, see Section 3.2.1, "Granting Activity Rights to Users."

To integrate Yahoo! Instant Messaging with Oracle WebCenter Collaboration complete the following procedures:

- Section 5.5.1, "Enabling Instant Messaging Integration"
- Section 5.5.2, "Configuring Instant Messaging in config.xml"

5.5.1 Enabling Instant Messaging Integration

This section describes how to use Oracle WebCenter Configuration Manager to enable instant messaging integration.

To enable instant messenger integration:

1. Launch Oracle WebCenter Configuration Manager.

2. In the application list on the left, under Collaboration, click **Collaboration Settings**.

3. Under Enable Instant Messaging, select **Enabled**.

    4. Click **Save**.

5.5.2 Configuring Instant Messaging in config.xml

Table 5–5 describes the settings for instant messaging integration contained in config.xml under `instant-messaging`.

Table 5–5   Configuration Parameters for Instant Messaging Integration

Parameter	Description
presence-url	Returns an image to indicate whether the user is online or not.
send-url	The URL from which messages are sent. The *$user* variable includes the e-mail address of the individual user.
contact-url	The URL at which messages can be received. The *$user* variable includes the e-mail address of the individual user.
presence-poll-interval	The number of seconds between presence polls.

5.5.3 Setting Up the IM Handle Property

If your users are required to have an IM handle value that is different than their e-mail address, follow this procedure to create the IM Handle property and add the property to the portal's General Information page for each user profile. After you have added this property, you can add each user's IM handle to their user profile; you can also have each user perform this task on their own.

1. Log in to the portal as the Administrator.

2. Click **Administration**.

3. Open the **Administrative Resources** folder.

4. From the Create Object drop-down list, choose **Property**.

5. On the Main Settings page, leave the default values and selections.

6. Click **Finish**.

    The Save Object dialog box appears.

7. Ensure that the Administrative Resources folder is selected and name the object `IM Handle`.

8. Click **Save**.

9. Click **Close**.

10. You are returned to the Administrative Resources folder.

11. From the Select Utility drop-down list, choose **Global Object Property Map**.

12. On the Main Page, click **Edit** for the User object.

13. In the Choose Property dialog box, select the **IM Handle** property, then click **OK**.

    You are returned to the Main Page.

14. Click **Finish**.

15. From the Select Utility drop-down list, choose **User Profile Manager**.

16. Under Edit Object Settings, click the **User Information - Property Map** link.

17. If the IMUser user information attribute is assigned to the Email Address property, perform the following in sequence:

      a. Click **Edit** for the property.

      b. Delete `IMUser,` along with the comma that precedes it.

         Do not delete any other user information attributes that are assigned to the Email Address property.

      c. Click **Edit** for the Email Address property to return it to a non-editable state.

18. Click **Add**.

19. In the Choose Property dialog box, select the IM Handle property, then click **OK**.

    You are returned to the **User Information - Property Map** page.

20. Click **Edit** for the IM Handle property.

21. Delete `IMHandle`, then replace it with `IMUser`.

22. Click **Edit** for the IM Handle property to return it to a non-editable state.

23. Click **Finish**.

24. Click **Administration**, **Portal Resources**, then **Folder**.

25. Click the **Portlet** link.

26. Click the **General Information** portlet link.

27. In the Edit Portlet: General Information page, click **Edit**.

    The User Profile Portlet Configuration dialog box appears.

28. Click **Add Property**.

29. Select the **IM Handle** property name, then click **OK**.

    You are returned to the User Profile Portlet Configuration dialog box.

30. Click **Finish**.

    You are returned to the Edit Portlet: General Information page.

31. Click **Finish**.

    You are returned to the Portal Resources Folder. The IM Handle property is added to the portal's user profile, General Information page.

5.6 Configuring Excel Portlets

Oracle WebCenter Collaboration comes with portlets and a portlet template that enable you to display a Microsoft Excel file from a Collaboration project in the portal interface:

- My Excel: can be added to a My Page

- Community Excel: can be added to a community page

- Global Excel Portlet Template: can be used to create multiple instances of Excel portlets, so that Excel file can be displayed on a My Page or community page

For information on adding an Excel portlet to a page and configuring the portlet to display an Excel file, see the Oracle WebCenter Collaboration online help.

To configure the maximum size of Excel files that can be displayed in a portlet:

1. Launch Oracle WebCenter Configuration Manager.

2. In the application list on the left, under Collaboration, click **Collaboration Settings**.

3. Under Excel Portlets, configure the following settings:

   - **Maximum Number of Rows**: An Excel file that exceeds the maximum number of rows will produce an error and will not be displayed in the portlets. A value of 0 means there is no restriction on the number of rows.

   - **Maximum Number of Columns**: An Excel file that exceeds the maximum number of columns will produce an error and will not be displayed in the portlets. A value of 0 means there is no restriction on the number of columns.

4. Click **Save**.

5.7 Configuring Microsoft Project Import

Table 5–6 describes the settings for Microsoft Project import contained in config.xml under `project-import`.

Table 5–6   Configuration Parameter for Customizing Microsoft Project Imports

Parameter	Description
number-of-tasks-limit	The total number of tasks allowed in an import. The default is 1000.

5.8 Configuring the E-mail a Project Feature

This section describes how to configure the E-mail a Project feature. The E-mail a Project feature lets users:

- E-mail a message to a discussion within a project

- E-mail a document to a folder within a project

- Reply to a message post notification

This section discusses the following:

- Enabling the E-mail a Project Feature and Configuring the SMTP Server

- Performing a Basic Configuration

- Example: Relaying E-mail to Oracle WebCenter Collaboration

  This section provides an example of configuring sendmail on a Linux computer that is also running Oracle WebCenter Collaboration. You can use this example as a guideline for configuring your mail host if it is running on the same computer as Oracle WebCenter Collaboration.

  > **Note:** Groupware Integration is not necessary for users to employ the E-mail a Project feature. Groupware Integration is only necessary if users want to employ the capabilities that are described in Section 5.4, "Integrating Oracle WebCenter Collaboration and Groupware." Additionally, the Notification Service -- which is used to generate and send e-mail notifications from projects to users -- is not required to employ the E-mail a Project feature. However the E-mail a Project feature is less useful if the Notification Service is not running.

5.8.1 Enabling the E-mail a Project Feature and Configuring the SMTP Server

This section describes how to use Oracle WebCenter Configuration Manager to enable the E-mail a Project feature and to configure the SMTP server.

To enable the E-mail a Project feature and configure the SMTP server:

1. Launch Oracle WebCenter Configuration Manager.

2. In the application list on the left, under Collaboration, click **Collaboration Settings**.

3. Under E-mail a Project Settings, select **Enabled**.

4. In the SMTP Server box, type the SMTP server to use for the E-mail a Project feature.

5. Click **Save**.

5.8.2 Performing a Basic Configuration

This section discusses how to configure E-mail a Project if you run your mail host and Oracle WebCenter Collaboration on separate computers.

To configure Oracle WebCenter Collaboration to use the E-mail a Project feature:

- An IT or network operations employee at your organization needs to add a DNS MX (mail exchange) record that points to Oracle WebCenter Collaboration.

- The users' e-mail address must be registered in their portal user profile.

  Either the administrator or user can perform this task. The e-mail address in the portal user profile must exactly match the user's e-mail address; this is case-sensitive.

- **(Optional)** If you do not want to use the default values, you can configure the following nodes in the e-mail section of config.xml:

Table 5–7 describes the settings for the E-mail a Project feature contained in config.xml under `Email Service Settings`.

Table 5–7   Configuration Parameters for E-mail a Project Configuration

Parameter	Description
domain	The e-mail domain. For example: *mail.buttercut.imap.com* Most likely, you configured this node when you ran the Oracle WebCenter Collaboration Installer. This parameter can be set only in the Configuration Manager.
connection-pool	The number of socket handlers for incoming connections. The default value is 10.
mail-processors	The number of threads devoted to processing incoming e-mails. The default value is 5.
maximum-message-size	The maximum size of incoming e-mails. -1 indicates that Oracle WebCenter Collaboration does not perform size checks. When this is the case, the Oracle WebCenter Collaboration API enforces size limits for message bodies and files. The default value is -1.
authorized-connections	The names or IP addresses of hosts, in a comma-delimited format, that are allowed to connect to the SMTP handler. We recommend creating this list of names to enforce security. See the config.xml file for an example of this list. The default value is *, which indicates no limit.

Table 5–7   (Cont.) Configuration Parameters for E-mail a Project Configuration

Parameter	Description
idle-timeout	The time (in minutes) that an incoming connection can remain idle. The default value is 20.

5.8.3 Example: Relaying E-mail to Oracle WebCenter Collaboration

If you run your e-mail host on the same computer as Oracle WebCenter Collaboration, you must configure your e-mail host to relay e-mail to Oracle WebCenter Collaboration. This section provides an example of configuring sendmail to relay e-mail to Oracle WebCenter Collaboration, which you can use as a guideline for configuring your own e-mail host.

In this example, Oracle WebCenter Collaboration uses port 2525 (by default, Oracle WebCenter Collaboration uses port 25, which is the same port that sendmail uses. For this reason, Oracle WebCenter Collaboration's port must be changed.)

> **Note:** The steps that are required for you to set up your e-mail host to relay mail to Oracle WebCenter Collaboration may differ than the example, depending on your production environment.

5.8.4 Prerequisites

These prerequisites provide an example of the tasks that should be completed before configuring sendmail.

1. The sendmail-cf rpm package must be installed. To determine if it is installed, run the following as root:

   ```
   rpm -qa | grep sendmail
   ```

   The return should appear as follows:

   ```
   sendmail-8.12.11-4.RHEL3.1
   sendmail-cf-8.12.11-4.RHEL3.1
   ```

2. Create a subzone/subdomain under your current domain. For example, collabmail.yourcompany.com.

3. Create a host entry that points to your Oracle WebCenter Collaboration server.

   ```
   MX    10    mail.collabmail.yourcompany.com
   ```

4. Create a MX (mail exchange) record so that anything that gets sent to *@collabmail.yourcompany.com goes to the host record that you just created:

   ```
   MX    10    mail.collabmail.yourcompany.com
   ```

   The value 10 in the above example represents the priority that enables you to have more MX records. It assures that e-mails go to the higher priority first.

   > **Note:** An alternative to Step 2 (above) is to specify mx 10 X.X.X.X under your subzone.

5.8.5 Configuring Sendmail

These instructions provide an example for configuring sendmail to relay incoming mail to Oracle WebCenter Collaboration:

1. Log in as root.

2. Stop the sendmail processes:

```
/etc/rc.d/init.d/kudzu stop
/etc/rc.d/init.d/sendmail stop
/etc/rc.d/init.d/apmd stop
```

3. Verify file "relay-domains" is in etc/mail.

   a. Add your domain:

   ```
   computer.yourimap.com
   ```

   For example, collab-x5.plumimap.com.

4. Edit the etc/mail/access file.

   a. Add the following to the access file:

   ```
   To: computer.yourimap.com     RELAY
   To: collab-x5.plumimap.com        RELAY
   ```

   b. From your terminal, rehash to update the **access.db** file:

   ```
   /usr/sbin/makemap hash /etc/mail/access.db < /etc/mail/access
   ```

5. Edit the sendmail.mc file to relay e-mails to Oracle WebCenter Collaboration using a different port.

   ```
   /etc/mail/sendmail.mc
   ```

   a. Add the following before the MAILER lines at end of the file:

   ```
   FEATURE(`mailertable')
   define(`confRELAY_MAILER', `esmtp')
   define(`RELAY_MAILER_ARGS', `TCP $h 2525')
   ```

   b. Look for the following line in the file:

   ```
   DAEMON_OPTIONS(`Port=smtp,Addr=127.0.0.1, Name=MTA')dnl
   ```

   Comment the above line out so that it appears as follows:

   ```
   dnl DAEMON_OPTIONS(`Port=smtp,Addr=127.0.0.1, Name=MTA')dnl
   ```

   c. In your terminal, type the following:

   ```
   m4 /etc/mail/sendmail.mc > /etc/mail/sendmail.cf
   ```

6. Edit the mailertable file as follows.

   ```
   /etc/mail/mailertable
   ```

   a. Add the following to the mailertable file:

   ```
   computer.yourimap.com     relay:mail.computer.yourimap.com
   ```

   For example:

   ```
   Collab-x5.plumimap.com  relay:mail.computer.plumimap.com
   ```

     b. Then rehash to update the **mailertable.db** file by typing the following in your terminal:

```
/usr/sbin/makemap hash /etc/mail/mailertable.db < /etc/mail/mailertable
```

7. Start sendmail as follows:

```
/etc/rc.d/init.d/apmd start
/etc/rc.d/init.d/sendmail start
/etc/rc.d/init.d/kudzu start
```

8. Edit the Oracle WebCenter Collaboration config.xml file to enable e-mail and to use port 2525:

```
email enabled="yes" port="2525"
```

9. Restart Oracle WebCenter Collaboration.

The collaboration.log file should show the E-mail Service has started on port 2525 with no errors.

10. A Telnet to the computer port should return something similar to the following:

```
220 Collaboration 10.3.3 Build:198844.20050824 0720.0 SMTP Server (Messaging
Server) ready Wed, 24 Aug 2005 14:50:36 -0700 (PDT)
```

5.8.6 Working With Oracle WebCenter Collaboration E-mail Errors

If an error occurs when a user sends an e-mail to an Oracle WebCenter Collaboration project:

- Oracle WebCenter Collaboration rejects the e-mail and does not reply with an error notification if it cannot verify:
  - The identification of the user who sent the e-mail.
  - The format of the e-mail address.
- Oracle WebCenter Collaboration replies with an error notification if it can verify:
  - The identification of the user who sent the e-mail.
  - The format of the e-mail address.

If Oracle WebCenter Collaboration is down, the mail server queues the e-mail and attempts redelivery a few times before quitting. Oracle WebCenter Collaboration sends an error e-mail to the user who sent the e-mail, then redelivers the e-mail when Oracle WebCenter Collaboration is back up.

5.9 Integrating Oracle WebCenter Collaboration and Oracle WebCenter Analytics

Oracle WebCenter Collaboration can be integrated with Oracle WebCenter Analytics to send events to Oracle WebCenter Analytics as a user is browsing and using Oracle WebCenter Collaboration. This allows Oracle WebCenter Analytics to have an accurate event data collection at any given time.

To enable Oracle WebCenter Analytics integration:

1. Launch Oracle WebCenter Configuration Manager.

2. In the application list on the left, under Collaboration, click **Analytics**.

3. Under Enable Analytics, select **Enabled**.

4. Click **Save**.

For instructions on using the OpenUsage API to send Oracle WebCenter Collaboration events to Oracle WebCenter Analytics, see the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Analytics* on the Oracle Technology Network in the Oracle WebCenter Analytics 10*g* Release 4 (10.3.3.0.0) documentation set.

5.10 Integrating Oracle WebCenter Collaboration and Oracle Business Process Management

Oracle WebCenter Collaboration can be integrated with Oracle Business Process Management, allowing users to attach an Oracle WebCenter Collaboration document to a WorkSpace process instance and then initiate the process from the document in the Oracle WebCenter Collaboration user interface.

To enable Oracle Business Process Management integration:

1. Launch Oracle WebCenter Configuration Manager.

2. In the application list on the left, under Collaboration, click **Collaboration Settings**.

3. Under Enable ALBPM Integration, select **Enabled**.

4. Click **Save**.

The following table describes the parameters in config.xml, under `ALIPIntegration`, that are used to enable integration with Oracle Business Process Management:

Table 5–8 config.xml Parameters for Oracle Business Process Management integration

Node or Attribute	Description
processPortletUUID	The UUID for the Process - Application portlet. By default, the value is **E1F1B56E-0563-4397-9544-223AD1885C16**. You do not must change this value.
	Only users with access to the Process - Application portlet are able to use the **Initiate Process** feature in Oracle WebCenter Collaboration.
requestTimeoutInMilliSecond	Specifies the amount of time, in milliseconds, that Oracle WebCenter Collaboration waits to receive the names of available processes from Oracle BPM. If Oracle WebCenter Collaboration does not receive these names in the specified amount of time, Oracle WebCenter Collaboration stops waiting for process names. By default, the value is **60000** (60 seconds).

5.11 Integrating Oracle WebCenter Collaboration and the Tagging Engine

Oracle WebCenter Collaboration can be integrated with the Tagging Engine, allowing users with the **Access Tagging Engine** activity right to apply tags to Oracle WebCenter Collaboration objects so that they can be searched on and accessed from within the Tagging Engine user interface.

To enable Tagging Engine integration:

1. Launch Oracle WebCenter Configuration Manager.

2. In the application list on the left, under Collaboration, click **Tagging Engine**.

3. Under Enable Tagging, select **Enabled**.

4. Under Tagging Communication, type the URL to the Tagging Engine in the **Tagging URL** text box:

   a. From the Tagging Engine Items or Tagging Engine Users portlet click **Display in Tagging Engine**.

   b. Copy URL from the Address field of the browser.

   c. Paste the URL in the **Tagging URL** text box.

5. Click **Save**.

5.12 Integrating Oracle WebCenter Collaboration and Oracle Universal Content Management

Oracle WebCenter Collaboration can be integrated with Oracle Universal Content Management, allowing users to export Collaboration projects and documents to Oracle Universal Content Management.

To enable Oracle Universal Content Management integration:

1. Launch Oracle WebCenter Configuration Manager.

2. In the application list on the left, under Collaboration, click **Collaboration Settings**.

3. Under Enable Tagging, select **Enabled**.

4. Under Project and Document export to UCM, configure the following settings:

   - Select **Enabled**.

   - In the **UCM User** box, type the name of the Oracle Universal Content Management to use to connect to Oracle Universal Content Management.

   - In the **IDC Url to UCM** box, type the URL to connect to Oracle Universal Content Management. The URL must be in the format `idc://server:port`, where the default port is 4444 for intradoc and 4433 for intradoc over SSL.

   - In the **Project parent folder id** box, type the ID of the parent folder (collection) in Oracle Universal Content Management you want to use as the root folder for document export. The folder dialog for document export will display folders underneath this folder. Project export ignores this value.

5. Click **Save**.

A

Troubleshooting

This appendix lists common problems that may occur during Oracle WebCenter Collaboration run time.

A.1 Troubleshooting Common Run-Time Problems

Table A–1   Common Run-Time Problems and Solutions

Problem Description and Details	Cause and Solution
■ **Problem:** Document content does not appear. ■ **Details:** In the Oracle WebCenter Collaboration application, the list of documents in a project appears, but you cannot access the document links.	■ **Cause:** In Oracle WebCenter Configuration Manager, either the path to the Document Repository Service is incorrect or the port associated with the Document Repository Service is incorrect. ■ **Solution:** Edit the Document Repository Service component's settings in Oracle WebCenter Configuration Manager. Enter the correct values into the Host and Port settings, then click **Save**. To verify that the Document Repository Service is up and running, go to the Windows Command Prompt. Type the following command: `Telnet Document_Repository_computer port_number` If the Windows Command Prompt displays a blank screen with no errors, the Document Repository Service is up and running.
■ **Problem:** Portlets time out. ■ **Details:** When you start Oracle WebCenter Collaboration, the portlets time out and time-out errors display. These errors are most likely to occur when you start Oracle WebCenter Collaboration the first time after it is installed.	■ **Cause:** The Java Server Pages (**.jsp** pages) in your application server were not precompiled before you started Oracle WebCenter Collaboration for the first time. ■ **Solution:** The Oracle WebCenter Collaboration portlets must be refreshed. Refresh the page. If you run Oracle WebCenter Collaboration for the first time, you might must refresh the page a couple of times, because the **.jsp** pages are compiled when Oracle WebCenter Collaboration is first accessed.

Table A–1 (Cont.) Common Run-Time Problems and Solutions

Problem Description and Details	Cause and Solution
■ **Problem:** Portlets do not load. ■ **Details:** When you start Oracle WebCenter Collaboration, the Oracle WebCenter Collaboration portlets do not start or fail to preload on startup. Various errors might display.	■ **Cause 1:** The Web application server is not up and running. ■ **Solution 1:** Restart the Windows service named **Oracle WCI Collaboration**. Wait for two or three minutes to allow the application server to start, then refresh the page.
	■ **Cause 2:** The port used to access the Web application server is incorrect. ■ **Solution 2:** Follow these steps: 1. In the Portal, click the Administration tab. 2. Click the Collaboration administrative folder. 3. Click Remote Server. 4. Click the Collaboration remote server. 5. Check that the base URL for Oracle WebCenter Collaboration is correct. This URL should include the following information: http://*Collaboration_Computer_Name*: *Application_Server_Port*/collab where: *Collaboration_Computer_Name* is the name of the computer on which Oracle WebCenter Collaboration is installed. *Application_Server_Port* is the port number used by the Oracle WebCenter Collaboration application server. You can find the HTTP and HTTPS port numbers that are used by Oracle WebCenter Collaboration application server in Oracle WebCenter Configuration Manager's Collaboration application, Application Settings component.
	■ **Cause 3:** A database exception occurred. For example, the application server cannot connect to the database. ■ **Solution 3:** Open the **collaboration.log** log file and look for any exceptions.
	■ **Cause 4:** An exception occurred in the application server that resulted in Oracle WebCenter Collaboration failing to start. In the application server log file, a "failed to preload on startup" error displays. ■ **Solution 4:** Restart the Windows service named **Oracle WCI Collaboration**.

Table A–1   (Cont.) Common Run-Time Problems and Solutions

Problem Description and Details	Cause and Solution
Problem: A Database Role-Reconciliation Error Occurs. **Details:** A database role-reconciliation error occurs, and Oracle WebCenter Collaboration cannot connect to the portal database.	**Cause:** The wrong value was specified in Oracle WebCenter Configuration Manager, Collaboration application, Collaboration Settings component, **Linked database alias** setting. **Solution:** To find the correct value that should you should type into the Linked database alias setting: Oracle: Navigate to Oracle WebCenter Configuration Manager, Portal Service application, Portal Database component. The value you should type into the Linked database setting is specified in the User name setting. MSSQL: Navigate to Oracle WebCenter Configuration Manager, Portal Service application, Portal Database component. The value you should type into the Linked database setting is specified in the User name setting. Add .dbo. to the end of the user name value. For example, if the user name is alidbuser, the value that you type into the Linked database alias setting should be alidbuser.dbo. DB2: Navigate to Oracle WebCenter Configuration Manager, Portal Service application, Portal Database component. The value you should type into the Linked database setting is specified in the User name setting. In Oracle WebCenter Configuration Manager, navigate to the Oracle WebCenter Collaboration application, Collaboration Settings component, Linked database alias setting. Type the correct value, then click **Save**.
Problem: Error 400 Page from Notify **Details:** Links from Notify mail return an Error 400 page.	**Cause:** This occurs when the portal and Oracle WebCenter Collaboration run on the same port on the same computer. **Solution:** Ensure that Oracle WebCenter Collaboration and portal run on different ports or on different computers.
Problem: Grant Rights and Portal vs. System User **Details:** If you use SQL Plus through Enterprise Manager, grant rights scripts fail.	**Cause:** The Collaboration user or portal user does not have the proper grant rights. **Solution:** If using Enterprise Manager, run grant rights scripts as an Oracle system user rather than a portal user.
Problem: Invalid URLs for Experience Definitions appear in Notification Emails. **Details:** When a user clicks on a URL for an Experience Definition in a Notification e-mail, they are taken to a previous version of the Experience Definition.	**Cause:** Experience Definition URLs include user-specific fragments that preserve the correct look and feel of Experience Definitions for individual users. These URLs are cached by the Notification Service. If a portal user changes his or her login domain, the cached Experience Definition URLs for that user become invalid. There are other, less-common reasons why Experience Definition URLs can become invalid. If you are experiencing the same problem for a different reason, restarting the Notification Service most likely resolves the problem for you, too. **Solution:** Restart the Notification Service.

Table A–1   (Cont.) Common Run-Time Problems and Solutions

Problem Description and Details	Cause and Solution
Problem: Error message appears when user tries to access Collaboration Administration, pages, or portlets. **Details:** See Section A.1.1, "Troubleshooting Error Message" for the error message that appears.	**Cause:** You did not restart the portal after scripting the Oracle WebCenter Collaboration database. **Solution:** Restart the portal. If restarting the portal does not resolve the issue, ensure that the portal's tables are owned by the portaldbuser, and Oracle WebCenter Collaboration's tables are owned by the collabdbuser -- not dbo.

A.1.1 Troubleshooting Error Message

Following is the error message that corresponds to the last Troubleshooting problem in the above table:

```
java.lang.NoClassDefFoundError
at com.plumtree.collaboration.api.portalaccess.PortalAccessManager.
getGuestPortals(PortalAccessManager.java:279)
at com.plumtree.collaboration.api.portalaccess.PortalAccessManager.
fillMap(PortalAccessManager.java:388)
```

B

Working with the Oracle WebCenter Configuration Manager and Configuration Files

This appendix contains a detailed description of the Oracle WebCenter Configuration Manager and for each of the Oracle WebCenter Collaboration configuration files that you can edit to customize your installation.

It includes the following sections:

- Oracle WebCenter Configuration Manager
- Overview of Oracle WebCenter Collaboration Configuration Files
- config.xml
- documentTemplates.xml
- filetypes.xml
- database.xml

B.1 Oracle WebCenter Configuration Manager

The tables in this section describe the settings in Oracle WebCenter Configuration Manager available to customize Oracle WebCenter Collaboration. Each table represents a section under Collaboration.

Table B–1   Oracle WebCenter Configuration Manager - Collaboration - Analytics

Setting	Description
Enabled	Enable integration with Oracle WebCenter Analytics

Table B–2   Oracle WebCenter Configuration Manager - Collaboration - Application Settings

Setting	Description
HTTP enabled	Select if HTTP should be used for the application's web protocol.
HTTP port	Specify the port on which the application should listen for HTTP requests
HTTPS enabled	Select if HTTPS should be used for the application's web protocol.
HTTPS port	Specify the port on which the application should listen for HTTPS requests

Table B–3   Oracle WebCenter Configuration Manager - Collaboration - Collaboration Database

Setting	Description
Vendor	The database vendor.
Host	The name of the computer that hosts the database.
User name	The name of the database user.
Password	The password for the database user.
Port	The port number on which the database services requests.
Minimum pooled database connections	The minimum number of pooled connections.
Maximum pooled database connections	The maximum number of pooled connections.
MSSQL Only: Database Name	The name of the database.

Table B–4   Oracle WebCenter Configuration Manager - Collaboration - Collaboration Settings

Setting	Description
Collaboration Database Settings	
▪ Linked Database Alias	▪ The linked database alias of form aluidb.dbo. that allows Collaboration to access the ALI database
Enable Instant Messaging	
▪ Enabled	▪ Select to enable Instant Messaging with Collaboration.
Enable ALBPM Integration	
▪ Enabled	▪ Select to enable Integration with ALBMP.
E-mail a Project Settings	
▪ Enabled	▪ Select to enable the e-mail a project functionality for Collaboration
▪ SMTP Server	▪ SMTP server to use for e-mail a project
Enable Office Task Pane for WebEdit	
▪ Enabled	▪ Enable Office Task Pane for WebEdit. Enabling the Office Task Pane disables WebDAV for WebEdit.
Project and Document export to UCM	
▪ Enabled	▪ Enable Project and Document export to UCM
▪ UCM User	▪ Connect as this existing user account in UCM.
▪ IDC Url to UCM	▪ URL to connect to UCM: should be in the format idc://server:port, where the default port is 4444 for intradoc and 4433 for intradoc over ssl.
▪ Project parent folder id	▪ Id of the parent folder (collection) in UCM. The folder dialog for document export will display folders underneath this folder. Project export ignores this value.
Search Service and Content Indexing	
▪ Enabled	▪ Enable the search service for indexing and search requests.

Table B–4   (Cont.) Oracle WebCenter Configuration Manager - Collaboration - Collaboration Settings

Setting	Description
Index Manager	
■ Indexing Threads	■ The maximum number of threads that can concurrently index content.
■ Concurrent File Uploads	■ The maximum number of simultaneous file uploads.
■ Maximum Queued Bytes	■ The maximum number (in bytes) that can be queued in memory before an indexing thread submits its queue to the search service.
■ Maximum Queued Items	■ The maximum number of items that can be queued in memory before an indexing thread submits its queue to the search service.
■ Queued Item Interval (ms)	■ The maximum time (in milliseconds) before an indexing thread submits its queue to the search service.
■ Indexing Logging Enabled	■ Enables logging from the index manager subcomponent to a file on disk.
Enable Notification Service (CNS)	
■ Enabled	■ Enable the notification service.
Excel Portlets	
■ Maximum Number of Rows	■ The maximum number of rows an Excel file can have in order for the Excel portlets to display it. A value of 0 means there is no restriction on the number of rows.
■ Maximum Number of Columns	■ The maximum number of columns an Excel file can have in order for the Excel portlets to display it. A value of 0 means there is no restriction on the number of columns.

Table B–5   Oracle WebCenter Configuration Manager - Collaboration - Document Repository Service

Setting	Description
Host	The fully-qualified domain name of the computer on which the Document Repository Service is installed.
Port	The port number used by the Document Repository Service.
Override host name and port with this URL	Overrides the above settings. Ignored if blank. An example value is: http://localhost:8020/dr.

Table B–6   Oracle WebCenter Configuration Manager - Collaboration - Groupware

Setting	Description
Enabled	Select to enable Groupware with Collaboration.

Table B–7   Oracle WebCenter Configuration Manager - Collaboration - JDK Logging

Setting	Description
Logging level for sql calls	Logging level for sql calls.
Logging level for documents	Logging level for documents.
Logging level for classes not covered by the other categories	Logging level for classes not covered by the other categories.

Table B–7   (Cont.) Oracle WebCenter Configuration Manager - Collaboration - JDK Logging

Setting	Description
Logging level for classes in the UI	Logging level for classes in the webui packages.
Logging level for wikis and blogs	Logging level for wiki and blogs.
Logging level for classes in the Collaboration IDK (WSServer)	Logging level for classes in the wsserver packages.

Table B–8   Oracle WebCenter Configuration Manager - Collaboration - Logging

Setting	Description
Server	The application name that will uniquely identify log messages sent from this application. WCI Logging Utilities will use this string to determine the location from which log messages originate. The application name can be any string that meets the following restrictions: it must not be empty, it must not exceed 128 in length, and it may only contain non-white-space visible ASCII characters and the space character. Most ALI products follow the naming convention [product-name].[machine-name].[user-name].
Local only	Select to limit broadcast of this application's logging messages to only the computer on which this application is installed.

Table B–9   Oracle WebCenter Configuration Manager - Collaboration - Search Service

Setting	Description
URL	Fully-qualified domain name of the computer on which the Oracle WCI Search Service is installed.
Timeout (milliseconds)	The number of milliseconds that the Rank Engine waits before the search request is terminated.

Table B–10   Oracle WebCenter Configuration Manager - Collaboration - Tagging

Setting	Description
Enabled	Select to enable Tagging with Collaboration.
Tagging URL	The fully gatewayed url to tagging.

Table B–11   Oracle WebCenter Configuration Manager - Collaboration - WCI Notification Service Client

Setting	Description
URL	Fully-qualified domain name, port, and protocol of the URL to connect to the WebCenter Interaction Notification Service.
Timeout (milliseconds)	The number of milliseconds that clients wait before the notification request is terminated.
Host	Fully-qualified domain name of the computer on which the WebCenter Interaction Notification Service is installed.

Table B–12   Oracle WebCenter Configuration Manager - Collaboration - Web Authentication

Setting	Description
User name	HTTP Basic Authentication user name. Along with the password below, this is used by Pathways to securely identify requests as originating from the portal. This does not must be the user name of a portal user. These credentials must match the credentials defined in the Administrator's Basic Authentication Information section of the Pathways Remote Server object's properties in the portal.
Password	Along with the user name above, this is used by Pathways to securely identify requests as originating from the portal. This does not must be the user name of a portal user. These credentials must match the credentials defined in the Administrator's Basic Authentication Information section of the Pathways Remote Server object's properties in the portal.

B.2 Overview of Oracle WebCenter Collaboration Configuration Files

This section provides overviews of Oracle WebCenter Collaboration and Notification Service configuration files.

- For Microsoft Windows, these files are installed in *install_dir*\ptcollab\10.3.3\settings\config, where *install_dir* is, by default, C:\Oracle\Middleware\wci.

- For UNIX and Linux, these files are installed in *install_dir*/ptcollab/10.3.3/settings/config, where *install_dir* is, by default, /opt/oracle/middleware/wci.

Table B–13 provides a general overview of the Oracle WebCenter Collaboration configuration files.

Table B–13   Oracle WebCenter Collaboration Configuration Files

Oracle WebCenter Collaboration Configuration File	Description
config.xml	The main configuration file for Oracle WebCenter Collaboration. This file enables you to configure various advanced Oracle WebCenter Collaboration settings, including connection information to other components that Oracle WebCenter Collaboration uses (such as search and notification) and advanced settings for features such as bulk upload and WebDAV. For more information, see Section B.3, "config.xml."
documentTemplates.xml	Sets the document templates that are recognized byOracle WebCenter Collaboration. For more information, see Section B.4, "documentTemplates.xml."
filetypes.xml	Lists file types in Oracle WebCenter Collaboration. For more information, see Section B.5, "filetypes.xml."
database.xml	Configures Oracle WebCenter Collaboration database settings. The configuration file is automatically updated during the installation of Oracle WebCenter Collaboration. For more information, see Section B.6, "database.xml."
dr.xml	Configures the connection to the Document Repository Service. Note: dr.xml is automatically updated during the installation of Oracle WebCenter Collaboration. Do not modify this file.

Table B–13 (Cont.) Oracle WebCenter Collaboration Configuration Files

Oracle WebCenter Collaboration Configuration File	Description
audit.xml	Controls the logging and profiling functionality of Oracle WebCenter Collaboration. **Note**: The contents of this file are generated byOracle WebCenter Collaboration. They should not be modified.
cache.xml	Manages Oracle WebCenter Collaboration caches. **Note**: The contents of this file are generated by Oracle WebCenter Collaboration They should not be modified.
cluster.xml	Configures settings for Oracle WebCenter Collaboration that is set up in a clustered network environment.
object-migration.xml	Controls object migration in Oracle WebCenter Collaboration. **Note**: The contents of this file are generated by Oracle WebCenter Collaboration. They should not be modified.

For information on creating, editing and deleting holidays, see Section 2.2.3.11, "Restricting the Size of Single File Uploads."

B.3 config.xml

The following table provides a detailed description of the configuration parameters in Oracle WebCenter Collaboration's config.xml file.

> **Notes:**
>
> - Use the Configuration Manager to manage settings when possible. Edit configuration files only if the setting is not part of the Configuration Manager.
>
> - Do not change nodes that are not documented in this table.

Table B–14 Nodes in config.xml

Node	Description
portal version	Displays the version of the owning portal.
audit	Filename of the audit run-time configuration file.
database	Filename of the database connectivity configuration file.
cache	Filename of the managed cache configuration file.
search	Enables and disables communication between Oracle WebCenter Collaboration and the Search Server. Valid values are **yes** and **no**.
servername	The host name of the Search Server. This value should be a fully-qualified domain name.
port	The port where the Search Server listens for communication.
enableLogging	Enables and disables Search Server logging. Valid values are **true** and **false**.
defaultLanguage	The default language of the Search Server.

Table B–14   (Cont.) Nodes in config.xml

Node	Description
languages_dir	The path name to the location where language information is stored by the Search Server.
textExtraction	The path and filename of the application used to perform text extraction.
maxTextBytesToIndex	The maximum size for each object that is indexed by the Search Server.
temp_dir	The path name of the temporary directory used by the Search Server.
runReconcileThread	This should be set to **true** on the computer on which Oracle WebCenter Collaboration is installed. In a load balancing environment, set to **false** on all servers except one. In a global deployment environment, set to **false** on all satellite nodes and set to **true** on exactly one server at the master node.
realTimeIndexing	If not in a global deployment, set this value to **true** on all computers on which Oracle WebCenter Collaboration is installed. If in a global deployment, set to **false** on all computers on which Oracle WebCenter Collaboration is installed, including the master node.
fileTypeRegister	Filename of the filetypes configuration file.
maxUploadMegaBytes	The maximum size for a single file upload.
temporaryZipFolder	
bulkUpload	Enables and disables the Bulk Upload feature. Valid values are **yes** and **no**.
nonGatewayedUploads	Determines if uploads are gatewayed through the Portal server. Valid values are: **yes**: Uploads are gatewayed through the Portal server. **no**: Uploads are not gatewayed through the Portal server.
url	The base URL Microsoft Office uses to communicate with Oracle WebCenter Collaboration. This attribute is used if enable is set to **true**. This value is set by Oracle WebCenter Configuration Manager and should not be updated by editing config.xml directly.
tokenBasedAuthentication	Determines if token-based authentication is used. In a normal Oracle WebCenter Collaboration implementation, there is no must change these values. Valid values are: **true**: Enables token-based authentication. This is the default. **false**: Disables token-based authentication. This setting can only be used when HTTP communication is gatewayed and some other authentication method is being used.

Table B–14   (Cont.) Nodes in config.xml

Node	Description
useClustering	Controls the use of message clustering (also known as *load balancing*) with token-based authentication. Valid values are: **yes**: Enables message clustering. This is the default. **no**: Disables message clustering. This setting should only be used when message clustering is not required and would degrade performance. This setting has no effect if general clustering functionality has been disabled for Oracle WebCenter Collaboration. Therefore we recommend that you always enable useClustering.
maxWaitSeconds	Determines how long Oracle WebCenter Collaboration waits for a response from other servers in the cluster. This setting is applicable only if token-based authentication and message clustering/load balancing are enabled. **Default**: 30
webEdit	Enables or disables WebEdit. Valid values are **yes** and **no**.
nonGatewayedAccess	Determines if HTTP communication between Microsoft Office and Oracle WebCenter Collaboration is gatewayed through the portal. Valid values are: **yes**: HTTP communication is gatewayed through the portal. This is the default. **no:** HTTP communication is not gatewayed through the portal.
serverURL	The base URL Microsoft Word uses to communicate with Oracle WebCenter Collaboration. This attribute is used if enable is set to **true**. This value is set by Oracle WebCenter Configuration Manager and should not be updated by editing config.xml directly.
truncateFileNames	The number of characters that are allowed in the file name displayed in WebDAV before the characters are truncated.
clsid	Specifies the class ID of the COM object. This value should not be modified.
fileSpec	Specifies the name of the distribution file and information about the component. This value should not be modified unless a more recent version of the object needs to be deployed.
installOfficeToolsPopUp	Enables or disables the Collaboration Office Tools Add-In installer. Valid values are **yes** and **no**.
webDAV	Contains WebDAV settings.
fullWebDAVAccessToThisServer	Enables or disables the use of WebDAV. Valid values are: **yes:** Causes Oracle WebCenter Collaboration to accept WebDAV requests. This is the default. **no:** Causes Oracle WebCenter Collaboration to reject WebDAV requests.
requestsAreGatewayed	Enables or disables WebDAV communication between Windows Explorer and Oracle WebCenter Collaboration. Valid values are **true** and **false**.

Table B–14   (Cont.) Nodes in config.xml

Node	Description
uiDisplaysServerConfigInfo	Controls how Oracle WebCenter Collaboration displays the **New**, then **Web Folder** dialog in the **Documents** tab. Valid values are:
	yes: Displays the Web Folder dialog box. This is the default.
	no: Does not display the Web Folder dialog box.
useNonGatewayedURL	Determines whether the Web Folder dialog box displays instructions for mapping a gatewayed network drive.
	Valid values are:
	no: Causes the Web Folder dialog to display information for mapping between Windows Explorer and Oracle WebCenter Collaboration through the gateway. This is the default.
	yes: Causes the Web Folder dialog to display information for mapping directly between Windows Explorer and Oracle WebCenter Collaboration.
	If the connection between Windows Explorer and Oracle WebCenter Collaboration is gatewayed, this instance of Oracle WebCenter Collaboration continues to function as the WebDAV service. Therefore, this instance of config.xml must have **fullWebDAVAccessToThisServer.enabled** set to **true** and **fullWebDAVAccessToThisServer.requestsAreGatewayed** set to **true**.
serverURL	Provides the base URL to Oracle WebCenter Collaboration that acts as the WebDAV service if Oracle WebCenter Collaboration is configured to communicate directly with Windows Explorer.
	This value is set by Oracle WebCenter Configuration Manager and should not be updated by editing config.xml directly.
imageServer	Specifies the relative paths to the directories in the Image Service where the Oracle WebCenter Collaboration images, help, and javascript can be found.
baseURL	The base URL of the image service used with Oracle WebCenter Collaboration. By default, this node is empty and Image Service is used. We recommend that you leave this node empty; however, if necessary, you can use this node for debugging purposes or to point to an image service other than the Image Service.
images	The relative path where the images are stored.
javascript	The relative path where the javascript source files are stored.
misc	The relative path to where miscellaneous source files are stored.
help	The relative path where the Oracle WebCenter Collaboration online help files are stored.
help508	The relative path where online help files for 508-mode are stored.
portal_common	The location of common portal images.
applets	The relative path where java applets are stored.
messaging	Configuration section for communicating with the Notification Service.

Table B–14   (Cont.) Nodes in config.xml

Node	Description
notification	Enables or disables the Notification Service. Valid values are **yes** and **no**.
cache-subscriptions	Increases the efficiency of the Notification Service by caching subscriptions every hour. Valid values are **yes** and **no**. Default is yes. We recommend that you keep this setting enabled unless your system has a performance or memory issue.
host	The host of the Notification Service.
port	The port where the Notification Service listens for communication.
max-queue-size	Maximum number of notification events that can be queued at any one point in time. Generally this value should not be increased but can be decreased to throttle the number of notification events being sent out.
name	Configured through Oracle WebCenter Configuration Manager.
password secure	Indicates whether the owning portal password is encrypted (and secure). If you are using an encrypted password, set to **yes**. Valid values are: **yes:** Indicates that the owning portal password is encrypted and secure. **no:** Indicates that the owning portal password is not encrypted and not secure.
gateway-entry https:	Defines the main access point for the portal. If the portal has been configured to use https but this is not set in the portal PTSERVERCONFIG table, you can set the attribute https to **yes** to force https.
collaboration-remote-server-uuid	Do not modify this value.
collaboration-web-service-uuid	Do not modify this value.
collaboration-config-web-service-uuid	Do not modify this value.
collaboration-remote-datesource-uuid	Do not modify this value.
cluster	Enables and disables clustering. Valid values are **yes** and **no**.
http-caching portlet-enabled	Enables and disables portlet caching. Valid values are **yes** and **no**.
http-caching application-view-enabled	Enables and disables caching of http requests to increase efficiency of application views. Valid values are **yes** and **no**.
web-services	Enables and disables Oracle WebCenter Collaboration Web services. Valid values are **yes** and **no**.
administration	Enables and disables Collaboration Administration pages.
object-migration	Enables and disables object migration functionality. Valid values are **yes** and **no**.
jscontrols	Settings for the jscontrols components.
imageServerConnectionURL	Alternative non-SSL URL to access jscontrols if Image Service is running on SSL.

Table B–14   (Cont.) Nodes in config.xml

Node	Description
debugLevel	Internal debug level for the jscontrols component.
calendar-cache	Enables and disables calendar caching. Valid values are **true** and **false**.
calendar-trace	Enables and disables trace for debugging of calendar problems. Valid values are **true** and **false**. Do not modify this node unless instructed to do so by Oracle Technical Support.
explorer	Settings for Collaboration Explorer controls.
serverSidePagination	Enables and disables server-side pagination of Explorer controls to improve performance when there are many items. Valid values are **yes** and **no**.
upgrade	Refers to a copy of the old config.xml file after an upgrade.
browserMode	Do not modify this node. We support only Normal mode.
richTextEditor	Enables and disables the rich text editor for discussion messages and announcements. Valid values are **yes** and **no**.
activityRight	Determines whether to check community roles for managing Oracle WebCenter Collaboration projects.
checkCommunityRoles	If enabled, this node performs extra checks to verify whether a user has Project Leader access to a community project. Valid values are **true** and **false**. Enabling this node may slow down the performance of Project Explorer.
auto-create-community project	Valid values are: **yes:** Causes Oracle WebCenter Collaboration to automatically create community projects on Community pages. **no:** Disables automatic create community project functionality.
groupware	This node is used to configure groupware integration. Enabled and server settings are configured through Oracle WebCenter Configuration Manager.
timeoutInMilliSecond	Specifies the amount of time, in milliseconds, that Oracle WebCenter Collaboration waits for responses from the SOAP server. If the SOAP server does not respond in this amount of time, the current operation is aborted and an exception is returned. Due to the performance constraints and the fact that large attachments might be transferred between Oracle WebCenter Collaboration through Exchange, the attribute should be set to a value greater than 10000 (10 seconds).
calendarCachePeriod	Specifies the cache time-out period, in seconds, for groupware items on the My Calendar portlet. When the My Calendar portlet is refreshed, Oracle WebCenter Collaboration checks if the current items have timed out. If they have, Oracle WebCenter Collaboration retrieves the entries from the back-end server. Otherwise, the entries are retrieved from memory.
addressBookReturn	The maximum number of returned addresses from the address search operation.

Table B–14   (Cont.) Nodes in config.xml

Node	Description
maxAttachmentSizeinKB	The maximum attachment file size, in kilobytes, that a meeting request or appointment can contain.
	This limit is the total file size of all attachments an item can have.
calendarAutoSynch	Enables or disables automatic synchronization between a user's project calendar and their Exchange or Notes calendar. Valid values are: **yes** and **no**.
monthRange	The range of months auto-synchronization covers, starting from the current month.
instant-messaging	Instant messaging is enabled through Oracle WebCenter Configuration Manager.
presence-url	This node returns an image to indicate whether the user is online or not.
send-url	This node includes the URL from which messages are sent. The *$user* variable includes the e-mail address of the individual user.
contact-url	This node should include the URL at which messages can be received. The *$user* variable includes the e-mail address of the individual user.
presence-poll-interval	This node includes the number of seconds between presence polls.
ALIPIntegration	Oracle BPM integration is enabled through Oracle WebCenter Configuration Manager.
processPortletUUID	The UUID for the Process - Application portlet. By default, the value is **E1F1B56E-0563-4397-9544-223AD1885C16**. You do not must change this value.
requestTimeoutInMilliSecond	Specifies the amount of time, in milliseconds, that Oracle WebCenter Collaboration waits to receive the names of available processes from Oracle BPM. If Oracle WebCenter Collaboration does not receive these names in the specified amount of time, Oracle WebCenter Collaboration stops waiting for process names. By default, the value is **60000** (60 seconds).
project-import	Contains parameters that are specific to Microsoft Project import.
number-of-tasks-limit	The total number of tasks allowed in an import. The default is 1000.
expand-tasklists-by-default	Displays expanded tasklists by default. Valid values are yes and no. When disabled, only root tasks appear in tasklists by default.
email	Email a project is enabled through Oracle WebCenter Configuration Manager.
connection-pool	The number of socket handlers for incoming connections.
mail-processors	The number of threads devoted to processing incoming e-mails.
maximum-message-size	The maximum size of incoming e-mails. –1 indicates that Oracle WebCenter Collaboration does not perform size checks. When this is the case, the Oracle WebCenter Collaboration API enforces size limits for message bodies and files.

Table B–14   (Cont.) Nodes in config.xml

Node	Description
enable-summary-list	This node is used to expose the e-mail summary list feature through the UI. This feature is not supported. Valid values are **true** and **false**.
authorized-connections	The names or IP addresses of hosts, in a comma-delimited format, that are allowed to connect to the SMTP handler. We recommend creating this list of names to enforce security. See the config.xml file for an example of this list.
idle-timeout	The time (in minutes) that an incoming connection can remain idle.
transaction-manager	This node includes database-specific settings. Only database experts should modify these settings.

B.4 documentTemplates.xml

You can define the systemwide document templates that appear in the user interface when creating a new Microsoft Office document by adding entries to **documentTemplates.xml**. By default, this file only includes document templates for empty Microsoft Office documents. You can add additional entries to allow custom document templates to appear in the interface.

The following table provides a detailed description of the configuration parameters in Oracle WebCenter Collaboration's documentTemplates.xml file.

Table B–15   Nodes in documentTemplates.xml

Node	Description
templateFile cache	The name of the file located in: ■ For Microsoft Windows: *install_dir*\ptcollab\10.3.3\settings\documentTemplates ■ For UNIX/Linux: *install_dir*/ptcollab/10.3.3/settings/documentTemplates Valid values are: **True:** Set for smaller files that should be cached in memory. **False:** Set for very large files that should not be cached in memory.
fileType	The name of one of the filetypes from filetypes.xml for which inPlaceEdit is enabled.
displayString	The string to appear in the drop-down list in the graphical user interface. Not used unless the next field below is empty.
displayStringIndex	Index into the Oracle WebCenter Collaboration localized string files of a string to use in the drop-down list. If this field is not empty, the previous field above is not used.
defaultDocName	Default document name for new documents created from this template. Not used unless the next field below is empty.
defaultDocNameIndex	Index into the Oracle WebCenter Collaboration localized string files of a string to use as the default document name for documents created from this template. If this field is not empty the previous field above is not used.

B.5 filetypes.xml

You can define filetypes corresponding to the types of documents that are used in your implementation. New filetypes can be added to the configuration file **filetypes.xm**l.

Creating filetypes lets you have more control over indexing and search. It also lets you specify icons for each filetype, thereby customizing the Oracle WebCenter Collaboration user interface. The following types of documents have filetypes defined by default:

- HTML
- Microsoft Excel
- Microsoft PowerPoint
- Microsoft Project
- Microsoft Word
- Microsoft Visio
- PDF
- text
- zip

To define new filetypes, you must create a new entry in **filetypes.xml**. Place the entries in the order in which you want them to appear in the user interface. You can define multiple content types and extensions for each filetype. You should ensure that the preferred content type and extension are defined first. Use the following guidelines when changing the contents of filetypes.xml:

- Do not modify the `<UNKNOWN index>` node. However, you may modify the other nodes and add new entries.
- Put the entries in the order in which they should appear in a drop-down list.
- You may use multiple contentType and extension fields in each index.
- You should place the preferred content type as first in the list for each index.
- No content type or extension should appear in more than one fileType entry.

The following table provides a detailed description of the configuration parameters in Oracle WebCenter Collaboration's filetypes.xml file.

Table B–16   Nodes in filetypes.xml

Node	Description
UNKNOWN index	**Note**: Do not modify this node or its subnodes.
html index	Specifies whether html documents should be indexed for searching. Valid values are **yes** and **no**.
msexcel index	Specifies whether Microsoft Excel documents should be indexed for searching. Valid values are **yes** and **no**.
mspowerpoint index	Specifies whether Microsoft PowerPoint documents should be indexed for searching. Valid values are **yes** and **no**.
msproject index	Specifies whether Microsoft Project documents should be indexed for searching. Valid values are **yes** and **no**.
msword index	Specifies whether Microsoft Word documents should be indexed for searching. Valid values are **yes** and **no**.

Table B–16   (Cont.) Nodes in filetypes.xml

Node	Description
msvisio index	Specifies whether Microsoft Visio documents should be indexed for searching. Valid values are **yes** and **no**.
pdf index	Specifies whether .pdf documents should be indexed for searching. Valid values are **yes** and **no**.
text index	Specifies whether .txt documents should be indexed for searching. Valid values are **yes** and **no**.
gzip index	Specifies whether .zip files should be indexed for searching. Valid values are **yes** and **no**.
displayString	This string is used directly in the graphical user interface to describe this type of document if no displayStringIndex occurs.
shortcutDisplayString	This string is used directly in the graphical user interface to describe this type of document shortcut if no shortcutDisplayStringIndex occurs.
displayStringIndex	If a displayStringIndex entry occurs, it is used as a key into Oracle WebCenter Collaboration's localized language files.
templateDisplayString	This string is used directly in the graphical user interface to describe this type of document template if no templateDisplayStringIndex occurs.
shortcutDisplayStringIndex	If a shortcutDisplayStringIndex entry occurs, it is used as a key into Oracle WebCenter Collaboration's localized language files.
templateDisplayStringIndex	If a templateDisplayStringIndex entry occurs, it is used as a key into Oracle WebCenter Collaboration's localized language files.
portalDisplayStringIndex	This string is used as a key into the portal's localized language files. The resulting string appears on the Search Results page.
imageFile	The name of the file icon in: ■ Microsoft Windows: *install_dir*\ptimages\imageserver\plumtree\collab\private\img ■ UNIX/Linux: *install_dir*/ptimages/imageserver/plumtree/collab/private/img
shortcutImageFile	The name of the file shortcut icon in: ■ Microsoft Windows: *install_dir*\ptimages\imageserver\plumtree\collab\private\img ■ UNIX/Linux: *install_dir*/ptimages/imageserver/plumtree/collab/private/img
templateImageFile	The name of the file template icon in: ■ Microsoft Windows: *install_dir*\ptimages\imageserver\plumtree\collab\private\img ■ UNIX/Linux: *install_dir*/ptimages/imageserver/plumtree/collab/private/img
contentType	The value of the Content-Type header sent to the browser for this type of file. More than one contentType subnode may appear for each fileType node, but the same contentType should not be used for more than one fileType.
extension	The file extension for this type of file. More than one extension subnode may appear for each fileType node, but the same extension should not be used for more than one fileType.

Table B–16   (Cont.) Nodes in filetypes.xml

Node	Description
webEdit	Specifies whether this type of file can be WebEdited. Unless serious modifications are made to the code, only Microsoft Office applications are able to be WebEdited. Valid values are **yes** and **no**.
appCode	Represents the application that opens the document in a WebEdit session. Valid values are: ■ **1** (for Microsoft Word) ■ **2** (for Microsoft Excel) ■ **3** (for Microsoft PowerPoint)

B.6 database.xml

This section provides information about the `<linked-database-alias>` node in database.xml.

> **Note:**   Use the Configuration Manager to manage database settings when possible. Edit configuration files only if the setting is not part of the Configuration Manager.

When using a SQL Server database for Oracle WebCenter Collaboration, the `<linked-database-alias>` node should appear like the following:

```
<linked-database-alias>PORTAL_DB_NAME.PORTAL_DB_OWNER.</linked-database-alias>
```

Both periods (.) in the linked database alias are required. The PORTAL_DB_OWNER must be the owner of the database who created the portal tables; it is not adequate to have db_owner permission on the database.

To verify that you are using the correct user:

1. Open the portal database in SQL Server Enterprise Manager.

2. Click **Tables**.

3. Check the login name that appears in the Owner column of the tables. This login name is the owner that should appear in the `<linked-database-alias>` node.

    If you used the *sa* login to create the portal tables, the database owner is *dbo*. To confirm the database owner, verify the database owner in Enterprise Manager.

> **Note:**   If you edit database.xml, you must stop and start Oracle WebCenter Collaboration for the changes to take effect.

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