

Oracle Utilities Customer Self Service

Whitepaper: Customizing and Extending the OUCSS
Custom Portal

Release 2.1.0

E36186-04

September 2013

Oracle Utilities Customer Self Service Whitepaper: Customizing and Extending the OUCSS Custom Portal

Release 2.1.0

E36186-04

September 2013

Copyright © 2011, 2013, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Table of Contents

Overview	4
Additional Resources.....	4
Abbreviations.....	4
Preparation and Procedures	5
Software Requirements	5
Pre-Installation Tasks	5
Assumptions	5
Customizing the Page Template.....	6
Customize and Configure Existing Page Template.....	6
Exporting an Existing Page Template	14
Importing a Page Template.....	16
Customizing the Navigation Model	17
Customizing and Configuring an Existing Navigation Model.....	18
Exporting an Existing Navigation Model.....	22
Importing a Navigation Model	23
Creating a New Navigation Model.....	25
Extending the OUCSS Portal.....	26
About Portal Security	26
Adding New Taskflows and Pages.....	27
Adding Support for a New Language	30
Customizing and Configuring an Existing Resource Catalog.....	33
Accessing Custom Pages	41
Accessing User Account Details	43
Deploying the extend.oucss.portal as Shared Library	49
Portal Labels	53

Chapter 1

Overview

This whitepaper describes the steps required to customize and re-brand OUCSS Custom Portals.

Additional Resources

Further information is available in the *Developer's Guide for Oracle WebCenter Portal (11.1.1.7.0)*, available on the OTN at http://docs.oracle.com/cd/E28280_01/webcenter.1111/e10148/toc.htm.

Note: This document and related documentation is subject to revision and updating. For the most recent versions of documentation relating to this produce, as well as information on functionality and known issues for other Oracle products that may be required for installation and proper functionality of this product, check the Oracle Utilities Customer Self Service section of the [Oracle Utilities Documentation](http://www.oracle.com/technetwork/apps-tech/utilities/documentation/index.html) area on the Oracle Technology Network (OTN) web site (<http://www.oracle.com/technetwork/apps-tech/utilities/documentation/index.html>).

Abbreviations

CCB - Oracle Utilities Customer Care and Billing

MDM - Oracle Utilities Customer Care and Billing

DDL – Data Definition Language

MDS – Metadata Services

OUCSS – Oracle Utilities Customer Self Service

Portal – Oracle WebCenter Portal Framework

Chapter 2

Preparation and Procedures

Software Requirements

Please refer to the *Oracle Utilities Customer Self Service Installation Guide* for product-specific versions and the current patch level.

Pre-Installation Tasks

The following tasks should be completed before you can customize OUCSS Portal.

- Ensure that your Oracle JDeveloper version is 11gR1 PS5 (11.1.1.7.0).
- Ensure that the WebCenter Extension bundle is enabled in JDeveloper.
- Ensure that your OUCSS (custom) Portal has been deployed and is running.

Assumptions

- The OUCSS Portal is built using the “WebCenter Portal Framework” application template.
- The Custom Portal is deployed onto an Oracle WebLogic (10.3.6) server.
- The OUCSS Schema is created and populated with seed data. For running the taskflows, a data source with jndi name “jdbc/OUCSSDS” is also expected in the target application server.
- For taskflows that require the sending of emails (e.g., Registration, Invite, etc.), a mail session with the jndi name “mail/OUCSS” is also expected on the target application server.

Note: The following information is not within the scope of this document:

- Setup of database and MDS or other schemas required by the custom portal.

- Detailed security of the custom portal to restrict access to taskflows, page templates, navigation models, and/or portal pages.

Customizing the Page Template

The default OUCSS Portal contains the out-of-box page templates Global and Swooshy, as provided by the Oracle WebCenter Framework Application template. The default page templates can be replaced by customizing the existing page templates or importing new page templates exported from another instance.

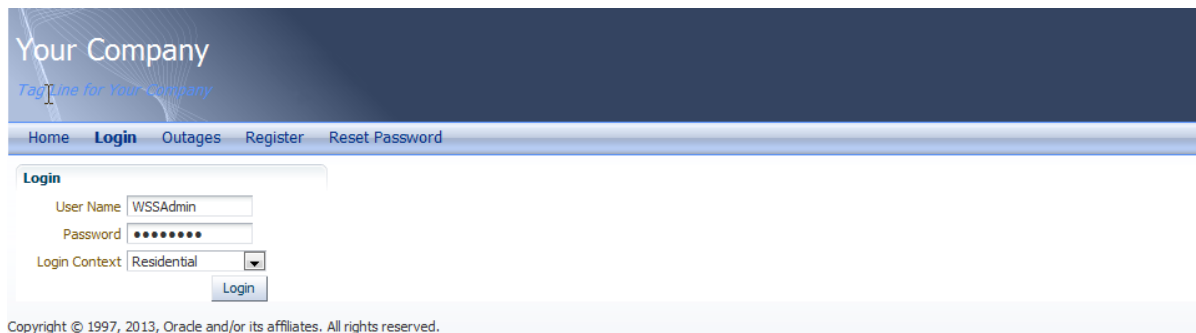
For more information on default and page template customization, see

http://docs.oracle.com/cd/E23943_01/webcenter.1111/e10148/jpsdg_id_resources.htm#BAJCCAC

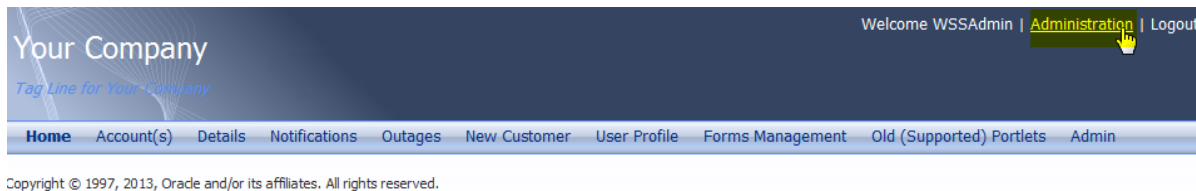
Customize and Configure Existing Page Template

The following steps describe how to customize the Swooshy page template that exists on a deployed OUCSS Portal.

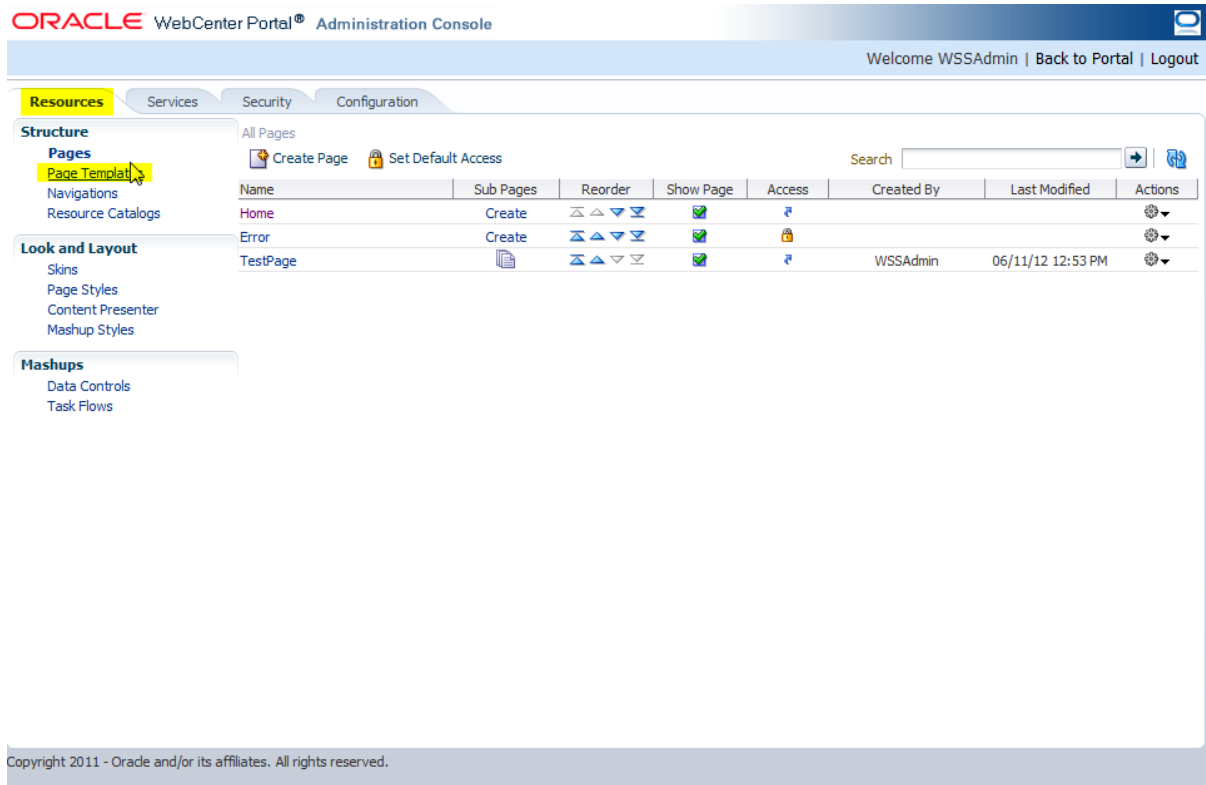
- 1 Log in to the OUCSS Portal with Administrator permission (WSSAdmin use is seeded with the required permission).



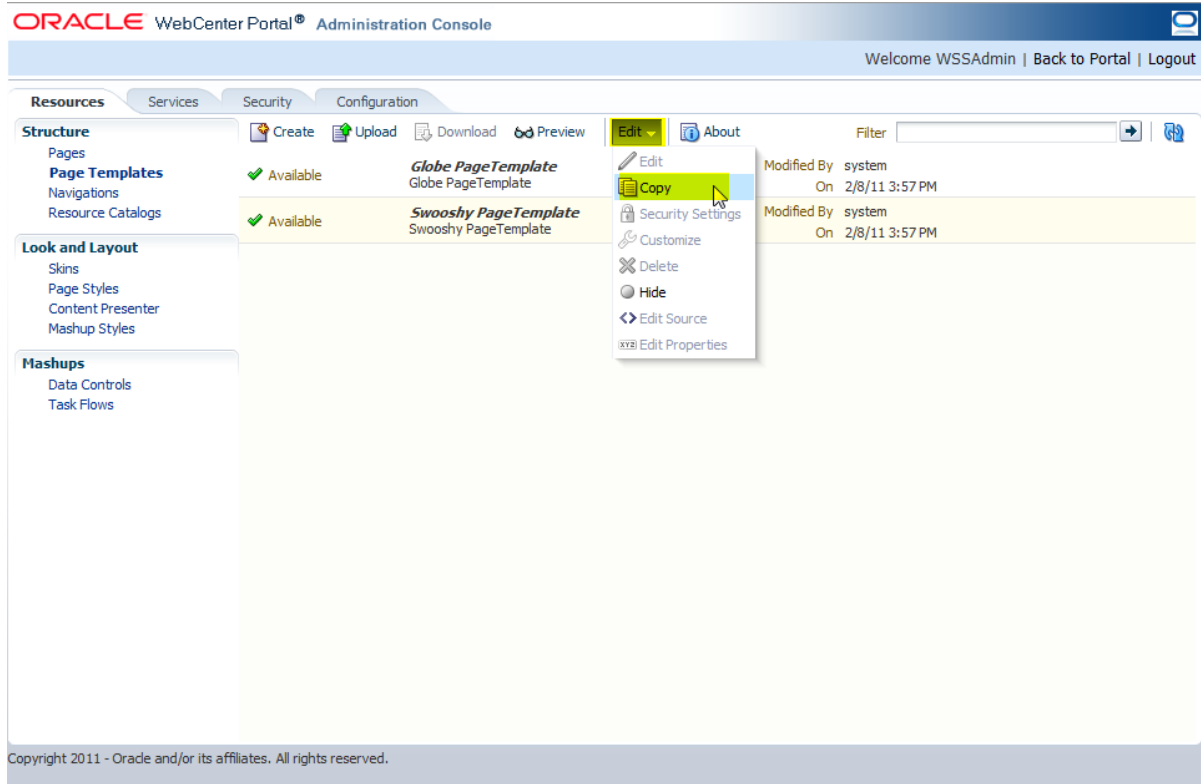
- 2 Click on the **Administration** link on the top-right section of the screen.



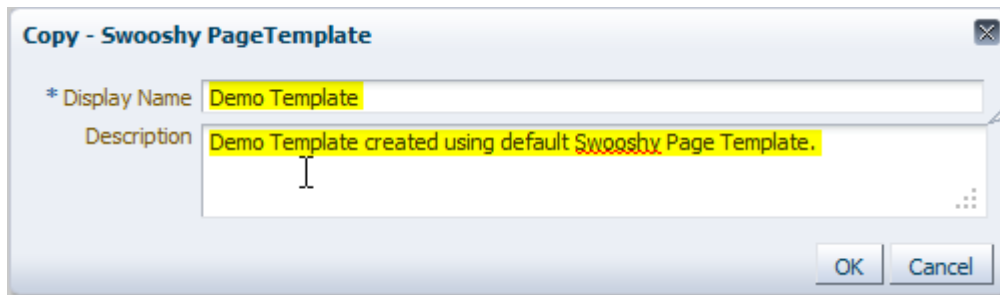
- 3 In the Administration console, click the **Resources** tab, then choose **Page Templates** in the **Structure** section:



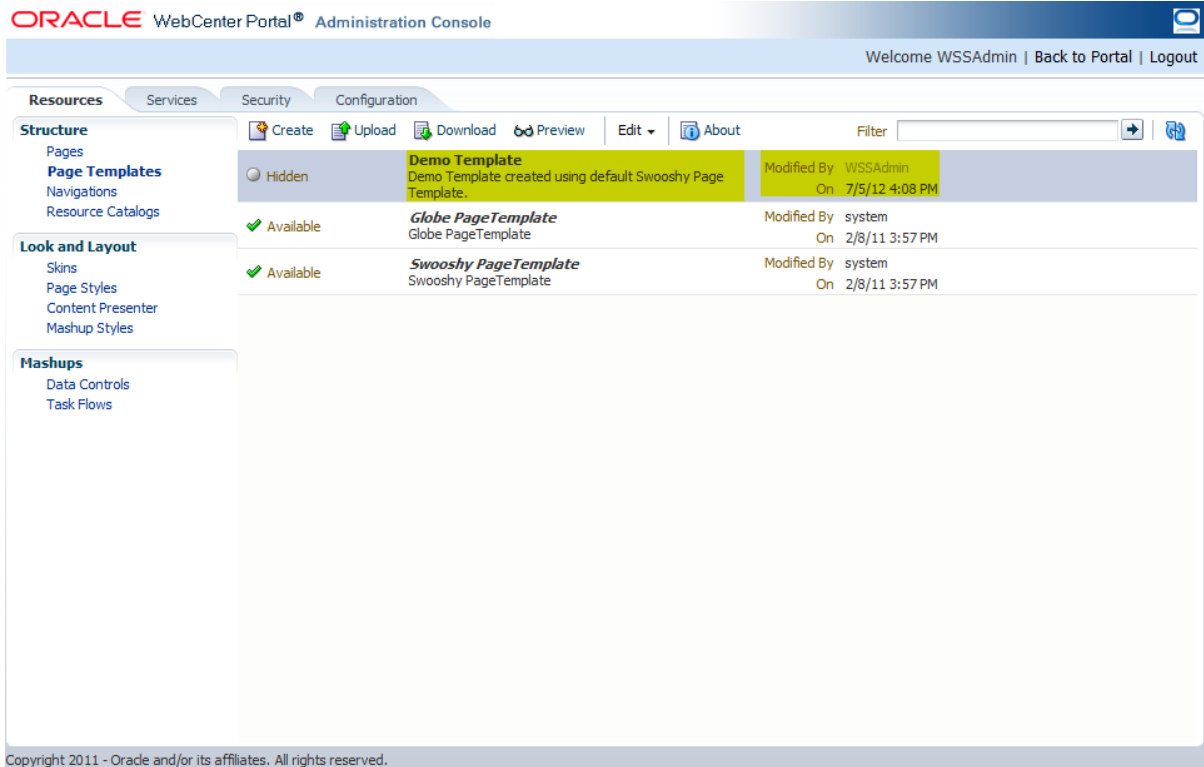
- 4 The Swooshy Page Template is read-only and already seeded. To customize it, make a copy of the Existing Swooshy Page Template. To make a copy:
 - A Select the Swooshy Page Template from the list of Page Templates.
 - B Click the **Edit** menu and select **Copy**.



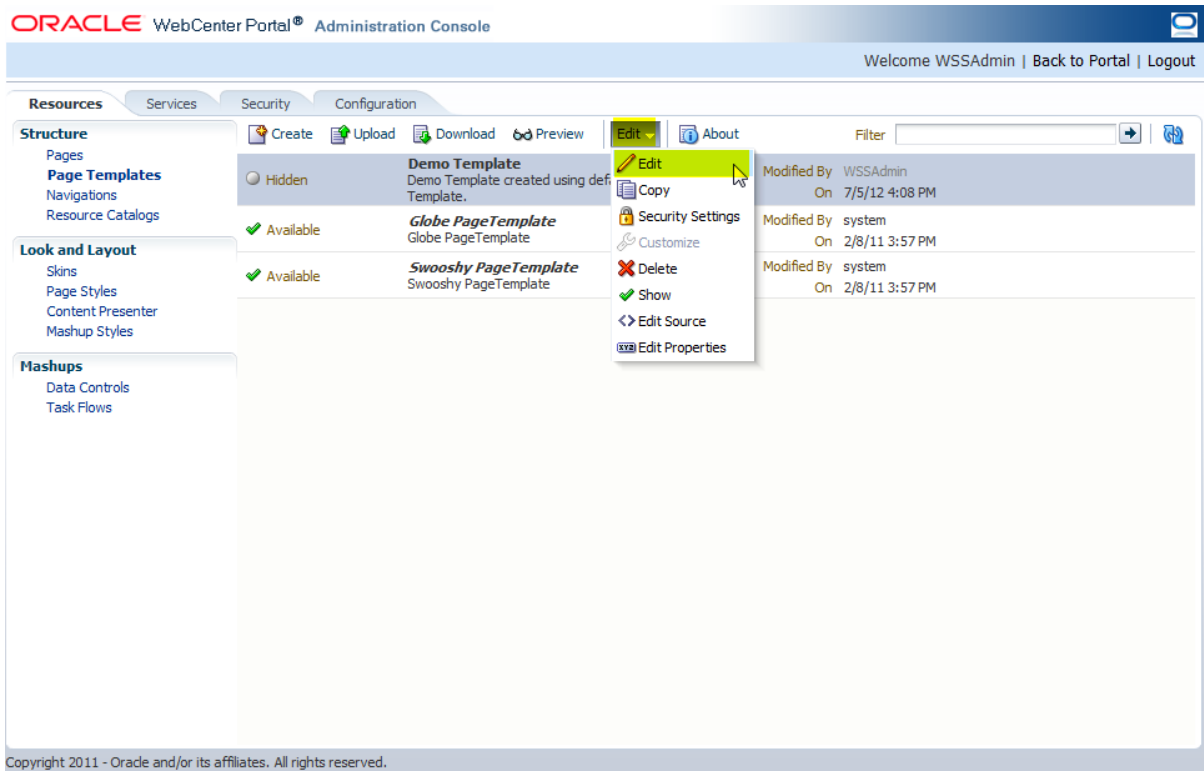
C Enter a name and description for the new template:



D Click **OK** to create the new template.

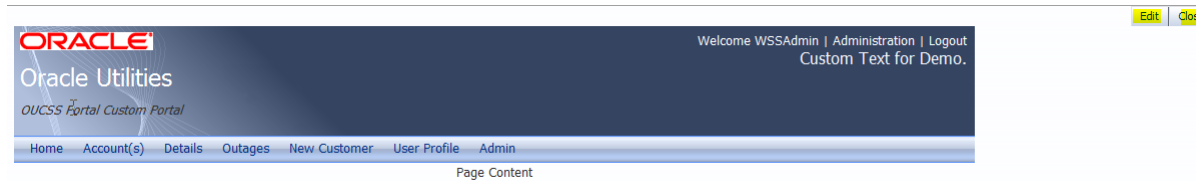
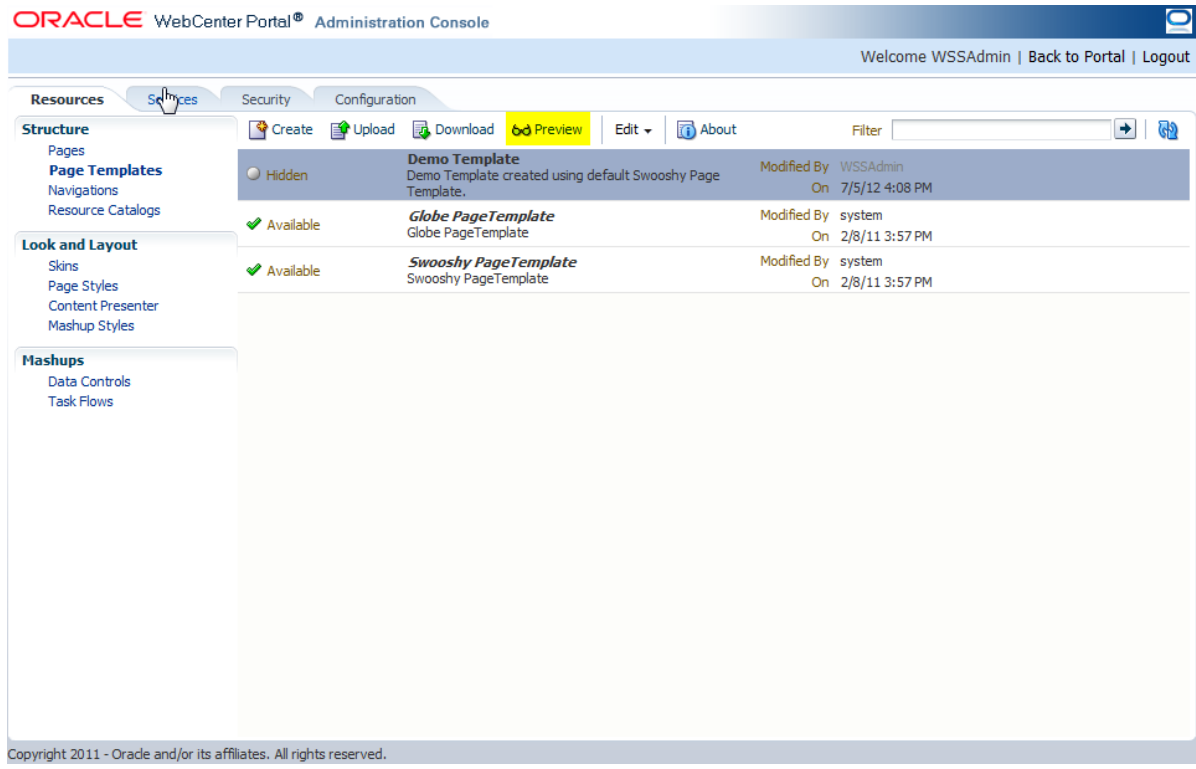


- 5 Select the new template, then click the **Edit** menu and choose **Edit** to open the template for customization.



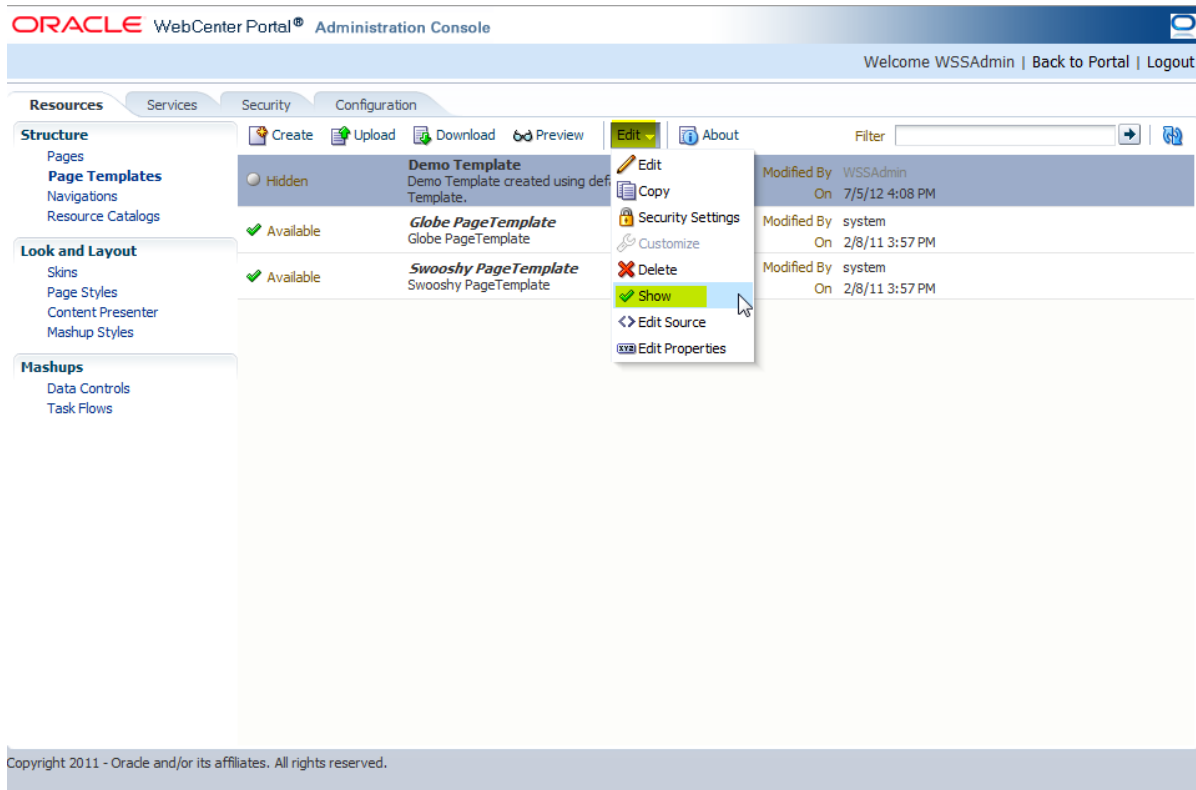


- 6 Customize as required, and then click **Save**, then **Close**.
- 7 Click **Preview** to preview the changes. If not satisfied, click **Edit** on the **Preview** screen and modify the customization. When complete, click **Close**.

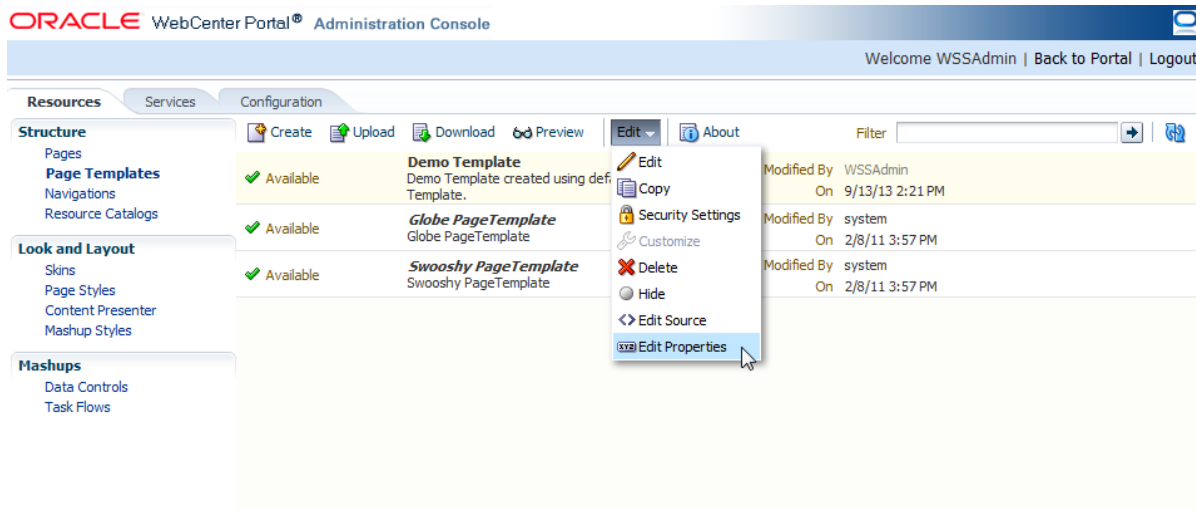


Copyright 2011 - Oracle and/or its affiliates. All rights reserved.

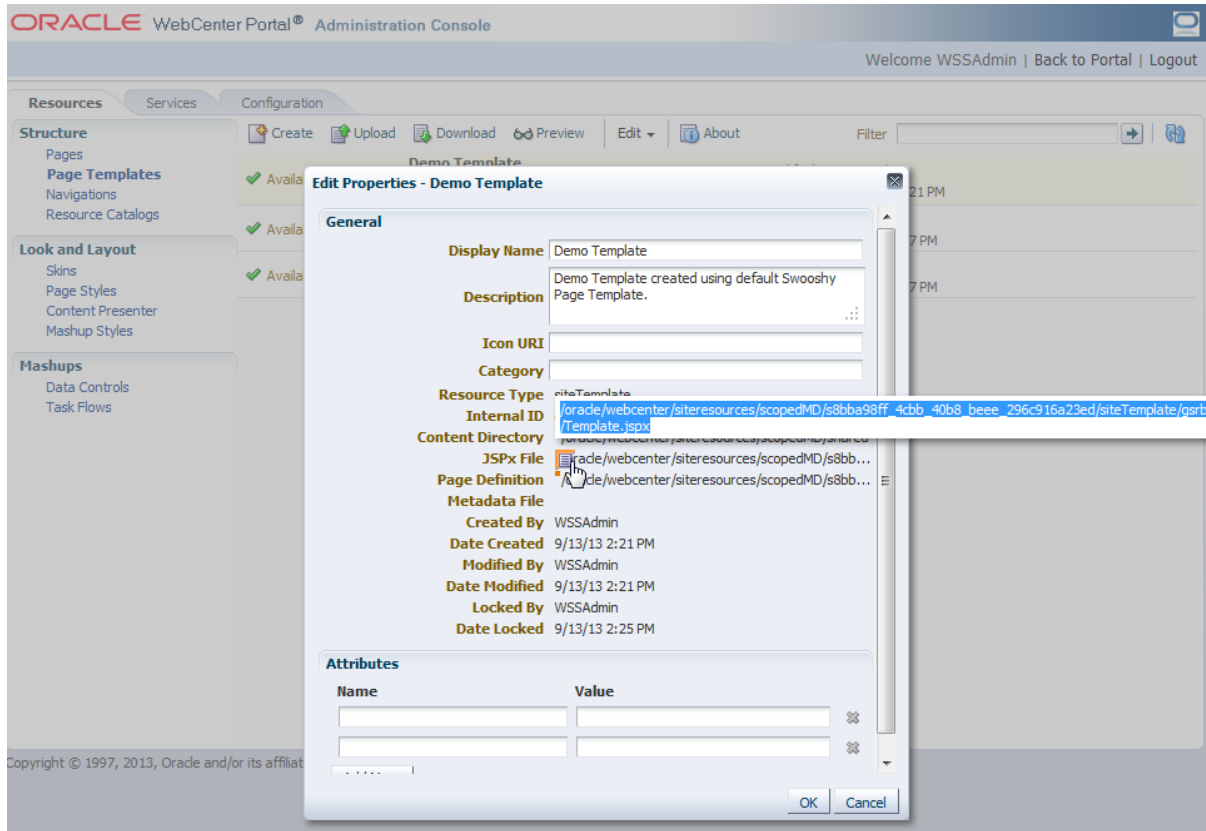
- 8 All newly-created templates are hidden by default. Unhide the template by clicking **Edit > Show**.



- 9 To activate and use the new Demo Template as the site template for one or more Context, copy the page path of the new template. Click Edit -> Edit Properties.



- 10 Select the “JSPx File” and copy the complete path.



- 11 Click the **Back to Portal** link. Select Admin > Resources page.
- 12 Filter the resources with resource codes PORTAL_ST_. Update the "URL Override" property by selecting PORTAL_ST_<<Context>> (RESIDENTIAL, PUBLIC etc) resource with the JSPx path copied in Step 10.

The screenshot shows the Oracle WSSAdmin interface. At the top, there is a header with "Your Company" and "Tag Line for Your Company". Below the header is a navigation bar with links: Home, Account(s), Details, Notifications, Outages, New Customer, User Profile, Forms Management, Old (Supported) Portlets, and Admin. The main content area displays a table of resources with columns: Resource Code, Resource Type, Locator Type, URL, and URL Override. The table lists three resources: PORTAL_ST_COMMERCIAL, PORTAL_ST_PUBLIC, and PORTAL_ST_RESIDENTIAL. Below the table, there is a "Resource" section for PORTAL_ST_RESIDENTIAL. This section includes fields for Resource Code, Resource Type (WXURL), and Locator Type (WXREL). The URL field contains "/oracle/webcenter/portalapp/pagetemplates/pageTemplate_swooshy.aspx". The URL Override field is highlighted in green and contains "/oracle/webcenter/sites/resoucsa/scoopsdmd/s8bba98ff_4cbb_40b8_b3ee_296c916a23ed/siteTemplate/gsr99abd02_5d7f_4d1b_9a37_417e347a67d8/Template.aspx". The Description field contains "Site Template to be used for Residential Customers". The Help field contains "No Preview Provided". At the bottom left, there is a copyright notice: "Copyright © 1997, 2013, Oracle and/or its affiliates. All rights reserved."

- 13 Repeat the same process to update other Context with custom Site template.
- 14 Restart the OUCSS Portal managed server and verify that changes are reflected.

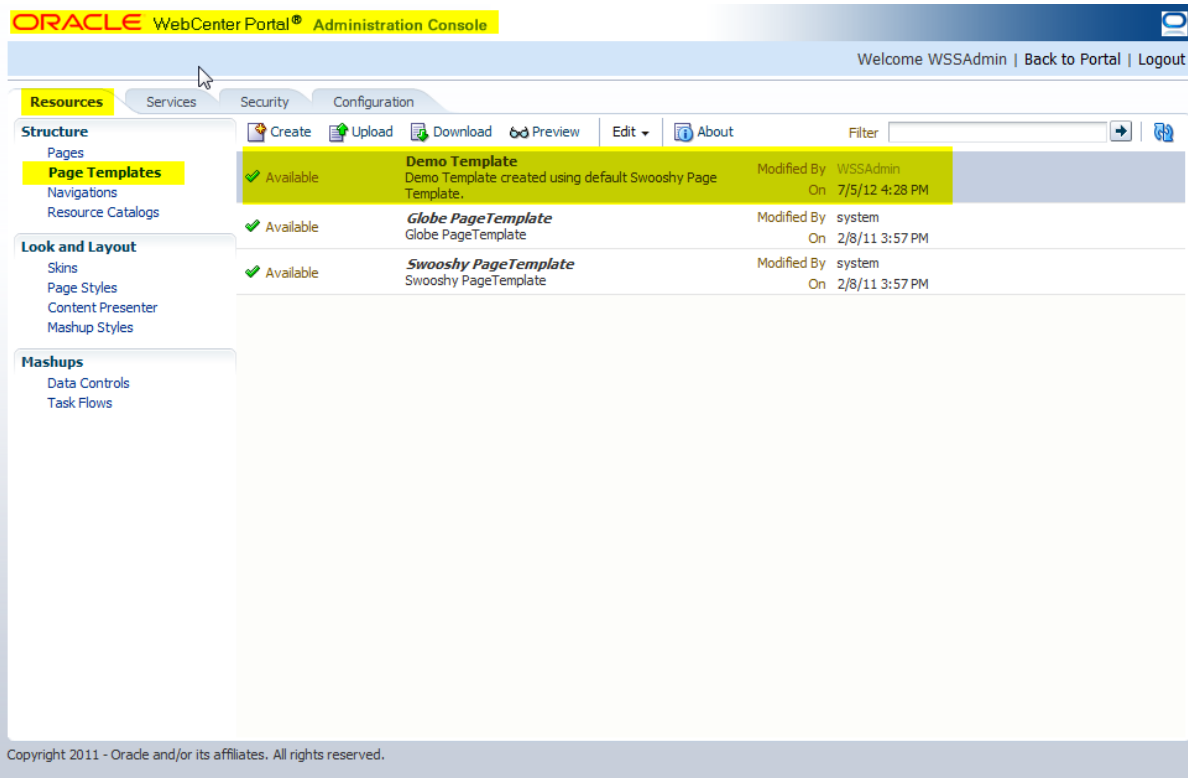
The screenshot displays the Oracle Utilities OUCSS Portal Customer Self Service interface. At the top, the Oracle logo and 'Oracle Utilities OUCSS Portal Custom Portal' are visible. The user is logged in as 'WSS Admin1'. The page shows account information for a residential account, including the amount due (\$0.00) and service charges (\$340.15). A warning message states: 'You are not enrolled in Budget Billing. Budget Billing is a payment plan that lets you levelize your payments throughout the year.' Below this, there are sections for 'Service Charges To Date', 'Usage Overview', and 'Consumption Summary', all of which display error messages: 'We cannot process at this time. Please try again later or contact customer service.' and 'There are no services available for processing for this account.' At the bottom, there is a banner for 'Smart Meters and You' with the text 'Find out what a Smart Meter can do for you and how it can save you money'.

Exporting an Existing Page Template

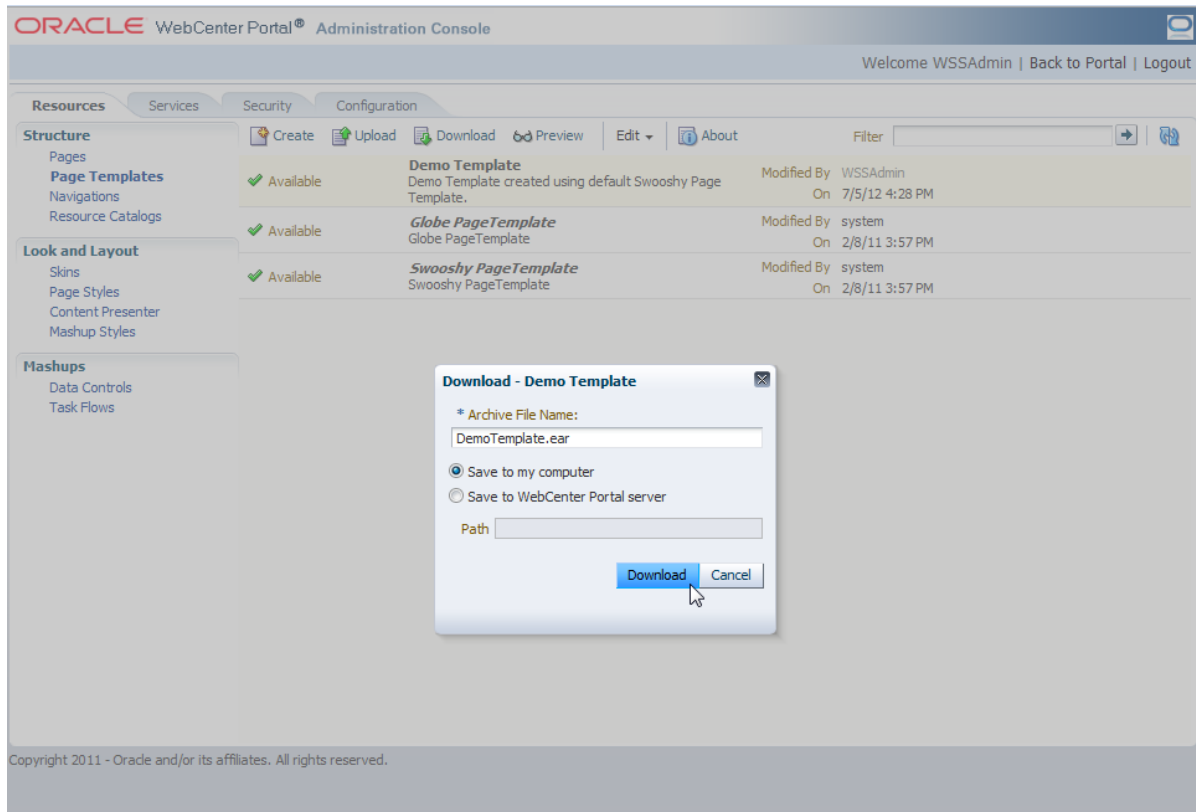
Page templates from other WebCenter portal instances, or from JDeveloper, can be imported into the OUCSS Portal for quick rebranding.

To export an existing template:

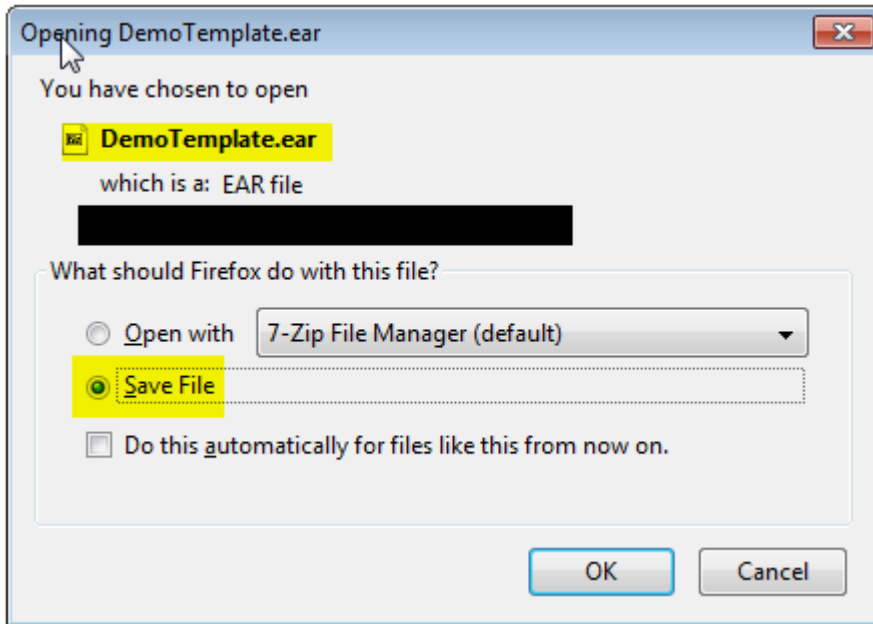
- 1 Log in to the instance of the existing page template with Administrator privileges, then click on the **Administration** link to launch the Administration Console.
- 2 Choose the **Resources** tab, and then click on the **Page Templates** link in the **Structure** section. Select the template to be migrated.



- 3 Click **Download** on the toolbar to open the Download dialog. Enter the Archive File Name, choose the location for the exported archive on your local machine, then click **Download**.



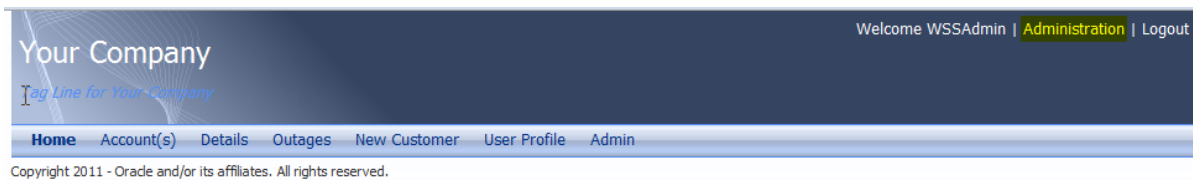
- 4 In the **Opening** dialog, choose **Save File** to save the template, then click **OK**.



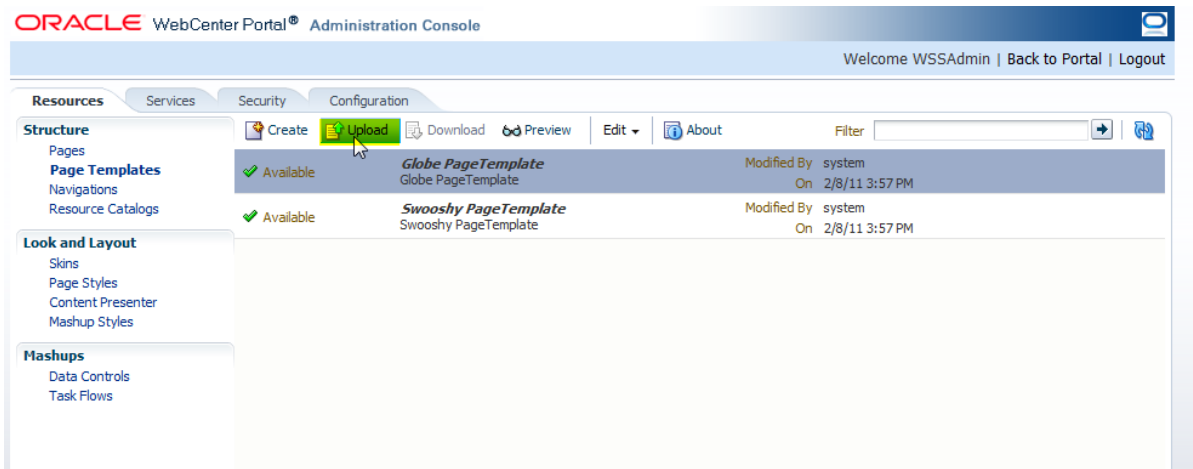
- 5 Log out of the Administration Console.

Importing a Page Template

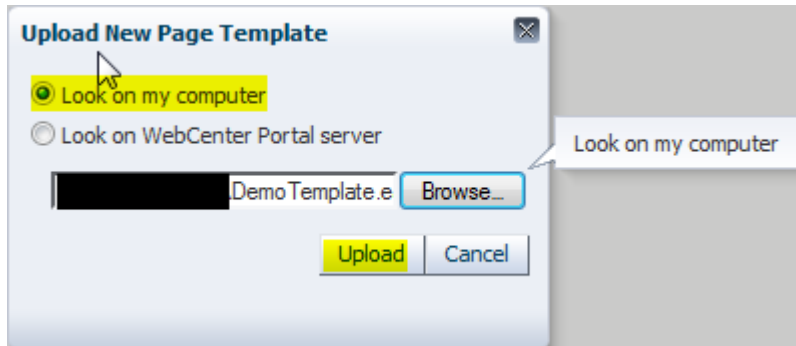
- 1 Log in to the portal instance with Administrator privileges in the location in which the template is to be migrated/imported.



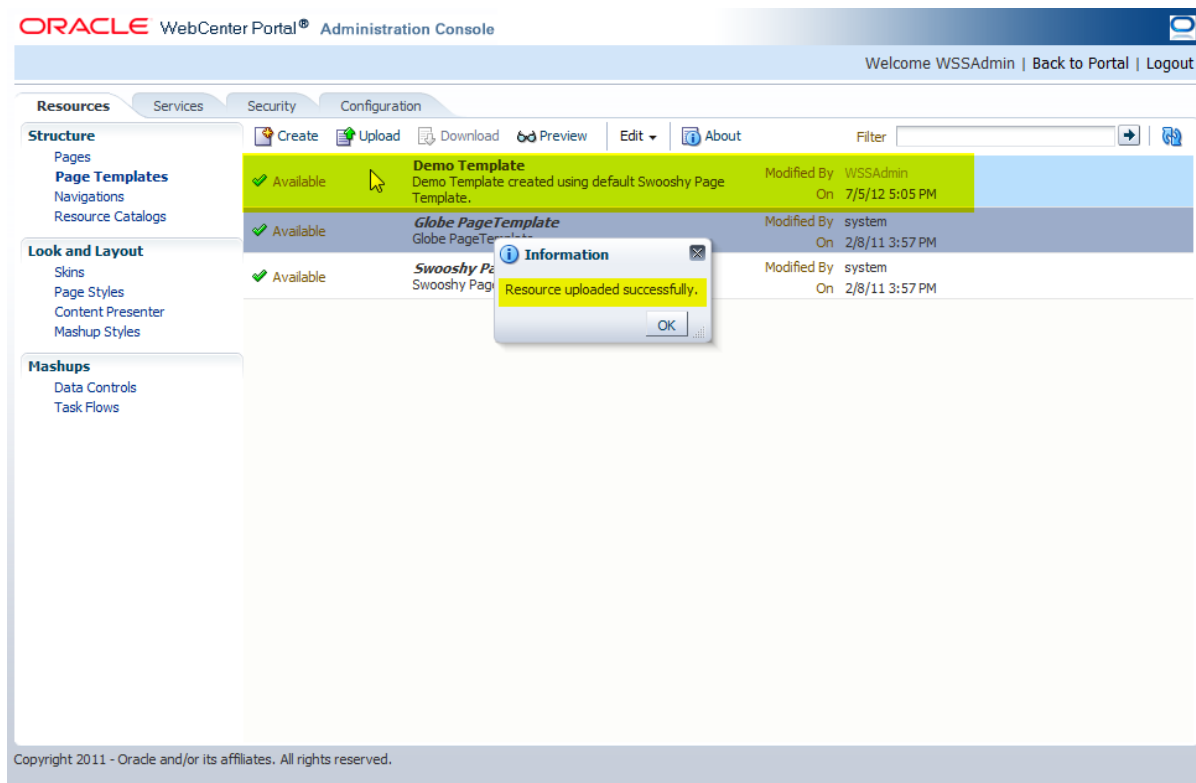
- 2 Click **Administration** and go to the **Resources > Page Templates** page.
- 3 Click **Upload**.



- 4 Select the **DemoTemplate.ear** or **Page Template** export archive that was downloaded from the previous portal instance, then click **Upload**.



- 5 Click **OK** to confirm. The newly-uploaded **Page Template** should be visible on the list.



- 6 Click the **Configuration** tab and set the new page template as the default page template. For more on this step, see the topic, [“Customizing and Configuring an Existing Page Template”](#).

Customizing the Navigation Model

One of the primary activities in rebranding the portal is to customize the navigation model. This procedure involves adding new links and/or deleting or renaming existing links. If numerous changes are required, a new navigation model can also be created from scratch.

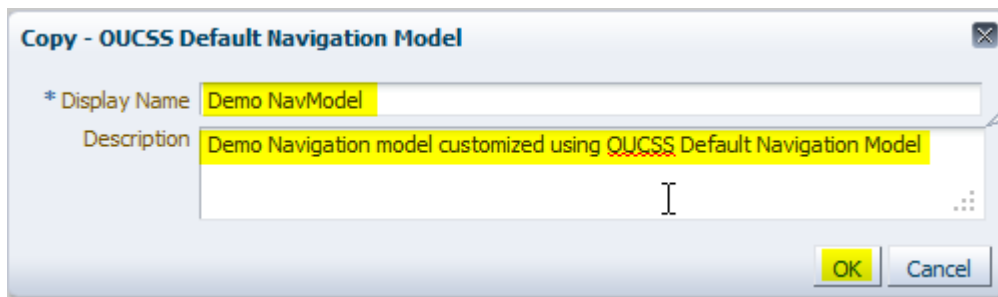
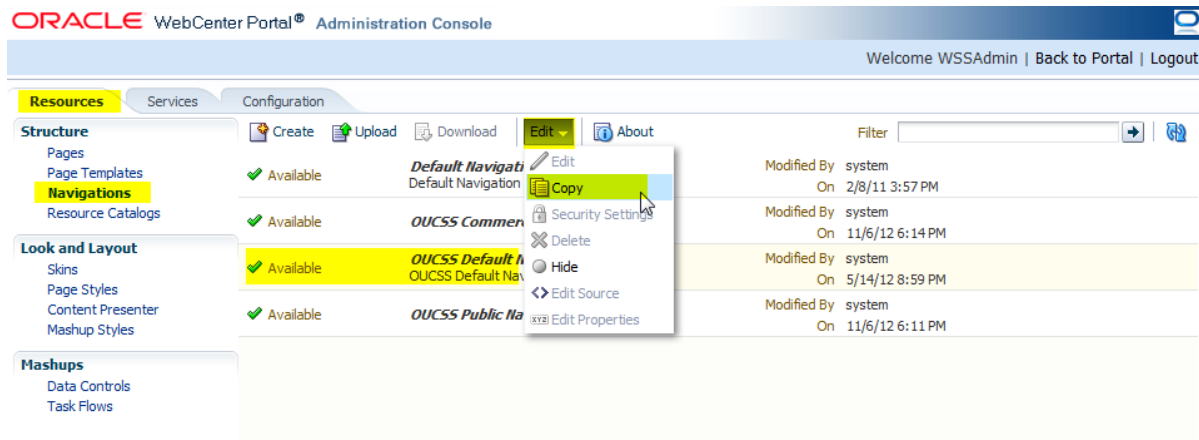
For additional information on customizing the navigation model, see http://docs.oracle.com/cd/E23943_01/webcenter.1111/e10148/jpsdg_navigation.htm#BABJHFCE

Customizing and Configuring an Existing Navigation Model

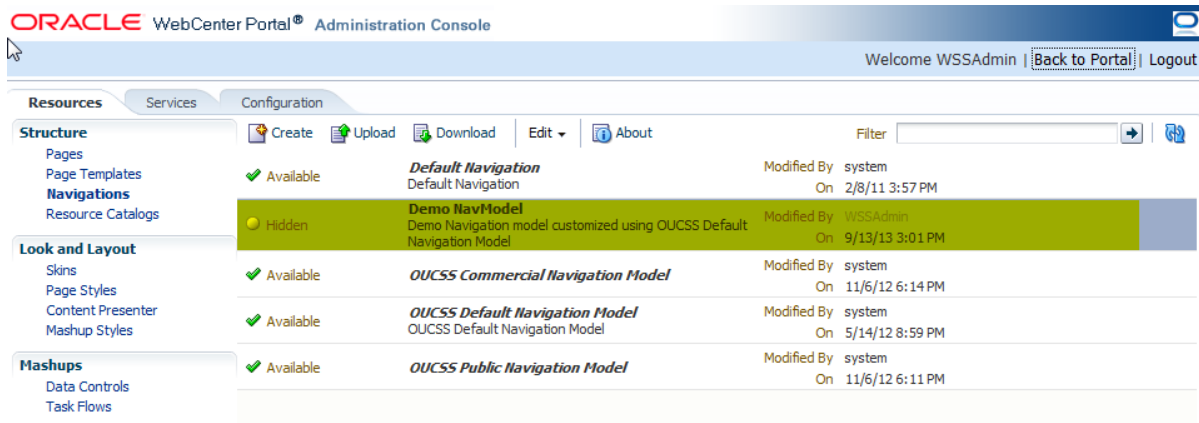
The default OUCSS Portal is configured to use the OUCSS Default Navigation Model. This navigation model is read-only and already seeded. To customize it, a copy of this navigation model must be created.

To customize the default navigation model:

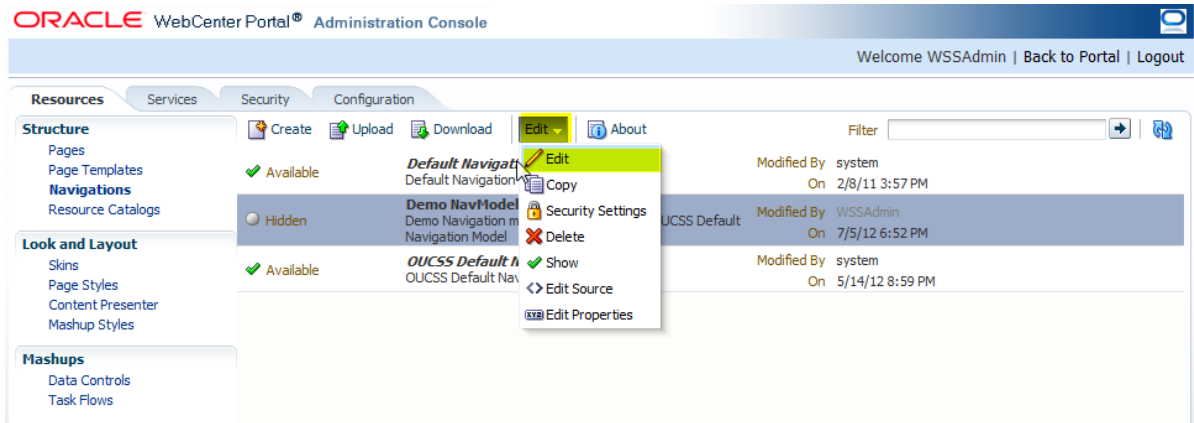
- 1 Log in to the OUCSS Portal with Administrator privileges and go to the Administration Console.
- 2 Choose the Resources tab, then click the **Navigations** link in the **Structure** section.
- 3 Select **OUCSS Default Navigation Model**, then click **Edit > Copy**.



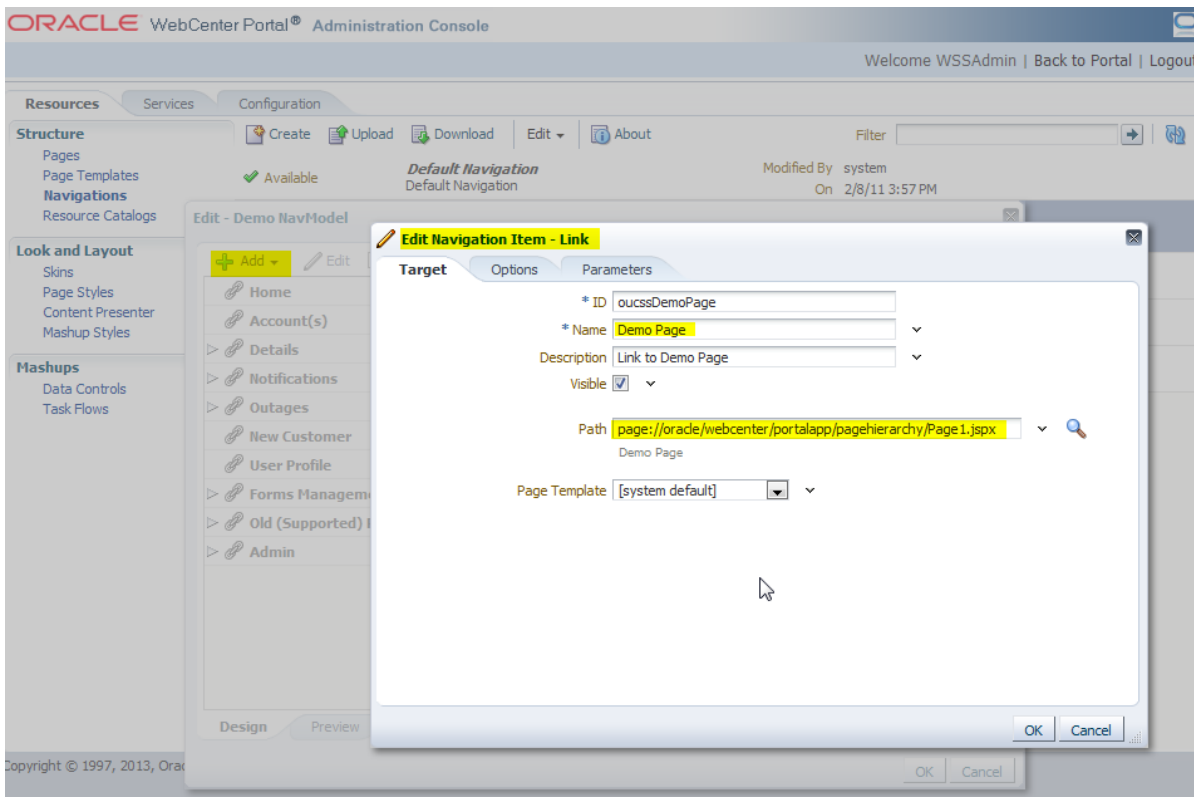
- 4 In the **Copy** dialog, enter a name and description for the new navigation model, and then click **OK** to create the model.

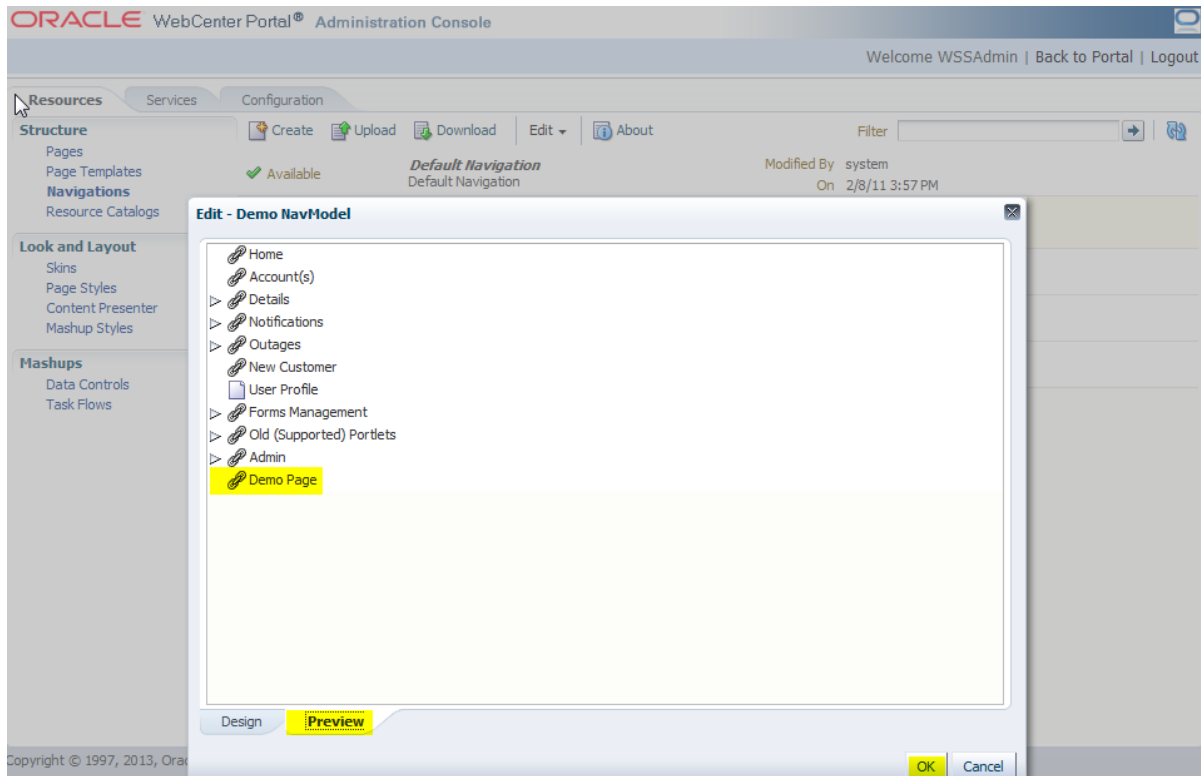
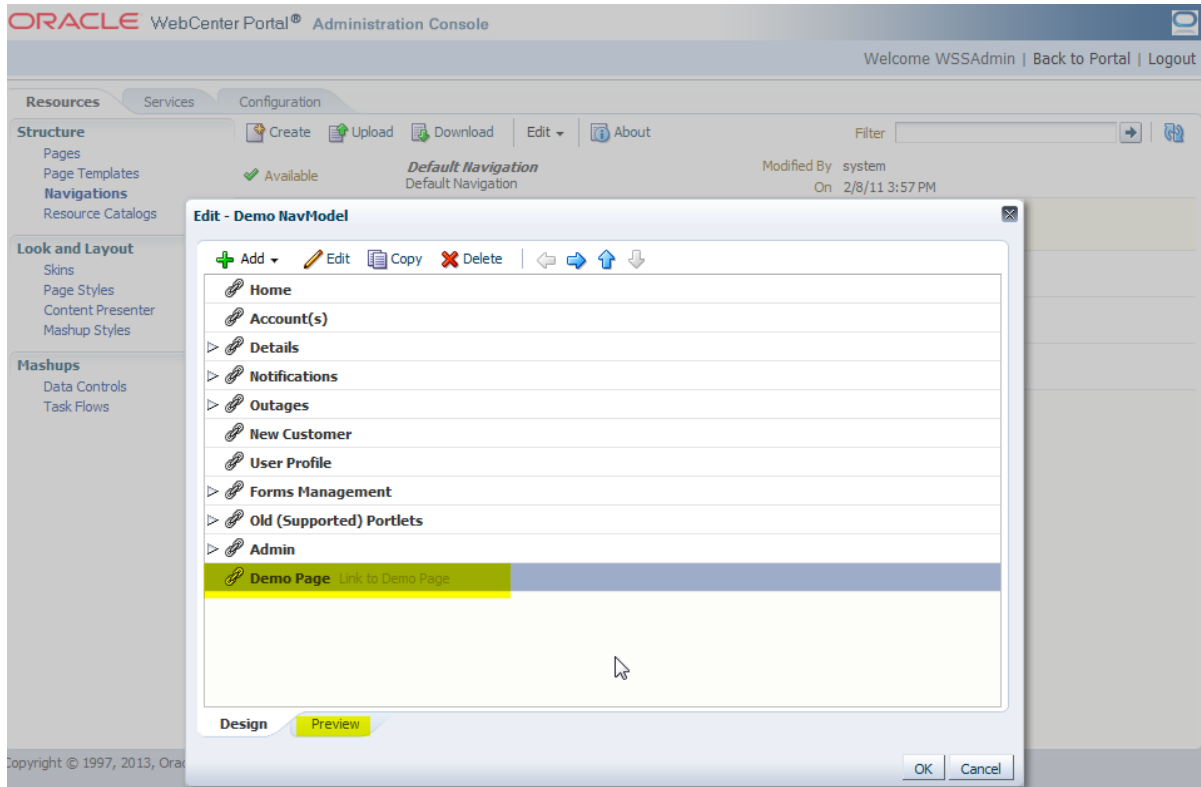


- 5 To begin customization, choose the new navigation model and click **Edit > Edit**.

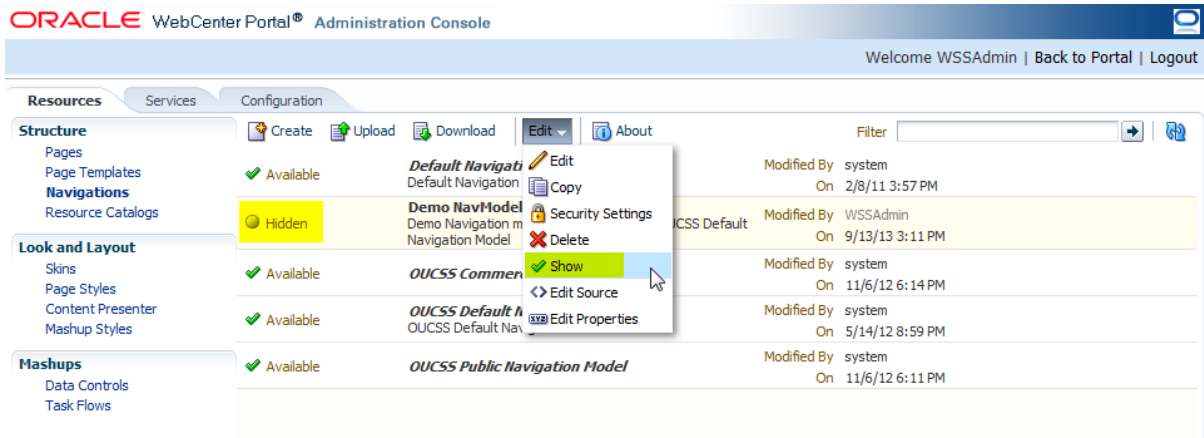


- 6 Customize the navigation model per your requirements, then choose the **Preview** tab at the bottom of the Edit dialog to verify the customized model. If satisfied with the customizations, click **OK**.

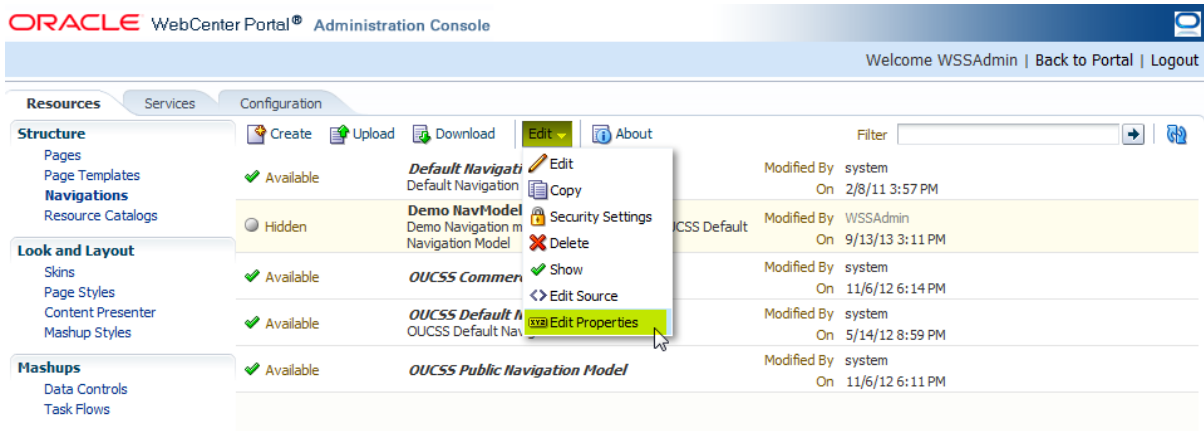




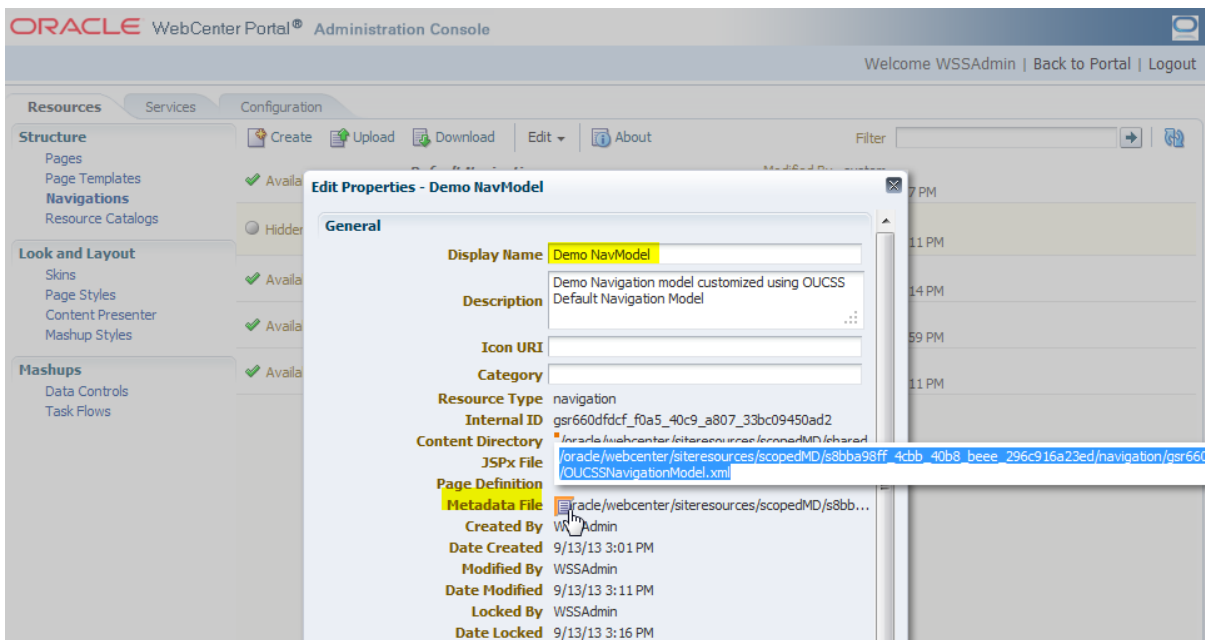
7 Newly-created navigation models are hidden by default. To unhide your new model, click **Edit** > **Show**.



- To activate and use the new Navigation Model for one or more Context, copy the XML path of the navigation model. Click Edit -> Edit Properties..



- Copy the complete Metadata path of the Navigation model from the edit dialog.



- 10 Click the **Back to Portal** link to exit the Administration Console and return to the portal application. Select Admin > Resources page.
- 11 Filter the resources with resource codes PORTAL_NAV. Update the “URL Override” property by selecting PORTAL_NAV_<<Context>> (RESIDENTIAL, PUBLIC etc) resource with the Metadata path copied in Step 9.

Actions ✕

Resource Code	Resource Type	Locator Type	URL	URL Override
PORTAL_NAV_COMMERCIAL	WXURL	WXREL	/orade/webcenter/portalapp/navigations/OUCSSC	
PORTAL_NAV_PUBLIC	WXURL	WXREL	/orade/webcenter/portalapp/navigations/OUCSSPI	
PORTAL_NAV_RESIDENTIAL	WXURL	WXREL	/orade/webcenter/portalapp/navigations/OUCSSN	

Resource Reset Save Cancel

Resource Code: PORTAL_NAV_RESIDENTIAL

Resource Type: WXURL

Locator Type: WXREL

URL: /orade/webcenter/portalapp/navigations/OUCSSNavigationModel.xml

URL Override: /orade/webcenter/sitesources/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/navigation/gsr660dfdcf_f0a5_40c9_a807_33bc09450ad2/OUCSSNavigationModel.xml

Description: Navigation Model URL for Residential Customers

Help: No Preview Provided

Copyright © 1997, 2013, Oracle and/or its affiliates. All rights reserved.

- 12 Repeat the same process to update other Context with custom Site template.
- 13 Restart the OUCSS Portal managed server and verify that changes are reflected.

Copyright © 1997, 2013, Oracle and/or its affiliates. All rights reserved.

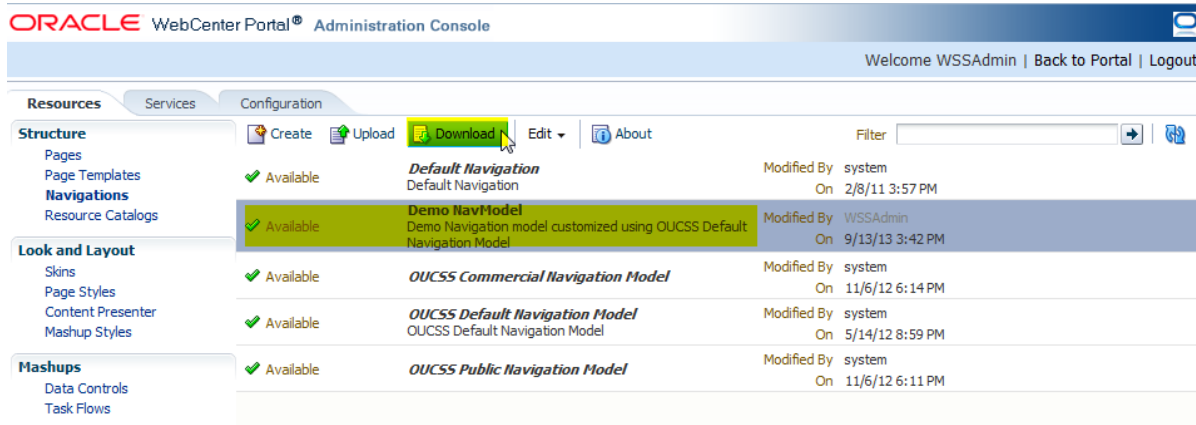
Exporting an Existing Navigation Model

Navigation models from other WebCenter instances can be exported for migration and back up.

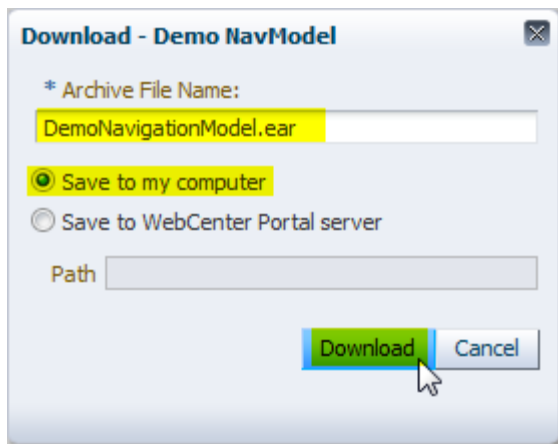
To export a navigation model:

- 1 Log in to the OUCSS Portal with Administrator privileges and go to the Administration Console.
- 2 Choose the **Resources** tab and click on the **Navigations** link.

- 3 Select the navigation model to migrate and click **Download**.



- 4 In the **Download** dialog, enter the archive name and choose the save location. Then click the **Download** button.

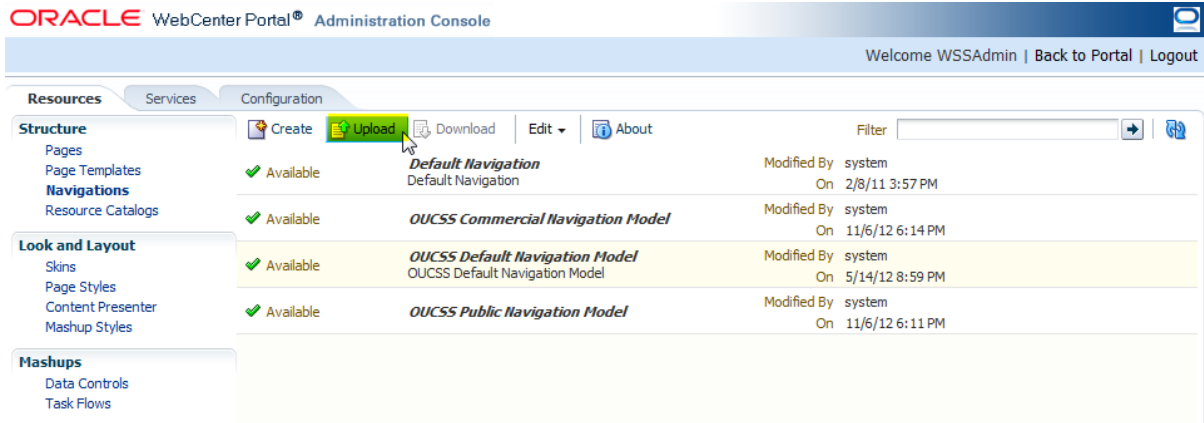


- 5 Save the file on the target location.

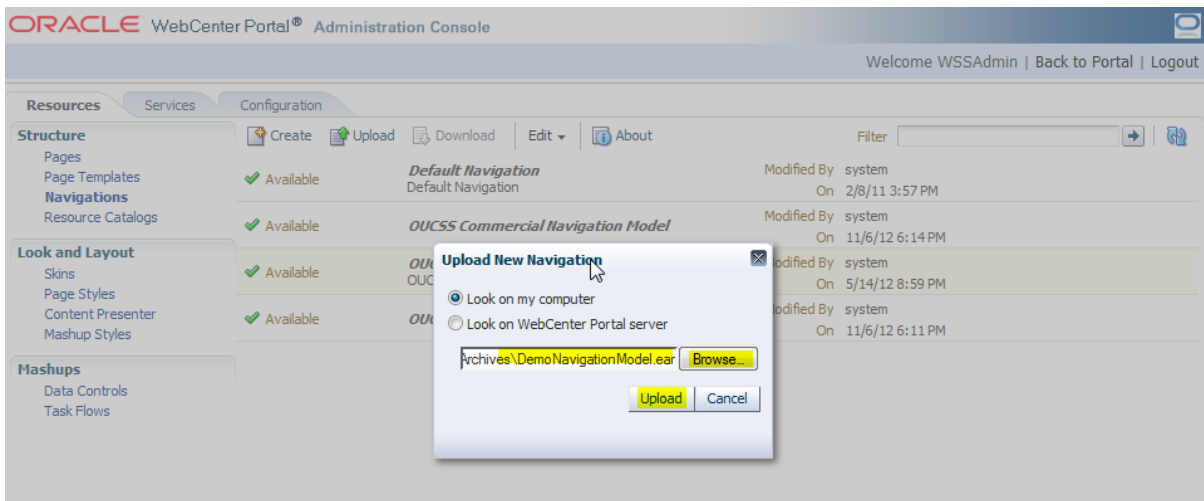
Importing a Navigation Model

To import navigation models from other instances:

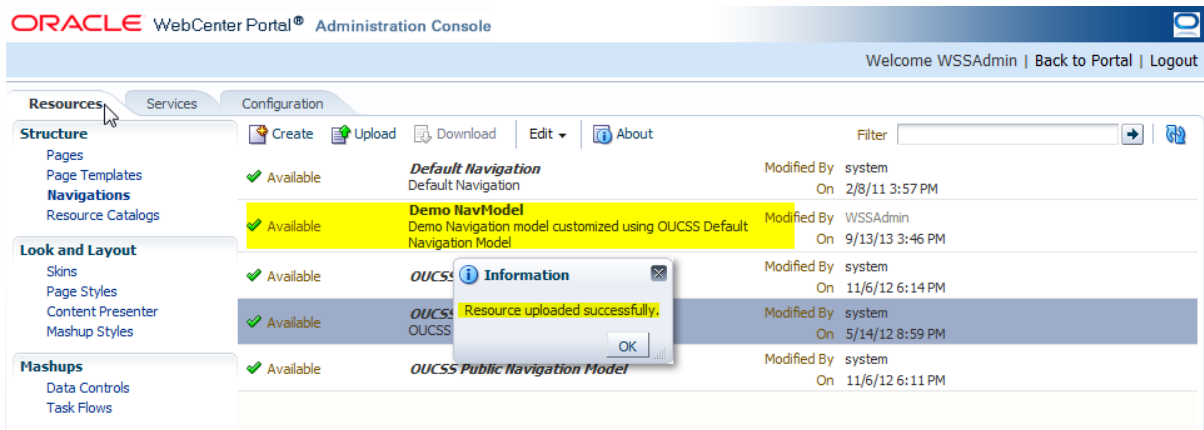
- 1 Log in to the OUCSS Portal with Administrator privileges and go to Administration Console.
- 2 Choose the **Resources** tab and click on the **Navigations** link.
- 3 Click **Upload**.



- 4 In the Upload New Navigation dialog, browse the exported navigation model archive to locate the model for import, then click **Upload**.



- 5 Click **OK** in the confirmation dialog, and verify that the imported model appears in the Navigations list.



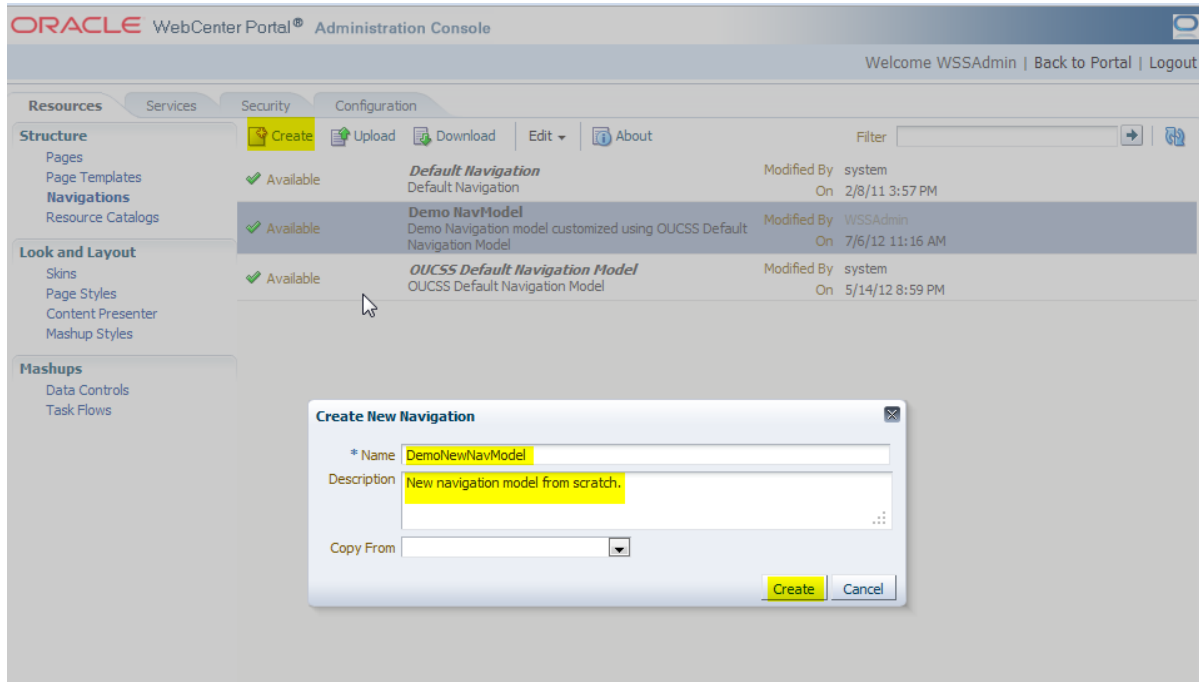
- 6 To customize and configure the imported navigation model, see the topic, "[Customizing and Configuring Existing Navigation Model](#)".

Creating a New Navigation Model

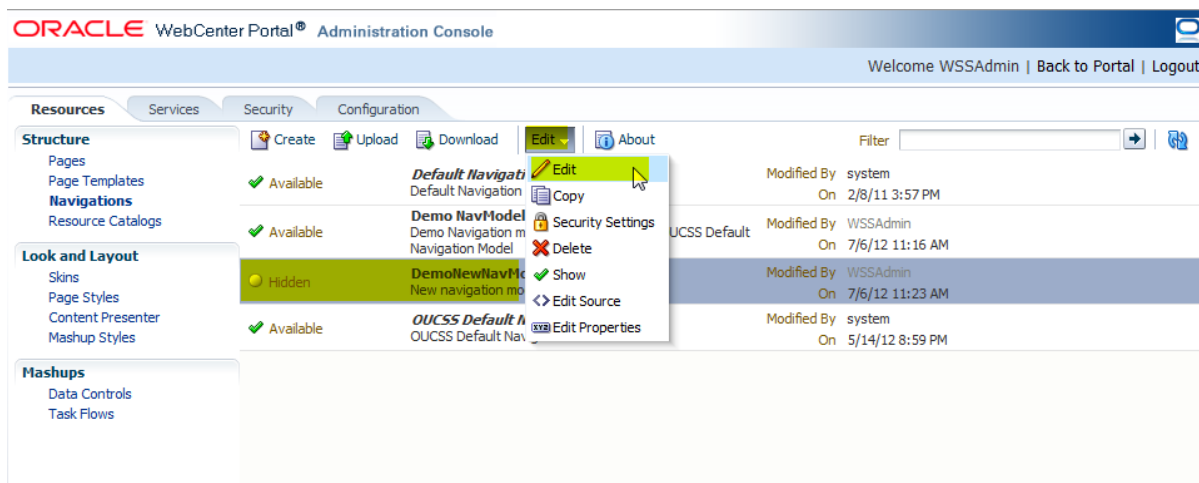
A new navigation model can be created from scratch to suit your portal needs.

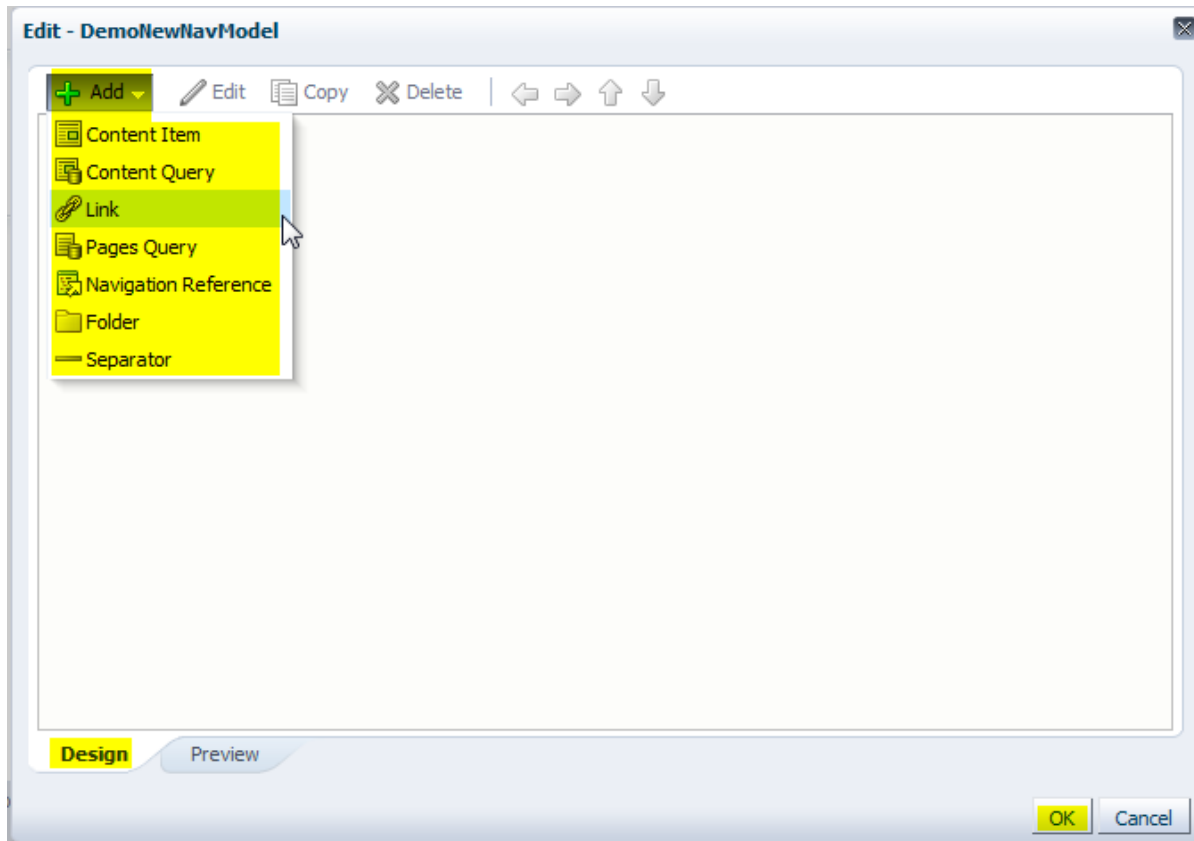
To create a new navigation model:

- 1 Log in to OUCSS Portal with Administrator privileges and go to the Administration Console.
- 2 Choose the **Resources** tab and click on the **Navigations** link.
- 3 Click **Create**, on the top menu, enter the new model name and description in the **Create New Navigation** dialog, then click the **Create** button in the dialog.



- 4 To configure the new navigation model, select the new model from the list and click **Edit > Edit**.





- For details on customizing and configuring the new navigation model, see the topic, “[Customizing and Configuring an Existing Navigation Model](#)”.

Extending the OUCSS Portal

An OUCSS Portal can be extended with custom taskflows and pages by using **ExtendOUCSSPortal** workspace included in `ExtendOUCSSPortal.zip`. The `ExtendOUCSSPortal` workspace includes two projects: `OUCSSPortalADFLibrary` and `OUCSSPortalSharedLibrary`.

The `OUCSSPortalADFLibrary` project is used to add portal artifacts (taskflows and pages) and the `OUCSSPortalSharedLibrary` project is used for redeploying the **extend.oucsc.portal** shared library.

About Portal Security

An OUCSS Portal is secured and requires permissions to be granted to render custom taskflows and pages. The OUCSS Portal’s security is implemented with required permissions to allow rendering of taskflows deployed using the `OUCSSPortalADFLibrary` project. For security to work, however, the taskflow definition should be created in the `<<ExtensionWorkSpace>>/OUCSSPortalADFLibrary/public_html/WEB-INF/oracle/ugbu/ss/custom/secure` and/or `<<ExtensionWorkSpace>>/OUCSSPortalADFLibrary/public_html/WEB-INF/oracle/ugbu/ss/custom/public` folders.

Custom Pages should also be created in the `<<ExtensionWorkSpace>>/OUCSSPortalADFLibrary/public_html/ /oracle/ugbu/ss/custom/pages/secure` and/or `<<ExtensionWorkSpace>>/OUCSSPortalADFLibrary/public_html/ /oracle/ugbu/ss/custom/pages/public` folders.

Use the following security criteria when creating taskflows:

Create taskflows under `\WEB-INF\oracle\ugbu\ss\custom\secure` if access is to be restricted to authenticated users (e.g, logged-in users).

Create taskflows under `\WEB-INF\oracle\ugbu\ss\custom\public` if the taskflows are to be accessible to all users (including public users).

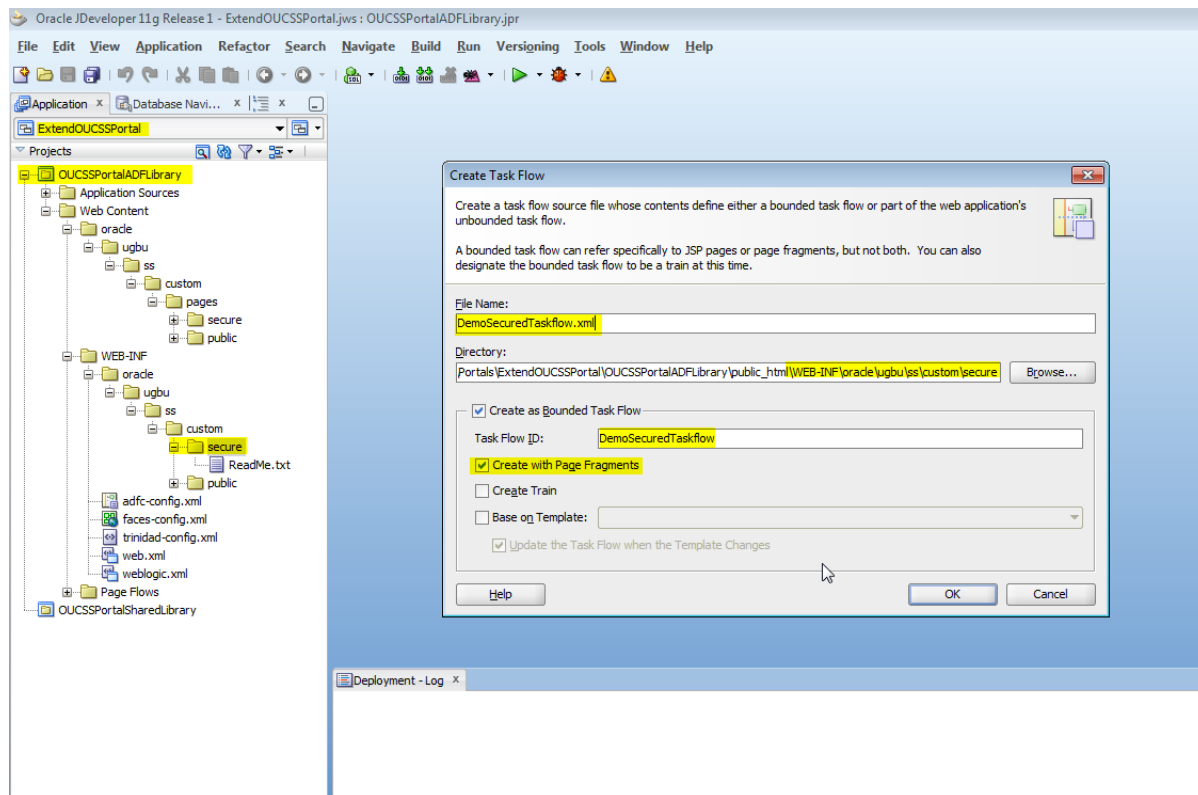
Create pages under `\oracle\ugbu\ss\custom\pages\secure` if the pages should be accessible only to authenticated users (e.g, logged-in users).

Create pages under `\oracle\ugbu\ss\custom\pages\public` if the pages should be accessible to all users (including public users).

The OUCSS Portal Administrator can manage the pages and taskflows created under both secure and public folders.

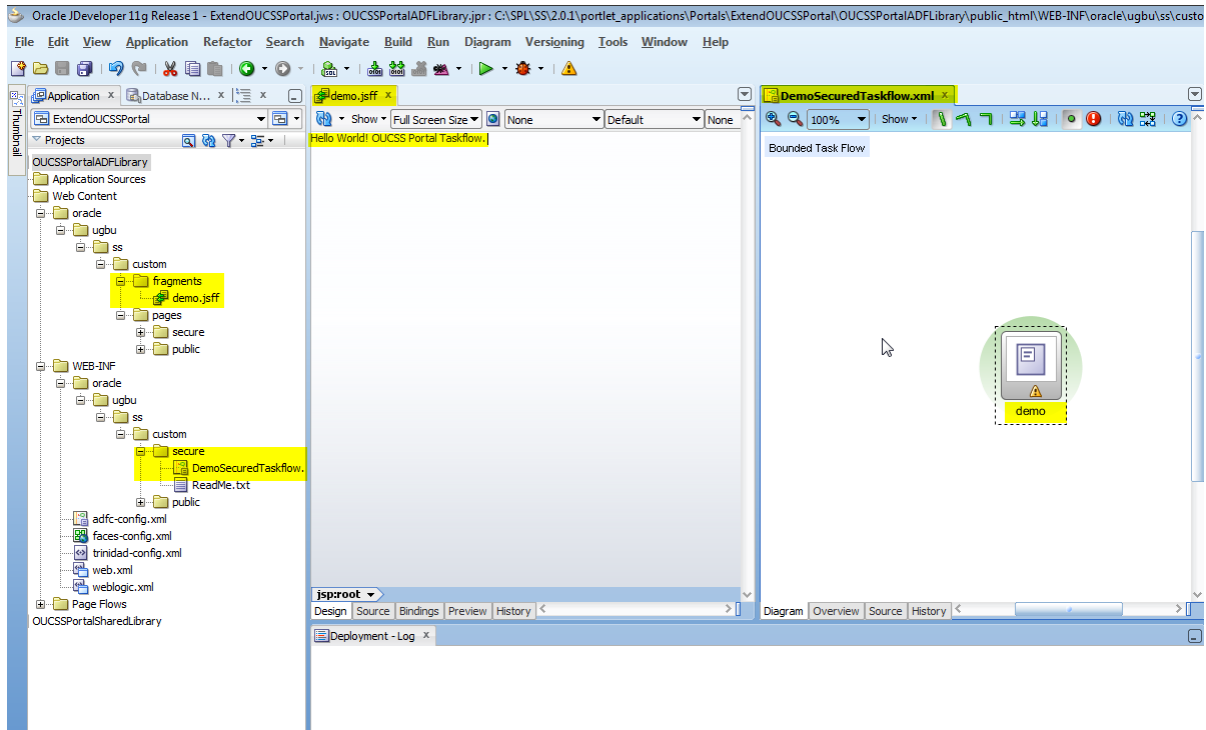
Adding New Taskflows and Pages

- 1 Extract the contents of **ExtendOUCSSPortal.zip** and open **ExtendOUCSSPortal.jws** in JDeveloper.
- 2 Select the `public_html\WEB-INF\oracle\ugbu\ss\custom\secure` folder in the **OUCSSPortalADFLibrary** project and add a new ADF Taskflow.



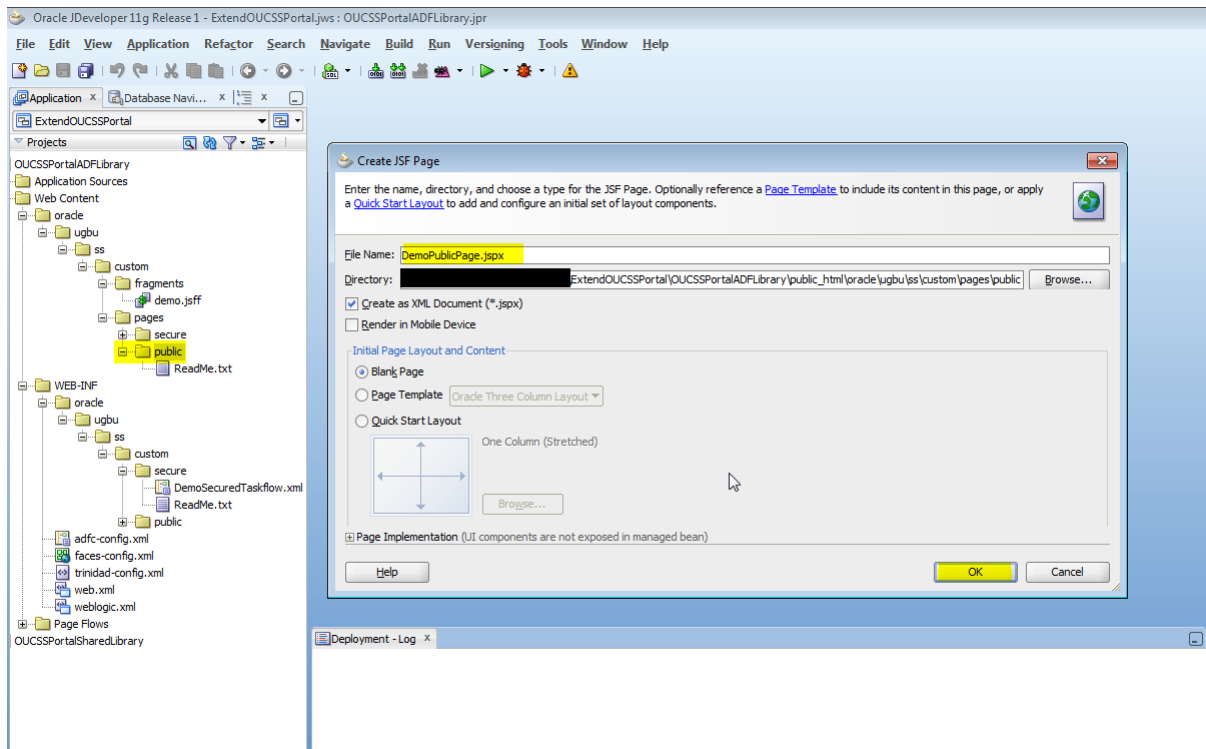
- 3 Implement the taskflow per the security requirements.

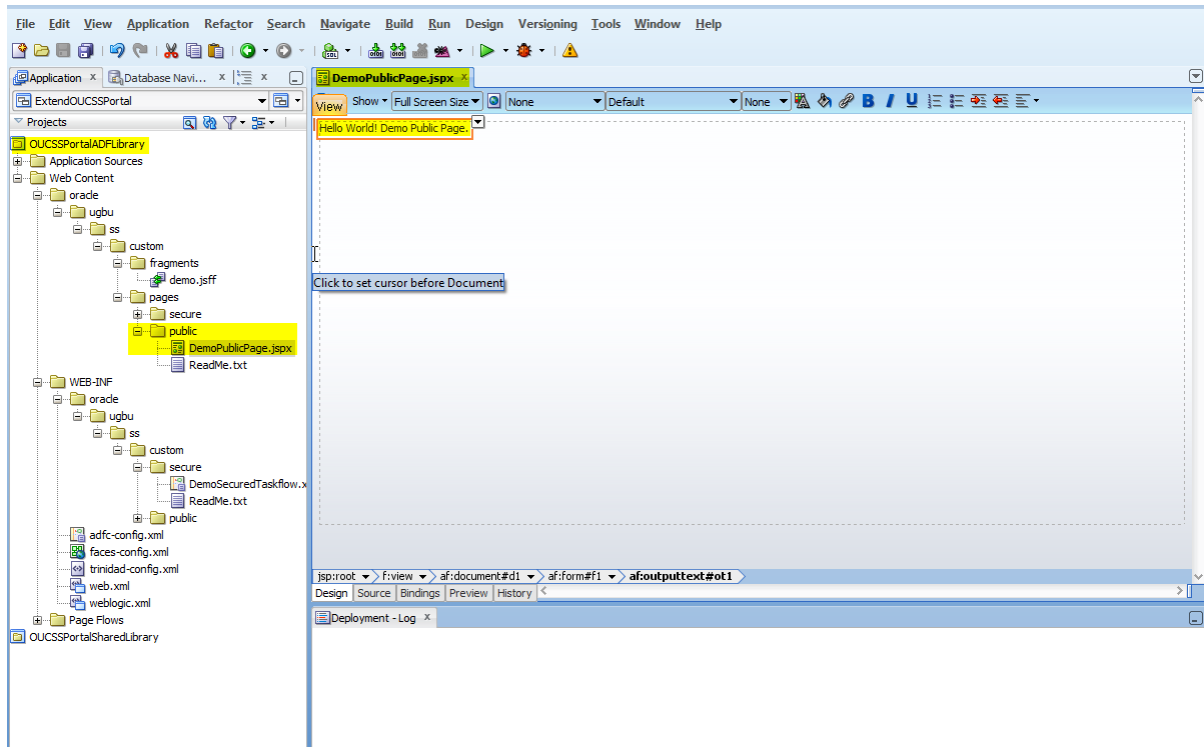
For the purposes of this demo, we'll create a secure taskflow containing one view that displays, "Hello World! OUCSS Portal Taskflow".



- 4 Select the /public_html/oracle/ugbu/ss/custom/public folder in the **OUCSSPortalADFLibrary** project and add a new Page (jspx).

For the purposes of this demo, a page named DemoPublicPage.jspx is created that contains the text, “Hello World! Demo Public Page.”.





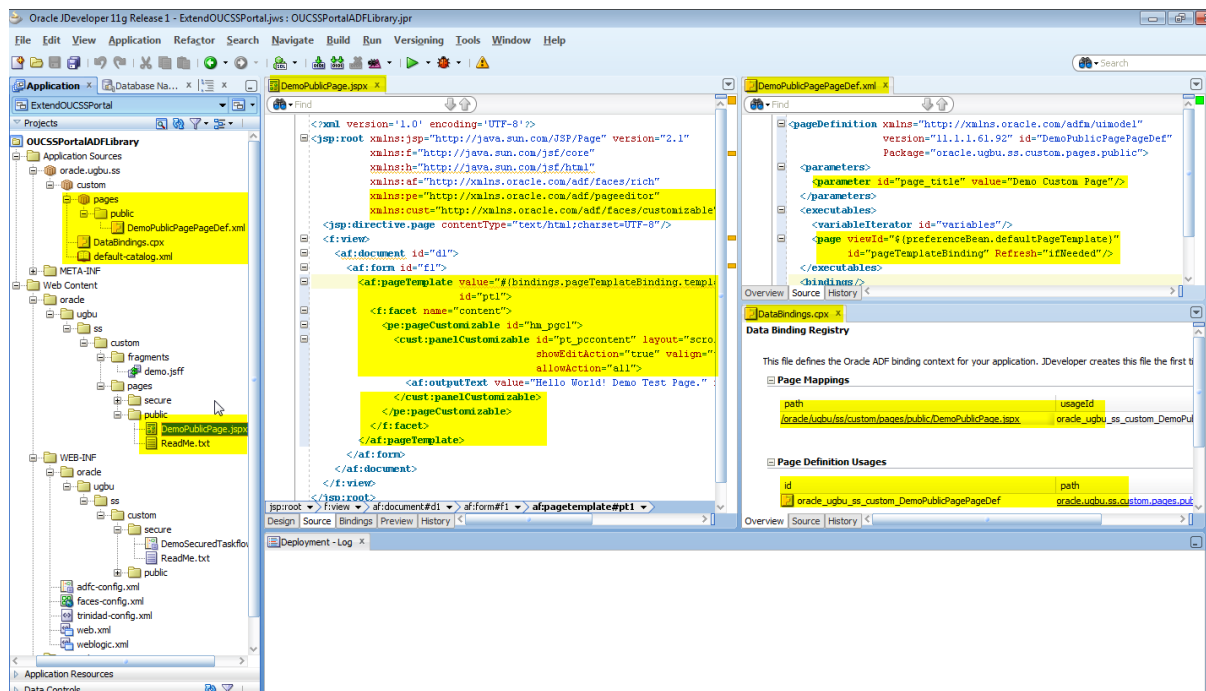
- 5 The newly-created page should reference a page template and page editor to enable runtime customization. To create the references:

- Modify JSPX to:

```
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
  xmlns:f="http://java.sun.com/jsf/core"
  xmlns:h="http://java.sun.com/jsf/html"
  xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
  xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
  xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable">
  <jsp:directive.page contentType="text/html;charset=UTF-8"/>
  <f:view>
    <af:document id="d1">
      <af:form id="f1">
        <af:pageTemplate value="#{bindings.pageTemplateBinding.templateModel}"
          id="pt1">
          <f:facet name="content">
            <pe:pageCustomizable id="hm_pgcl">
              <cust:panelCustomizable id="pt_pccontent" layout="scroll"
                showEditAction="true" valign="top"
                allowAction="all">
                <af:outputText value="Hello World! Demo Test Page." id="ot1"/>
              </cust:panelCustomizable>
            </pe:pageCustomizable>
          </f:facet>
        </af:pageTemplate>
      </af:form>
    </af:document>
  </f:view>
</jsp:root>
```

- Modify Page Def to:

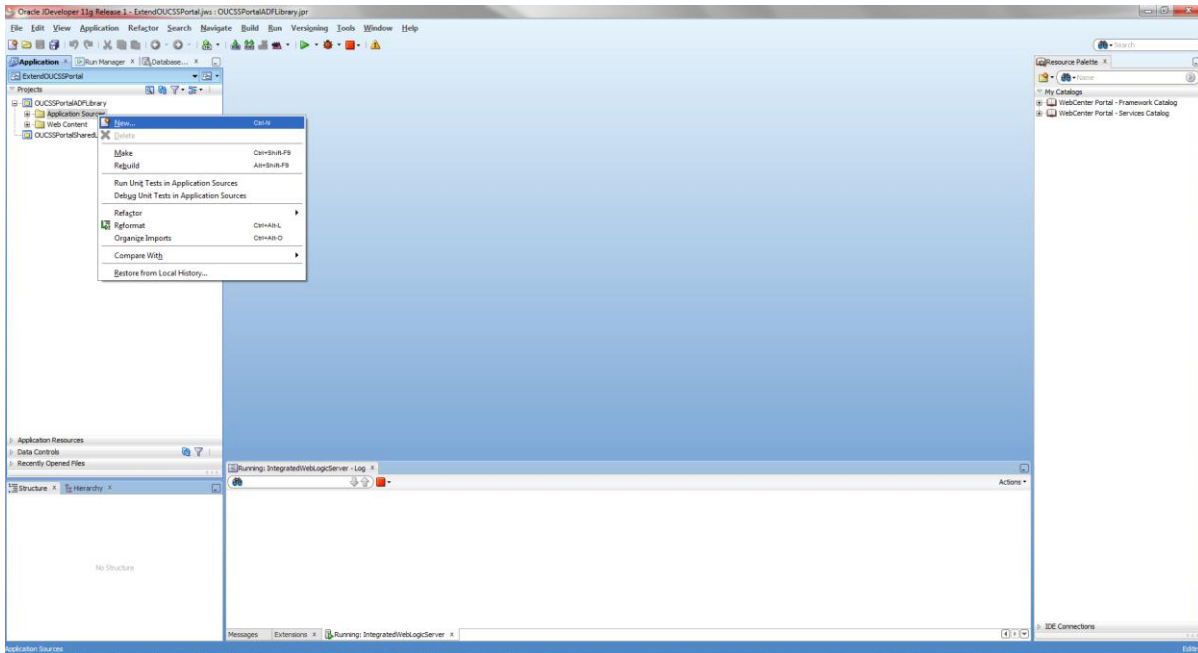
```
<?xml version="1.0" encoding="UTF-8" ?>
<pageDefinition xmlns="http://xmlns.oracle.com/adfm/uimodel"
  version="11.1.1.64.93" id="DemoPublicPagePageDef"
  Package="oracle.ugbu.ss.custom.pages.public">
  <parameters>
    <parameter id="page_title" value="Demo Custom Page"/>
  </parameters>
  <executables>
    <variableIterator id="variables"/>
    <page viewId="{(preferenceBean.defaultPageTemplate)}"
      id="pageTemplateBinding" Refresh="ifNeeded"/>
  </executables>
  <bindings/>
</pageDefinition>
```



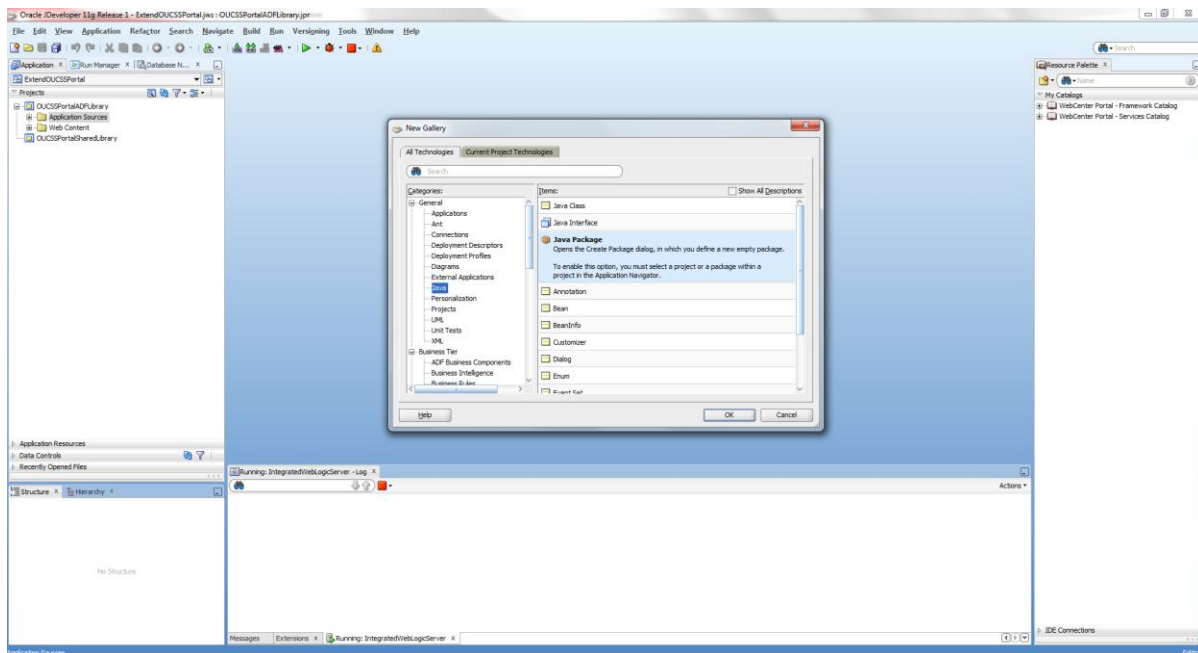
Adding Support for a New Language

OUCSS Portal by default is configured only to support English. In order to translate navigation links and page titles in OUCSS Portal, Portal bundles for the additional bundles are required to be created. In order to add a Portal Bundle for your supported language(s),

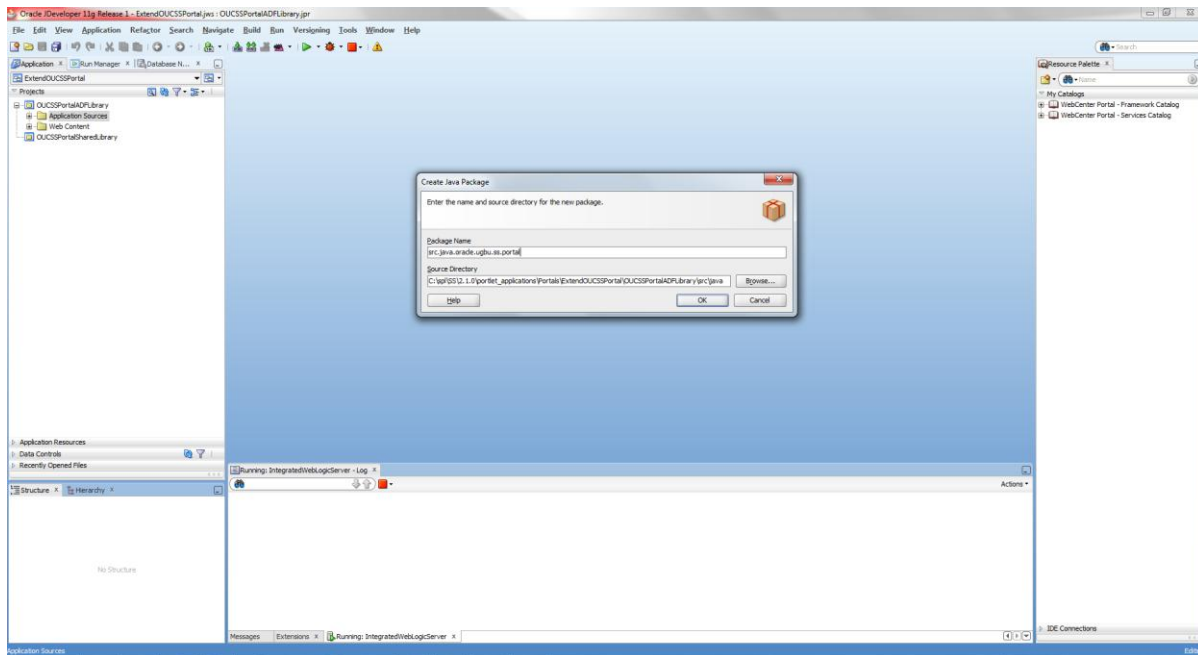
- 1 Create a new package in the Application Sources under the project OUCSSPortalADFLibrary. Right click on the 'Application Sources' directory and select 'New' from the pop-up menu.



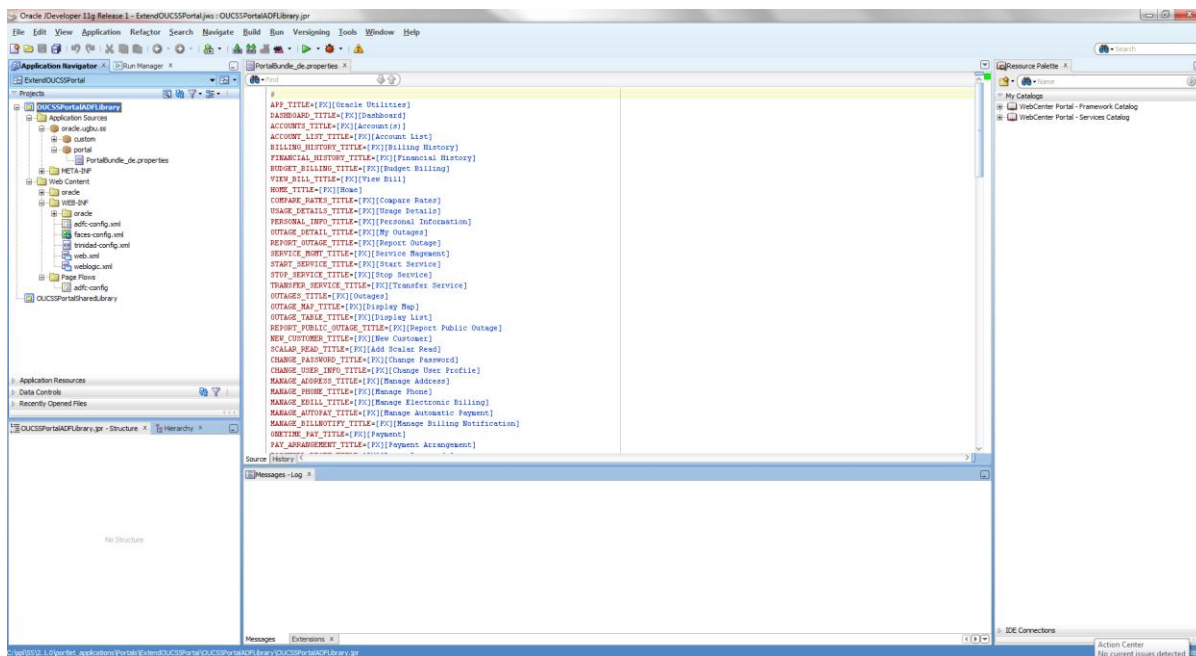
2 Select Java under 'General' categories in the left panel. Select 'Java Package' in the right panel. Click 'Ok'.



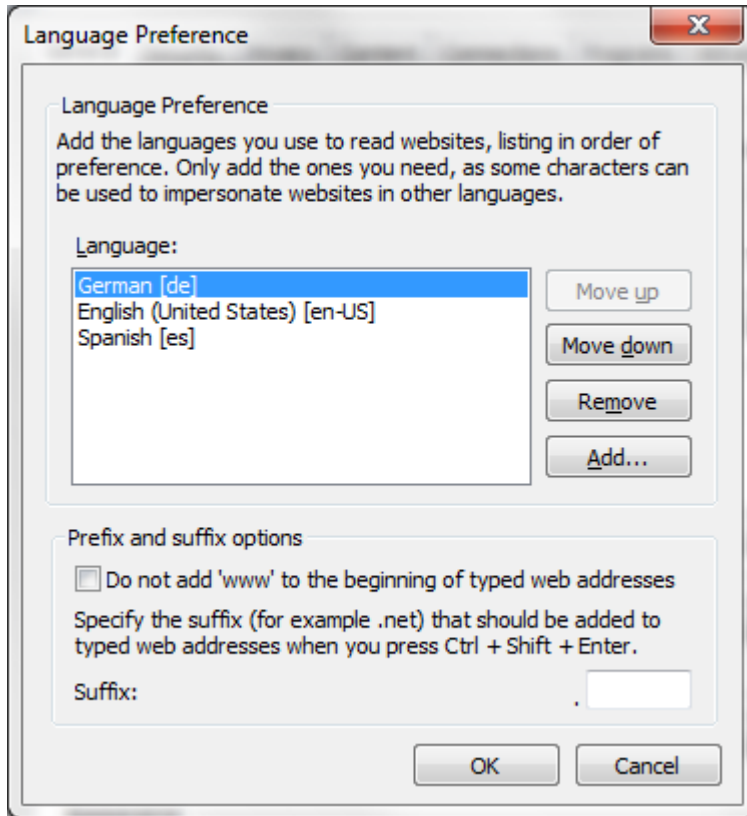
3 Mention 'Package Name' as 'src.java.oracle.ugbu.ss.portal' and click 'Ok'



- 4 Create a new resource bundle with appropriate locale with name format PortalBundle_<<locale>>.properties under the package created in step 3. Create separate bundle for many each supported locale required by implementation. For example, for German, create a resource bundle with name ‘PortalBundle_de.properties’. Please see [Appendix-A](#) for properties to be added to the Portal Bundle.



- 5 Please follow the section “[Deploying the extend.oucss.portal as Shared Library](#)” for details regarding how to deploy the extension. The added bundles will load after restart.
- 6 Set the browser language to appropriate locale before accessing the portal to see the translated labels.

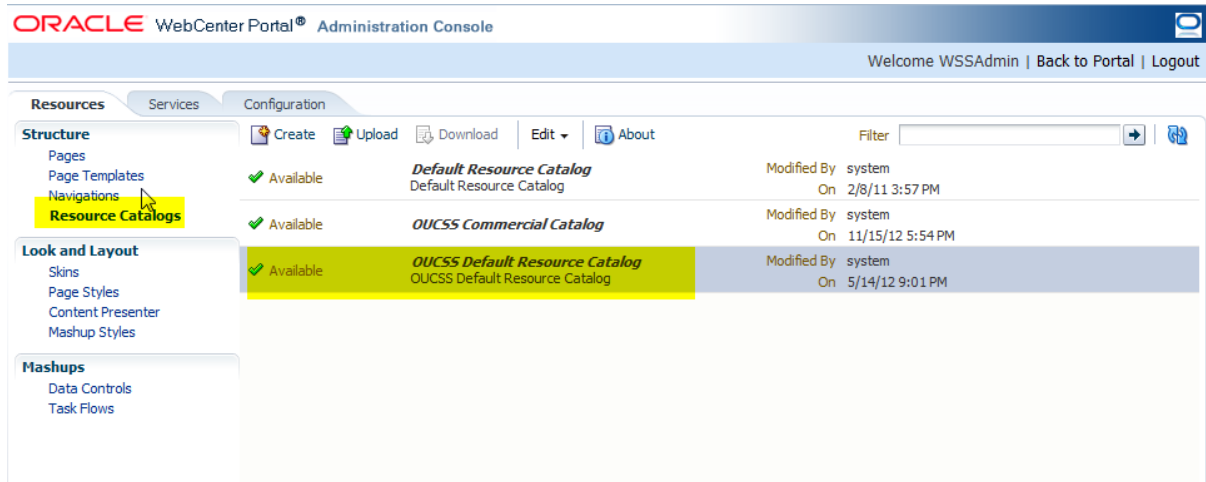


Customizing and Configuring an Existing Resource Catalog

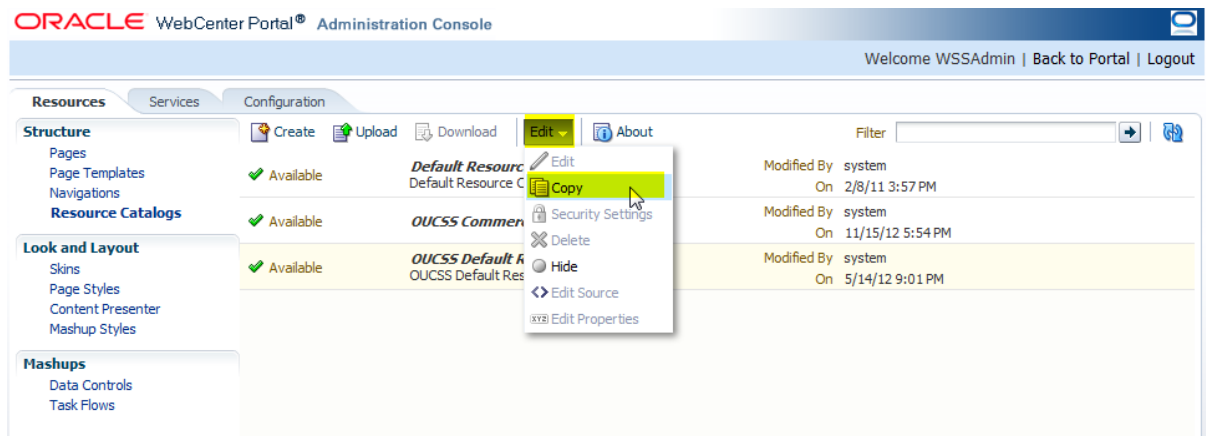
An OUCSS Portal application is configured to use separate catalog for Residential and Commercial context. Residential context is configured with OUCSS Default Resource Catalog and Commercial context is configured with OUCSS Commercial Catalog. Following sample describes customizing OUCSS Default Resource Catalog and the same steps can be followed to customize OUCSS Commercial Catalog.

To consume the newly-created taskflow, a customized resource catalog must be created.

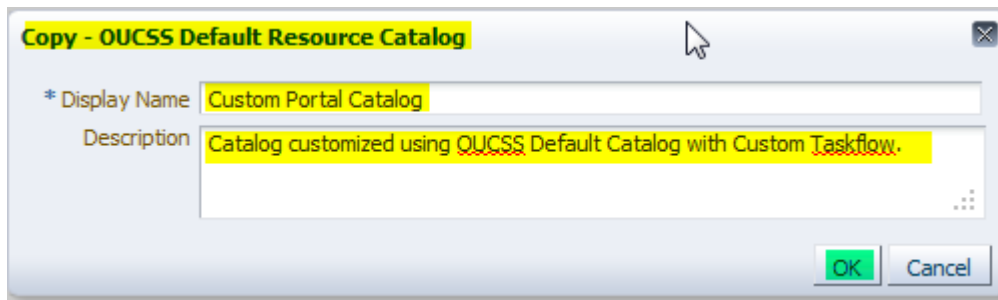
- 1 Log in to the OUCSS Portal with Administrator privileges and go to the Administration Console.
- 2 Choose the **Resources** tab and click on the **Resource Catalogs** link in the **Structure** section.



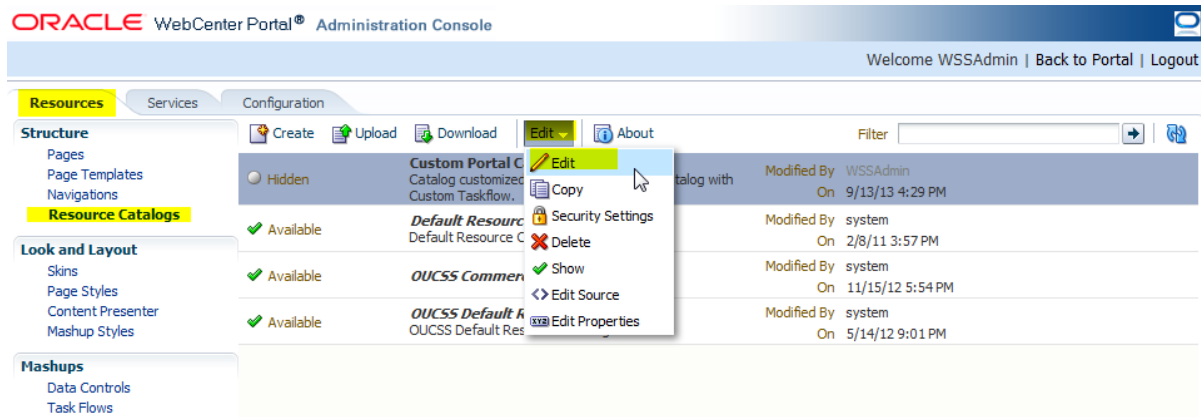
- To copy the default catalog (which is read-only and seeded), choose **OUCSS Default Resource Catalog** and click **Edit > Copy**.



- In the **Copy** dialog, enter the display name and description for the new catalog, then click **OK**.

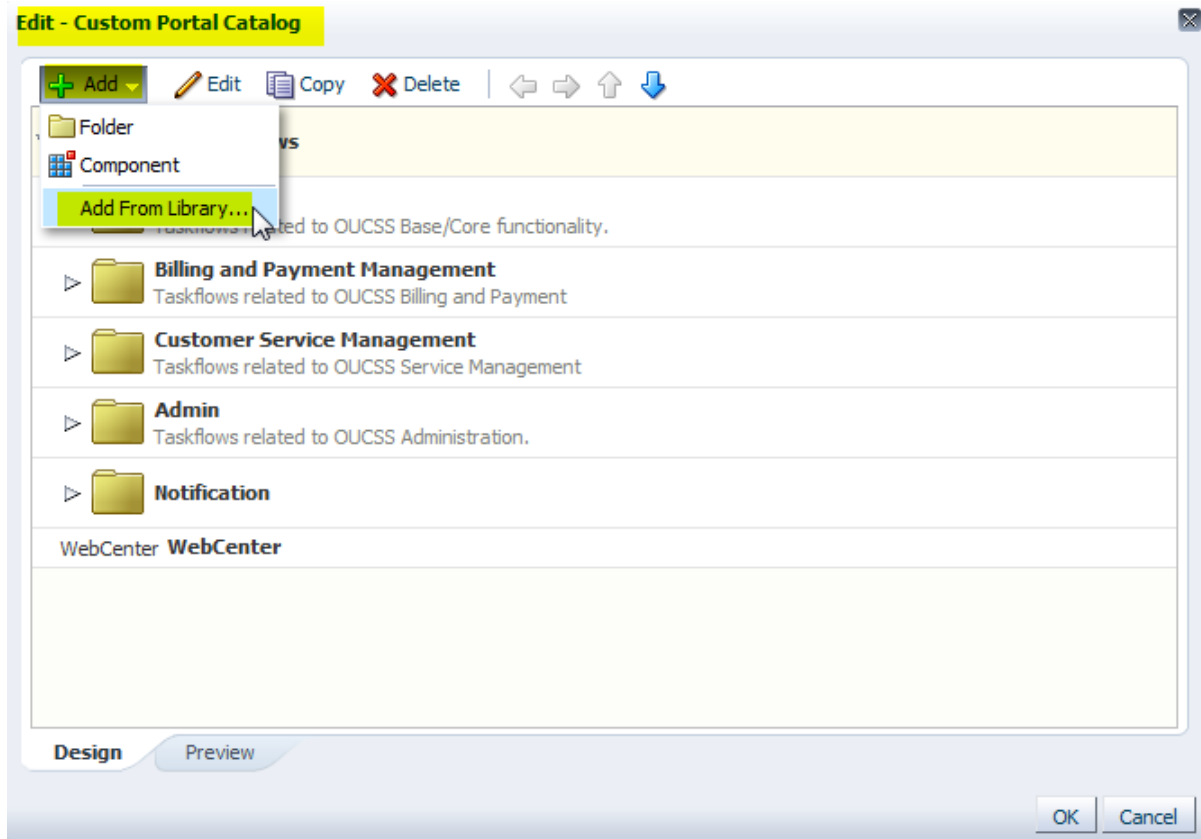


- 5 Select the new catalog from the list and click **Edit > Edit**.



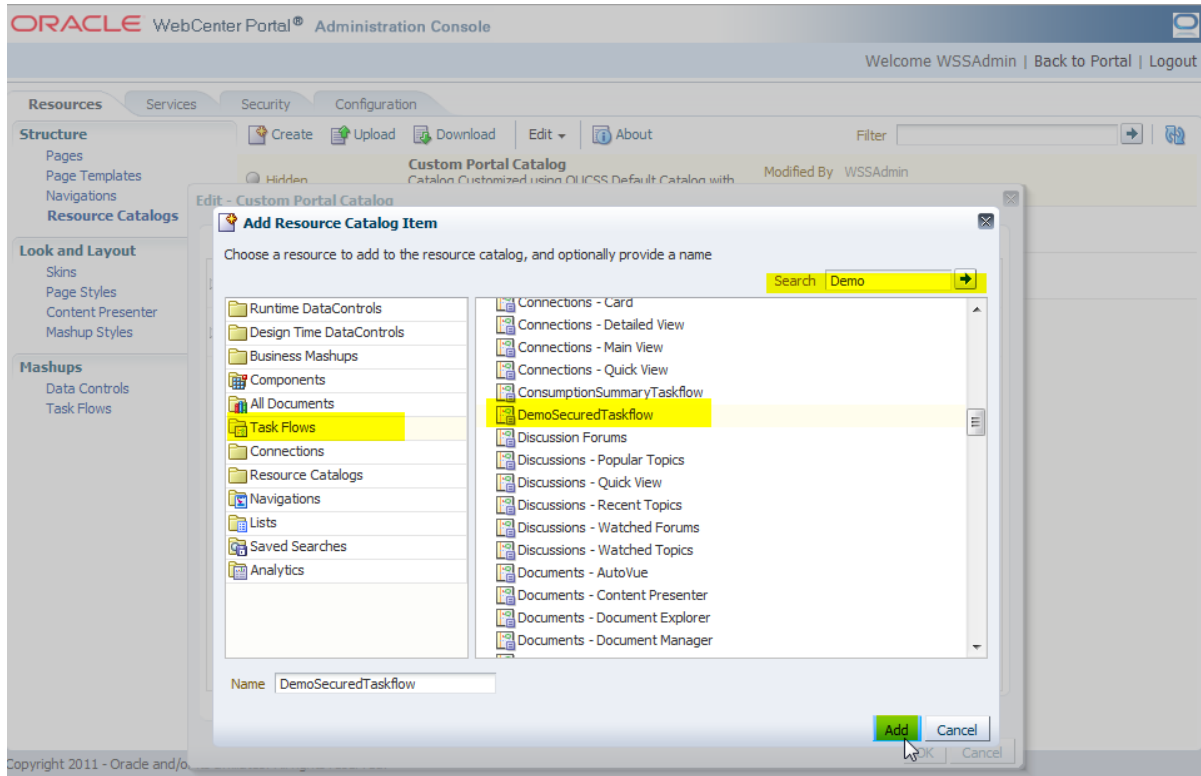
- 6 In the **Edit** dialog, click **Add > Add From Library...** to add the new taskflow to the catalog.

Note: You can also add folders or add the taskflow to another location in the catalog. For the purposes of this demo, the new taskflow (TestTaskflow) will be added at the catalog's root level.

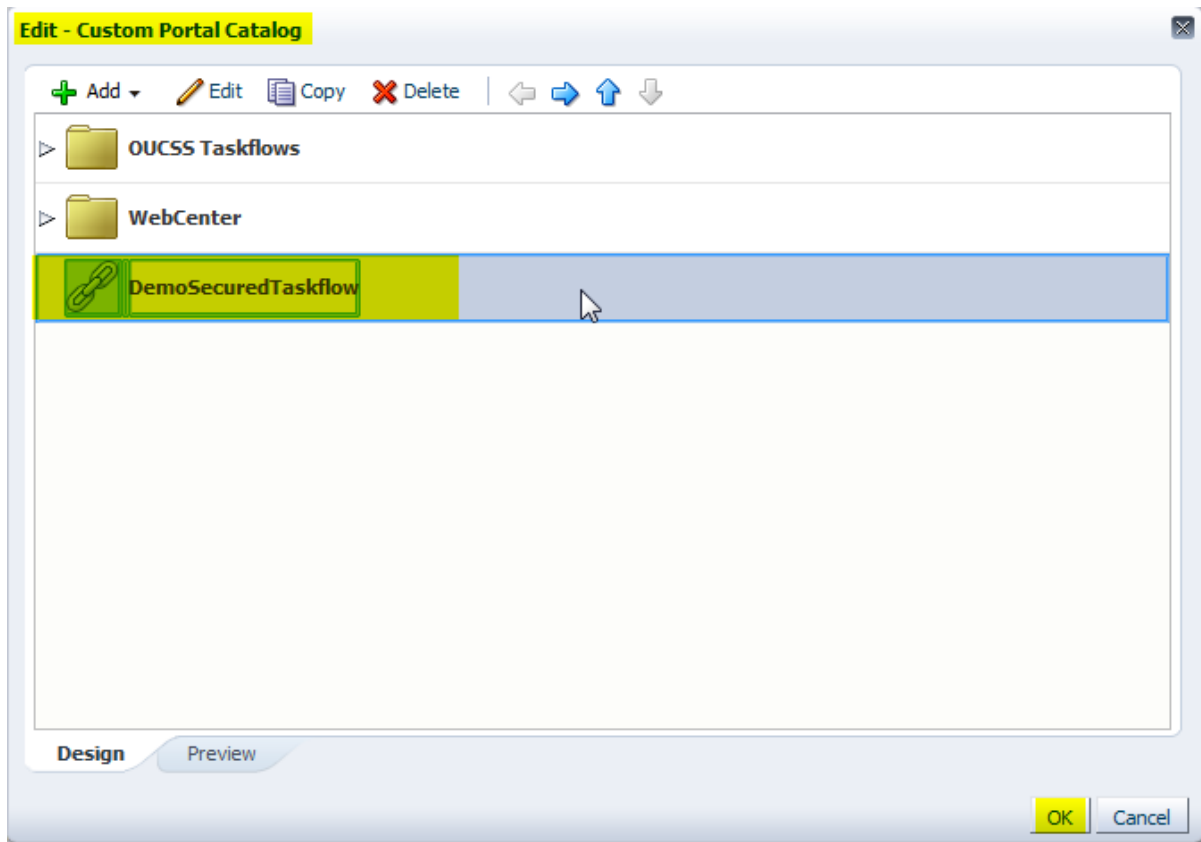


- 7 In the **Add Resource Catalog Item** dialog, select **Taskflows** from the menu on the left, then scroll down and choose the new taskflow (in this demo, the **DemoSecuredTaskflow** created earlier). Note that you can also search for the taskflow using the Search field in the dialog.

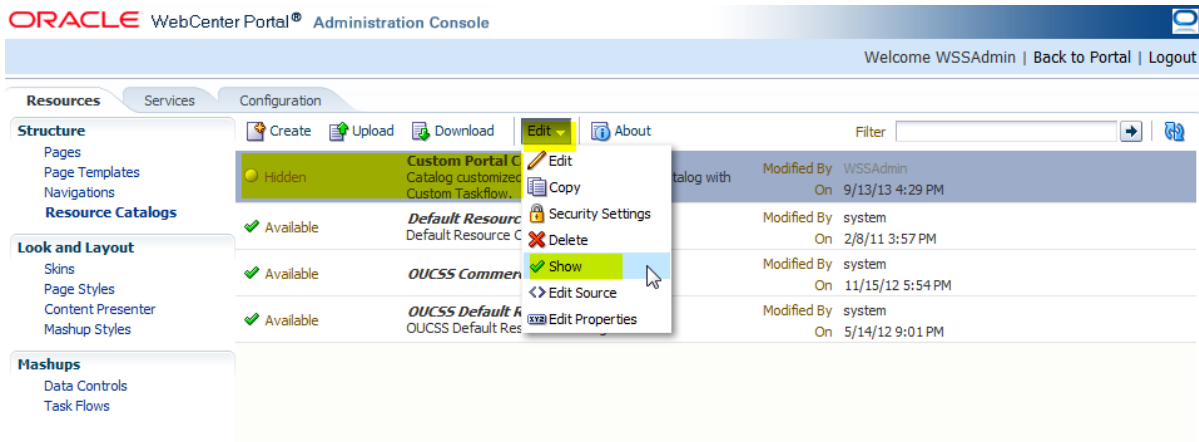
When the taskflow is selected, click the **Add** button.



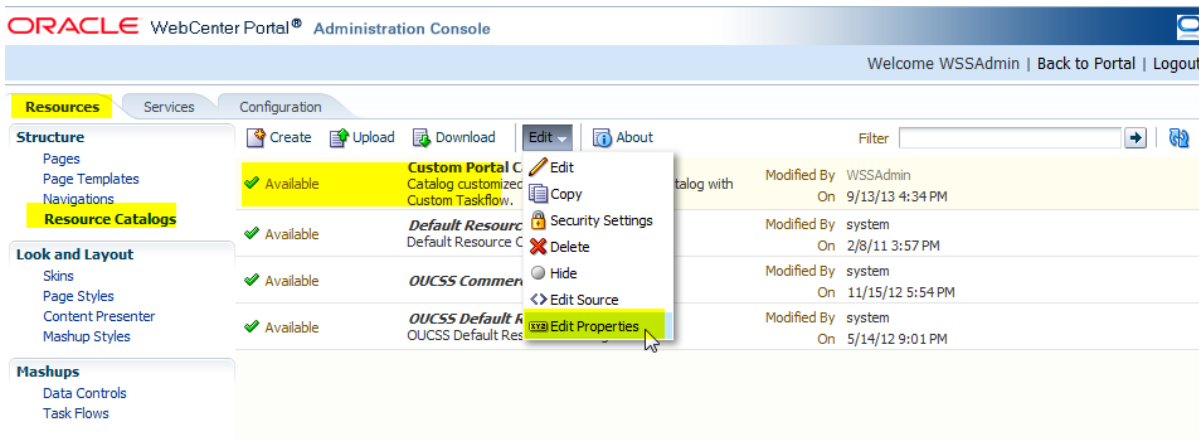
8 The new taskflow now appears in the catalog list. Click **OK** to save the changes.



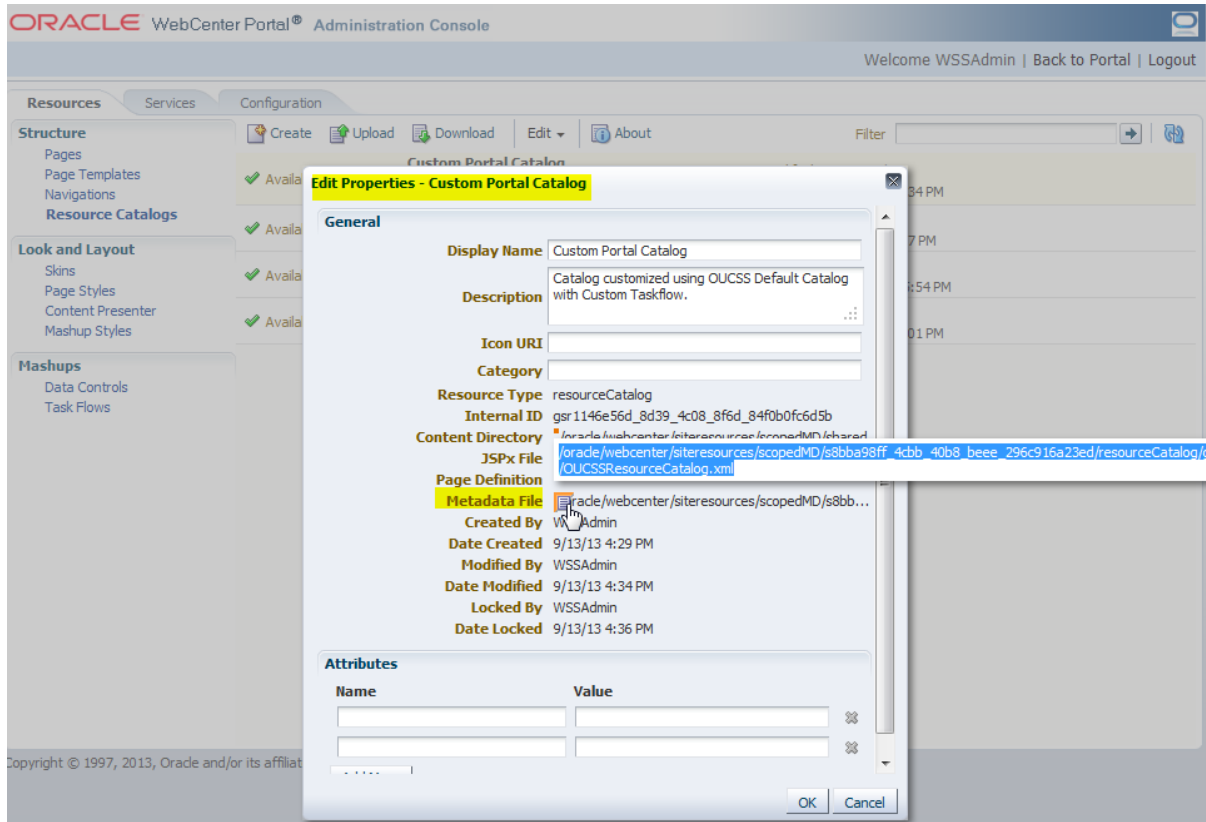
- 9 Select the new catalog (**Custom Portal Catalog** in this demo) and unhide it by clicking on **Edit > Show**.



- 10 To activate and use the new Custom Portal Catalog as the site template for one or more Context, copy the page path of the new template. Click Edit -> Edit Properties.



- 11 Select the Metadata File path from Edit Properties dialog.



- 12 Click the Back to Portal link. Select Admin > Resources page.
- 13 Filter the resources with resource codes PORTAL_RC_. Update the "URL Override" property by selecting PORTAL_RC_<<Context>> (RESIDENTIAL or COMMERCIAL) resource with the Metadata File path copied in Step 11.

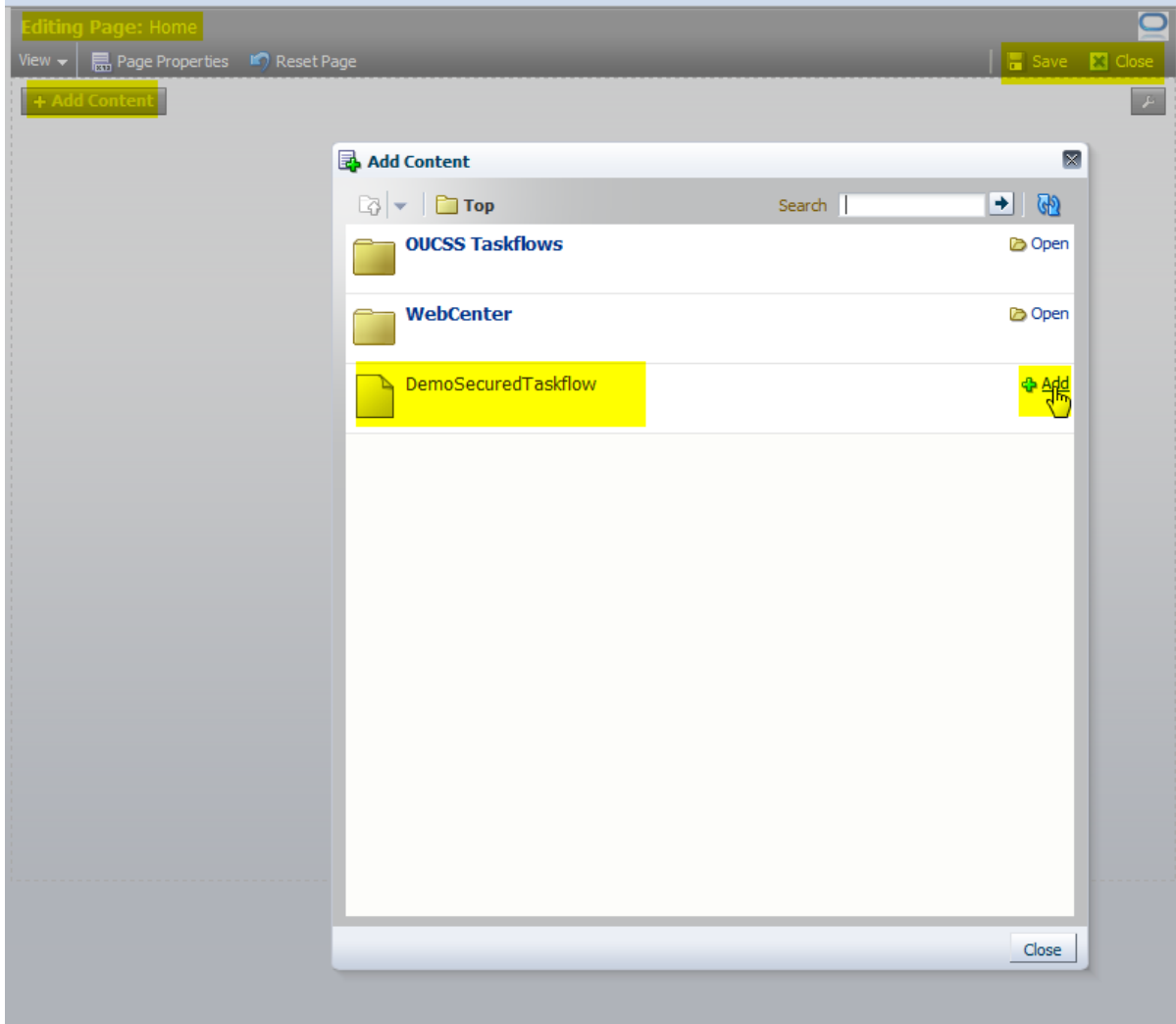
The screenshot shows the WSSAdmin interface. At the top, there is a header with 'Your Company' and 'Welcome WSSAdmin | Administration | Logout'. Below the header is a navigation bar with links: Home, Mount(s), Details, Notifications, Outages, New Customer, User Profile, Forms Management, Old Portlets, and Admin. The main content area features an 'Actions' dropdown and a table of resources. The table has columns for Resource Code, Resource Type, Locator Type, URL, and URL Override. Two rows are visible: 'PORTAL_RC_COMMERCIAL' and 'PORTAL_RC_RESIDENTIAL'. Below the table is a 'Resource' configuration form for 'PORTAL_RC_RESIDENTIAL'. The form includes fields for Resource Code, Resource Type (WXURL), Locator Type (WXREL), URL, URL Override, Description, and Help. The URL Override field is currently selected and shows a list of options, with the selected one being a long UUID-based path.

Resource Code	Resource Type	Locator Type	URL	URL Override
PORTAL_RC_COMMERCIAL	WXURL	WXREL	/oracle/webcenter/portalapp/catalogs/OUCSSCommercial	
PORTAL_RC_RESIDENTIAL	WXURL	WXREL	/oracle/webcenter/portalapp/catalogs/OUCSSResourceC	

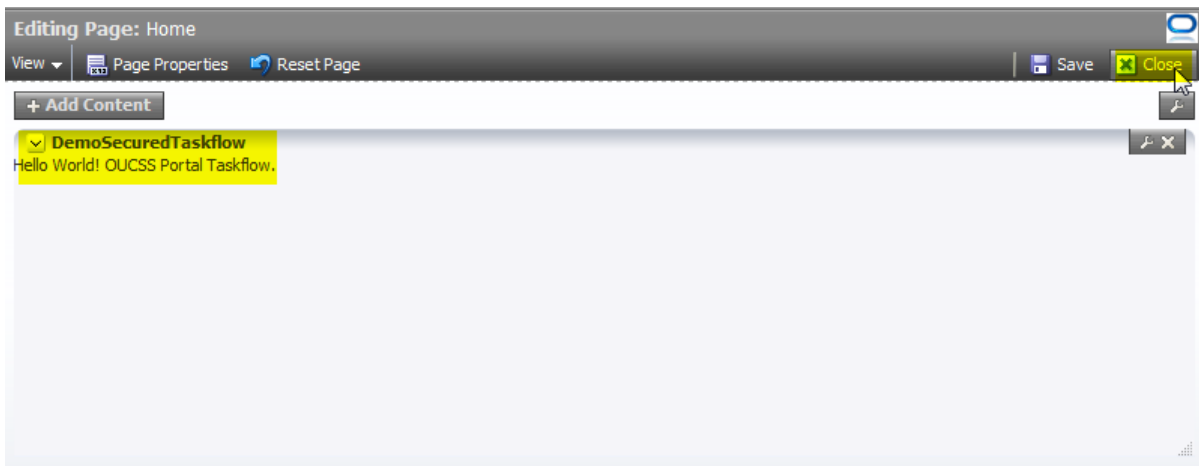
Resource configuration for PORTAL_RC_RESIDENTIAL:

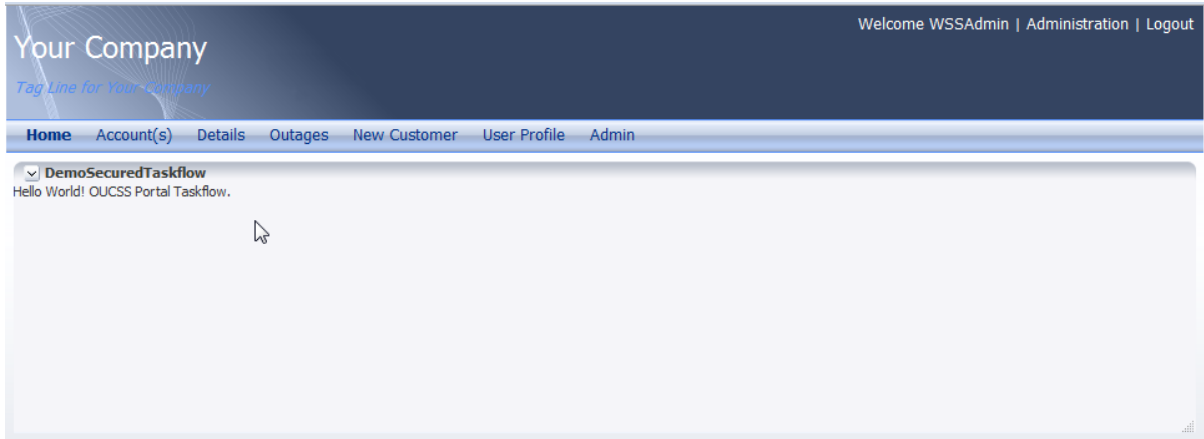
- Resource Code: PORTAL_RC_RESIDENTIAL
- Resource Type: WXURL
- Locator Type: WXREL
- URL: /oracle/webcenter/portalapp/catalogs/OUCSSResourceCatalog.xml
- URL Override: /oracle/webcenter/sitesources/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/resourceCatalog/gsr1146e56d_8d39_4c08_8f6d_84f0b0fc6d5b/OUCSSResourceCatalog.xml
- Description: Resource Catalog URL for Residential Customers
- Help: No Preview Provided

- 14 Save changes and repeat the same process to update other Context with custom Site template.
- 15 Restart the OUCSS Portal managed server and verify that changes are reflected.



16 Click the **Close** button in the **Editing Page** view to commit and view the changes.





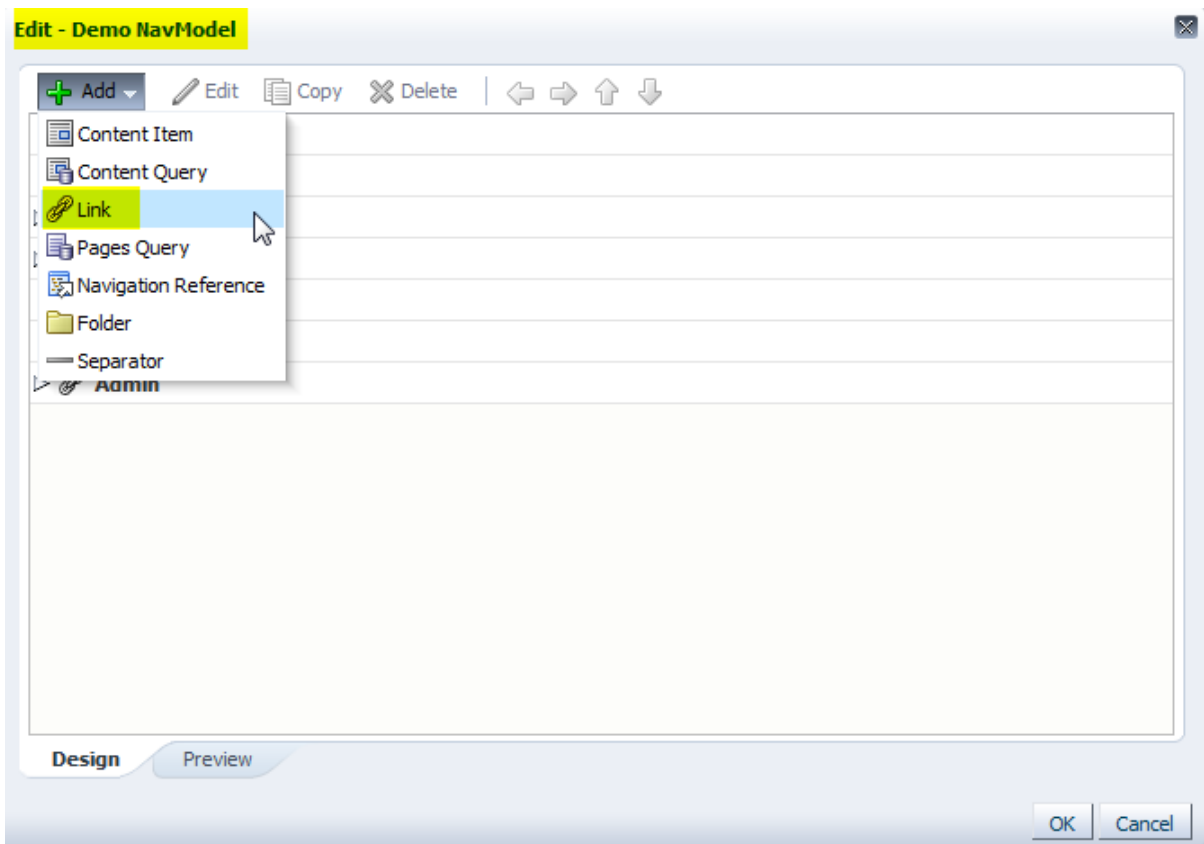
Accessing Custom Pages

Newly-added pages can be accessed by customizing the navigation model and adding links to the customized pages.

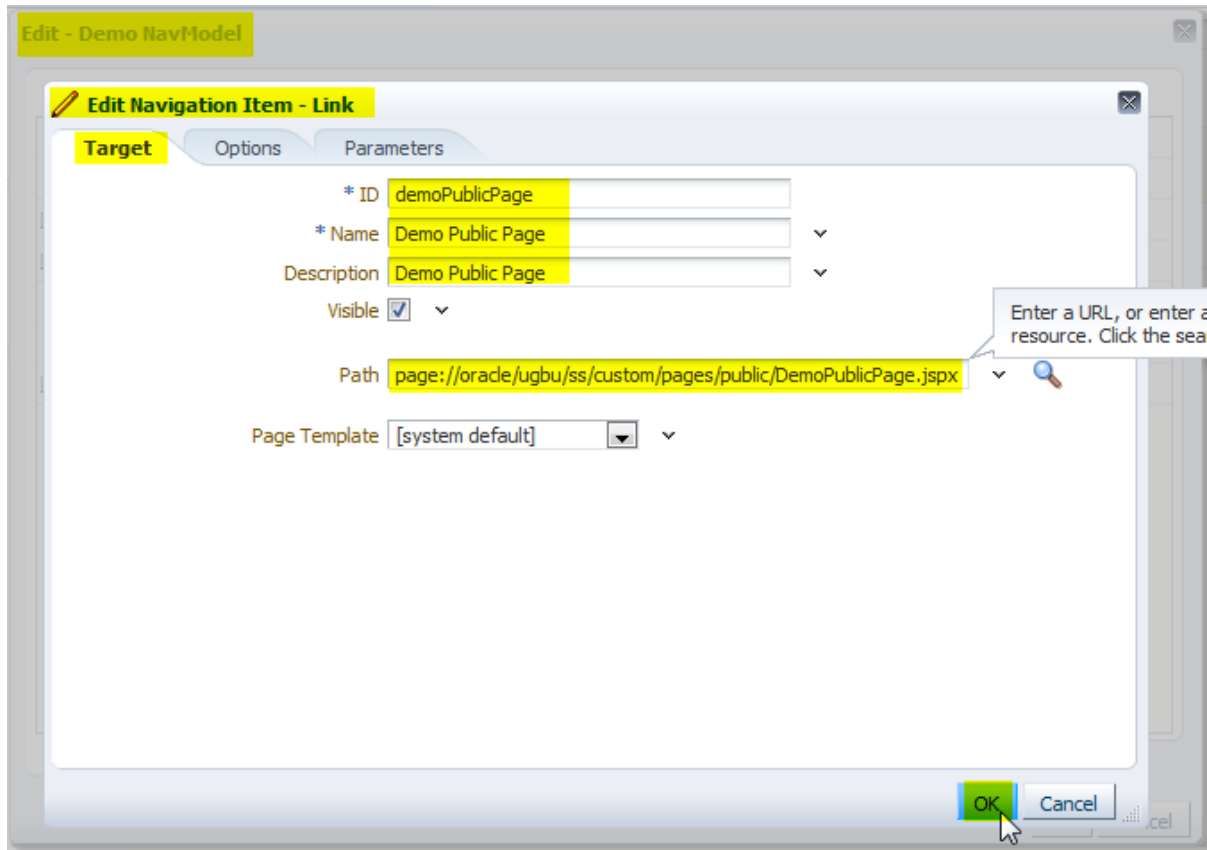
- 1 Log in to the OUCSS Portal with Administrator privileges and go to the Administration Console.
- 2 Choose the **Resources** tab and click on the **Navigations** link in the **Structure** section.
- 3 Select a navigation model for the new links, then click **Edit > Edit**.

For the purposes of this demo, Demo NavModel will be used for the new links.

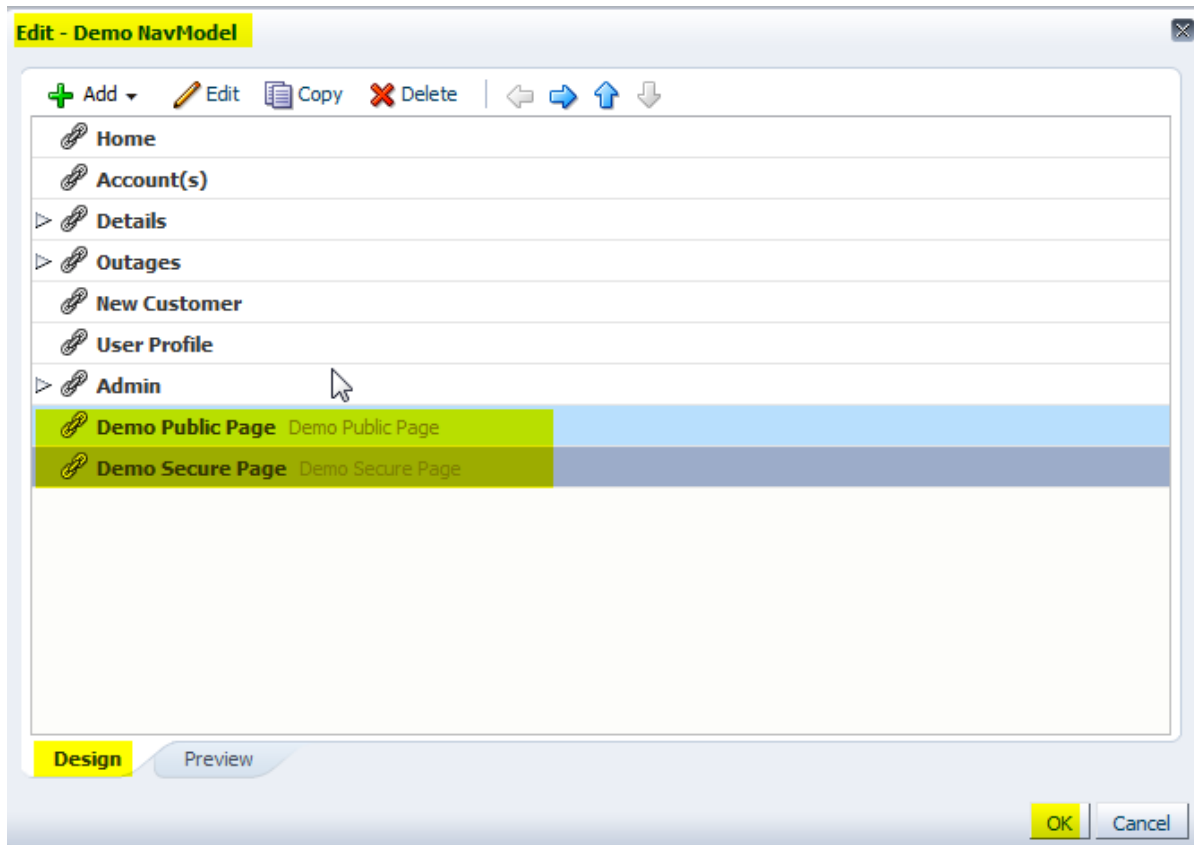
- 4 In the **Edit** dialog, click **Add > Link**.



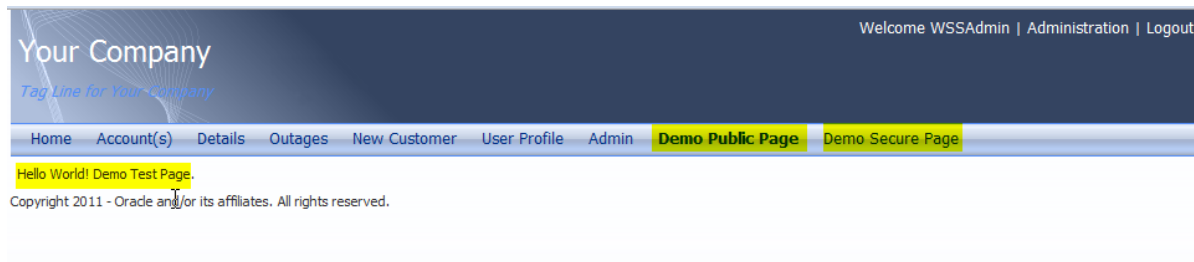
- 5 In the **Edit Navigation Item** dialog, choose the **Target** tab, enter link details, then click **OK**.



- 6 Add links to other pages per your site requirements. Click **OK** in the **Edit** dialog when finished adding links.



- 7 Verify that the navigation model is configured as the **Default**, and then click **Back to Portal**.




































Accessing User Account Details

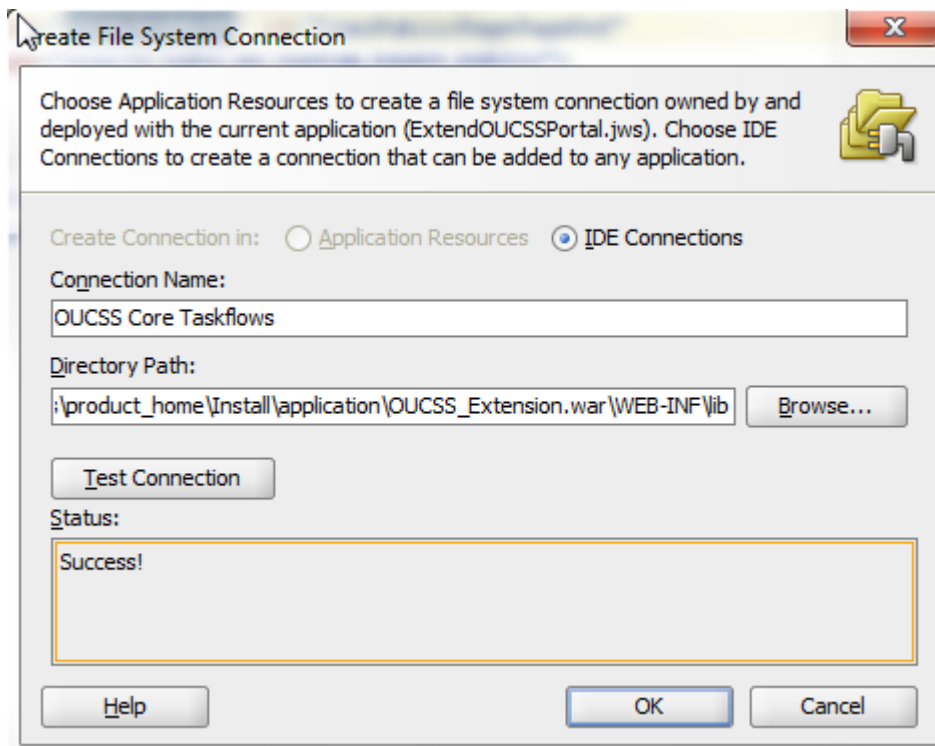
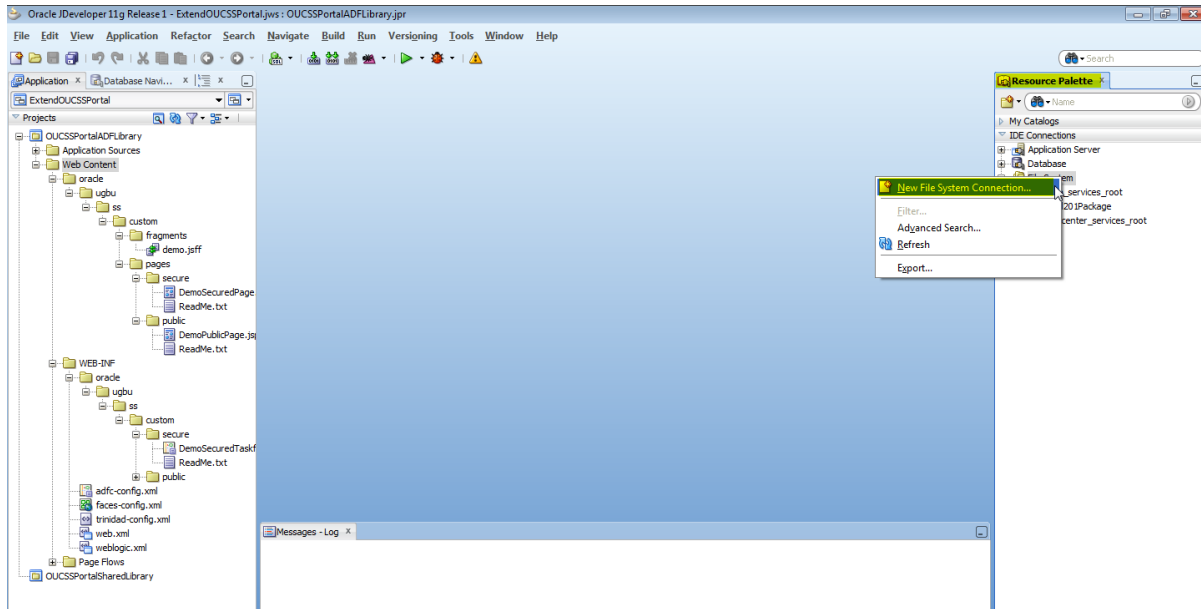
Account details and other OUCSS API can be accessed in custom pages and taskflow views by referring to the Utilities Shared jar from the OUCSS Shared module.

In this example, a managed bean is created and accessed using the Secured Taskflow. The managed bean will retrieve accounts of a logged-in user and display the list in the taskflow.

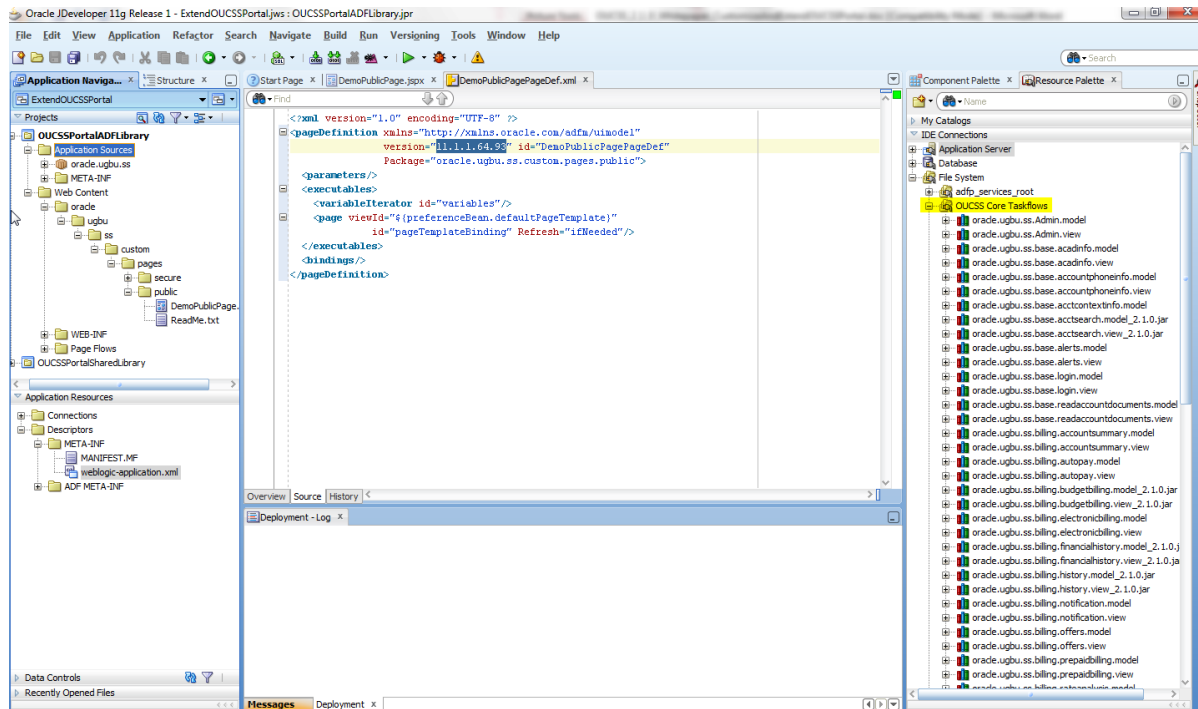
- 1 Unjar/unzip the OUCSS_Extension.war file from <<webcenter_WSS_zip>>\Install\application\ into a folder that is accessible to JDeveloper.

 oracle.ugbu.ss.Admin.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	2,324 KB
 oracle.ugbu.ss.Admin.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	432 KB
 oracle.ugbu.ss.base.acadinfo.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	197 KB
 oracle.ugbu.ss.base.acadinfo.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	164 KB
 oracle.ugbu.ss.base.accountphoneinfo.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	186 KB
 oracle.ugbu.ss.base.accountphoneinfo.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	149 KB
 oracle.ugbu.ss.base.acctcontextinfo.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	163 KB
 oracle.ugbu.ss.base.acctsearch.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	162 KB
 oracle.ugbu.ss.base.acctsearch.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	100 KB
 oracle.ugbu.ss.base.alerts.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	207 KB
 oracle.ugbu.ss.base.alerts.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	200 KB
 oracle.ugbu.ss.base.login.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	336 KB
 oracle.ugbu.ss.base.login.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	457 KB
 oracle.ugbu.ss.base.readaccountdocuments.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	288 KB
 oracle.ugbu.ss.base.readaccountdocuments.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	215 KB
 oracle.ugbu.ss.billing.accountssummary.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	135 KB
 oracle.ugbu.ss.billing.accountssummary.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	118 KB
 oracle.ugbu.ss.billing.autopay.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	181 KB
 oracle.ugbu.ss.billing.autopay.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	158 KB
 oracle.ugbu.ss.billing.budgetbilling.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	352 KB
 oracle.ugbu.ss.billing.budgetbilling.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	248 KB
 oracle.ugbu.ss.billing.electronicbilling.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	163 KB
 oracle.ugbu.ss.billing.electronicbilling.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	140 KB
 oracle.ugbu.ss.billing.financialhistory.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	244 KB
 oracle.ugbu.ss.billing.financialhistory.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	212 KB
 oracle.ugbu.ss.billing.history.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	303 KB
 oracle.ugbu.ss.billing.history.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	297 KB
 oracle.ugbu.ss.billing.notification.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	286 KB
 oracle.ugbu.ss.billing.notification.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	251 KB
 oracle.ugbu.ss.billing.offers.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	40 KB
 oracle.ugbu.ss.billing.offers.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	118 KB
 oracle.ugbu.ss.billing.prepaidbilling.model_2.1.0	9/10/2013 9:12 AM	Executable Jar File	335 KB
 oracle.ugbu.ss.billing.prepaidbilling.view_2.1.0	9/10/2013 9:12 AM	Executable Jar File	427 KB

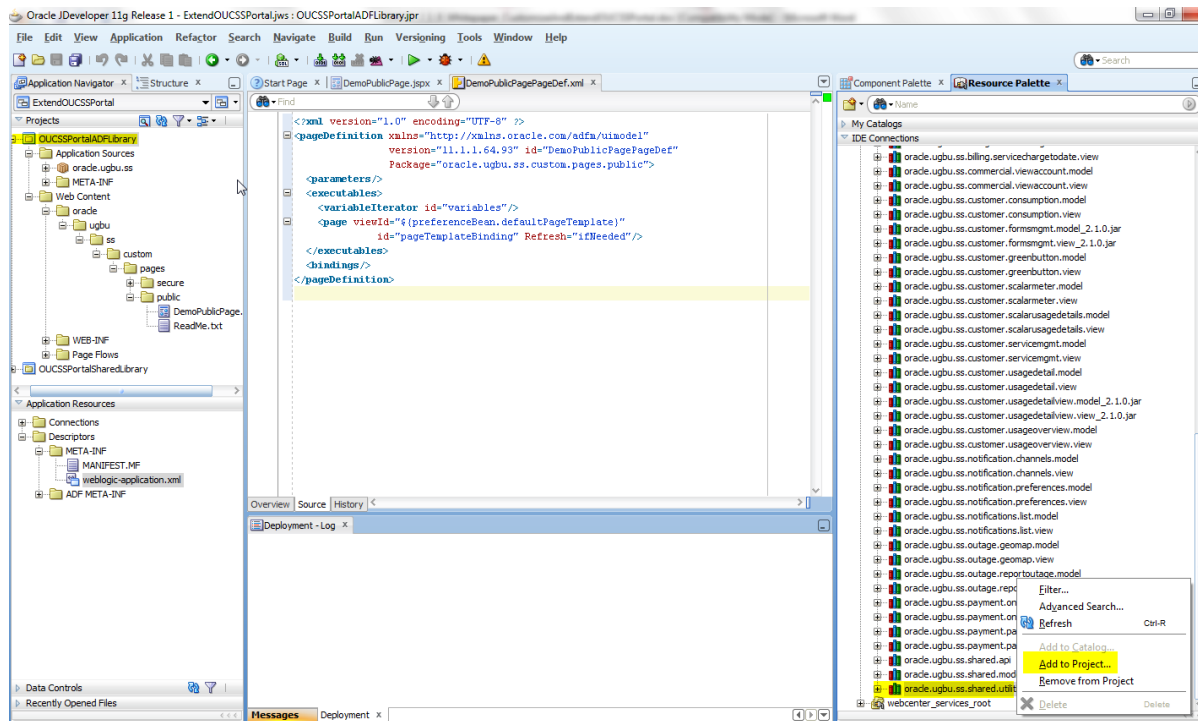
- Using the JDeveloper Resource Palette, create a File System Connection with the name “OUCSS_Taskflows” using the <<Unzip_Folder>>\WEB-INF\lib directory created in the previous step.



- Click **OK** to see the OUCSS libraries under “OUCSS Core Taskflows” in the Resource Palette.



- Make sure the OUCSSPortalADFLibrary project is selected in JDeveloper. Right-click oracle.ugbu.ss.shared.utilities under the OUCSS Core Taskflows file system connection, then select **Add to Project** from the context menu. If a confirmation dialog appears, click **Add Library**.



- Repeat step 4 and add oracle.ugbu.ss.shared.api library to the project.
- Save all.

- 7 Create a Java class (DemoManagedBean.java, sample code below) and extend **SSBaseManagedBean** class.
- 8 Use the following sample code to access the account details in the task flow.

Note: The following code sample assumes that the custom taskflow or page will default the `userId` to the logged in User. If you want to test the code without logging in, then override the user to a valid OUCSS User by calling `super.setWebUserId("<<valid_UserId>>");` in the constructor of the `DemoManagedBean`.

```
package oracle.ugbu.ss.custom.view.backing;

import com.oracle.ugbu.ss.api.model.account.OUCSSAccount;
import com.oracle.ugbu.ss.api.model.account.OUCSSAccountList;
import com.oracle.ugbu.ss.api.model.security.OUCSSUser;
import com.oracle.ugbu.ss.shared.view.beans.SSBaseManagedBean;

public class DemoManagedBean
    extends SSBaseManagedBean
{
    @SuppressWarnings("compatibility")
    private static final long serialVersionUID = 1L;

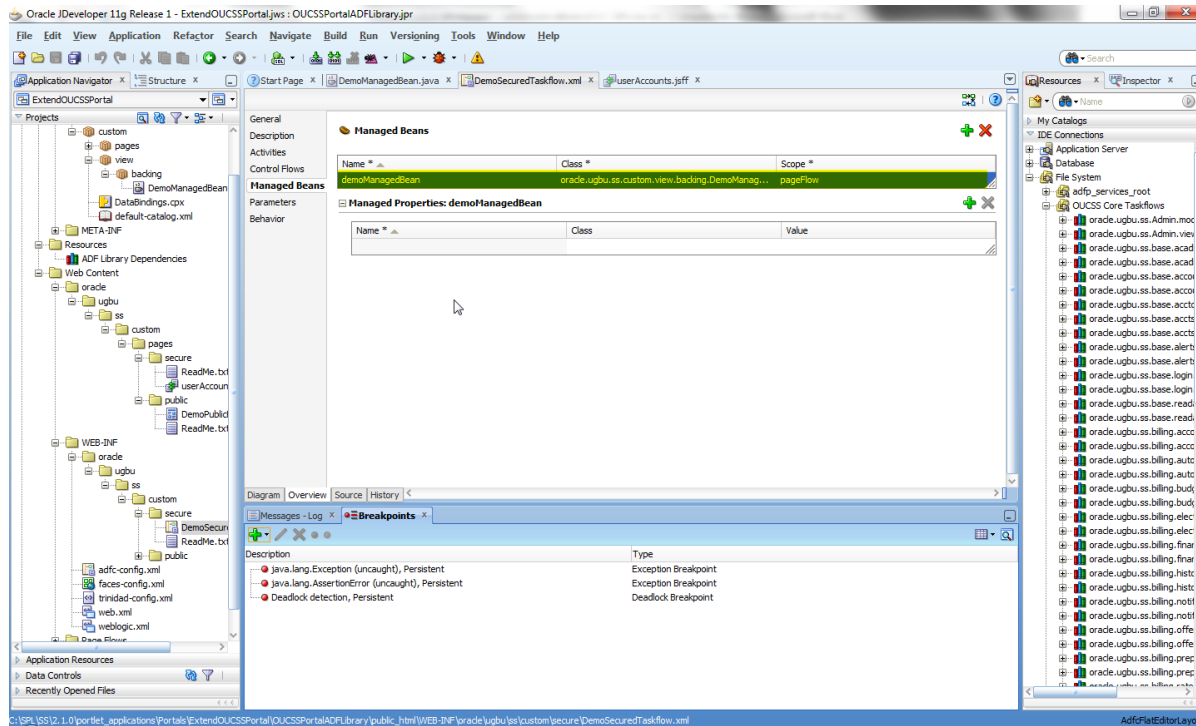
    public DemoManagedBean()
    {
        super();
        // Uncomment to Override the user for testing.
        //super.setWebUserId("WSSAdmin");
    }

    /**
     * Method to get details about the current logged in user.
     * @return
     */
    public OUCSSUser getUser()
    {
        return super.getContext().getCurrentUser();
    }

    /**
     * Method to get list of accounts enrolled to logged in User.
     * @return
     */
    public OUCSSAccountList getUserAccountList()
    {
        OUCSSAccountList accountList =
            getContext().getCurrentUser().getUserAccounts();
        return accountList;
    }

    /**
     * Method to get the currently selected account.
     * @return
     */
    public OUCSSAccount getCurrentAccount()
    {
        OUCSSAccount currentAccount =
            getContext().getCurrentUser().getCurrentUserAccount();
        return currentAccount;
    }
}
```

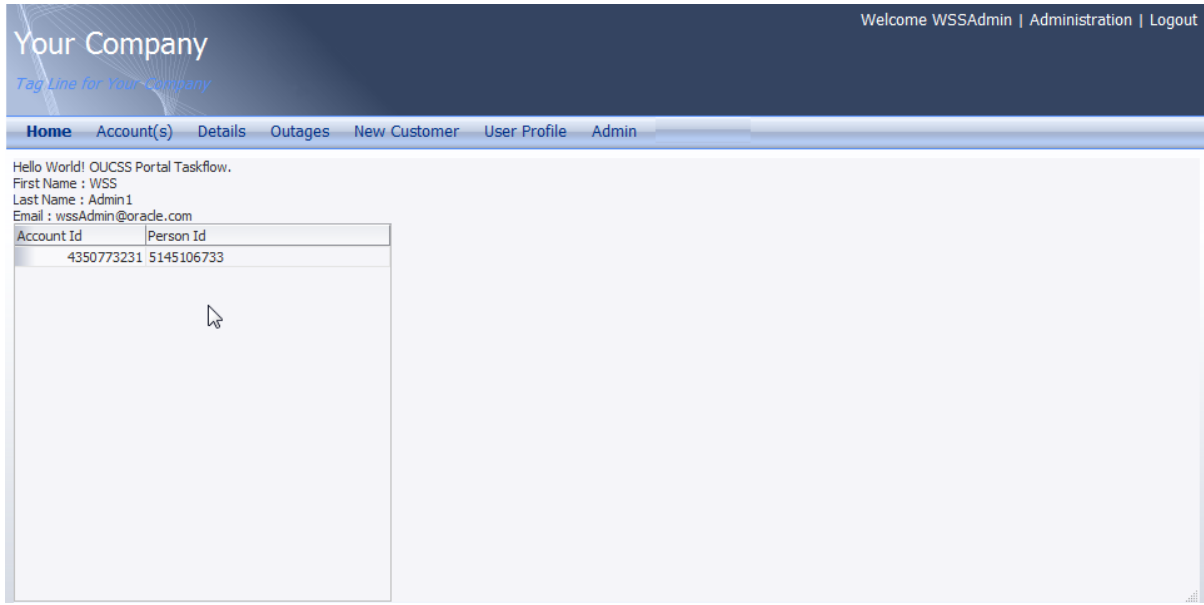
- 9 Declare the `DemoManagedBean` class as a managed bean in the taskflow definition or `adfc-config.xml` (UnBounded Taskflow). For the purposes of this example, the scope used is **pageFlowScope**.



10 Reference the managed bean method to display user and account details as demonstrated in the following JSPX code:

```
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
  xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
  xmlns:f="http://java.sun.com/jsf/core">
  <af:panelBorderLayout id="pb11">
    <f:facet name="top">
      <af:outputText value="Hello World! OUCSS Portal Taskflow." id="ot1"/>
    </f:facet>
    <af:panelGroupLayout layout="vertical" valign="start" id="pg11">
      <af:outputText value="First Name : #{pageFlowScope.demoManagedBean.user.firstName}"
        id="ot4"/>
      <af:outputText value="Last Name : #{pageFlowScope.demoManagedBean.user.lastName}"
        id="ot5"/>
      <af:outputText value="Email : #{pageFlowScope.demoManagedBean.user.emailAddress}"
        id="ot6"/>
      <af:table value="#{pageFlowScope.demoManagedBean.userAccountList}"
        var="row" id="t1" contentDelivery="immediate"
        columnStretching="last" rowSelection="none"
        summary="Account List" columnSelection="none"
        rowBandingInterval="1" shortDesc="Account List">
        <af:column headerText="Account Id" id="c1" rowHeader="true">
          <af:outputText value="#{row.key1}" id="ot2"/>
        </af:column>
        <af:column headerText="Person Id" id="c2">
          <af:outputText value="#{row.key2}" id="ot3"/>
        </af:column>
      </af:table>
    </af:panelGroupLayout>
  </af:panelBorderLayout>
</jsp:root>
```

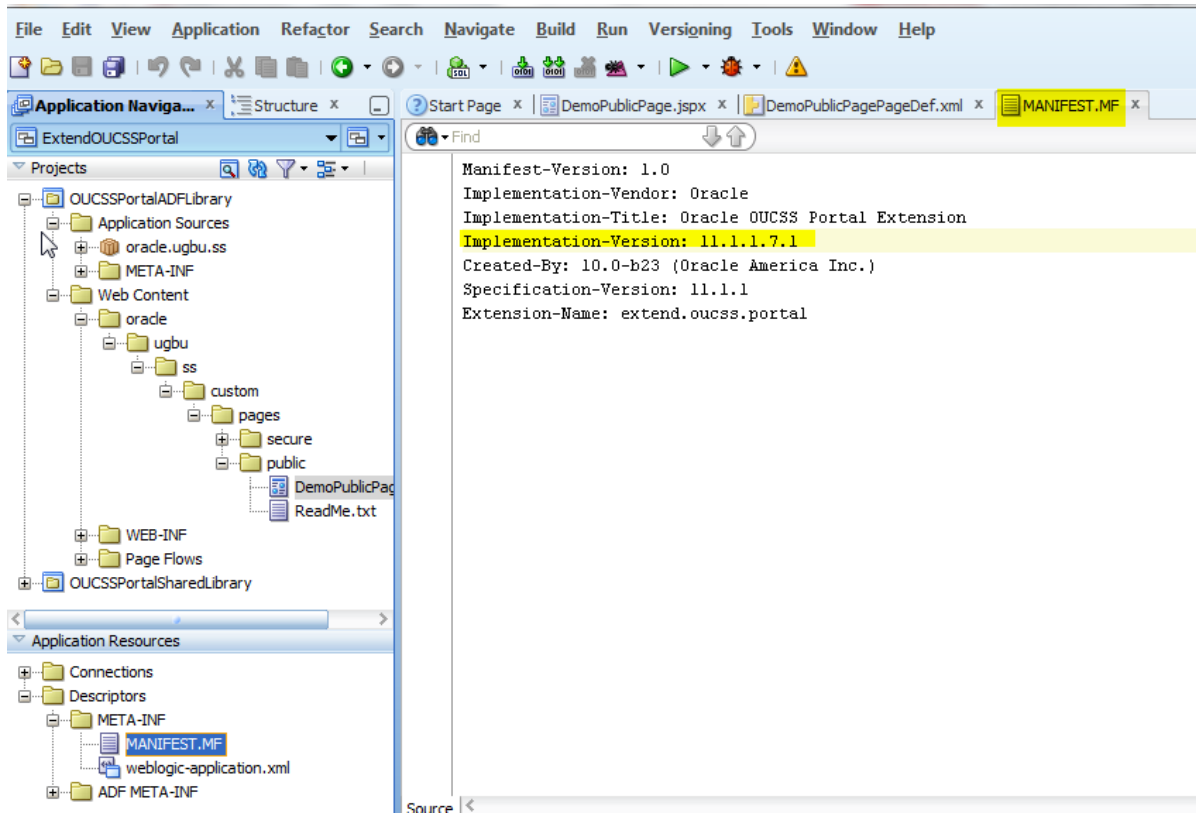
11 Run/Deploy the extension again and consume the taskflow in any page. In this example, the taskflow is consumed in the Home Page, as shown in the following image:



Deploying the extend.oucss.portal as Shared Library

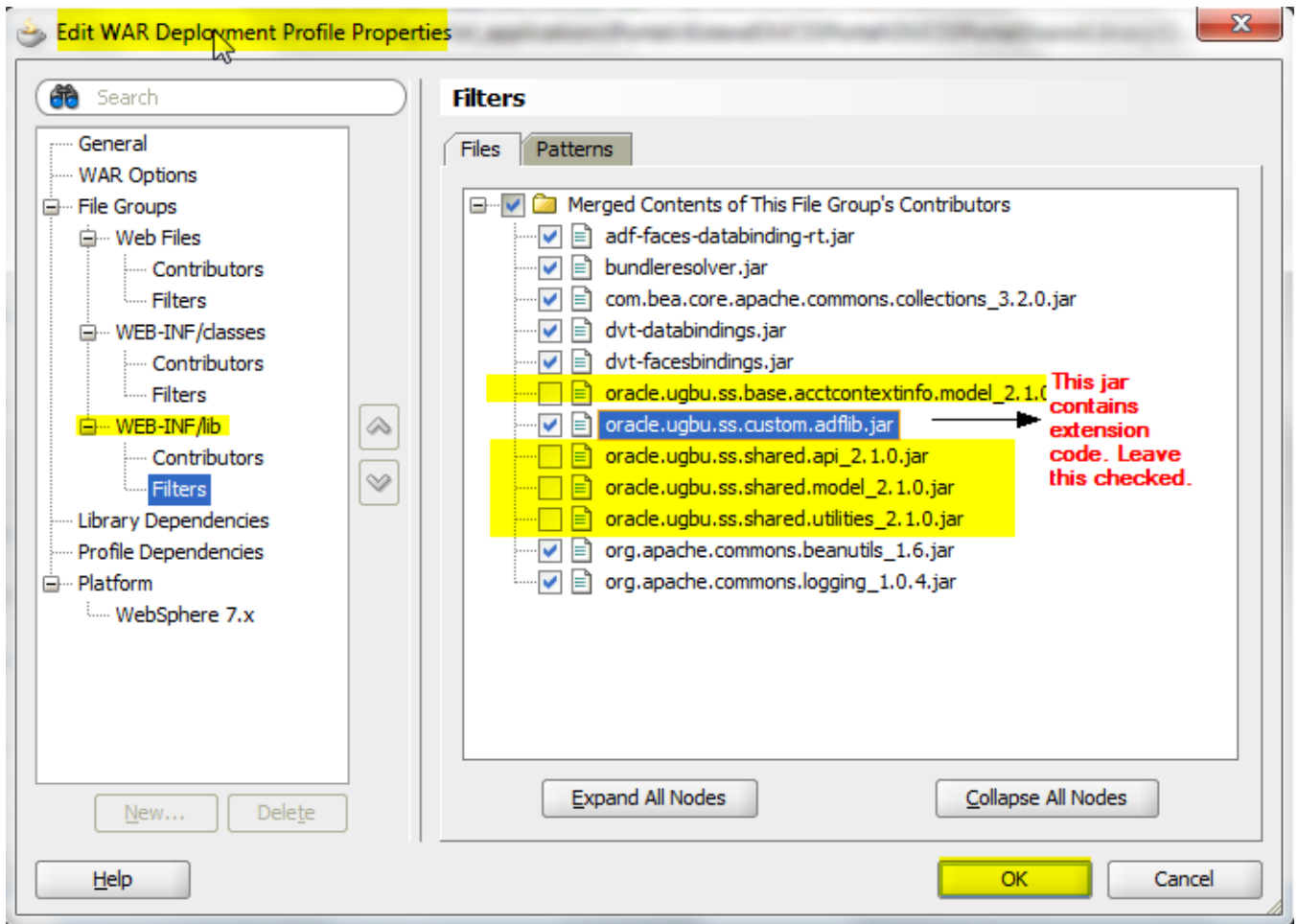
- 1 Modify the implementation version number in the MANIFEST.MF file in the **OUCSSPortalExtension** shared library (<<Application_Home>>/src/META-INF/MANIFEST.MF) before redeploying.

Note: The default implementation version number is 11.1.1.7.0. You can increment the major or minor version for every new revision deployed. For the purposes of this demo, the new implementation version number will be incremented to 11.1.1.7.1.

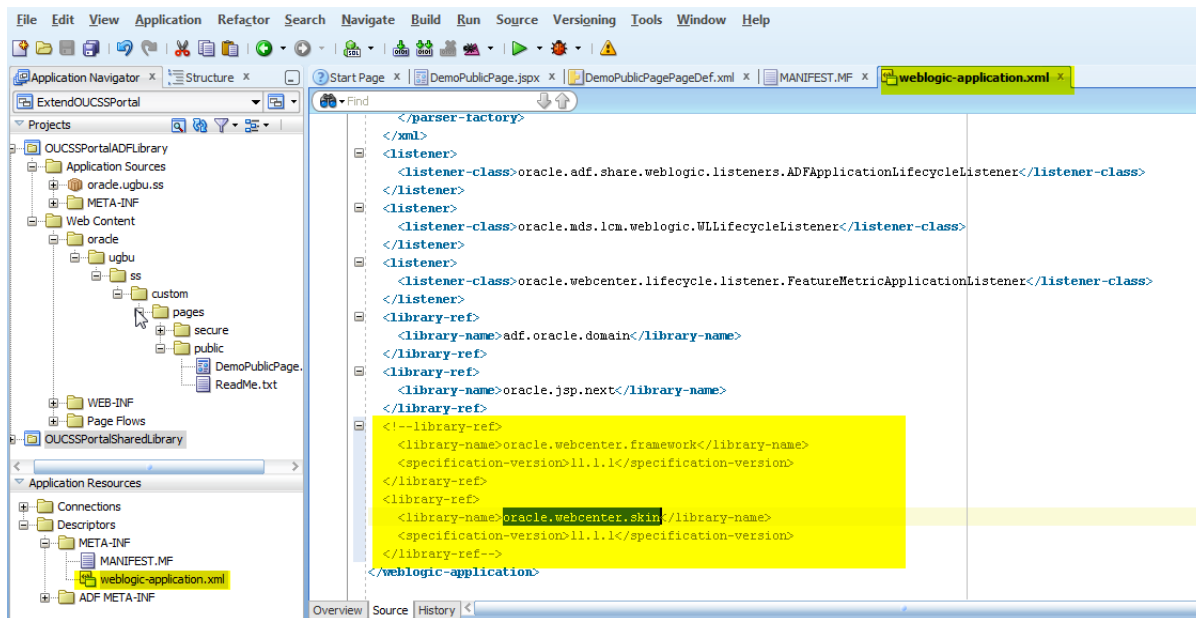


- 2 Edit the OUCSSPortalSharedLibrary deployment profile and uncheck references to jars from the OUCSS Shared library, as shown in the following image. Depending on the customization, uncheck all jars named “oracle.ugbu.ss.*.jar” except “oracle.ugbu.ss.custom.adflib.jar”.

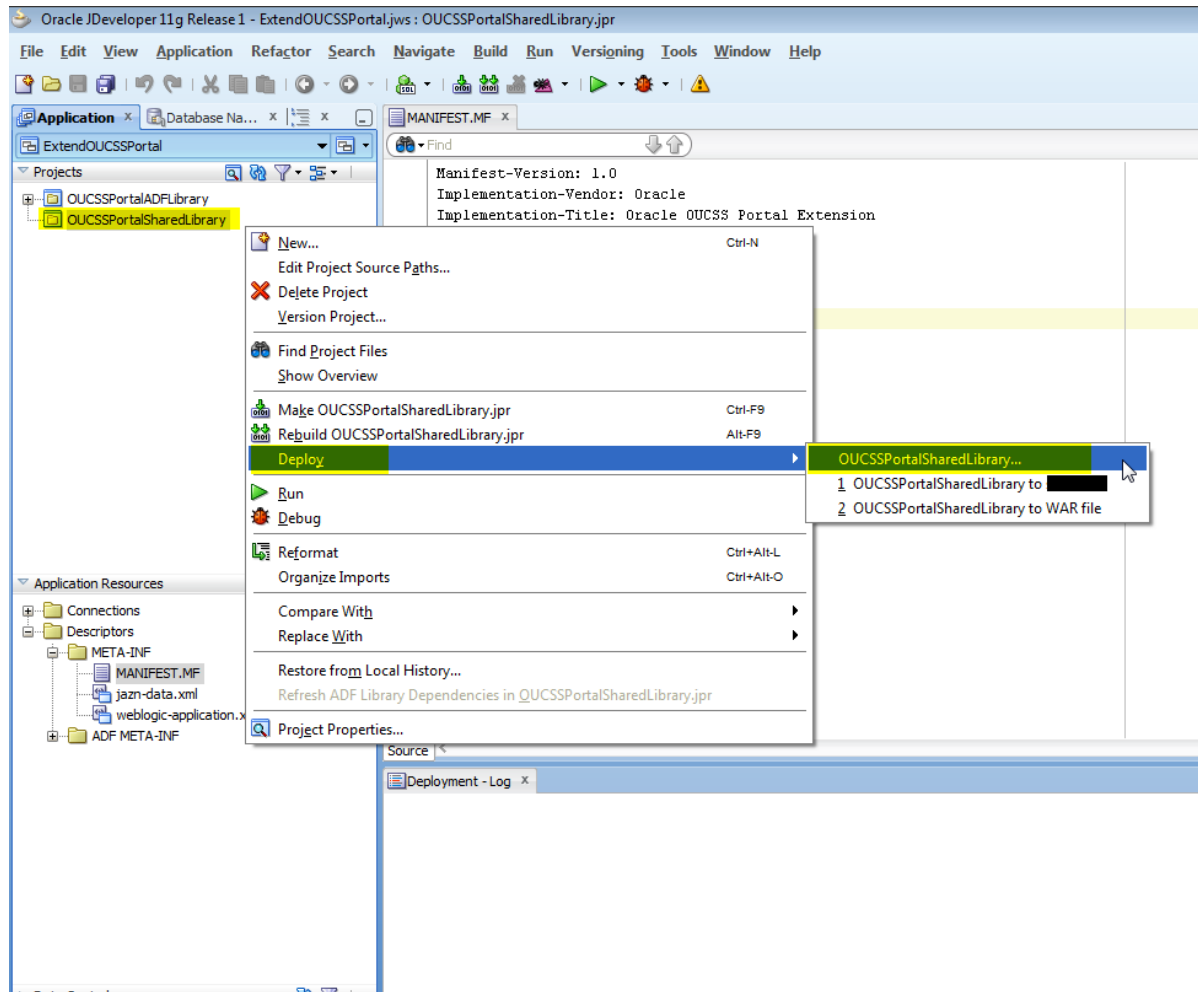
Note: It is important to remove any references to OUCSS jars from extension library. If not removed, then additional copies of these jars will be loaded at runtime which will affect application of patch and upgrades and cause issues.



- 3 Make weblogic-application.xml and make sure that library-name oracle.webcenter.framework and oracle.webcenter.skin are commented and not active. Remove if these entries gets added by JDev.



- 4 Deploy the OUCSS Portal Extension Shared Library to consume the taskflow in the portal. To deploy, right-click on the **OUCSSPortalSharedLibrary** project and select the **OUCSSPortalSharedLibrary** deployment profile to redeploy the extension to the same managed server as the OUCSS Portal application.



- 5 Check **Deployments** in the WebLogic Console to verify that the deployment was successful.

	extend.oucss.portal(11.1.1.1,11.1.1.7.0)	Active	Library	512
	extend.oucss.portal(11.1.1.1,11.1.1.7.1)	Active	Library	100

- 6 The custom managed server must be restarted for the newly-created taskflows and pages to be consumed in the OUCSS Portal.

Appendix A

Portal Labels

Portal labels and their descriptions are mentioned in the table below.

LABEL	DESCRIPTION
APP_TITLE	Application Title
DASHBOARD_TITLE	Dashboard Title
ACCOUNTS_TITLE	Accounts Title
ACCOUNT_LIST_TITLE	Accounts List Title
BILLING_HISTORY_TITLE	Billing History Title
FINANCIAL_HISTORY_TITLE	Financial History Title
BUDGET_BILLING_TITLE	Budget Billing Title
VIEW_BILL_TITLE	View Bill Title
HOME_TITLE	Home Title
COMPARE_RATES_TITLE	Compare Rates Title
USAGE_DETAILS_TITLE	Usage Details Title
PERSONAL_INFO_TITLE	Personal Info Title
OUTAGE_DETAIL_TITLE	Outage Detail Title
REPORT_OUTAGE_TITLE	Report Outage Title
SERVICE_MGMT_TITLE	Service Management Title
START_SERVICE_TITLE	Start Service Title
STOP_SERVICE_TITLE	Stop Service Title

TRANSFER_SERVICE_TITLE	Transfer Service Title
OUTAGES_TITLE	Outage Title
OUTAGE_MAP_TITLE	Outage Map Title
OUTAGE_TABLE_TITLE	Outage Table Title
REPORT_PUBLIC_OUTAGE_TITLE	Report Public Outage Title
NEW_CUSTOMER_TITLE	New Customer Title
SCALAR_READ_TITLE	Scalar Read Title
CHANGE_PASSWORD_TITLE	Change Password Title
CHANGE_USER_INFO_TITLE	Change User Info Title
MANAGE_ADDRESS_TITLE	Manage Address Title
MANAGE_PHONE_TITLE	Manage Phone Title
MANAGE_EBILL_TITLE	Manage EBill Title
MANAGE_AUTOPAY_TITLE	Manage Autopay Title
MANAGE_BILLNOTIFY_TITLE	Manage Bill Notify Title
ONETIME_PAY_TITLE	One-time Payment Title
PAY_ARRANGEMENT_TITLE	Pay Arrangement Title
PASSWORD_RESET_TITLE	Password Reset Title
REGISTER_TITLE	Register Title
EDUCATION_TITLE	Education Title
ENVIRONMENT_TITLE	Environment Title
EDU_SERVICE_TITLE	Service Title
EDU_SAFETY_TITLE	Safety Title
EDU_CONSERVATION_TITLE	Conservation Title
ABOUT_TITLE	About Title
ABOUT_ORACLE_TITLE	About Oracle Title
ABOUT_UGBU_TITLE	About UGBU Title
ABOUT_OUCSS_TITLE	About OUCSS Title
HOME_BANNER_DESC	Home Banner
HOME_SECTION_DESC	Home Section Links
LOGIN_TITLE	Login Title
USER_PROFILE_TITLE	User Profile Title
WEBCENTER_RC_ITEMS	WebCenter Items
ENROLL_WRAPPER	Enroll Wrapper
ENROLL	Enroll

ADMIN_USER_TITLE	Admin User Title
ADMIN_LABEL_TITLE	Label Title
ADMIN_LOOKUP_TITLE	Lookup Title
ADMIN_SECURITY_TITLE	Security Title
ADMIN_MESSAGE_TITLE	Message Title
ADMIN_TRAIN_TITLE	Train Title
ADMIN_RESOURCE_TITLE	Resource Title
ADMIN_ACCESS_TITLE	Access Title
ADMIN_EDGEAPP_TITLE	Edge Application Title
ADMIN_TITLE	Admin Title
ADMIN_SYSTEM_TITLE	Admin Configuration Options
ADMIN_LOB_TITLE	Line of Business Title
ADMIN_PORTLET_TITLE	Portlets Title
ADMIN_LANGUAGE_TITLE	Language Title
ADMIN_OFFERS_TITLE	Offers Title
OUCSS_ADMIN_TASKFLOWS	OUCSS Admin Taskflows
VIEW_ACCOUNT_TITLE	View Account Title
DETAILS_MENU	Details Menu Title
BANNER_PROMOTION_TITLE	Promotional Banner Title
ACCOUNT_SUMMARY_TITLE	Account Summary Title
OUCSS_BASE_TASKFLOWS	OUCSS Base Taskflows Title
BASE_RC_TITLE	Base Title
BILLING_AND_PAYMENT_RC_TITLE	Billing and Payment Title
BILLING_AND_PAYMENT_RC_DESC	OUCSS Billing and Payment Taskflows Title
CUSTOMER_SERVICE_RC_TITLE	Customer Service Management Title
TASKFLOWS_RELATED_TO_OUCSS_SER	Taskflows related to OUCSS Service Management
ADMIN_RC_TITLE	Admin Title
ADMIN_RC_DESC	Taskflows related to OUCSS Administration.
OFFERS_RC_TITLE	Offers Title
OFFERS_RC_DESC	Taskflows related to OUCSS Offers
BASE_RC_DESC	Taskflows related to OUCSS Base/Core functionality
OUCSS_TASKFLOWS_TITLE	OUCSS Taskflows Title
OUCSS_TASKFLOWS_RC_TITLE	OUCSS Taskflows Title
OUCSS_COMM_TASKFLOWS_RC_TITLE	OUCSS Commercial Taskflows Title

ERR_UNAUTH_TITLE	Un-Authorized Title
ERR_UNAUTH_ERROR_DESC	User Un-Authorized Error Description
ERR_PAGENOTFOUND_TITLE	Page Not Found Error Title
ERR_PAGENOTFOUND_DESC	Page Not Found Error Description
ERR_TITLE	Error Title
ERR_DESC	Description for Unknown Exception
GOTO_HOME_LINK	Go to Home Link
LOGIN_TASKFLOW_RC_TITLE	Login Taskflow Title
LOGIN_TASKFLOW_RC_DESC	Description for Login Taskflow with Context enabled
USAGE_COMPARE_TITLE	Usage Compare Title
USAGE_AGGREGATE_TITLE	Usage Aggregate Title
COMMERCIAL_BCONTEXT_TITLE	Commercial Business Context Title
SET_ACCOUNTS_TITLE	Set Accounts Title
SET_MANAGEMENT_TF_TITLE	Set Management Title
CREATE_SET_TITLE	Create Set Title
NOTIFICATIONS	Notifications Title
NOTIFICATION_LIST	Notification Inbox Title
NOTIFICATION_CHANNELS	Notification Profile Title
NOTIFICATION_PREFERENCES	Notification Preferences Title
CUSTOMER_SEARCH_TITLE	Customer Search Title
ACCOUNT_SEARCH	Account Search Title
NAME_AND_ADDRESS_SEARCH	Name and Address Search
SEARCH_RESULTS_GRID	Search Results
ENTER_FORM	Enter Form
FORMS_MANAGEMENT	Forms Management Title
LOG_AN_ISSUE	Log an Issue Description
FORM_LIST	Form List Title
UPDATE_FORM	Update Form Title
SCALAR_USAGE_DETAILS	Scalar Usage Details Description
ACCOUNT_DOCUMENTS_TITLE	Account Documents Title
PREPAID_BALANCE_AND_CHARGES	Prepaid Balance And Charges Title
PREPAID_ESTIMATES_AND_COST	Prepaid Estimates And Cost Title
SERVICE_CHARGES_TITLE	Service Charge To Date Title
USAGE_OVERVIEW_TITLE	Usage Overview Title

CONSUMPTION_SUMMARY_TITLE	Consumption Summary Title
ALERTS_TITLE	Alerts Title
OLD_SUPPORTED_PORTLETS	Old (Supported) Portlets Title
MULTIACCOUNT	Multi-Account Title