Oracle® Universal Content Management

Content Portlet Suite Installation Guide

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Preface

The Oracle Content Portlet Suite (CPS) Installation Guide covers general information, hardware and software requirements, installation procedures, and technical tips. In addition, this guide also provides a tutorial on using the CPS portlets.

Audience

This guide is intended for application developers and integrators who want to access the content server through the Content Portlet Suite deployed on your portal server instance.

Related Documents

For more information, see the following documents:

- Oracle Content Portlet Suite (CPS) Developer Guide
- Oracle Content Portlet Suite (CPS) Release Notes
- Oracle Content Integration Suite (CIS) Administration Guide
- Oracle Content Integration Suite (CIS) Developer Guide
- Oracle Content Integration Suite (CIS) Release Notes

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.

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1 General Information

This chapter provides general information on Oracle Content Portlet Suite (CPS) including an overview of the portlets, a list of supported servers and versions, a description of portlet request-handling, and notes on internationalization (cross-locale implementations). It covers the following topics:

- "About Content Portlet Suite" on page 1-1
- "Supported Servers and Versions" on page 1-1
- "Recommended Access Settings" on page 1-2
- "Internationalization" on page 1-2

1.1 About Content Portlet Suite

Oracle Content Portlet Suite (CPS) enables you to manage content creation and the distribution process through a set of easy-to-use portlets. By providing access to Oracle Content Server, CPS enables users to update, search, and view content in an easy, efficient way. These are the available portlets for this release:

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

1.2 Supported Servers and Versions

This version of Content Portlet Suite (CPS) provides Web Services for Remote Portlets (WSRP) support. CPS is deployed as a WSRP producer and can be consumed from

other WSRP enabled consumers (portals). These are the supported WSRP producers and consumers for CPS:

Supported WSRP Producers

- Oracle WebCenter 11*g*
- Oracle Application Server 10.1.3.4 (preconfigured with WebCenter 10.1.3.4)
- Oracle WebLogic Portal 10.3 (preconfigured with Oracle WebLogic Server 10.3).

Supported WSRP Consumers

- Oracle WebCenter Spaces
- Oracle WebCenter 10.1.3.4
- Oracle WebCenter Interaction 10.3
- Oracle WebLogic Portal 10.3

1.3 Recommended Access Settings

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

Authenticated Users

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

- Guest Library: **edit**
- Guest Search: **edit**
- Saved Search: **edit**
- Metadata Admin: **view**
- Contribution: **edit**
- Workflow Queue: **view**
- Library: **edit**
- Search: **edit**

Anonymous Users

These security settings are recommended for anonymous users:

- Guest Library: **view**
- Guest Search: **view**

1.4 Internationalization

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

2

Deploying CPS as a WSRP Producer

This chapter provides information required for the deployment of Content Portlet Suite (CPS) as a WSRP producer. Once CPS is deployed, the portlets can be consumed from other WSRP enabled portal servers. These servers are available as WSRP producers:

- "Oracle WebCenter 11g" on page 2-1
- "Oracle Application Server with WebCenter 10g" on page 2-4
- "Oracle WebLogic Portal 10g" on page 2-5
- "Configure Oracle Content Server for CPS" on page 2-8

Important: User IDs on the content server must correspond with user IDs on your portal server.

2.1 Oracle WebCenter 11*g*

This section provides information required for the deployment of Content Portlet Suite (CPS) as a WSRP producer on Oracle WebCenter 11*g*. It covers the following topics:

- "Installation Requirements" on page 2-1
- "Supported WSRP Consumers" on page 2-1
- "Pre-Installation Tasks" on page 2-2
- "Deploying the EAR file" on page 2-2
- "Consuming the Portlets on WebCenter Spaces" on page 2-3
- "Post-Installation Tasks" on page 2-3

2.1.1 Installation Requirements

These servers and components are required for installation:

- Oracle Content Server 10*g*R3
- Oracle Content Portlet Suite (CPS) distribution file

A supported version of Oracle WebCenter 11*g* as *producer* is required:

- Oracle WebCenter 11*g*

2.1.2 Supported WSRP Consumers

These WSRP consumers are supported with Oracle WebCenter 11*g* as producer:

- WebCenter Spaces

2.1.3 Pre-Installation Tasks

The following must be completed before deploying CPS portlets:

- Uncompress the CPS distribution file (specific for WebCenter) and save it to a location on your local machine.
- In the uncompressed CPS distribution file, locate the /config directory. This directory contains the *adapterconfig.xml* and *cps-initialization.properties* files. If the content server instance is running on a different machine or on a non-default port, edit the *adapterconfig.xml* file and make changes to host and port properties to point to the content server.
- Create a JAR file named *cps-config.jar* containing the *adapterconfig.xml* and *cps-initialization.properties* files. This JAR file will be required in the deployment steps. This is a required step.

2.1.4 Deploying the EAR file

This section describes how to configure WebCenter as a producer using Web Services Remote Portlets (WSRP) for CPS.

Deploy the EAR File

1. Extract the WebCenter specific CPS zip file to your local directory.
2. Log in to the WebLogic Server Admin console of your WebCenter 11*g* instance. For example: http://<hostname>:<port>/console/
3. Click **Lock and Edit**.
4. In the *Domain Structure* section, click **Deployments**.
5. In the *Summary of Deployments* section, select the **Control Tab** and click **Install**.
6. In the *Install Application Assistant* section, click the **Upload your file(s)** link.
7. In the *Deployment Archive* section, click the **Browse** button.
8. Navigate to the /portlets directory of the extracted zip file on your local machine and select the StellentPortlets.ear file.
9. Click **Next**.
10. When upload is complete, the CPS EAR file will be displayed in the list of available files. Enable the option button corresponding to the CPS EAR file.
11. Click **Next**.
12. Select the **Install this deployment as an application** option.
13. Click **Next**.
14. Select the server on which you want to deploy the application.
15. Click **Finish** to deploy the application.
16. Access the WSDL URL.

    For example:

    ```
    http://<hostserver>:<hostport>/CPS/portlets/wsrp1?WSDL
    ```

Register your WSDL

1. From a command-line, launch the WebLogic Scripting Tool

   For example:

   ```
   <BEA-HOME>/as11r1wc/common/bin/wlst.sh
   ```

   Note: The WebLogic Scripting Tool (WLST) is a command-line scripting environment that you can use to create, manage, and monitor WebLogic Server domains. Refer to the WebLogic documentation *Using the WebLogic Scripting Tool* for more information

2. After the WebLogic Scripting Tool (WLST) initializes, type *connect()* and press **Enter**.
3. You will be prompted to enter the username, password and Admin server URL. Enter these values and press **Enter**.
4. Once connected to the server, run the following command to register your WSDL

   ```
   registerWSRPProducer('webcenter','<Provide any name for the wsdl
   handle>','<your wsdl>',timeout=500)
   ```

   For example:

   ```
   registerWSRPProducer('webcenter','StellentWSRP','http://<hostname>:<port>/cps/p
   ortlets/wsrp1?WSDL',timeout=500)
   ```

5. Copy the cps-config.jar file, created in the pre-installation steps, to:

   ```
   <BEA_HOME>/user_projects/domains/<your domain>/servers/<your server name>/_WL_
   user/StellentPortlets/<dir>/war/WEB-INF/lib
   ```

6. Restart the server on which StellentPortlets.ear is deployed.

2.1.5 Consuming the Portlets on WebCenter Spaces

1. Login to Webcenter Spaces at:

   ```
   http://<hostname>:<port>/webcenter/spaces/
   ```

2. Create a new page. Select **Page Actions** then **Edit Page** and then click **Add Content**.
3. A new dialog displays. Click on **Portlets** and then select the WSRP Producer that you registered.
4. Select the portlets you want to include.

2.1.6 Post-Installation Tasks

You must configure content server to communicate with CPS by enabling the IP address of the portal server. You must also install and enable the CIS_Helper component on the content server. See "Configure Oracle Content Server for CPS" on page 2-8 for instructions.

2.2 Oracle Application Server with WebCenter 10*g*

This section provides information required for the deployment of Content Portlet Suite (CPS) as a WSRP producer on Oracle Application Server preconfigured with Oracle WebCenter. It covers the following topics:

- "Installation Requirements" on page 2-4
- "Supported WSRP Consumers" on page 2-4
- "Pre-Installation Tasks" on page 2-4
- "Deploying CPS Portlets" on page 2-4
- "Post-Installation Tasks" on page 2-5

2.2.1 Installation Requirements

These servers and components are required for installation:

- Oracle Content Server 10*g*R3
- Oracle Content Portlet Suite (CPS) distribution file

A supported version of Oracle Application Server as *producer* is required:

- Oracle Application Server 10.1.3.4 (preconfigured with Oracle WebCenter 10.1.3.4)

2.2.2 Supported WSRP Consumers

These WSRP consumers are supported with Oracle Application Server with WebCenter 10*g* as producer:

- Oracle Application Server with WebCenter 10.1.3.4
- Oracle WebCenter Interaction 10.3
- Oracle WebLogic Portal 10.3

2.2.3 Pre-Installation Tasks

The following must be completed before deploying CPS portlets:

- Uncompress the CPS distribution file and save it to a location on your local server.
- Start Oracle Application Server (OC4J).

2.2.4 Deploying CPS Portlets

This section describes how to configure Oracle Application Server with WebCenter 10*g* as a producer using Web Services Remote Portlets (WSRP) for CPS.

Deploy the EAR File

1. Launch the Oracle Application Server Control.
2. Select the **Applications** tab.
3. Click **Deploy**.
4. Browse to the portlets directory of the uncompressed CPS distribution file and select the Portlets EAR file.
5. Enable the **Automatically create a new deployment plan** option.
6. Click **Next**.

7. Provide an application name (for example, CPS Remote Portlets) and context root (for example, /cps).
8. Click **Next**.
9. For the *Configure Class Loading* step, click the **Go To Task** icon.
10. De-select the **Import** option for the *apache.commons.logging* library.
11. Click **OK**.
12. Click **Edit Deployment Plan**.
13. Select the **Edit OC4J Descriptor** tab.
14. Click the **Edit Imported Libraries** link.
15. In the table footer, click **Add Another Row**. This adds a new row at the bottom of the table.
16. Click **Edit Remove link**.
17. Enter *oracle.ifs.client* for the value.
18. Click **Continue**.
19. Click **Continue**.
20. Click **OK**.
21. Click **Deploy**.

Edit Host and Port Properties

1. In the uncompressed CPS distribution file, locate the /config directory. This directory contains the cps-initialization.properties and adapterconfig.xml configuration files.
2. If your content server instance is running on a different computer, you must edit the adapterconfig.xml file. Change the host property value to reference the IP address or host name of your content server instance. Edit the port property value if your content server is running on a port other than the default port of 4444.

   For example:

   ```
   <property name="host">testserver</property>
   <property name="port">1433</property>
   ```

3. Copy cps-initialization.properties and adapterconfig.xml to the OC4J's /WEB-INF/lib directory of your CPS application.
4. Restart Oracle Application Server (OC4J).

2.2.5 Post-Installation Tasks

You must configure content server to communicate with CPS by enabling the IP address of the portal server. You must also install and enable the CIS_Helper component on the content server. See "Configure Oracle Content Server for CPS" on page 2-8 for instructions.

2.3 Oracle WebLogic Portal 10*g*

This section provides information required for the deployment of Content Portlet Suite (CPS) as a WSRP producer on Oracle WebLogic Portal. It covers the following topics:

- "Installation Requirements" on page 2-6
- "Supported WSRP Consumers" on page 2-6
- "Pre-Installation Tasks" on page 2-6
- "Deploying CPS Portlets" on page 2-7
- "Post-Installation Tasks" on page 2-8

2.3.1 Installation Requirements

These servers and components are required for installation:

- Oracle Content Server 10*g*R3
- Oracle Content Portlet Suite (CPS) distribution file

A supported version of Oracle WebLogic Portal as *producer* is required:

- Oracle WebLogic Portal 10.3 (preconfigured with Oracle WebLogic Server 10.3).

2.3.2 Supported WSRP Consumers

These WSRP consumers are supported with Oracle WebLogic Portal as producer:

- Oracle WebCenter Interaction 10.3
- Oracle WebLogic Portal 10.3

2.3.3 Pre-Installation Tasks

The following must be completed before deploying CPS portlets:

- Uncompress the CPS distribution file and save it to a location on your local server.
- Edit host and port properties:
  1. In the uncompressed CPS distribution file, locate the /config directory. This directory contains the *cps-initialization.properties* and *adapterconfig.xml* configuration files.
  2. If your content server instance is running on a different computer, you must edit the adapterconfig.xml file. Change the host property value to reference the IP address or host name of your content server instance. Edit the port property value if your content server is running on a port other than the default port of 4444.

     For example:

     ```
     <property name="host">testserver</property>
     <property name="port">1433</property>
     ```

  3. Create a JAR file named *cps-config.jar* containing the *adapterconfig.xml* and *cps-initialization.properties* files.
  4. Copy the *cps-config.jar* file to the /portlets/WEB-INF/lib directory of the uncompressed CPS distribution file. This step is required even if you do not modify the *adapterconfig.xml* file.
- Create a new WebLogic domain (for example, cps_domain) or use an existing domain. This domain must be configured to support WebLogic Server, Workshop for WebLogic, and WebLogic Portal.
- Start WebLogic Server.

2.3.4 Deploying CPS Portlets

This section describes how to configure WebLogic Portal as a producer using Web Services Remote Portlets (WSRP) for CPS.

Create a New Portal Web Project

1. Launch Workshop for WebLogic 10*g*R3.
2. Select **File** then **New** and then **Project**.
3. On the New Project dialog, expand the WebLogic Portal node.
4. Select **Portal Web Project**.
5. Click **Next**.

   The New Portal Web Project wizard displays.
6. On the *Create a New Oracle WebLogic Portal Web Project* step, enter a project name (for example, CPS).
7. Click **Finish**.
8. If the Open Associated Perspective dialog displays, click **Yes**.

Create a New Portal EAR Project

1. In Workshop for WebLogic, select **File** then **New** and then **Project**.
2. On the New Project dialog, expand the WebLogic Portal node.
3. Click **Portal EAR Project**.
4. Click **Next**.

   The New Portal EAR Project wizard displays.
5. On the *Create a New Oracle WebLogic Portal EAR Project* step, enter a project name (for example, CPS-EAR).
6. Click **Next**.
7. On the *Project Facets* step, select **WebLogic Portal EAR Project Facets** from the drop-down list.
8. Click **Next**.
9. On the *J2EE Modules to Add to the EAR* step, select the portal web project you created (for example, CPS).
10. Click **Finish**.
11. If the Open Associated Perspective dialog displays, click **Yes**.

Import the CPS Portlets

1. In Workshop for WebLogic, select Project Explorer view.
2. Expand the new Portal Web Project node (for example, CPS).
3. Right-click the WebContent node, and select **Import**.

   The Import wizard displays.
4. On the *Select an Import Source* step, expand the General node.
5. Select **File System**.
6. Click **Next**.

7. On the *File System* step, click the **Browse** associated with the *From Directory* field.
8. Navigate to the /portlets directory of the uncompressed CPS distribution file and click **OK**.
9. On the *Import Resources from Local File System* step, enable the **portlets** option.
10. Click **Finish**.
11. If prompted to overwrite Manifest.MF file, click **Yes**.
12. After the Portlets folder is imported, you might notice several errors in the web project. Error files are shown with a red cross prefixed with the file in Project Explorer view. Select the files showing errors and delete them.

Publish the EAR File

1. In Workshop for WebLogic, select Servers view.
2. Right-click in Servers view, click **New** then **Server**.

   The New Server wizard displays.
3. On the *Choose Type of Server to Create* step, accept the default settings and click **Next**.
4. On the *Specify a WebLogic Domain Directory* step, click **Browse**.
5. Navigate to the new CPS domain directory and click **OK**.

   For example:

   ```
   C:/oracle_weblogic/user_projects/domains/cps_domain
   ```
6. Click **Next**.
7. On the *Add and Remove Projects* step, select the CPS EAR file from the Available Projects section and click **Add** to add it to Configured Projects.
8. Click **Finish**.
9. In Servers view, right-click on the new server and select **Publish** to start the server and publish the EAR file.

The WSRP enabled CPS Portlets are available via the WSDL URL

For example:

```
http://<hostserver>:<hostport>/CPS/producer?wsdl
```

2.3.5 Post-Installation Tasks

You must configure content server to communicate with CPS by enabling the IP address of the portal server. You must also install and enable the CIS_Helper component on the content server. See "Configure Oracle Content Server for CPS" on page 2-8 for instructions.

2.4 Configure Oracle Content Server for CPS

You must configure content server to communicate with CPS by enabling the IP address of the portal server. You must also install and enable the CIS_Helper component on the content server.

This section contains the following topics:

- "Enabling the IP Address on Content Server" on page 2-9
- "Enabling the CIS_Helper Component on Content Server" on page 2-9

2.4.1 Enabling the IP Address on Content Server

You must enable the IP address of the application server. This enables the content server to listen for connections from the application server.

1. Launch the System Properties editor.

   Select **Content Server**, then ***instance name***, then **Utilities**, and then **System Properties**.

2. Open the **Server** tab.

3. Enter your application server specific information for the Hostname Filter and IP Address Filter.

   The wildcard (*) is accepted, but IP addresses must take the form x.x.x.x regardless of wildcards, and must be separated by a vertical bar.

   Example: 12.34.56.* | 12.34.57.* | 12.35.*.*

4. You must restart the content server for these changes to take effect.

2.4.2 Enabling the CIS_Helper Component on Content Server

You must install and enable the CIS_Helper component on the content server. The CIS_Helper.zip file is located in the */components* directory of the unbundled CPS distribution file. You can install and enable the component by using either Component Manager or Component Wizard.

Installing the CIS Helper Component Using Component Manager

1. Log onto the content server as an administrator. and click **Administration** and then **Admin Server**.

2. Click the button that corresponds with your server.

   The options and status page of the content server instance is displayed.

3. Click **Component Manager** in the menu on the left.

   The Component Manager page appears.

4. Click **Browse** opposite the Install New Component field.

   A file selection dialog box opens.

5. Select the CIS_Helper.zip file and close the dialog box.

6. Click **Install**.

   A page appears, confirming what will be installed.

7. Click **Continue**.

   After this process is completed, a message appears, stating that the component was uploaded and installed successfully.

8. Click **Continue**.

9. Enable the component and restart the content server.

Installing the CIS Helper Component Using Component Wizard

1. Launch the Component Wizard.

   Select **Start**, then **Programs**, then **Content Server**, then ***instance name***, then **Utilities**, and then **Component Wizard**. The Component Wizard is started, with the Component List dialog box active.

2. Click **Install**.

   The Install dialog box appears.

3. Click **Select**.

   A file selection dialog box appears.

4. Select the CIS_Helper.zip file and close the dialog box.

   The Install dialog box now displays all the files that will be installed.

5. Click **OK**.

   Once the required files are now installed, a message appears, asking whether the specified components should be enabled.

6. Click **Yes**.

   The CIS Helper component is loaded and enabled. The main Component Wizard window now shows a list of the component resources.

7. Close Component Wizard and restart the content server.

3

Consuming CPS Portlets

This chapter provides information required for consuming Content Portlet Suite (CPS) portlets. These servers are available as WSRP consumers for CPS portlets:

- "Oracle WebCenter 10" on page 3-1
- "Oracle WebCenter Interaction" on page 3-3
- "Oracle WebLogic Portal" on page 3-4

Important: User IDs on the content server must correspond with user IDs on your portal server.

Note: For information on consuming CPS portlets on WebCenter Spaces, see "Oracle WebCenter 11g" on page 2-1.

3.1 Oracle WebCenter 10

This section provides information for consuming CPS portlets on Oracle WebCenter 10. It covers the following topics:

- "Installation Requirements" on page 3-1
- "Supported WSRP Producers" on page 3-1
- "CPS Consumption Steps" on page 3-2

3.1.1 Installation Requirements

These servers and components are required for installation:

- Oracle WebCenter 10.1.3.4
- Oracle Content Server 10*g*R3
- Deployed CPS as a WSRP Producer

3.1.2 Supported WSRP Producers

This WSRP producer is supported with Oracle WebCenter10 as consumer:

- Oracle Application Server 10.1.3.4 (preconfigured with WebCenter 10.1.3.4)

3.1.3 CPS Consumption Steps

This section describes how to consume CPS portlets on Oracle WebCenter 10.

1. In JDeveloper with WebCenter create a new WebCenter Application.
2. Create a sample.jspx page and ADF secure the page.
3. Select **Tools** and then **ADF Security Wizard**.
4. Click **Next**.
5. Select **Configure ADF Security for A Web Application** and click **Next**.
6. Enable the **Enforce Authorization** option and click **Next**.
7. Enable the **Light Weight XML** option and click **Next**.
8. Select the defaults setting in the XML repository setting and click **Next**.
9. Enable the **HTTP Basic Authentication** option and click **Next**.
10. In the last step, select the roles that are to have access to the application from the default list or add roles using Manage Roles. Select the roles and click **Next**.
11. Click **Finish**
12. Right-click the sample.jspx page and select **Go to page definition**.
13. On the Structure pane, right-click SamplePageDef and select **Edit Authorization**.
14. Grant all privileges to the Role/User which you will be using to login.
15. Click **OK**.
16. Right-click the View Controller project and click **New**.
17. On the New Gallery dialog, locate the Webtier category and click **Portlets**.
18. Select **WSRP Producer Registration**.
19. Click **OK**.
20. On the Register WSRP Portlet Producer wizard, click **Next**.
21. Enter a name for your WSRP portlet producer. and click **Next**.
22. Enter the WSDL link of the WSRP enabled CPS producer.

    For example:

    ```
    http://<hostserver>:<hostport>/<cps_context_root_name>/portlets/wsrp1?wsdl
    ```

23. Click **Next**.
24. On the remaining screens select the appropriate configuration for your instance or accept the default settings and click **Finish**. If the registration is successful, a Portlet Producers folder is created in the Applications Navigator section of for your application.
25. Open the sample.jspx page. Note that below the sample.jspx page you can find different modes like design, source and history. Select the design mode so that portlets can be dragged and dropped on the page.
26. In the Component Palette pane, select the WSRP portlet producer you registered from the drop-down list.
27. The available portlets are displayed. Drag the portlets to the sample.jspx page.

3.2 Oracle WebCenter Interaction

This section provides information for consuming CPS portlets on Oracle WebCenter Interaction. It covers the following topics:

- "Installation Requirements" on page 3-3
- "Supported WSRP Producers" on page 3-3
- "CPS Consumption Steps" on page 3-3

3.2.1 Installation Requirements

These servers and components are required for the installation:

- Oracle WebCenter Interaction 10.3
- WSRP Consumer component

  The WebCenter Interaction WSRP Consumer component must be installed to configure WebCenter Interaction as a WSRP consumer. Refer to your WebCenter Interaction installation guide for information on installing this component.
- Oracle Content Server 10*g*R3
- Deployed CPS as a WSRP Producer

3.2.2 Supported WSRP Producers

These WSRP producers are supported with Oracle WebCenter Interaction as consumer:

- Oracle Application Server 10.1.3.4 (preconfigured with WebCenter 10.1.3.4)
- Oracle WebLogic Portal 10.3 (preconfigured with Oracle WebLogic Server 10.3)

3.2.3 CPS Consumption Steps

This section describes how to consume CPS portlets on Oracle WebCenter Interaction.

1. Start WebCenter Interaction and login to the portal as an administrator.
2. Click **Administration**.
3. Click on the folder where you want to store the remote portlets.
4. From the Create Object drop-down list, select **Portlet**.
5. On the Choose Template or WebService dialog, enable the **WSRP consumer** option.

   The WSRP Consumer component must be installed for this option to display. See "Installation Requirements" on page 3-3 for more information.
6. Click **OK**.
7. On the Create Portlet dialog, enable the **Suppress Portlet Title Bar** option.
8. In the Configure this Portlet section, click **Edit**.
9. Enter the WSDL link of the WSRP enabled CPS producer.
10. Click **Import Service WSDL**.
11. Click **Next**.
12. Choose the CPS remote portlet and click **Finish**.

13. On the Create Portlet dialog, click **Finish**.
14. On the Save Object dialog, provide a name and description and then save the portlet object to the desired folder.
15. Repeat these steps to add the other CPS remote portlets.

3.3 Oracle WebLogic Portal

This section provides information for consuming CPS portlets on Oracle WebLogic Portal. It covers the following topics:

- "Installation Requirements" on page 3-4
- "Supported WSRP Producers" on page 3-4
- "CPS Consumption Steps" on page 3-4

3.3.1 Installation Requirements

These servers and components are required for the installation:

- Oracle WebLogic Portal 10.3
- Oracle Content Server 10*g*R3
- Deployed CPS as a WSRP Producer

3.3.2 Supported WSRP Producers

These WSRP producers are supported with WebLogic Portal as consumer:

- Oracle Application Server 10.1.3.4 (preconfigured with WebCenter 10.1.3.4)
- Oracle WebLogic Portal 10.3 (preconfigured with Oracle WebLogic Server 10.3)

3.3.3 CPS Consumption Steps

This section describes how to consume CPS portlets on WebLogic Portal.

1. In the Portal Web Project, select the WebContent node.
2. From the File menu, select **New** and then **Portlet**.
3. On the New Portlet wizard, select the directory where you want the portlet to be available and provide a name for the portlet.
4. Click **Next**.
5. On the *Select Portlet Type* step, enable the **Remote Portlets** option.
6. Click **Next**.
7. On the *Producer* step, enable the **Find Producer** option.
8. Enter the WSDL link of the WSRP enabled CPS producer.
9. Click **Retrieve**.
10. Click **Register** to register the producer.
11. On the registration dialog, provide a Producer Handle name and enable the **Store registration properties in local registry** option.
12. Click **OK**.

13. Click **Next**.
14. Select the CPS remote portlet from the list of available portlets and click **Next**.
15. Provide proxy portlet details and click **Create**. A new remote (proxy) portlet is created.
16. From the File menu select **Save All** to save the remote portlet.
17. Repeat these steps to add the other CPS remote portlets. If you enabled the option to store registration properties in the local registry you can add the WSDL link (step 8) by clicking **Producer** and selecting it from the *Registered Producer* drop-down list.

Follow these additional steps to deploy the CPS portlets to your existing portal instance:

1. Select your Portal EAR project and open the Portal Administration Console by selecting **Run** and then **Open Portal Administration Console**.
2. Login using your administration credentials.
3. In the left navigation pane, click **Portal Management**.
4. Within the resource tree, select **Portals**
5. Select the CPS remote portlets and add them to your existing portal.

4

CPS Portlet Functionality

This chapter provides information on the CPS portlets, including a short tutorial on using the CPS portlets, and instructions on how to customize the Library and Guest Library portlets. It covers the following topics:

- "Using the CPS Portlets" on page 4-1
- "Customizing the Portlets" on page 4-8

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

4.1 Using the CPS Portlets

This section provides a brief tutorial of each of the CPS portlets. It covers the following topics:

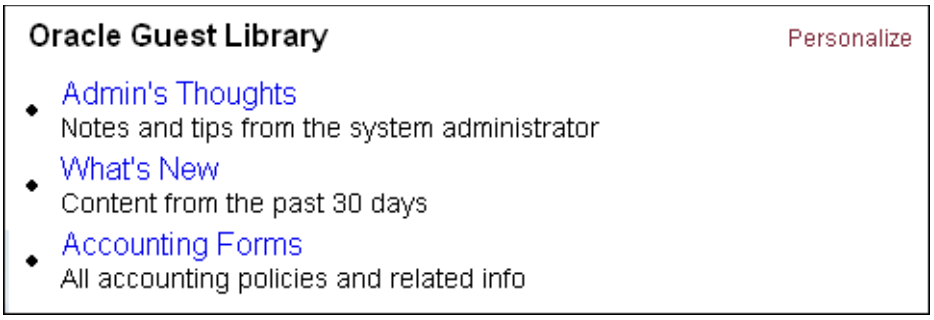
- "Guest Library Portlet" on page 4-1
- "Guest Search Portlet" on page 4-2
- "Saved Search Portlet" on page 4-3
- "Contribution Portlet" on page 4-4
- "Workflow Queue Portlet" on page 4-5
- "Library Portlet" on page 4-6
- "Search Portlet" on page 4-7
- "Metadata Admin Portlet" on page 4-8

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

4.1.1 Guest Library Portlet

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

Figure 4–1 Guest Library Portlet



Using the Guest Library Portlet

1. Click **Personalize**.

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

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

2. Modify the settings as desired and click **Save** when edits are complete.
3. Select a search query (for example, "What's New").

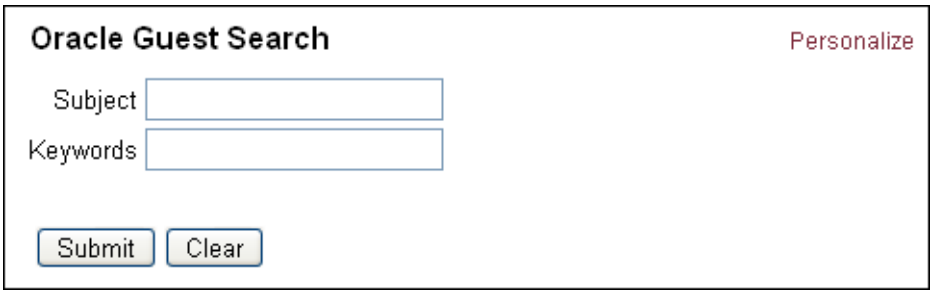
   The results are displayed in a list format.

4. Click **Back**.

4.1.2 Guest Search Portlet

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

Figure 4–2 Guest Search Portlet



Using the Guest Search Portlet

1. Click **Personalize**.

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

   - **Results Per Page**: Enter the number of results to display per page. Default is 20.

- **Sort By**: Select the field to sort by. Options are Date or Title.
- **Sort Order**: Select the sort order. Options are Ascending or Descending.

2. Modify the settings as desired and click **Save** when edits are complete.
3. Enter a subject or keyword and click **Search**.

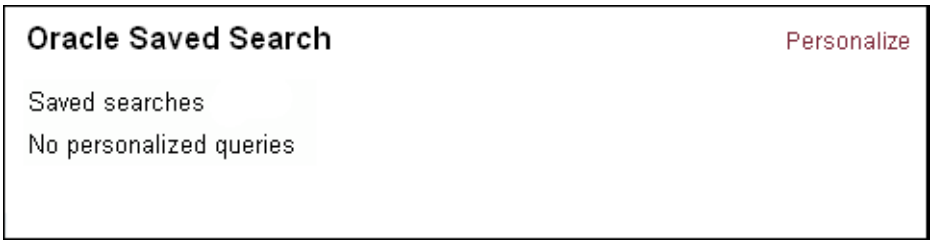
   There must be content checked into your content server that contains the specified subject or keyword for items to be retrieved.
4. On the search results screen, click **Save**.

   The save search query screen is displayed. This functionality saves a search to the saved searches list of the Saved Search portlet.
5. The keyword used to perform the search is displayed in the Keywords field. To save a search, enter a title for the query, the content item title, and click **Add New Query**.
6. Click **Back** to return to the search results page.

4.1.3 Saved Search Portlet

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

Figure 4–3 Saved Search Portlet



Using the Saved Search Portlet

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

1. Click **Personalize**.

   The search criteria page is displayed. On this page you can edit your standard search parameters, view or delete items from your saved search list, and create a new query.
2. Enter the information for the new query:
   - Query Title (for example, "Sales Images").
   - Query Description (for example, "Sales Department Images").
   - Query Text (for example, dDocTitle <substring> `salesimage`).

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

3. Click **Add New Query**.

Figure 4–4 Saved Search Portlet - Saved Query

1. Click the saved search title.

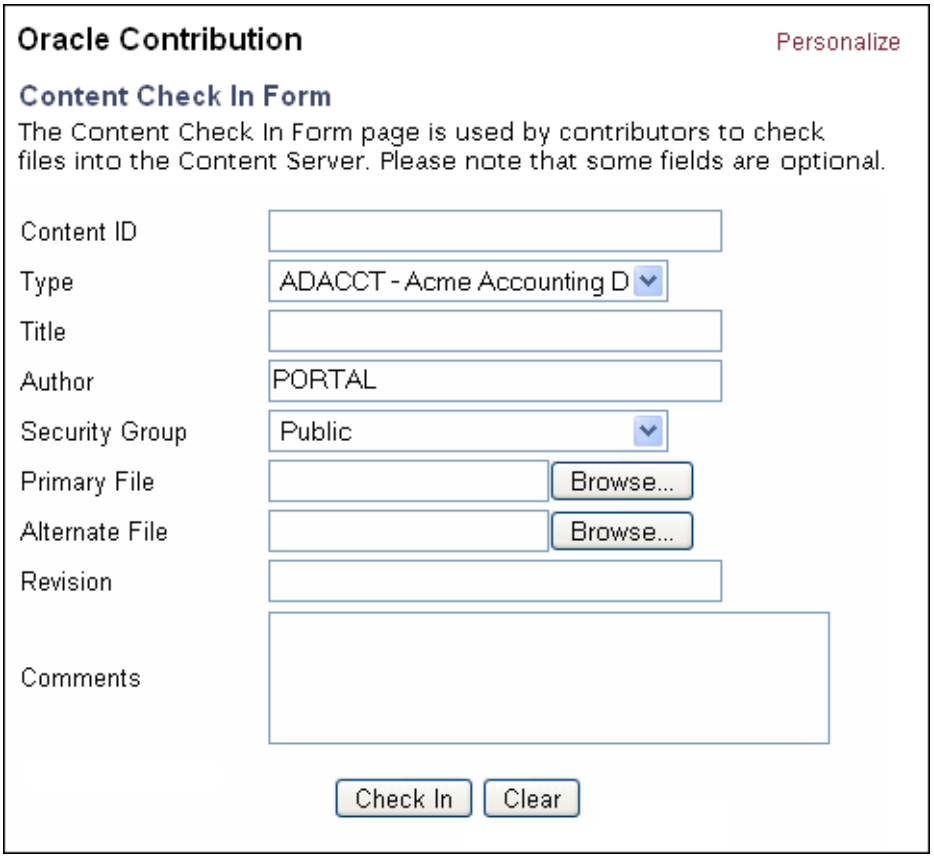
   The saved search results are displayed in a list format.

2. Click **Back**.

4.1.4 Contribution Portlet

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

Figure 4–5 Contribution Portlet



Using the Contribution Portlet

1. On the Contribution portlet, enter required metadata and any desired optional metadata.

   The Contribution portlet enables users to submit business content created in native applications for publishing and revision control. Metadata fields are defined by the content server administrator.

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

3. Click **Check In** to submit the content.

4.1.5 Workflow Queue Portlet

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

Figure 4–6 Workflow Queue Portlet

A workflow must be defined for this portlet to provide functionality. See the content server online documentation for instructions on defining a workflow.

This example assumes a criteria workflow with these properties:

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

And it assumes a workflow step with these properties:

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

Using the Workflow Queue Portlet

1. Locate the Workflow Queue portlet.

2. After creating a workflow, log in as a workflow reviewer (for example, user1) and check in a content item matching the specified criteria.

3. Review the workflow item.

   The Workflow Queue portlet provides this functionality:

   - **Title**: Lists the content item. Click to download file.
   - **Workflow Info**: Lists the active step. Click to view workflow step information.
   - **Last Action**: Lists the last action the user performed on the workflow.
   - **Action**: Users defined as reviewers can approve or reject content. Users defined as reviewer/contributor can approve, reject, or contribute content.
   - **Info**: Provides content item information.

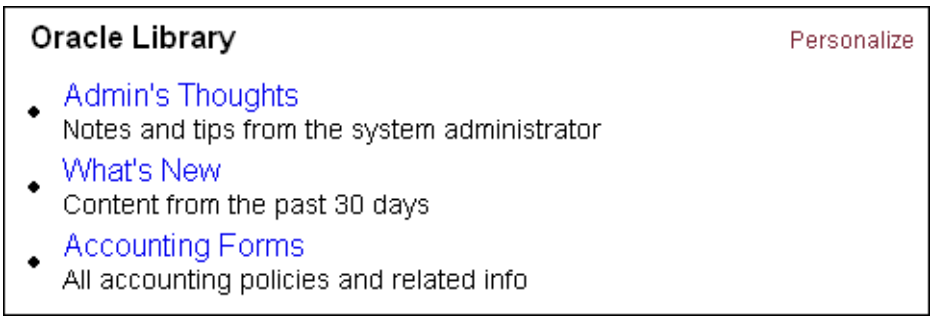
Figure 4–7 Workflow Queue Portlet - Workflow Defined

1. Click **Workflow Info** step name to view the workflow step information.
2. Click **Back**.
3. Click **Approve** or **Reject**.

4.1.6 Library Portlet

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

Figure 4–8 Library Portlet



Using the Library Portlet

1. Click **Personalize**.

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

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

2. Modify the settings as desired and click **Save** when edits are complete.

3. Select a search query (for example, "What's New").

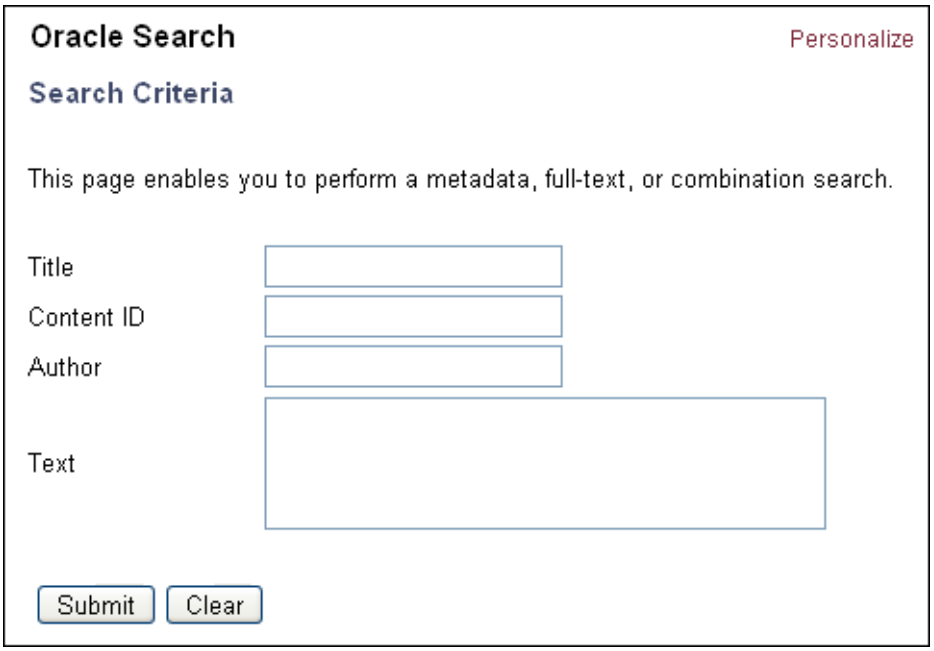
   The search results are displayed.

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

4.1.7 Search Portlet

The Search portlet enables portal users to perform a selected metadata and keyword search on the content server and provides read/write access to the returned content. Metadata fields are defined by the content server administrator.

Figure 4–9 Search Portlet



Using the Search Portlet

1. Enter a search query (for example, "sample") and click **Submit**.

   The results from the search query are displayed.

2. Click the **Info** icon.
3. On the Content Info page, these options can be selected from the list:
   - Content Information
   - Check Out
   - Check in Similar

- Send Link by Email

4. Click **Back**.

4.1.8 Metadata Admin Portlet

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

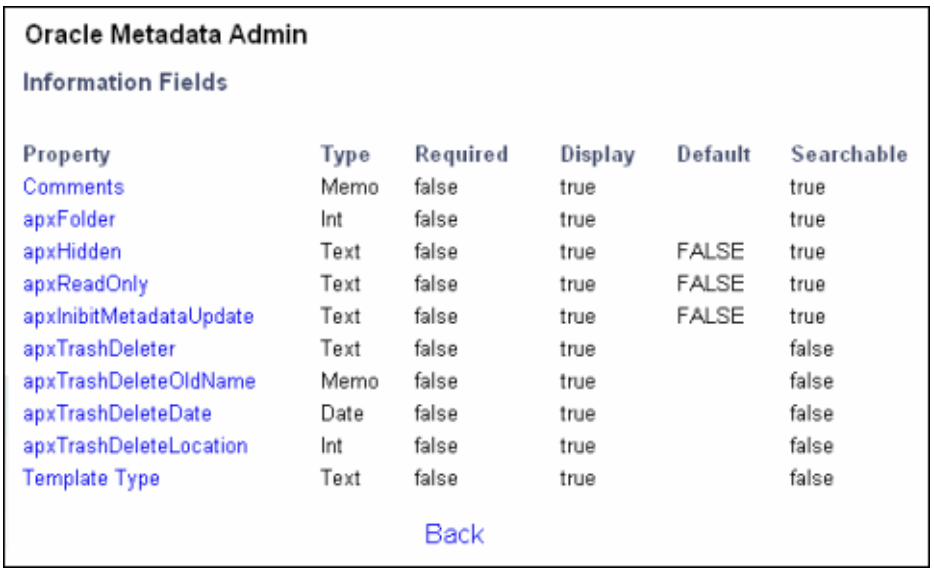
Figure 4–10 Metadata Admin Portlet

Using the Metadata Admin Portlet

1. Click **Information Fields**.

   The Information Fields list is displayed. Information fields are defined by the content server administrator.

Figure 4–11 Metadata Admin Portlet - Information Fields



1. Click an information field (for example., "Comments").

   The Edit Field page is displayed.

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

4.2 Customizing the Portlets

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

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

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

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

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

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

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

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

6. Edit the title and description entries. The title is the search title displayed to the user and the description is the short search description displayed to the user.

   For example: "Important Notices" and "Important messages from the president."

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

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

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

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

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

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

- **dInDate**: The content item release date (that is, the date the content item was released to the web).
- **dDocAuthor**: The content item author (for example, user1 or sysadmin).
- **dDocType**: The content item type (for example, ADACCT or FILES).

You must use the metadata parameter, not the field title (for example, dDocAuthor not Author).

These query string modifiers can be used:

- contains
- starts
- ends
- matches
- substring

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

Refer to the Portlets Developer Guide for a presentation of the portlet dispatch framework and information on using the Portlet SDK.

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