



BEA WebLogic Portal®

GroupSpace Guide

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QuickStart: Creating A GroupSpace Community

GroupSpace is a Community template that lets you quickly create a project management-type Community. This chapter explains how to create and start using a GroupSpace Community.

See the remaining chapters in this guide for a description of and instructions for working with a GroupSpace Community.

This chapter contains the following topics:

- [Creating a Portal Domain and Application](#)
- [Creating a GroupSpace Community Template](#)
- [Creating a GroupSpace Community](#)

Creating a Portal Domain and Application

Before you create a GroupSpace Community, you must first create a WebLogic Portal® domain and application (portal EAR project, portal web project, datasync project).

Follow the instructions in the [Getting Started with WebLogic Portal tutorial](#).

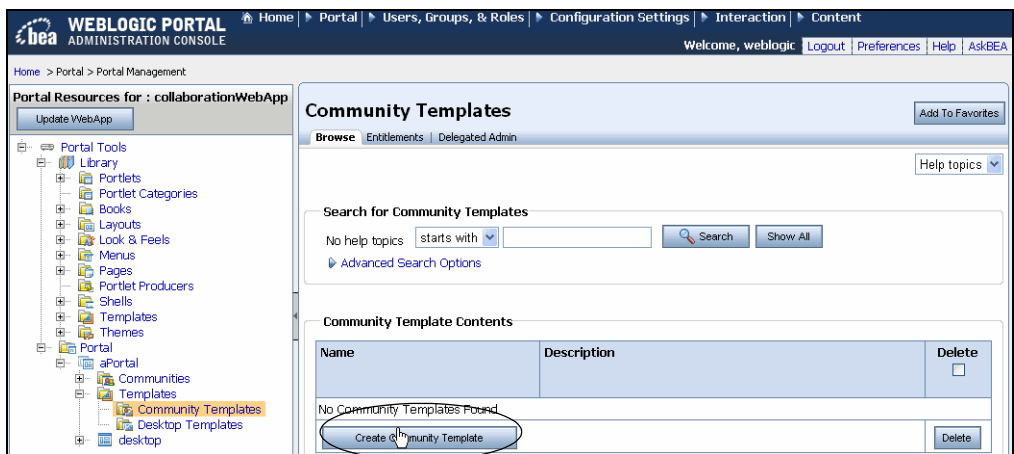
Important: When creating the domain and applications, be sure to select all the GroupSpace facet check boxes. The tutorial tells you not to select them, but you must select them to be able to create a GroupSpace Community.

Creating a GroupSpace Community Template

Before you create a GroupSpace Community, you must create a GroupSpace Community template using the following steps:

1. Verify that the server is running for your WebLogic Portal domain. In Workshop for WebLogic Portal, start the WebLogic Portal Administration Console by selecting your portal EAR project in the Navigator view and choosing **Run > Open Portal Administration Console**.
2. Log into the Administration Console with the username and password you defined for the domain.
3. In the Administration Console, choose **Portal > Portal Management**.
4. In the Resource tree, select **Portals** and create a portal if necessary.
5. Expand the folders for the portal you created, expand the **Templates** folder, and select **Community Templates**.
6. In the Community Template Contents section, click **Create Community Template** as shown in [Figure 1-1](#).

Figure 1-1 Create a New GroupSpace Community Template



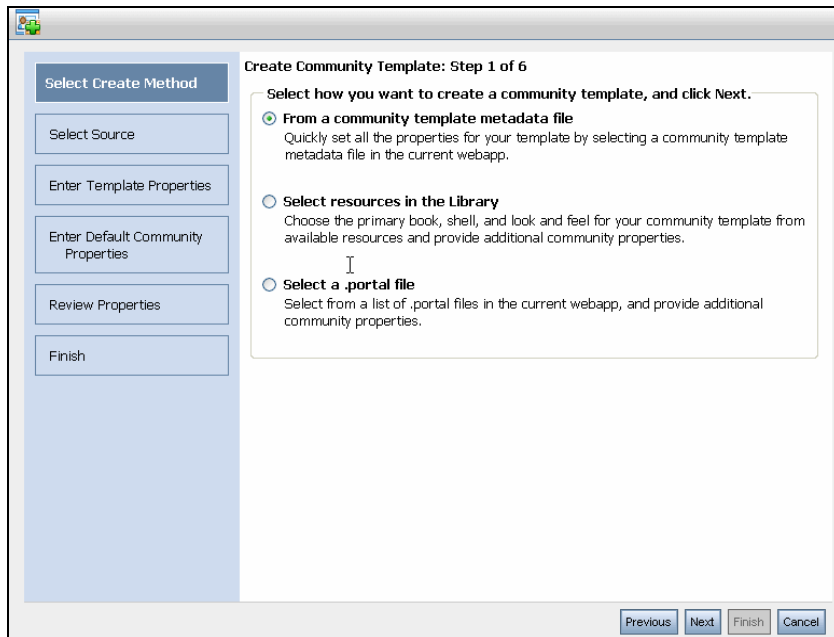
7. In the Create Community Template: Step 1 dialog, use a Community template metadata file:
 - **From a community template metadata file** – Select this option to quickly set all the properties for your template by selecting a GroupSpace Community template metadata

file in the current web application. This is the recommended method and is the most common method to create a Community template. The `.ctmeta` file defines the GroupSpace Community settings.

- **Select resources in the Library** – Do not select this option.
- **Select a .portal file** – Do not select this option.

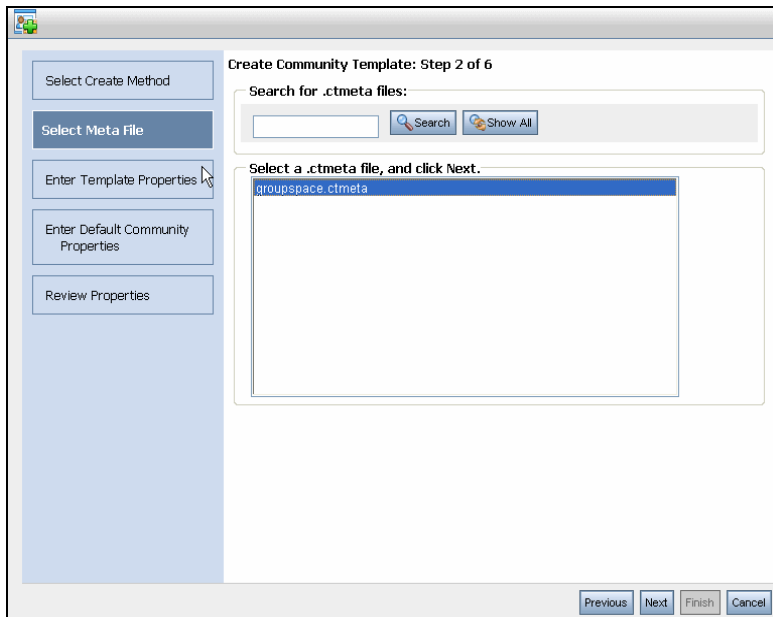
After you select an option, click **Next**. The first option, **From a community template metadata file**, is shown in [Figure 1-2](#) through [Figure 1-6](#).

Figure 1-2 Select a Community Template from the Current Web Application



8. In the Create Community Template: Step 2 dialog, you chose **From a community template metadata file** in the previous page, so click **Show All** and select the pre-configured `groupspace.ctmeta` database file. [Figure 1-3](#) shows the next step after selecting **From a community metadata file** selection.

Figure 1-3 Selecting the Pre-Configured groupspace.ctmeta File



9. In the Create Community Template: Step 3 dialog, enter the following information:
 - **Community Template Title** – Enter the name of the GroupSpace Community. For example, GroupSpace Template. This field is required.
 - **Description** – Enter text describing the Community template.
 - **Default Shell** – You must select **Community Header-Footer Shell** from the drop-down menu.
 - **Look And Feel** – Select a Look And Feel for this Community from the drop-down menu.
 - **Add this template to the Library** – Select this check box to add this template to the Community template library. See [Figure 1-4](#).

Figure 1-4 Enter a Name for the Community Template

Create Community Template: Step 3 of 6

Enter community template properties, and click Next.

Community Template Title: * GroupSpace Community 1

Description: This is the GroupSpace Community Template.

* = required information

Community Template Resources

Default Shell: Community Header-Footer Shell

Look And Feel: GroupSpace Default

Add this template to the Library

Previous Next Finish Cancel

10. In the Create Community Template: Step 4 dialog, review the following fields that are pre-populated by the template. Each template can have different defaults. After you review the fields, click **Next**:
- **Allow non-members to access the community** – Do not select this check box, since non-members cannot join a GroupSpace Community.
 - **Allow anyone to register for community membership** – You can select this check box to allow public registration and not require an invitation to join a Community.
 - **Allow people to create personal pages in the community** – You can select this check box to add personal pages and data. If you choose to not select this check box, Community members cannot customize the GroupSpace Community to add pages and books to the Community.
 - **Track member visits to the community** – If you are using the default Community You cannot select this check box to monitor how many times a member logs into the GroupSpace Community.
 - **Registration page** – Review the name of the URI that displays for users to register. For example, `/portlets/access/registration.portal`.

- **Error page** – Review the name of the URI that displays for the error page. For example, `/groupspace.jsp`.
- **Expiration Date** – Date and time zone when the Community expires. The default is to never expire.

If another template exists, you are prompted to resolve the conflict.

Other Community information is also copied from the template, such as the portal path, access tracking status, and other generic properties. See [Figure 1-5](#).

Figure 1-5 Enter a Name for the Community Template

Create Community Template

Create Community Template: Step 4 of 6

Enter default community properties, and click Next.

- Allow non-members to access this community
- Allow anyone to register for community membership
- Allow people to create personal pages in the community
- Track member visits to the community

Registration Page:*

Error Page:*

Callback Class for Community Delete:

Expiration Date:

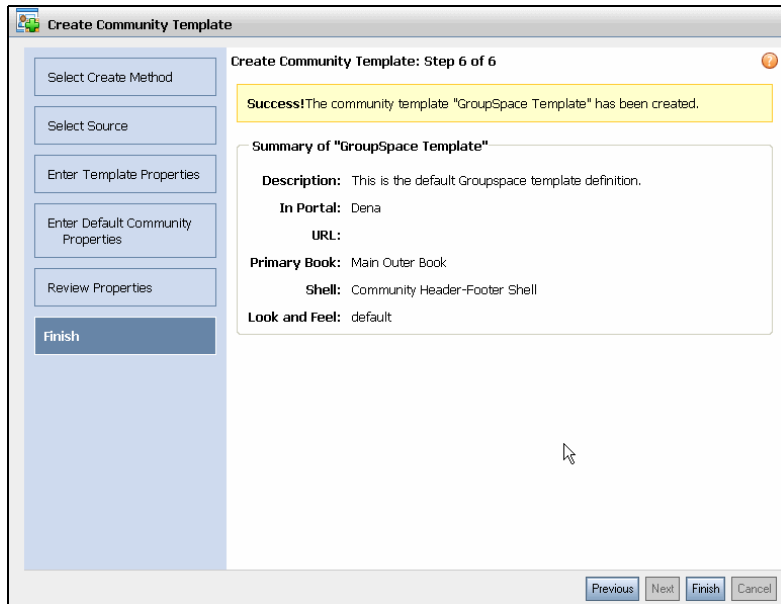
* = required information

Previous Next Finish Cancel

11. In the Create Community Template: Step 5 dialog, review the properties and click **Next**.

12. In the Create Community Template: Step 6 dialog, click **Finish** as shown in [Figure 1-6](#).

Figure 1-6 Click Finish to Create the New Community Template



Creating a GroupSpace Community

After you create a GroupSpace Community template, you can create your GroupSpace Community. When you move from your Staging environment to a Production environment, you will have to re-create the GroupSpace Community in your Production environment.

Perform the following steps to create a GroupSpace Community:

1. In the Administration Console, choose **Portal > Portal Management**.
2. In the Resource Tree, select **Portal** and expand the folder that contains the new portal you created in [“Creating a GroupSpace Community Template” on page 1-2](#).
3. Select the **Communities** folder and click **Create Community** in the Community Contents section.
4. In the Create Community Instance: Step 1 window, select **Use a Community Template** to choose a template that defines the Community's shell, Look and Feel, and contents. The recommended method for creating a GroupSpace Community is to choose the GroupSpace Community template you created in [“Creating a GroupSpace Community Template” on page 1-2](#). If you did not create or do not need a Community Template, you can also choose

Select a .community or .portal file to select the `groupspace.community` file directly. Some Communities, such as GroupSpace, require additional information located in a Community template metadata file (for example, `groupspace.ctmeta` file). Do not choose **Select resources in the Library** because this required GroupSpace Community metadata will not be applied and the GroupSpace Community will not work. See the [Portal Guide](#) for more information on library resources and `.portal` files.

Click **Next**.

5. In the Create Community Instance: Step 2 dialog, click **Show All** and select a template, resource, or `.portal` file. Complete the required fields and click **Next**.
6. In the Create Community Instance: Step 3 dialog, enter the following details:
 - **Title** – Enter the name of the new Community. For example, Project Management GroupSpace.
 - **Description** – Enter text describing the Community.
 - **Partial URL** – Enter a short URL for the new Community. For example, `project`.
 - **Allow non-members to access this community** – Do not select this check box, since non-members cannot join a GroupSpace Community.
 - **Allow anyone to register for community membership** – Select this check box to allow public registration and not require an invitation to join a Community.
 - **Allow people to create personal pages in the community** – Select this check box to let users customize their personal pages and persist those changes.
 - **Registration URI** – Review the name of the URI that displays for users to register. For example, `/portlets/access/registration.portal`.
 - **Error URI** – Review the name of the URI that displays for the error page. For example, `/portlets/access/err.jsp`.

Click **Next**, as shown in [Figure 1-7](#).

Figure 1-7 You Can Edit Community Properties

7. In the Create Community Instance: Step 4 dialog, review the settings. You can change the **Expiration Date** for the Community if you want. Verify that the **Make this community active now** check box is selected. If you deselect the **Make this community active now** check box, you cannot access the Community. Click **Next**.
8. In the Create Community Instance: Step 5 dialog, click **Finish**. You can also click **Go to Community** to go directly to the GroupSpace Community. An Invitation to join the new GroupSpace Community was created. You must log into your new GroupSpace application to accept the Invitation. Your role is owner/creator, so that you can then invite other users to join and you can perform other administrative tasks.
9. Log into your new sample GroupSpace Community and accept your invitation. Perform the following steps:
 - a. Access the URL for the new Community you created. You can also access the Example GroupSpace Community at: `http://localhost:7041/groupspace/groupspace.jsp`. Insert your machine name for `<localhost>`.
 - b. Enter the username and password of `weblogic/weblogic` and click **Login**.

- c. In the GroupSpace Invitations section, click the Community name that you created.
- d. In the Community Registration page, enter the username and password of weblogic/weblogic and click **Login**.
- e. In the GroupSpace Home page, click the Community name.

After you accept your invitation to join the GroupSpace Community, you can invite others to join the Community and entitle users to control what they can do. See [Chapter 6, “Managing GroupSpace”](#) for more information on managing your new GroupSpace Community.

Note: The **Create Community** option is available to all types of users including a user with the view-only right in a GroupSpace Community. To restrict a view-only user from creating a new community, you need to define a visitor entitlement policy as follows:

- Create a visitor entitlement role using WebLogic Portal Administration Console.
- Add the users who need to have the right to create communities to the visitor entitlement role.
- Add the entitlement role to the portal you want, and enable the **Create Community** capability.

The **Create Community** capability is available only for the resource type portal.

This visitor entitlement policy disables the **Create Community** option in the GroupSpace Community for users who are not added to the visitor entitlement role. For information on how to use Visitor Entitlements, see [Restricting Portal Visitor Access Using Entitlements](#).

After your users join the GroupSpace Community, they can use the portlets to collaborate with others and share information. See [Chapter 7, “Using the GroupSpace Portlets”](#).

Introduction

WebLogic Portal provides the ability to create a GroupSpace Community, a collaboration tool for groups of users who need to work together and share information. GroupSpace is built on the Communities Framework, and provides a dedicated, secure, self-managed environment to share information. The Communities Framework is built on the WebLogic Portal Framework, and leverages WebLogic portal features, such as a dynamic and extensible rendering framework, security, federation, content management, search, personalization, and end-user customization.

A GroupSpace Community is an instance of a Community that is built using the GroupSpace Community template. A Community is an extension of a portal desktop that contains group membership, member roles and capabilities, invitations, and look and feel customization. The Community template includes pages, books, portlets, layout, look and feel tools, invitations, and membership roles and capabilities. You invite users to join the Community and assign a role and capabilities to control what they can see and do in the Community.

When you run the WebLogic platform installer, it creates a domain in the `\<WL_HOME>\samples\domains\portal` directory and creates a sample GroupSpace application called GS Example Community, which is targeted to the domain. (You can also use the Configuration Wizard at `\<WL_HOME>\common\bin\config.cmd` or `config.sh` to create a different domain.) View the GS Example Community at `http://localhost:7041/groupspace/_groupspace.jsp`. Insert your machine name for `<localhost>`.

A GroupSpace Community includes the following portlets to support a collaborative work environment:

- Mail

Introduction

- Calendar
- Contacts
- Tasks
- GS Announcements
- GS Issues
- GS GroupNotes
- GS Links
- GS RSS Reader
- Discussion Forums
- GS Document Library
- CM Browser
- GS Enterprise Search
- GS Search

This chapter contains the following topics:

- [GroupSpace Communities in the Portal Life Cycle](#)
- [Getting Started](#)

GroupSpace Communities in the Portal Life Cycle

This section contains the following topics:

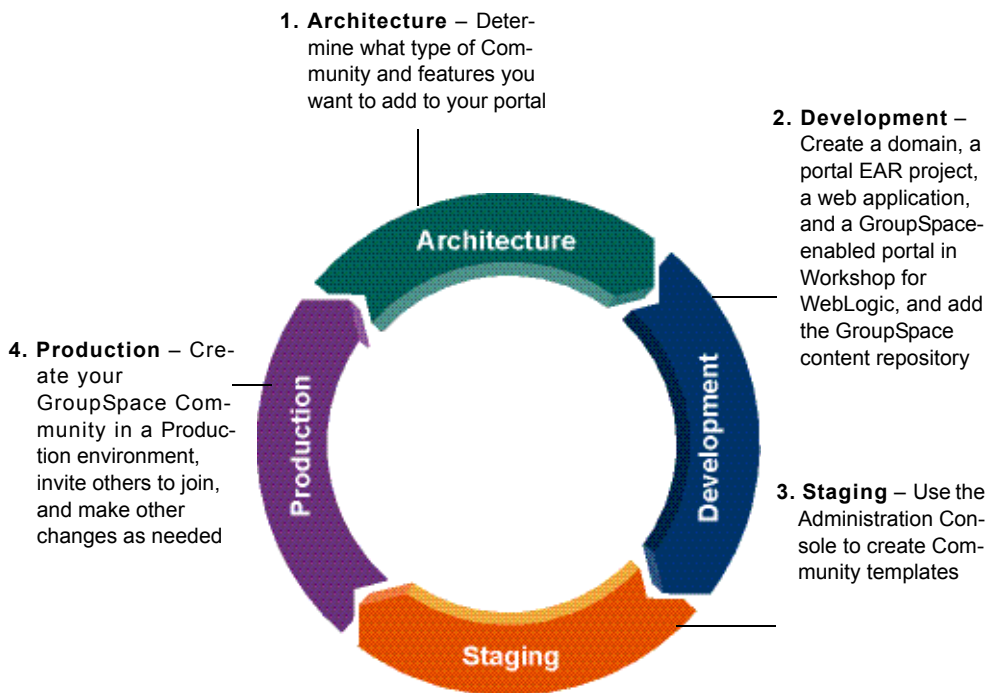
- [Architecture](#)
- [Development](#)
- [Staging](#)
- [Production](#)

The tasks in this guide are organized according to the portal life cycle. The portal life cycle contains four phases: Architecture, Development, Staging, and Production. Adding a

GroupSpace Community to your portal is an important part of the portal life cycle. For more information about the portal life cycle, see the [WebLogic Portal Overview](#).

Figure 2-1 shows which Interaction Management tasks occur in each phase.

Figure 2-1 GroupSpace Community Tasks in the Four Phases of the Portal Life Cycle



Architecture

In the Architecture phase, you enable GroupSpace in your portal domain, portal EAR project, and portal web project. For more information about the portal life cycle, see the [WebLogic Portal Overview](#).

The following chapter provides guidance on Architecture tasks:

- [Chapter 3, “Planning Your GroupSpace Community”](#) describes how to structure your GroupSpace Community, the GroupSpace components that are installed, and the benefits of using a GroupSpace Community.

Development

In the Development phase, you enable e-mail-based invitations (you can do this in the GroupSpace Community itself or by editing the `communities-config.xml` file), and manually add the GroupSpace CM repository.

Tools: Workshop for WebLogic.

The following chapter provides instructions on Development tasks:

- [Chapter 4, “Working with GroupSpace in Development”](#) provides direction on creating a GroupSpace-enabled portal, enabling e-mail-based invitations, and adding the GroupSpace CM repository.

Staging

In the Staging phase, portal administrators use the WebLogic Portal Administration Console to create a GroupSpace Community template.

If any of the functionality needs to change, developers can return to the Development phase and make changes using Workshop for WebLogic. Developers must redeploy the portal application to see the changes in the Staging environment. The Development phase and the Staging phase often occur simultaneously.

Tools: WebLogic Portal Administration Console.

The following chapter provides instructions on Staging tasks:

- [Chapter 5, “Creating a GroupSpace Community Template”](#) shows how to create a GroupSpace Community template and a GroupSpace Community.

Production

After developers test the portal application in the Staging phase, portal administrators use the [Production](#) phase to fine-tune the live production environment.

In the Production environment you create the GroupSpace Communities.

If you need to change any of these features, developers can use Workshop for WebLogic to return to the Development phase and make changes. Developers must redeploy the portal application to see the changes in the Staging environment.

Tools: WebLogic Portal Administration Console.

See Part IV: [Production](#) for guidance on Production tasks.

Getting Started

If you are new to portal development, see the *WebLogic Portal Overview* for more information about the portal life cycle. You can consult the *Communities Guide* for more information about developing a custom Community.

You can also check the GroupSpace blog located on Dev2Dev at:
<http://dev2dev.bea.com/pub/au/192>.

Introduction

Part I Architecture

Part I includes the following chapter:

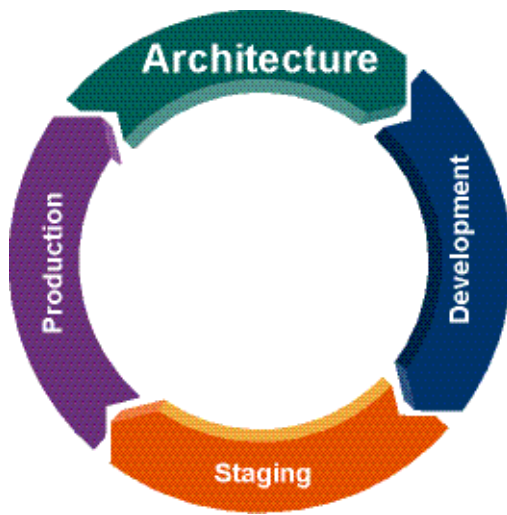
- [Chapter 3, “Planning Your GroupSpace Community”](#)

This section contains guidelines to help you plan your strategy for creating a GroupSpace Community. When you are planning how your users will interact with your GroupSpace Community, consider the following:

- How many users will access the GroupSpace Community
- How users will register
- What type of personalized content users will see
- Which portlets users will access in the GroupSpace Community

Part I contains instructions for planning your GroupSpace Community in the Architecture phase. When you finish the Architecture phase, you can proceed to the [Development](#) phase, and then on to the other phases.

For a description of the Architecture phase of the portal life cycle, see the [WebLogic Portal Overview](#). The portal life cycle is shown in the following graphic:



Planning Your GroupSpace Community

This chapter describes components in the GroupSpace application and shows you how to enable GroupSpace in your domain, portal EAR projects, and portal web projects.

The chapter contains the following topics:

- [Understanding GroupSpace Components](#)
- [Adding GroupSpace to your Applications](#)

Understanding GroupSpace Components

When you create a GroupSpace Community, the following GroupSpace-specific components are installed:

- GroupSpace Library Module – The `wlp-groupspace-app-lib` library module and the `wlp-groupspace-web-lib` library module.
- Community and GroupSpace Template C Defined by the `.ctmeta` file, the `.community` file, and the `communities-config.xml` file.
- GroupSpace Controls – See the [Communities Guide](#) for more information.
- Portlets – Contains the following two types of portlets:
 - GroupSpace-specific portlets – Portlets that begin with *GS*, such as *GS GroupNotes*. These portlets cannot be used outside of a GroupSpace Community.

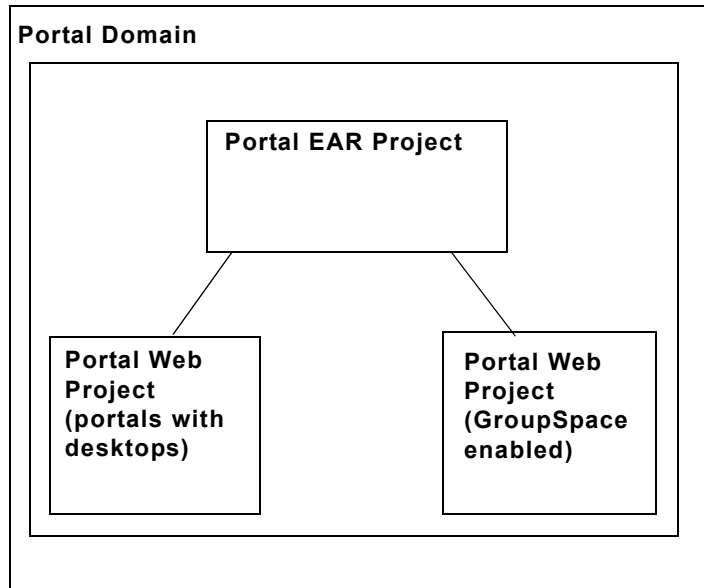
- Collaboration portlets – Portlets that do not begin with *GS*, such as *Discussion Forums*. These portlets can be used outside of a GroupSpace Community. See the [Portlet Development Guide](#) for more information.
- GroupSpace Invitations
- GroupSpace Notifications

Adding GroupSpace to your Applications

This section shows you how to enable GroupSpace in your applications; you must ensure GroupSpace is included in your portal domain, and add the GroupSpace libraries and facets to your portal EAR and web projects.

Tip: You should have only one GroupSpace web project per enterprise application. If you create a conventional portal web project to present your desktops and portlets, do not enable GroupSpace for that project.

If you want to create custom Communities, you must create a separate portal web project that does not include GroupSpace, as illustrated in [Figure 3-1](#).

Figure 3-1 GroupSpace Must Reside in its Own Portal Web Project

Adding GroupSpace to Your Portal Domain

1. If you have an existing server and it is running, stop the server.
2. Start the Configuration Wizard. From the Windows Start menu, choose **BEA Products > Tools > Configuration Wizard**.
3. In the Configuration Wizard, select the **Create** option for a new domain or the **Extend** option for an existing domain, and click **Next**. If you are extending an existing domain, select the domain root directory, and click **Next**.
4. Select **WebLogic Portal GroupSpace Framework** check box and click **Next**. Select the **WebLogic Portal GroupSpace Application** check box only if you want to add an out-of-the-box GroupSpace application.
5. Complete the remaining wizard windows.
6. Restart the server.

Adding GroupSpace to Your Portal EAR and Web Projects

1. Add the GroupSpace facets to your portal EAR project:
 - a. In the Navigator view, right-click an existing portal EAR project and choose **Properties**. If you are creating a new portal EAR project, skip to [step c](#) when you reach the Select Project Facets window.
 - b. In the Properties window, select **Project Facets**, and click **Add/Remove Project Facets**.
 - c. In the Project Facets window, expand **WebLogic Portal Collaboration** and select **GroupSpace Application Libraries**. If you are creating a new portal EAR project, continue through the remaining wizard windows.
 - d. Click **Finish**, and then click **OK**.
2. Add the **Collaboration Portlets** facet to your portal web project. Perform the same sub-steps above, and select the **GroupSpace** facet.

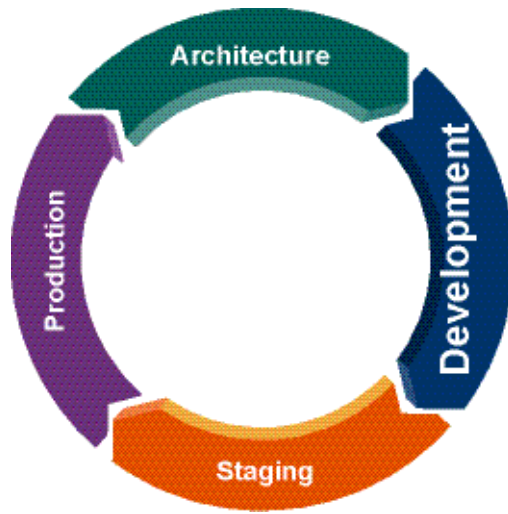
Part II Development

Part II includes the following chapter:

- [Chapter 4, “Working with GroupSpace in Development”](#)

Developers use Workshop for WebLogic in the Development phase to create a portal that is GroupSpace-enabled. After you create the portal, you enable e-mail-based invitations and configure the database (if you created a new domain). You can also create a custom GroupSpace Community or .ctmeta files during the Development phase.

For a detailed description of the Development phase of the portal life cycle, see the [WebLogic Portal Overview](#). The portal life cycle is shown in the following graphic:



Working with GroupSpace in Development

Working with a GroupSpace Community in the development phase involves enabling e-mail-based invitations and performing other optional development tasks to extend a GroupSpace Community.

The chapter contains the following topics:

- [Creating a GroupSpace Community](#)
- [Extending the Default GroupSpace](#)
- [Community Properties Reference](#)
- [Analyzing GroupSpace Events](#)
- [Changing the GroupSpace Look & Feel](#)
- [Setting Up the Rich Text Editor](#)

Creating a GroupSpace Community

Creating a GroupSpace Community is ultimately performed by a portal administrator in the Administration Console, or by a GroupSpace end user with appropriate rights. GroupSpace Communities, like all Communities, are rendered from the database (rather than the file system). In order to create a GroupSpace Community, those administrators and users rely on resources that are accessible from the development environment.

Development tasks are not required for administrators and end users to create default GroupSpace Communities. There are primary resources involved in the creation of GroupSpace Communities—resources that developers can extend or modify as needed.

Before you decide to use GroupSpace, see [Planning and Designing Communities](#) in the *Communities Guide* to help you determine your Community needs.

Understanding GroupSpace Resources

The GroupSpace shared J2EE libraries contain the following resources. To see these resources, open the Merged Projects view.

- **Shell** – A Community shell containing the Visitor and Community Tools. GroupSpace uses this shell and applies look and feel overrides to give the header its appearance. Location:
`<portalWebProject>/communityFiles/.`
- **Look and Feel** – A default GroupSpace Look and Feel. Location:
`<portalWebProject>/framework/skins/ or`
`<portalWebProject>/framework/skins/gstdefault/.`
- **Invitation** – The invitation e-mail that is sent to Community invitees. Location:
`<portalWebProject>/invitations/.`
- **Portlets**– The GroupSpace and Collaboration Portlets. Location:
`<portalWebProject>/portlets/.`
- **The `groupspace.community` file** – A portal file with a `.community` extension. Portal administrators can use it to create GroupSpace templates that can then be turned into GroupSpace Communities. Location:
`<portalWebProject>/<WebContent>/groupspace.community.`
- **The `groupspace.ctmeta` file** – A Community template metadata file that provides preconfigured settings for the default GroupSpace Community. This file is used to create a Community template and a Community, and references the `.community` file to use to create the Community. The file also contains more advanced settings that make Community template creation easy for portal administrators. Location:
`<portalWebProject>/<WebContent>/groupspace.ctmeta.`
- **The `communities-config.xml` file** – This enterprise application-level file lets you configure the e-mail settings for your e-mail server (to send Community invitations) and lets you add security capabilities to your Communities.

Note: The Page Flow source files used throughout GroupSpace are not available for override.

You can use these resources without modification in order to create default GroupSpace Communities, or you can develop customizations to configure your own version of GroupSpace. For information on customizations you can make, see [Extending the Default GroupSpace](#).

Enabling E-Mail-Based Invitations

After you create your portal application, you can use one of the following methods to enable e-mail-based invitations:

1. Launch your GroupSpace Community and use the following steps in the UI to configure e-mail invitations:
 - a. Log into your GroupSpace Community.
 - b. Choose **Communities > Manage This Community**.
 - c. On the Properties Page tab, click **Community Email Configuration**.
 - d. In the **Reply-to Address** field, enter your e-mail address.
 - e. In the **Display Name**, enter the name you want to appear in the From field in your e-mails.
 - f. In the **Outgoing Mail Server (SMTP)** field, enter the outgoing host name or IP address.
 - g. In the **Outgoing Mail Port (SMTP)** field, enter the port number to connect to the outgoing mail server. For example, enter **25** for SMTP.
 - h. In the **Account username (SMTP)** field, enter the name of your mail account. Do not use special characters.
 - i. In the **Account password (SMTP)** field, enter a password.
 - j. Click **Save**.
2. You can also manually configure e-mail invitations by locating the `communities-config.xml` file in the `\META-INF` directory of your EAR application and editing it. For example, `C:\Documents and Settings\dsmith\workshop\myportalear\META-INF`. If you do not have a `communities-config.xml` file, you must create one by copying [Listing 4-1](#) to a text file.
 - a. Open the `communities-config.xml` file in a text editor and customize the information in the following lines, as shown in [Listing 4-1](#).

Listing 4-1 Enter Your Values in the communities-config.xml File

```
<?xml version="1.0" encoding="UTF-8"?>
<communities-config xmlns="http://www.bea.com/ns/portal/
90/communities-config">
  <properties-config>
    <property-map>
      <name>groupspace.DefaultEmailConfiguration</name>
      <property>
        <name>replyToAddress</name>
        <value>--Please Change-- some.user@
          yourcompany.com</value>
      </property>
      <property>
        <name>displayName</name>
        <value>GroupSpace Emailer</value>
      </property>
      <property>
        <name>smtpServer</name>
        <value>--Please Change-- smtp.yourdomain.com</value>
      </property>
      <property>
        <name>smtpPort</name>
        <value>25</value>
      </property>
      <property>
        <name>smtpUsername</name>
        <value>--Please Change-- smtpuserid</value>
      </property>
      <property>
        <name>smtpPassword</name>
        <value>--Please Change-- smtppassword</value>
      </property>
    </property-map>
  </properties-config>
</communities-config>
```

- b. Save the `communities-config.xml` file. You can change these settings later in your GroupSpace Community by choosing **Communities > Manage This Community** and selecting the **Properties Page** tab. You can change these settings for each GroupSpace instance.

Note: If you plan to run the sample GroupSpace application, the database is already configured. By default, all domains are configured to use PointBase.

Configuring the Database in a New Domain

If you created a new domain with the Configuration Wizard, you can use a database other than PointBase. PointBase is the default database. The items you create in the GS Example Community are stored in the `Community_Repository`. The CM Browser portlet displays read-only content from the Shared Content Repository.

1. Perform the following steps to add GroupSpace content repository database objects, and then add and configure an `appsGroupSpaceDataSource` to point to the non-PointBase GroupSpace database you define:
 - a. If the WebLogic Server and the WebLogic Portal Administration Console are running, stop them.
 - b. Back up your database data as described by your database vendor.
 - c. For new 9.x domains, the `WEBLOGIC_GROUPSPACE` schema is automatically created within the default PointBase database. The `appsGroupSpaceDataSource` is automatically added to the new domain and configured to access the `WEBLOGIC_GROUPSPACE` schema. GroupSpace database objects must reside in a different database schema than the main portal database objects (which were created in the `WEBLOGIC` PointBase schema by default).

For a PointBase database, go to [step e](#). For the following types of databases, a Database Administrator must define a database user or database for the WebLogic GroupSpace database schema:

- For Oracle, see `<WL_HOME>/portal/db/oracle/admin/create_tablespace.sql` and `create_users.sql`.
- For SQL Server, see `<WL_HOME>/portal/db/sql_server/admin/create_database.sql`.
- For Sybase, see `<WL_HOME>/portal/db/sybase/admin/create_devices` and `create_database.sql`.

- For DB2, see `<WL_HOME>/portal/db/db2/admin/create_tablespaces.sql` and `create_users.sql`.

For more details on running these scripts, see the [Database Administration Guide](#)

- d. After you define a non-PointBase database in a new 9.x domain, you can replace the `appsGroupSpaceDataSource` (which points to PointBase by default) in your domain with the one from the appropriate driver directory, and then update it for your database environment. Manually edit the `@CMREPO_DB` variables for the database you configured in [step c](#). Sample `appsGroupSpaceDataSource-jdbc.xml` definition files for each database and driver that BEA supports are available in the following general locations: `<WL_HOME>/portal/db/jdbc/<database_driver>`. For example, `oracle_bea` or `sybase_bea`.
- e. Edit the domain's `groupspace_database.properties` file to set the database and user information for the GroupSpace Content Management Repository database.
- f. You can use the BEA WebLogic Configuration Wizard (see the [BEA Products Creating WebLogic Domains Using the Configuration Wizard Guide](#) for detailed instructions) or run `create_db.cmd -database.properties=groupspace_database.properties` from the domain's home directory (or `./create_db.sh -database.properties=groupspace_database.properties`) to add the GroupSpace database objects.

For more details on setting up your GroupSpace database, see the [Database Administration Guide](#).

2. Start the server by changing to the `<WL_Home>/samples/domains/portal/bin/` directory and typing `startWebLogic.cmd`. You can view the GS Example Community, which is populated with sample data, at `http://<localhost>:7041/groupspace/groupspace.jsp`. The CM Browser portlet uses the Shared Content Repository; all other data is stored in the Community Repository.

Tip: To stop the server, change to the `<WL_Home>/samples/domains/portal/bin/` directory and type `stopWebLogic.cmd`.

After you create a portal, the next step is to create a Community template. A Community template is a packaged set of resources that you can use to build a project management or collaboration application. You can create a Community template and use that template to create a new Community without writing additional code. See [Chapter 5, “Creating a GroupSpace Community Template”](#) for instructions on creating a GroupSpace Community template.

After you create a GroupSpace template in the Staging phase, you can propagate that template to the production environment where it can be used to create GroupSpace Communities.

Extending the Default GroupSpace

The default GroupSpace template and resources let you quickly and easily create a full-featured GroupSpace Community. However, there might be times when you want to modify the default GroupSpace template. For example:

- You could create a new `.community` file that provides a different configuration of GroupSpace portlets.
- If you did not want to use the Mail portlet, you could remove it from the `groupspace.community` file.
- You could modify the default e-mail message that is sent to GroupSpace invitees, or you may want to hard-code a date that GroupSpace Communities expire.
- You could add new security capabilities to your Communities that work with security restrictions you provide in your custom code.

Extending a GroupSpace Community could also involve adding functionality. For example:

- Using the GroupSpace controls, you could develop a portlet that performs tasks in customized ways.
- You can access the number of times specific predefined GroupSpace events occur, letting you perform custom analytics.

The following sections describe some of the ways you can extend the default GroupSpace Community template.

Understanding Which Files to Not Modify

Modifying certain files could cause GroupSpace to function incorrectly. Do not modify the following GroupSpace resources:

- The `GroupSpace.user` user profile property set in the `<datasync project>/src/userprofiles` directory.
- Any directories or content in the Virtual Content Repository located under `Community_Repository/GroupSpace`, `Community_Repository/CmxControlUniqueKeysFolder`, `Community_Repository/users`.

- The following properties in the `.ctmeta` file: `callback-class`, `registration-uri`, `error-uri`, and `inviter-invoker-class`.

Copying Source Files from the Library

If you want to modify resources used in GroupSpace, copy those resources from the shared library. When you copy resources from a library to your file system, the file system copies take precedence over the library resources.

Perform the following steps to copy GroupSpace resources from the shared library:

1. Switch to Merged Projects view (included with the Portal perspective).
2. Right-click any available shared library resources (they appear in italic font), and select **Copy to Project**.
3. Switch to the Navigator view and open the resources for modification.

To return to using the shared library versions of any files, delete the files from the Navigator view. Before you delete a file, verify that it is a file that is stored in the shared library. Some files provided in GroupSpace are not included in the shared library and will be permanently deleted if you delete them in the Navigator view.

Changing the Text of the GroupSpace Invitation E-mail

If you want to modify the e-mail text that is sent for invitations to a Community, modify the `/invitations/email/invite_body.jsp` and `invite_subject.jsp` files.

When you modify either of these files, you must restart the server for the changes to take effect.

Modifying the `groupspace.community` File

The `groupspace.community` file, located at

`<portalWebProject>/<WebContent>/groupspace.community`, is a portal file with a `.community` extension. It contains the full set of GroupSpace features and can be used as is for creating GroupSpace Communities.

You can modify this file to suit your needs. For example, if you do not want the Mail portlet to be included in GroupSpace Communities that are created from this file, you can remove the portlet in the portal editor.

However, modify this file only for simple changes. If you want to make major modifications to this file, make a copy of it or create a new Community file and make more extensive modifications to it.

Modifying the `groupspace.ctmeta` File

The `groupspace.ctmeta` file, located at `<portalWebProject>/<WebContent>/groupspace.ctmeta`, is a Community template metadata file that provides default settings (many of them advanced) for a Community template. Portal administrators use this file to quickly and easily create Community templates, which in turn are used to create Communities that have those settings. Among other settings, this file specifies `groupspace.community` as the `.community` file that is used for the Community.

You can modify this file to suit your needs. For example, if you create a new `.community` file that you want to use as a basis for new Communities, you can reference that file in the `.ctmeta` file.

If you want to retain the original `groupspace.ctmeta` file, you can make a copy of the `groupspace.ctmeta` file to create your own `.ctmeta` file.

You can change any settings in this file. However, for GroupSpace to work correctly, do not change any of the following properties:

- The `callback-class`
- The `registration-uri`
- The `error-uri`
- The `inviter-invoker-class`

See “[Community Properties Reference](#)” on page 4-12 for `.ctmeta` property descriptions.

Modifying GroupSpace Security Capabilities

GroupSpace provides the following security capabilities, or role names: creator, owner, contributor, and viewer. (Creator and owner are provided by default in every Community, even non-GroupSpace Communities.) GroupSpace uses these capabilities to control create, read, update, and delete actions performed by users in GroupSpace.

These capabilities are defined in the `/META-INF/communities-config.xml` file in the GroupSpace shared library. You cannot modify this file. However, you can add capabilities to

your `<portalEARproject>/META-INF/communities-config.xml` file and develop custom functionality that uses those capabilities.

Users with Community management rights can also override capability rights in the Community Tools. For example, a Community administrator can add “update” rights to viewers. The updated capability settings are stored in the database.

Consider the following when modifying Community capabilities:

- **Adding a Role to GroupSpace** – Even if a new role you add has full create, read, update, and delete capabilities, the role cannot manage an existing Community. But this role can create and manage a new Community.
- **Modifying Existing Capabilities** – Modifying existing capabilities does not change the capabilities for existing Communities, but new Communities use the modified capabilities.

A GroupSpace Community defines rights for each of its default capabilities: creator, owner, contributor, and viewer. If you modify any of the rights for a capability in the Community Tools, those rights modifications are stored in the database and override the default rights.

Using GroupSpace Controls

GroupSpace provides many convenience controls that you can add to your Page Flows. These controls let you develop many types of GroupSpace functionality and provide powerful search capabilities.

Perform the following steps to add a GroupSpace control to a Page Flow:

1. Open the Page Flow controller and switch to the Page Flow Explorer view (available in the Page Flow perspective).
2. Right-click **Referenced Controls** and choose **Add Control**.
3. In the Select Control window, expand the appropriate Portal GroupSpace controls group, select the control you want to use, and click **OK**.
4. The control appears under Referenced Controls, where you can expand it and drag the actions you want into the page flow.

For API-level information on GroupSpace controls, see `com.bea.apps.groupspace.*.controls` in [Javadoc](#).

Using the GroupSpace API

GroupSpace provides a rich API for developing custom GroupSpace functionality. Functionality developed using the GroupSpace API can be used only in the context of a GroupSpace Community. For example, if you develop custom GroupSpace RSS portlet using the `com.bea.apps.groupspace.rss.feed.Feed` class, that portlet will not work in a non-GroupSpace Community.

For details on the GroupSpace API, see the `com.bea.apps.groupspace.*` packages in [Javadoc](#).

Adding Your Own Community Portlets

You can add custom-built portlets to your GroupSpace Community. Develop a portlet that contains the functionality you want, using such resources as the GroupSpace controls and the Community framework API, then add the portlet to the `.community` file to which you want it to belong.

Any portlet you develop using the Community framework API can run only in the context of a Community. Likewise, any portlet you develop using the GroupSpace API can run only in the context of a GroupSpace Community.

Using GroupSpace Events

GroupSpace includes many predefined events that are automatically triggered as users interact with a GroupSpace Community. As each event is fired, the event is added to a buffer by a predefined event listener. When the buffer is flushed to the database, the count for each type of event that has occurred is updated. GroupSpace tracks only the number of times each type of event occurred.

GroupSpace automatically tracks create, read, update, and delete operations on GroupNotes, Links, Doc Library, Issues, and RSS channels. GroupSpace does not currently track: Links, view and delete; Doc Library, create and update; and RSS channels, view.

The counts are stored in

```
Community_Repository\Groupspace\

```

The event listener

(`com.bea.apps.groupspace.analytics.listeners.AnalyticEventListener`) is registered as an asynchronous listener in the Administration Console, in **Service Administration > Application Configuration Settings > Personalization > Event Service**. If you want to stop tracking event counts, you can unregister the listener.

Use the following guidelines for best performance:

- Leave the event listener configured as asynchronous.
- In conjunction with the buffer, the GroupSpace event service uses a timer, set to a default length of one minute. When the timer goes off (or when the buffer reaches capacity), any events in the buffer are written to the database. You can configure the timer in the `web.xml` file.

See the [Interaction Management Guide](#) for more information on listener classes.

Community Properties Reference

The following items describe Community properties. These properties are set in the following ways:

- In development, when developers create `.ctmeta` files that portal administrators use to create Community templates and Communities.
- In production, when portal administrators create Community templates based on library resources or `.portal` files.
- In production, when end users create Communities based on existing Community templates.

Title – The default name of the Community that appears in the user interface. The title can be overridden by the localized Community title.

Description – The default description of the Community that appears in the user interface. The description can be overridden by the localized Community description.

Allow non-members to access this community – If set to true (checked), anyone can access the Community without registering as a member.

Allow anyone to register for community membership – If set to true (checked), anyone can register as a member in the Community without first receiving an invitation.

Allow people to customize their view and add personal pages – If set to false (unchecked), the Visitor Tools are disabled in the Community. Community administrators, however, can still access the Community Tools.

Registration Uri/Page – The path to the Community registration page, usually the home page for a Community.

Error Uri/Page – The path to the error page that is displayed when a user is not allowed access a Community; for example, if the user is not a member or the Community is disabled.

Expiration Date - The date when the Community will automatically become inactive.

Make this community active now / Status – If set to **Inactive**, only Community members with an administrative capability can access the Community.

Track member visits to this community – If set to **yes**, the number of times members visit the Community is stored in the virtual content repository.

Callback Class – The name of the class (including the package path information) that performs special tasks when the Community is created, activated, deactivated, or deleted. For example, the GroupSpace callback class is

`com.bea.apps.groupspace.security.GroupSpaceCallbackImpl`. Your development team may provide its own callback class.

Enable Tree Optimization – If set to **true**, improves Community performance. For more information on this feature, see *Designing Portals for Optimal Performance in the [Portal Development Guide](#)*.

Analyzing GroupSpace Events

A GroupSpace Community includes several predefined events that are automatically triggered as users interact with a GroupSpace Community. As each event occurs, the event is captured by a predefined event listener and stored in a buffer. When the buffer information is written to the database, the count for each type of event that occurred is updated.

The events are not visible in the UI, but you can view and analyze the events later. The ability to capture and store events is on by default, and these events must occur within a GroupSpace Community.

GroupSpace Community events automatically track the following create, read, update, and delete operations for the portlets listed in [Table 4-1](#).

Table 4-1 Predefined Events that Are Captured and Stored

	Create	Read	Update	Delete
GS Links	✓	X	✓	X
GS Document Library	X	✓	X	✓
GS Issues	✓	✓	✓	✓
GS RSS Reader	✓	X	✓	✓
GroupNotes	✓	✓	✓	✓

The events are asynchronous events and are stored in the Community Repository in the following location: `\Community_Repository\Groupspace\<AppName>\<WebApp>\<CommunityName>\Analytics\<EventName>`. For example, `\Groupspace\myPortalEAR\myPortalWebProject\myGroupSpace\Analytics>LoginEventx295rf29v61jstcmjryfey3dhysvd1o`. You can use WebLogic Portal's content management API to access the event counts for your own analytical purposes.

The pre-configured event listener (`com.bea.apps.groupspace.analytics.listeners.AnalyticEventListener`) is registered as an asynchronous listener in the WebLogic Portal Administration Console. (Choose **Service Administration > Application Configuration Settings**, and select **Personalization and Event Service**.)

The event listener is located in the `p13-config.xml` file. If you want to stop tracking event counts, you can unregister the listener. The event information that is stored for each Community is the event name, the count, and the date. See the [Interaction Management Guide](#) for more information on listener classes.

For best performance, use the following guidelines:

- Leave the events as asynchronous events; do not modify the events to be synchronous.
- The GroupSpace event service uses a buffer (to store the event information) and a timer. When the timer goes off, it automatically writes the buffered events to the database. The

timer's default is one minute; you can configure the length of the timer in the `web.xml` file.

Changing the GroupSpace Look & Feel

Look & Feel determines the appearance of your GroupSpace Community, from the placement and behavior of elements on a page to the colors used in the portlet title bars.

A Look & Feel file (`.laf`) is an XML block that is inserted into the overall `.portal` XML file. The Look & Feel file references a specific skin and skeleton. The skin provides a set of images, JavaScript functions, and CSS files, which are referenced by the skeleton JSPs that convert the portal XML components to the final HTML output. See the [Portal Development Guide](#) for more detail on Look & Feel, skins, and skeletons.

WebLogic Portal ships with several different Look & Feel files that do not work within a GroupSpace Community. A Look & Feel is generally application-specific.

Choose one of two ways to change the Look & Feel of your GroupSpace Community:

1. Modify the existing Look & Feel by overriding what is provided in the library modules
2. Create a new Look & Feel by duplicating the default GroupSpace Look & Feel and editing it. This method leaves the original Look & Feel, unless you block it with entitlements.

Tip: Only the GroupSpace Default (`gsdefault`) Look & Feel is compatible with GroupSpace; you should make all other Look & Feel files (Default, Classic, All Text, and Legacy) unavailable to users. The best way to do this is to create an entitlement role to which that no one belongs, and then entitle the other Look & Feel files so that they are available only to that role. Leave the GroupSpace Default Look & Feel unentitled so that it is available to all users.

This section contains the following topics:

- [Modifying the Default GroupSpace Look & Feel](#)
- [Creating a New GroupSpace Look & Feel](#)

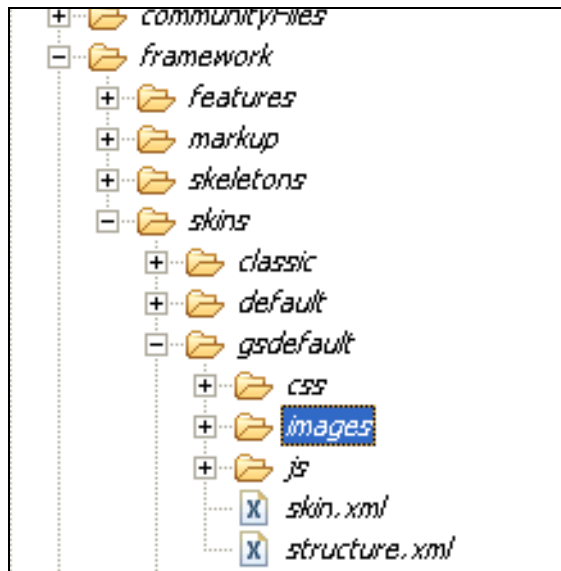
Modifying the Default GroupSpace Look & Feel

The following steps describe how to modify one part, the GroupSpace logo, of the default GroupSpace Look & Feel.

Perform the following steps to modify the default GroupSpace Look & Feel:

1. In Workshop for WebLogic, verify that the Visitor Tools project facet is installed in your portal web project. See [Enabling Visitor Tools](#) in the *Portal Development Guide* for instructions on enabling a new Look & Feel.
2. Choose **Window > Show View > Merged Projects**. The Merged Projects view provides a virtual view of your project where items in italics are located in the library modules that ship with WebLogic Portal, and other items physically reside in your project directory. Items in your project directory will be used instead of library module items if they have the same name and path. WebLogic Portal provides the ability to create an overriding local copy of a file from a library module.
3. Expand the following italicized directories in your portal web project directory: **framework > skins > gsdefault > images**, as shown in [Figure 4-1](#).

Figure 4-1 The images Directory



4. For example, right-click the italicized `header-logo.gif` file in the `/images` directory and choose **Copy to Project**. The item is no longer italicized because your project has a local copy of the file that will be used instead of the library module version.
5. Right-click your copy of the file and choose **Properties** to see where the file is located on your local disk, or right-click the file and choose **Show In > Navigator** to see the local file in an unmerged view of your project.

6. Edit your local copy of the `header-logo.gif` file in any image editor, as shown in [Figure 4-2](#). Save your changes.

Figure 4-2 Edit the header-logo.gif File



7. Access the GroupSpace Community in your browser to view the changes. If you do not see the changes, the old image may be cached by the browser. Press **Ctrl+F5** to reload all the images and the CSS.
8. Perform these same steps to modify other Look & Feel and CSS files. Be careful changing these files as edits can affect other functionality in your GroupSpace Community. Test your changes often.

Creating a New GroupSpace Look & Feel

You can create a new GroupSpace Look & Feel based on the default `gsdefault.laf` file. (See the [Portal Development Guide](#) for instructions on creating other new Look & Feel files.)

Perform the following steps to duplicate the entire GroupSpace Default Look & Feel and edit it to create your own Look & Feel:

1. Verify that the Visitor Tools project facet is installed in your portal web project. See [Enabling Visitor Tools](#) in the *Portal Development Guide* for instructions on enabling a new Look & Feel.
2. In the Merged Projects View, expand the `/framework/skins` directories so you can see the `/gsdefault` directory.
3. Right-click the `/gsdefault` directory and choose **Copy to Project**.
4. On your local disk, rename the `gsdefault` directory (under your project's `/framework/skins` directory) to a new Look & Feel name. Do not use spaces in the name.

5. In the Merged Projects View, expand the **/framework/markup/lookandfeel** directories so you can see the `gsdefault.laf` file.
6. Right-click **gsdefault.laf** and choose **Copy to Project**.
7. On your local disk, rename the **gsdefault.laf** file (in your project's `framework/markup/lookandfeel` directory) to match your new Look & Feel name from [step 4](#).
8. Edit your new `.laf` file: change the title, description, definitionLabel, markupName (to match the definitionLabel), and skin (to match the name in [step 4](#) & [step 7](#)) and save your changes. Do not change the skeleton, skeletonPath, or skinPath.
9. Redeploy the application and restart the server to see your new Look & Feel. The new Look & Feel should be available in the **Customize > Colors** menu in your GroupSpace Community.
10. Edit the images and CSS in your new `/skin` directory to make changes.

The skin also references the CSS and images in the `/<yourproject>/wlpAppsCollaborationCore` directory. You may want to make local copies of certain files there, or the whole directory. Javascript exists in the directory; take care if you decide to replace the entire directory with a renamed directory, rather than just overriding certain files.

Tip: If you edit your `skin.xml` file (for example, to import a new CSS file into your new Look & Feel), do not change the skeletonid or skeleton-path. Changing the skeleton can cause it to break; use the `gsdefault` skeleton that ships with WebLogic Portal.

Setting Up the Rich Text Editor

Some GroupSpace portlets have a rich text editor to apply formatting to documents or other items. Portal Administrators can allow users to access a portlet's formatting toolbar and a bottom toolbar, which lets them view the item's HTML text or preview the item.

For example, enabling rich text editing in the GS Issues portlet allows users to use the formatting toolbar to apply bold, Italic, indentations, colored fonts, and so on. Enabling the bottom toolbar in the GS Issues portlet lets users see and use the **HTML**, **Edit**, and **Preview** buttons.

You can enable or disable the rich text editor settings for the following portlets:

- GS Issues
- GS GroupNotes

- GS Announcements
- Calendar
- Tasks
- AddressBook (in the Contacts portlet)
- Mail
- Discussion Forums

Enabling Rich Text Editing

The GS Example Community has the rich text editor enabled by default and the bottom toolbar disabled. For all other web applications, the System Administrator must edit the `web.xml` file to enable the rich text editor and the bottom toolbar, and then the Portal Administrator sets the portlet preferences.

Perform the following two steps to enable the rich text editor:

1. The System Administrator uses a text editor to edit the `web.xml` file in your `/WEB-INF` directory and add the required context parameters and values, as shown in [Listing 4-2](#). After you edit the file, restart the WebLogic server. Use the following guidelines to determine how to set the values in the `web.xml` file:
 - If the rich text editor (`RichTextEditorEnabled`) value is set to `false` in the `web.xml` file, rich text editing is not enabled and the bottom toolbar is not enabled and does not appear in the portlet. You cannot override the settings in the Administration Console, as described in [step 2](#).
 - If the bottom toolbar (`RichTextEditorHTMLToolBarEnabled`) value is set to `false` in the `web.xml` file, and the rich text editor value is set to `true`, rich text editing is enabled, but not the bottom toolbar. The bottom toolbar does not appear in the portlet. You cannot override the bottom toolbar settings in the Administration Console.
 - If the bottom toolbar value is set to `true` but the rich text editor is set to `false`, the bottom toolbar is not enabled and rich text editing is not enabled. You cannot override the settings in the Administration Console.

Listing 4-2 Add Context Parameters and Values to the End of the `web.xml` File

```
<context-param>
  <param-name>com.bea.apps.groupspace.RichTextEditorEnabled</param-name>
```

```
<param-value>true</param-value>
</context-param>

<context-param>
  <param-name>com.bea.apps.groupspace.RichTextEditorHTMLToolBarEnabled
    </param-name>
  <param-value>true</param-value>
</context-param>

<context-param>
  <param-name>collaboration.RichTextEditorEnabled</param-name>
  <param-value>true</param-value>
</context-param>
```

2. After the context parameters are added to the `web.xml` file, the Portal Administrator uses the Administration Portal to modify portlet preference settings for each portlet. See [Modifying Portlet Preferences for Rich Text Editing](#).

Modifying Portlet Preferences for Rich Text Editing

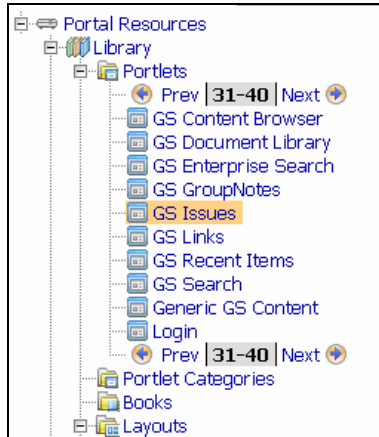
You can use portlet preferences to control the rich text editor and the bottom toolbar for individual portlets.

WARNING: If the `web.xml` file's rich text editor values are set to `false`, any edits you make to portlet preferences in the Administration Console are ignored. If the rich text editor value is `false`, but the bottom toolbar value is set to `true`, the toolbar does not appear in the portlet.

Perform the following steps in the Administration Console to change portlet preferences for rich text editing and the bottom toolbar:

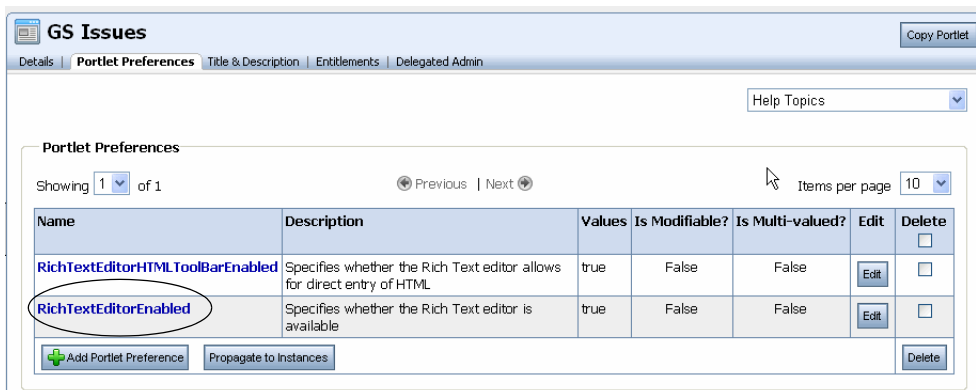
1. In the Portal Resources tree in the Administration Console, select **Library > Portlets**.
2. Click **Prev** or **Next** to locate the portlet you wish to modify and select it so that it is highlighted, as shown in [Figure 4-3](#).

Figure 4-3 Select the Portlet Whose Preference You Want to Modify



3. After you select the portlet, click **Portlet Preferences**.
4. Locate the preference you want to change, as shown in Figure 4-4.

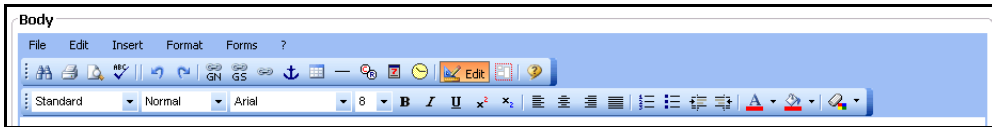
Figure 4-4 Click Edit to Change a Preference



5. The GS Issues, GS GroupNotes, and GS Announcement portlets contain a preference called `RichTextEditorEnabled`. Verify that the preference's setting is `true`, to allow the portlet to display the rich text editor. If this preference is set to any value other than `true`, the portlet displays a simple text area for entering information. Other portlets (Address Book in Contacts, Mail, Calendar, Tasks and Discussion Forums), also have preferences to enable the rich text editor, but they are named differently than the GS portlets. After you locate the portal preference you want to change, click **Edit**.

Select the **Is Modifiable** check box for the `RichTextEditorEnabled` preference to allow users to modify this preference. Do not select the **Is Multi-valued** check box. Click **Save**.

Figure 4-5 The Rich Text Editor in a Portlet



Tip: By default, the GS Example Community that ships with WebLogic Portal has the rich text editor formatting toolbar enabled, and the bottom toolbar is disabled. For other web projects, the default is that rich text editing is not enabled for any of the portlets.

6. You can also change the preference that controls the display of the bottom toolbar. For example, if you change the GS Issues `RichTextEditorHTMLToolBarEnabled` preference to `true`, the portlet displays the bottom toolbar when the rich text editor is available. The toolbar controls the **Edit**, **HTML**, and the **Preview** buttons. Clicking **HTML** allows a user to enter HTML directly into the text area. See [Figure 4-6](#).

Figure 4-6 The Bottom Toolbar in a Portlet that Allows Rich Text Editing



7. Other portlets might contain other preferences that you can set. For example, the Mail portlet has a `collaboration.max.attachment.size` preference to control the size of mail attachments that users can send or receive.
8. After making your changes to the portlet preferences, click **Save** to see the change appear in your portlet in your Community desktop. If you made preference changes at the library level, click **Propagate to Instances** to force proliferation of this preference to every instance of this portlet. WebLogic Portal overwrites all desktop instance's preferences with the library preferences. For more information on propagating to instances, see the [Portlet Development Guide](#).

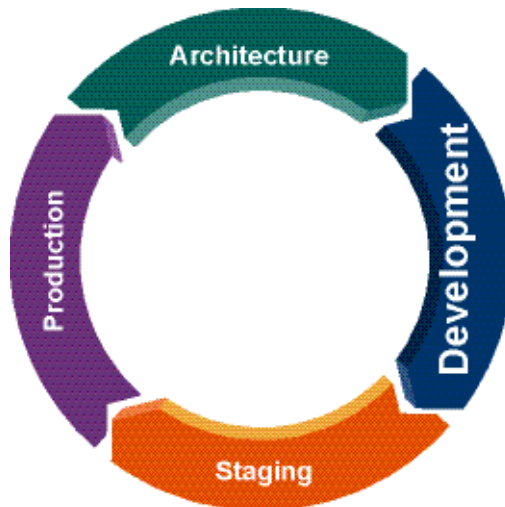
Part III Staging

Part III includes the following chapter:

- [Chapter 5, “Creating a GroupSpace Community Template”](#)

During the Staging phase, you use the Administration Console to create a GroupSpace Community template.

For a description of the Staging phase of the portal life cycle, see the [WebLogic Portal Overview](#). The portal life cycle is shown in the following graphic:



Creating a GroupSpace Community Template

After you create a GroupSpace-enabled web application in Workshop for WebLogic (see [Chapter 4, “Working with GroupSpace in Development”](#)), use the Administration Console to create a GroupSpace Community template. A Community template is a packaged set of resources you can use to build a project management or collaboration application. You can create a GroupSpace Community template and use that template to create a new GroupSpace Community without writing additional code.

When you create a Community template, you can choose to use an existing Community template or Community template metadata file, you can select resources in the library, or you can use a `.portal` file. The most common method is to use an existing `.ctmeta` file to create your Community template. If you are creating a GroupSpace Community, you must use an existing `.ctmeta` file.

This chapter contains the following topics:

- [Creating a GroupSpace Community Template](#)

Creating a GroupSpace Community Template

See the [QuickStart: Creating a GroupSpace Community](#) chapter.

Propagating GroupSpace Communities

You cannot propagate a GroupSpace Community from staging to production. You can only propagate Community templates.

Creating a GroupSpace Community Template

Part IV Production

Part IV includes the following chapters:

- [Chapter 6, “Managing GroupSpace”](#)
- [Chapter 7, “Using the GroupSpace Portlets”](#)

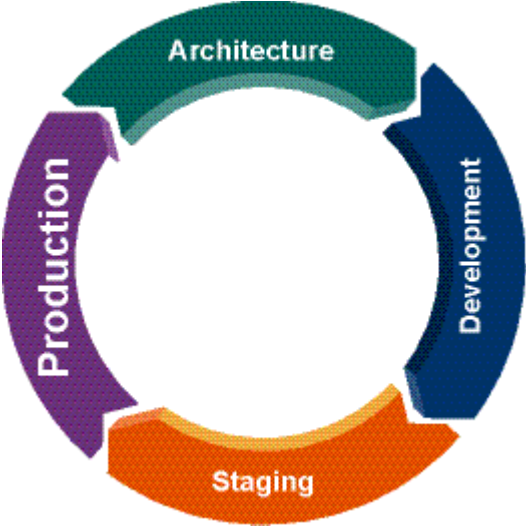
The Production phase allows you to create your GroupSpace Community, send invitations to users, edit roles, and customize the look and feel of the Community.

Some of the tasks you can perform in the Production phase include the following:

- Re-create the GroupSpace Community you created in the Staging phase
- Log in to accept your invitation to join the GroupSpace Community
- Invite other users to join
- Edit roles and capabilities
- Customize the look and feel of your GroupSpace Community
- Use the GroupSpace Community portlets to collaborate and share information

The GroupSpace Community uses the template that you created in the [Staging](#) phase. The Propagation Utility moves the GroupSpace Community template that you created in the Staging phase to your Production environment, but it does not move the GroupSpace Community itself. You must re-create the Community in your Production environment. See the [Production Operations Guide](#) for more information on deployment and propagation.

For a description of the Production phase of the portal life cycle, see the [WebLogic Portal Overview](#). The portal life cycle is shown in the following graphic:



Managing GroupSpace

The Propagation Utility does not move the GroupSpace Community that you created in the Staging phase to your Production environment, so you must re-create the Community in your Production environment.

This chapter contains the following topics:

- [Creating a GroupSpace Community](#)
- [Setting Visitor Entitlements on GroupSpace Resources](#)
- [About Custom Community Properties](#)
- [Managing GroupSpace Content](#)
- [Creating Localized Community Titles and Descriptions](#)
- [Deactivating or Deleting a Community](#)
- [Propagating Communities](#)
- [Logging In](#)
- [Inviting Users to Join](#)
- [Editing Roles and Capabilities](#)
- [Managing the GroupSpace Portlets](#)
- [Customizing Your GroupSpace Community](#)

- [Customizing Template JSPs](#)

Creating a GroupSpace Community

See [QuickStart: Creating a GroupSpace Community](#) chapter.

Setting Visitor Entitlements on GroupSpace Resources

Do not manually set visitor entitlement roles on GroupSpace resources. GroupSpace provides its own mechanism for controlling user access to its resources. Manual entitlement settings could interfere with the normal operation of GroupSpace.

About Custom Community Properties

Do not modify any of the default GroupSpace custom properties on your GroupSpace Community's Custom Properties page in the WebLogic Portal Administration Console. These properties support programmatic operations in GroupSpace. Modifying any of these properties could interfere with the normal operation of GroupSpace.

Managing GroupSpace Content

GroupSpace Communities use the `Community_Repository` and specific content types to store content. Almost every item in GroupSpace, from an Issue to a calendar appointment, is stored as content in `Community_Repository`, and access is controlled through predefined Visitor Entitlements. As users interact with the GroupSpace Community, the application automatically adds to, modifies, and entitles content in the `Community_Repository`.

Warning: Because of the automated nature of GroupSpace's interactions with `Community_Repository`, do not make manual modifications to the `Community_Repository` or its types (unique keys), especially by modifying Visitor Entitlements. It is recommended that you set delegated administration on the `Community_Repository` so that only specific portal administrators can view it.

Creating Localized Community Titles and Descriptions

You can provide localized text for the title and description of your Communities. When you provide localized text, and a browser is set to use a language you provide, the localized title and description of that Community appear in that browser, either in the Administration Console or in

the Community itself. For example, in GroupSpace, localized titles appear in the GroupSpace header.

If you want to use double-byte characters, such as Chinese, make sure your system is configured to support this.

You can also use this feature to provide an alternative Community name and description in English, changing them as often as you like.

1. In the Portal Resources tree in the Administration Console, select **Portals > yourPortal > Communities > yourCommunity**.
2. On the Title & Description page, click **Add Localized Title**.
3. In the Add a Localized Title & Description window, enter:
 - Language (required) - The two-letter code for the language. For example, zh for Chinese.
 - Country (optional) - The name of the country.
 - Variant (optional) - The two-letter language variant in uppercase, such as US for the United States English, or TW for Taiwan Chinese.
 - Title (required) - The localized title you want to provide.
 - Description (optional) - The localized description you want to provide.
4. Click Create.

If you want to modify an existing title and description, such as changing the English text, click the language link and modify the title and description.

Deactivating or Deleting a Community

If you want to prevent users from accessing a Community, you can either deactivate or delete the Community. Reasons to deactivate a Community include wanting to prevent user access while you configure it, archiving it, or wanting to activate it again in the future. Deleting a Community permanently removes it from the database.

Deactivating a Community

To deactivate an active Community, which prevents users from accessing the Community:

1. In the Portal Resources tree, select the Community you want to deactivate (**Portals > yourPortal > Communities > yourCommunity**).
2. On the Summary page, click **Status & Expiration**.
3. In the Status & Expiration dialog, select **Inactive** and click **Update**.
or
4. If you want to deactivate the Community on a specific date, select **Active**, set the **Expiration Date** for when it should automatically be deactivated, and click **Update**.

The callback class assigned to the Community determines what occurs when the Community is deactivated. For example, notifications can be sent to users when a Community is deactivated.

Deleting a Community

To delete a Community, which permanently removes it from the database:

1. In the Portal Resources tree, select **Portals > yourPortal > Communities**.
2. On the Browse page, check the **Delete** box next to the Community.
3. Click **Delete**.

Propagating Communities

You cannot propagate a Community back to staging or development. You can only propagate Community templates.

Logging In

After you or another user receive an invitation to join a GroupSpace Community, you can log in and become a member.

Perform the following steps to log into the GS Example Community:

1. Go to `http://<localhost>:7041/groupspace/groupspace.jsp`. Insert your machine name for `<localhost>`.
2. Enter your **Username** and **Password** and click **Login**. (If you created the GroupSpace Community, log in as `weblogic/weblogic`.)
3. In the GroupSpace Invitations section, click the GroupSpace Community name.

4. In the Community Registration page, enter your personal information and click **Save and Continue** or click **Skip**.

Inviting Users to Join

After you create your own GroupSpace Community, you can invite other users to join the GroupSpace Community. You can also assign Community members to a role to control what they can do, use portlet settings to control who can view a portlet’s data, and set portlet preferences.

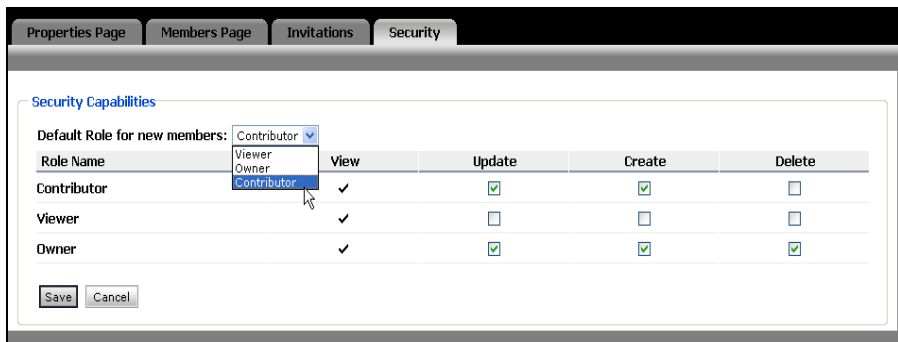
The benefit of joining a GroupSpace Community is that users who belong to the same Community can work together and share information and resources.

The ability to access a GroupSpace Community is based on Community properties and membership. If anyone can access a GroupSpace Community, the Community is public. If you are required to register, the Community is private and you are redirected to a registration page.

The following two ways allows users to join a Community:

1. **Invitations** – GroupSpace creators and owners send an e-mail Invitation to invite users to join the Community. Prospective Community members must each receive their own unique invitation. See [“Inviting Users” on page 6-6](#).
2. **Self-registration** – If Public Registration exists, visitors can register to join the Community without an Invitation. The capability of each new self-registered user depends on what you set up (choose **Communities > Manage This Community** and select the **Security** tab.) The default capability for a user that self-registers is Contributor. See [Figure 6-1](#).

Figure 6-1 Set the Default Role



Inviting Users

Accessing a Community is based on Community properties and membership. The following two related properties affect Community access:

- **Access** – If anyone can access this Community, the Community is public. If you are required to register, the Community is private and you are redirected to a registration page.
- **Joining** – If Public Registration exists, visitors can register to join the Community without an Invitation. The capability of each new self-registered user will have depends on what you set up in the security mapping page (choose **Communities > Manage This Community** and select the **Security** tab). The default capability for a user that self-registers is Contributor. You can also set up the Community so that only invited users can join.

GroupSpace creators and owners can invite users through e-mail to join the Community. Prospective Community members must each receive their own unique invitation. Users that belong to the same Community can work together and share information and resources.

This section contains the following topics:

- [Sending an Invitation to Join the Community](#)
- [Accepting an Invitation](#)
- [Removing a Member](#)

Sending an Invitation to Join the Community

You can invite users to join the GroupSpace application. You must configure your outgoing mail server to be able to send e-mail invitations.

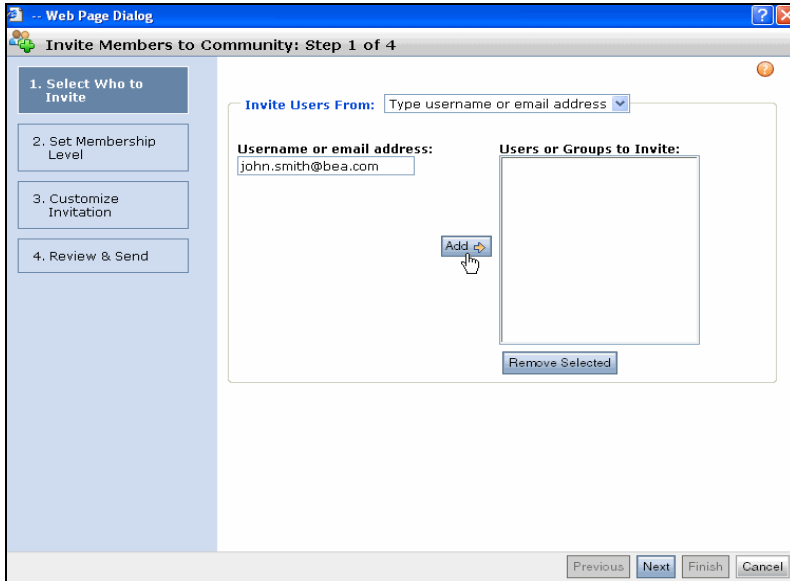
Perform the following steps to invite someone to join the GroupSpace Community:

1. Log into the GroupSpace application as a Community owner or creator.
2. Choose **Communities > Manage This Community**.
3. Configure your outgoing e-mail server to be able to send e-mail invitations by selecting the **Properties Page** tab and clicking **Outgoing Email Configuration** and enter the following information to set up your outgoing mail server. Each field is required.
 - **Reply-to Address** – Your username.
 - **Display Name** – The name you want to appear in the From field of the e-mail.

- **Outgoing Mail Server (smtp)** – Your server name.
 - **Outgoing Mail Port (smtp)** – The port to connect to the incoming mail server. This defaults to the value for the selected protocol. For SMTP, enter 25.
 - **Account username (smtp)** – Enter the account’s username. For example, `groupspace`.
 - **Account password (smtp)** – Enter the account’s password for the incoming mail server.
4. Select the **Members Page** tab and click **Invite More People**.
 5. In the Invite Members to Community: Step 1 dialog in the Invitation wizard, use the drop-down list to select users or groups to invite:
 - **Type username or e-mail address** – Manually type each existing username or e-mail address.
 - **Browse All Available Users** – Select a user from the list. If the list is long, you can search for the user’s name. The search is case sensitive.
 - **Browse All Available Groups** – Select a group from the list. The Visitor Entitlements you set up for your portal determine which groups appear here. If the list of groups is long, you can search for a group name. The search is case sensitive. For more information on Visitor Entitlements, see the [Security Guide](#).
 - **Your current Communities** – Select a user from the list. The list contains other Community members from all the Communities to which you belong.

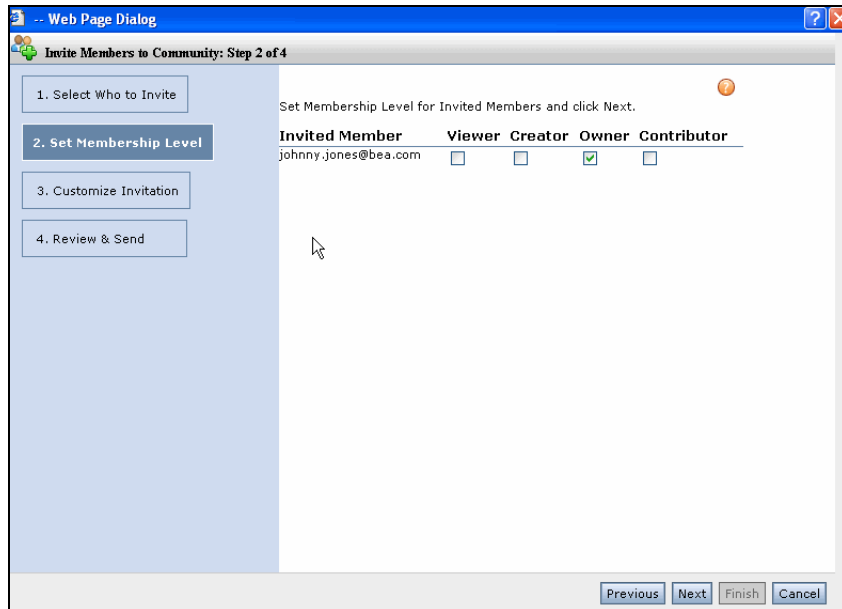
Click **Add** to move the user or group to the **Invitees** section (see [Figure 6-2](#)) and click **Next**. (If you use a username, the user must have a User Profile created.)

Figure 6-2 Use the Drop-Down List to Select Who to Invite to the GroupSpace Community



6. In the Invite Members to Community: Step 2 dialog, assign a role by selecting one of the check boxes and clicking **Next**. See [“Editing Roles and Capabilities” on page 6-11](#) and [“Editing Default Role Capabilities” on page 6-14](#) for more information on roles. See [Figure 6-3](#).

Figure 6-3 Assign a Role to the Person You Are Inviting



7. In the Invite Members to Community: Step 3 dialog, enter your name in the **Send Invitation from** field, type a message, and click **Next**.
8. In the Invite Members to Community: Step 4 dialog, review the invitation and click **Finish**.
9. Click **Close** to exit the Invitation wizard. The people you invited will receive an e-mail with a link to the GroupSpace Community you created. The members must log in to accept the invitation.

Tip: You can view Invitations that have been sent on behalf of the Community that have not been accepted. Choose **Communities > Manage This Community** and select the **Invitations** tab to see Invitation details and status. Status includes sent, accepted, rejected, revoked, or expired invitations. You can select the **Cancel Invitation** check box next to a pending Invitation and click **Remove** to cancel the Invitation.

Accepting an Invitation

When a member receives an invitation and decides to join a Community, the member must go to the provided GroupSpace Community URL and accept the invitation.

Perform the following steps to accept an invitation to join a Community:

1. Open the e-mail you received that invited you to join a GroupSpace Community.
2. In the e-mail, click the URL for the GroupSpace Community that you were invited to join.
3. In the Community Registration page, click **Need to create a login**.
4. Enter a **Username** and a **Password**. Retype the password in the **Confirm password** field and click **Create Account**.
5. In the Community Registration page, click the link to the Community.

Removing a Member

A GroupSpace owner or creator can remove members from the Community. Removing a member deletes the user's membership, but does not delete the user.

Perform the following steps to remove a Community member:

1. Log into the GroupSpace application as an owner or creator.
2. Choose **Communities > Manage This Community**, as shown in [Figure 6-4](#).

Figure 6-4 Choose Manage This Community



3. Select the **Members Page** tab.
4. Locate the member and select the **Remove** check box.
5. Click **Remove**.

Editing Roles and Capabilities

The GroupSpace Community administrator sets up the roles to control what users can do in the Community. Each role has specific, defined capabilities. A content item can be a folder or an item in the folder.

The GroupSpace application contains the following capabilities:

- **Create (C)** – Can add content items
- **Update (U)** – Can modify the content item’s properties
- **Delete (D)** – Can delete content items
- **View (V)** – Can see content items and their properties

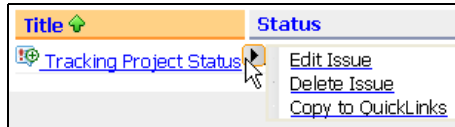
The GroupSpace application’s roles and default capabilities are listed in [Table 6-1](#). You can change the default capabilities (except for View, which is always enabled). The default membership role is Contributor. A GroupSpace Community member can have more than one role. See “[Editing Default Role Capabilities](#)” on [page 6-14](#) for more information.

Table 6-1 Roles and Default Capabilities

Role	Purpose	Capability
Creator	Create a GroupSpace Community, and create, update, and delete content	C,U,D,V
Owner	Manage a GroupSpace Community, and create, update, and delete content	C,U,D,V
Contributor	Can create and update content	C,U,V
Viewer	View content	V

A user’s capability can be tied to the Active Menu that you see when you hover your mouse over an item (an Issue, for example) and click the arrow that appears. If your assigned capabilities include the ability to delete items, you will see the **Delete** choice, as shown in [Figure 6-5](#).

Figure 6-5 This User has Create, Update, Delete, and View Capabilities, as shown in the Active Menu



For instructions on editing the XML file that controls the Active Menu capabilities, see the [Communities Guide](#).

A system administrator at your company can use the Administration Console to modify the GroupSpace Content Repository and control the visibility of content for all GroupSpace Communities. See the [Content Management Guide](#) for more information.

This section contains the following topics:

- [Assigning a Role to a Member](#)
- [Editing Default Role Capabilities](#)

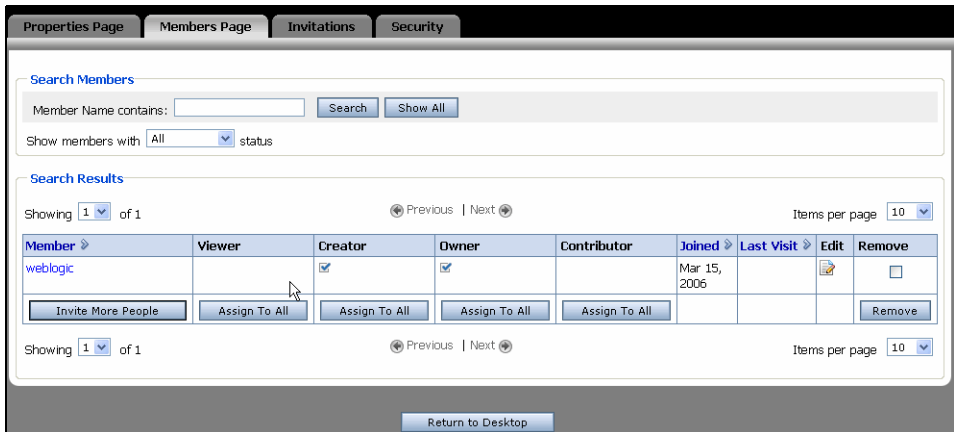
Assigning a Role to a Member

A GroupSpace Community owner or creator can assign a role to each member.

Perform the following steps to change the role a member is assigned:

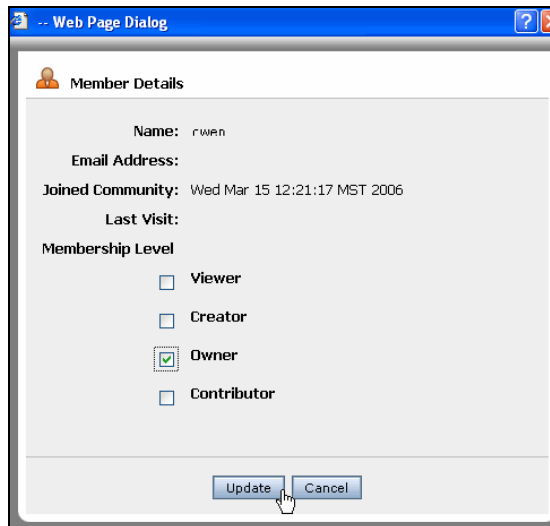
1. Log into the GroupSpace application as an owner or creator.
2. Choose **Communities > Manage This Community**.
3. Select the **Members Page** tab. The Members Page is shown in [Figure 6-6](#).

Figure 6-6 Roles for Users



4. Locate the member and click **Edit**.
5. Select the check box for a role that you want to assign to the member and click **Update**, as shown in Figure 6-7. Select only one role for each member.

Figure 6-7 Assign Roles to a Member



6. Click **Update** and close the window.

Tip: To assign all your users the same role, click **Assign To All** at the bottom of the column in the **Members Page** tab.

An anonymous user is a user that has not logged in and does not have a role in the GroupSpace Community. Anonymous users cannot see the data in the GroupSpace portlets.

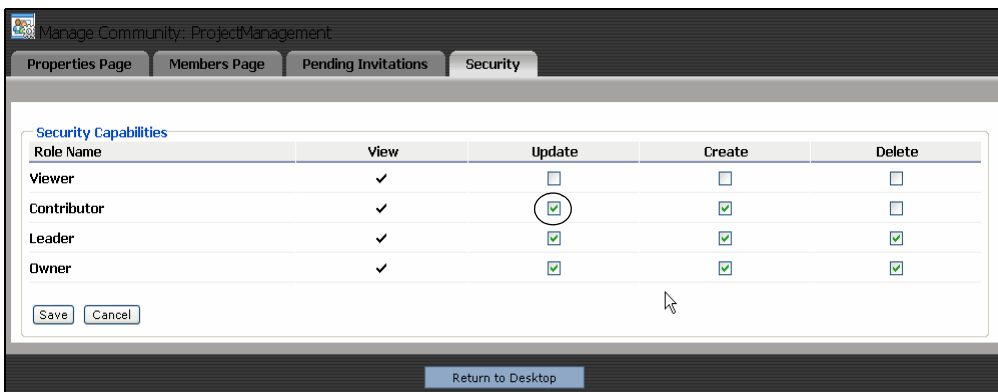
Editing Default Role Capabilities

GroupSpace administrators can change the default capabilities that are assigned to each GroupSpace Community role.

Perform the following steps to change what a role can do:

1. Log into the GroupSpace application as an owner or creator.
2. Select **Communities > Manage This Community**.
3. Select the **Security** tab.
4. Click **Security Capabilities**.
5. Locate the role you want to change and select the check box under each capability to enable it or disable it, as shown in [Figure 6-8](#).

Figure 6-8 Edit the Default Capabilities for Each Role



6. Click **Save**.
7. Close this window to return to the GroupSpace application.

Managing the GroupSpace Portlets

This section contains the following topics:

- [Controlling Who Can View Portlet Data](#)
- [Changing Default Portlet Preferences](#)
- [Using GroupSpace QuickLinks](#)
- [Adding Related Content Items](#)
- [Viewing the History of Items in a Portlet](#)
- [Sending Notifications to the Community](#)
- [Searching Your GroupSpace Community](#)
- [Enabling GroupSpace Customization](#)
- [Changing the Appearance of Your GroupSpace Community](#)

Controlling Who Can View Portlet Data

The data in a GroupSpace portlet can be visible just to the user in the Communities to which the user belongs, or to all members of the Community.

Use the following definitions help you control who can view a portlet's data:

- **Community** – All members of the Community can see the data in the portlet. Community data is tied to a specific Community.
- **Personal** – The user who created the data belongs to multiple Communities and can see the data in all the Communities. Personal data is tied to a user, and personal data is stored in a different folder than the Private and Community data.
- **Private** – Only the user who created the data can view the data in this Community. Some portlets (Mail, Contacts, Calendar, Tasks, Discussion Forums, and Announcements) cannot contain Private data.

A Community member can change the visibility of some private items to be visible to the Community. For example, a private Issue can be changed from being visible only to the user that created it to being visible to the entire Community. (A saved search can also be changed from Private visibility to Community visibility; see [“Saving Your Search Queries” on page 7-49.](#))

Table 6-1 lists each portlet and who can view the portlet’s data.

Table 6-1 Data Visibility Is Controlled by the Community, Personal, and Private Settings

Portlet Name	Community	Personal	Private
GS Issues	✓	✓	✓
Discussion Forums	✓		
Mail		✓	
Contacts	✓	✓	
GS GroupNotes	✓	✓	✓
Calendar	✓	✓	
Tasks	✓	✓	
GS Links	✓	✓	✓
GS Announcements	✓		
GS RSS Reader	✓	✓	✓
GS Document Library	✓	✓	✓
CM Browser	✓		

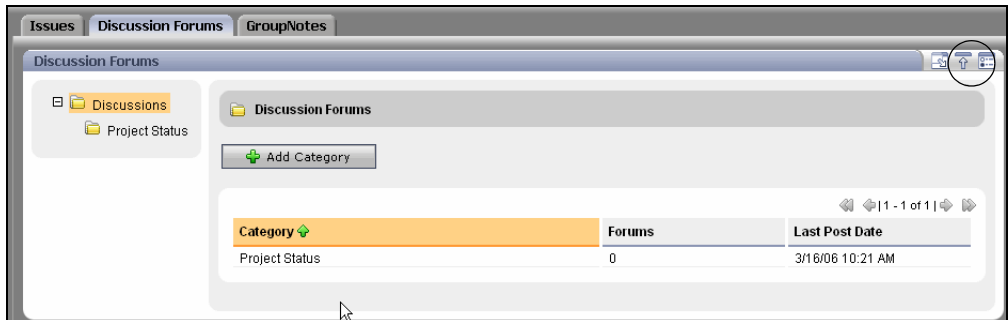
Changing Default Portlet Preferences

You can change preferences for some portlets to control the language, time zone, number of items to display on each page, default views, and so on.

Perform the following steps to edit a portlet’s preferences:

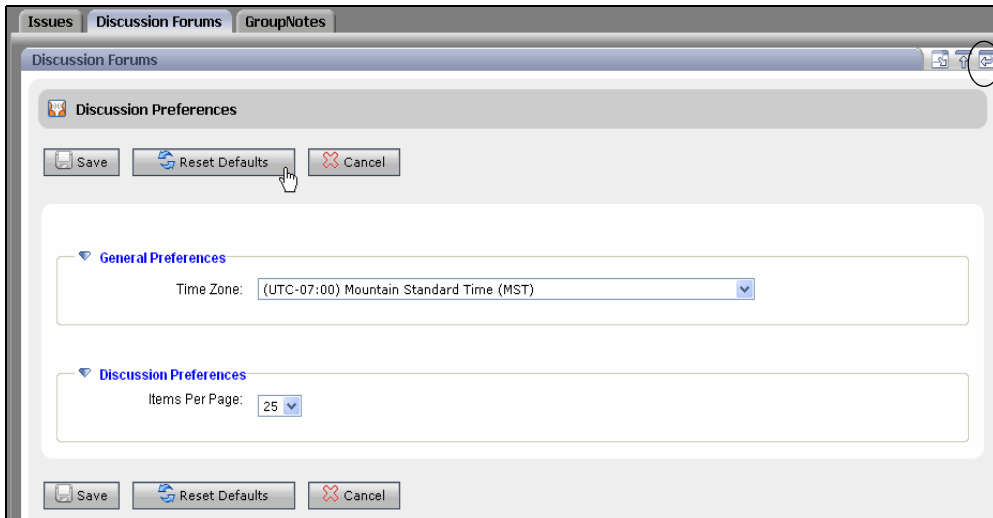
1. Log into your GroupSpace Community.
2. Select the portlet's tab and click the portlet's **Edit** icon, as shown in [Figure 6-9](#).

Figure 6-9 Edit the Portlet's Preferences



3. Enter information by clicking **General Preferences** and **Discussion Preferences** (this example is for the Discussion Forums portlet shown in [Figure 6-10](#); preferences are specific to the portlet):
 - **General Preferences** – Choose the preferred time zone.
 - **Discussion Preferences** – Select the number of items to display on each page from the **Items Per Page** drop-down list, as shown in [Figure 6-10](#). Depending on the portlet, other preferences can also appear here.

Figure 6-10 Preferences for the Discussion Forums Portlet



4. Click **Save**.
5. Click the portlet's **Leave Edit** icon.

Using GroupSpace QuickLinks

The GroupSpace Community application contains an area called QuickLinks that temporarily stores items. For example, you can create an Issue, copy the Issue to the QuickLinks, and then insert the Issue as a Related Item in a GroupNote.

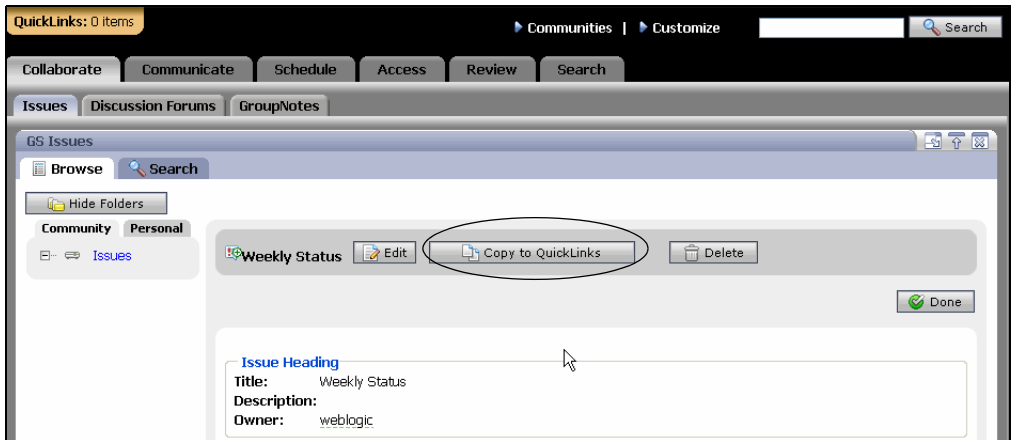
QuickLinks works with the following portlets:

- GS Issues
- GS GroupNotes
- GS Document Library

Perform the following steps to copy and paste an item using QuickLinks:

1. Create an item, such as an Issue, and save it. (See the instructions on [“Using the GS Issues Portlet” on page 7-2.](#))
2. Click **Copy to QuickLinks**, as shown in [Figure 6-11](#).

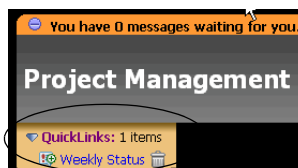
Figure 6-11 Copy the Issue to QuickLinks



You can also click **Done** (see Figure 6-11) and then drag and drop the title of the item to the QuickLinks area at the top of the page. (You can also hover your mouse over the title of the item, click the arrow that appears, and choose **Copy to QuickLinks**.) The QuickLinks area can hold up to five items. You can remove an item from QuickLinks by clicking the **Remove This Item from QuickLinks** icon next to the item.

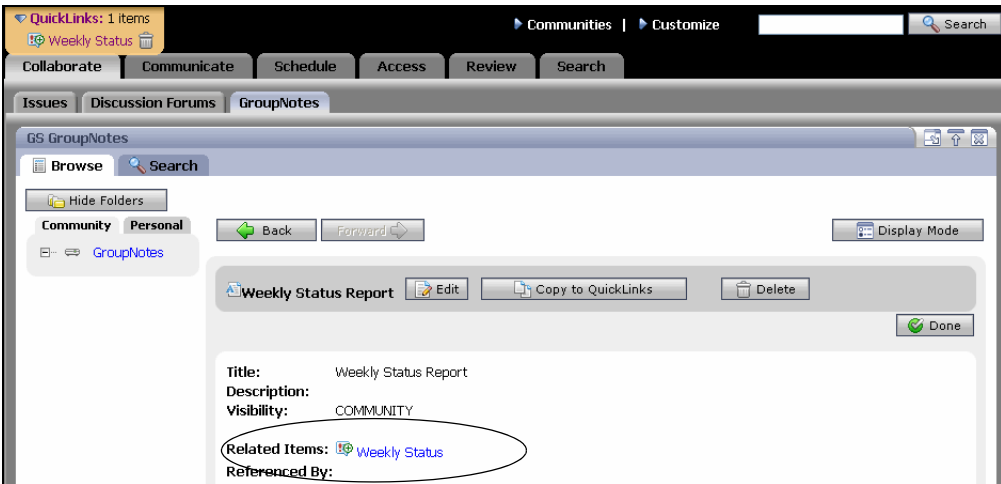
Figure 6-12 shows one item in the QuickLinks.

Figure 6-12 Items Appear in QuickLinks



3. Open the portlet and the item where you want to copy the item.
4. Drag the QuickLink item to the **Related Items** section and drop it. If the portlet is longer than the page, hold the left mouse key and scroll with your mouse scroll wheel. (You can also click **Add Related Items** and select the **QuickLinks** option. Select a **Resource Type** to view the contents of QuickLinks, choose an item to copy into the **Related Items** section, and click **Add**.)
5. Click **Update** in the portlet where you dropped the QuickLinks item. The item now appears in the **Related Items** section, as shown in Figure 6-13.

Figure 6-13 The QuickLinks Item Appears as a Related Items Icon



Tip: Dragging an item to QuickLinks makes a copy of the item and places it in the QuickLinks area. Clicking **Move QuickLink Item Here** (instead of copying the item), removes the item from QuickLinks and places it in the new portlet.

Adding Related Content Items

When you establish a relationship between two resources in a GroupSpace portlet (for example, you relate a document to an Issue), you have created a related content item. Related content items are relationships to GroupNotes, Issues, Discussions, and Document Library items.

Viewing the History of Items in a Portlet

You can monitor who added or changed items in your GroupSpace application during a specific time frame.

This history is available for the following portlets:

- GS Issues
- GS GroupNotes
- GS Document Library

- GS RSS Reader

Perform the following steps to view the history of items added or modified in a portlet:

1. Select the **Review** tab.
2. At the **Resource Type** field, choose a resource type from the drop-down list.
3. At the **View Items Modified or Created in the Past *x* Days** field, select a number from the drop-down list. The new or modified items appear in the list, as shown in [Figure 6-14](#).

Figure 6-14 New GS Issues Added or Modified in the Last Seven Days

The screenshot shows the 'GS Recent Items' portlet interface. At the top, there are navigation tabs: Collaborate, Communicate, Schedule, Access, Review, and Search. The 'Review' tab is selected. Below the tabs, there's a search bar and a 'Communities | Customize' link. The main content area is titled 'GS Recent Items' and contains a filter for 'Resource Type' set to 'Issues'. Below that, it says 'View Items Modified or Created in the Past 2 Days'. There are buttons for 'Get Item and Page Count' and 'Refresh Items'. A table lists the items:

Title	Creation Date	Modification Date	Modified By
Weekly Status	June 13, 2006 08:30:21 AM	June 13, 2006 08:30:21 AM	weblogic
Project Management	June 13, 2006 08:29:47 AM	June 13, 2006 08:29:47 AM	weblogic

At the bottom right, there are buttons for 'Get Item and Page Count' and 'Refresh Items', and a dropdown for 'Items per page: 25'.

4. Click an item to view its details in the appropriate portlet.

Sending Notifications to the Community

The GroupSpace Notifications Center advises you when Announcements, Invitations, and E-mail items appear and when Calendar items and Tasks are due. The Notification Center is visible from anywhere in the GroupSpace Community.

The GroupSpace application checks for Notifications every 15 seconds. If you receive more than one e-mail Notification regarding an update to an item you are following, the GroupSpace application summarizes the number of updates and sends one Notification. If other Notifications occur for Announcements, personal Calendar appointments, personal Tasks, or Invitations, you will receive one Notification per item. If you subscribe to more than one GroupSpace Community, you will receive separate Notifications for each Community.

Displaying Notifications can be intrusive or passive. A Critical Notification has a high priority, so it is intrusive and a pop-up box informs you that a Critical item is waiting for you. The Notification alert disappears if you click **OK**. You must clear the Notification from the Notifications Center, or you will be notified each time you log in. A Notification with a lower priority is passive, and is queued so you can view it later.

Tip: If you are expecting a new Notification and do not see it in the Notifications Center, click **Refresh**.

For instructions on creating and managing Announcements, see “Using the GS Announcements Portlets” on page 7-12.

Configuring the Notifications Center

You can make changes to the Notifications Center to determine what causes Notifications to appear in the Notifications Center and how often.

Perform the following steps to set up the Notifications Center:

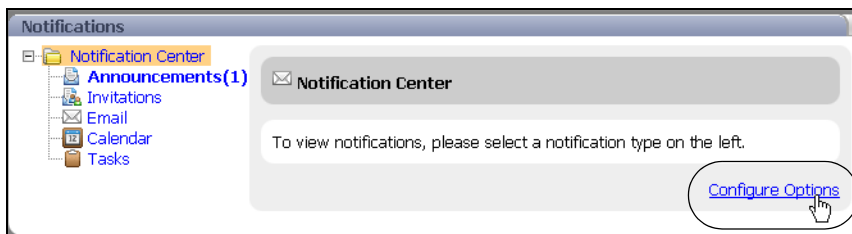
1. Click the Notification link at the top of the GroupSpace application, as shown in [Figure 6-15](#).

Figure 6-15 Notifications Link



2. In the Notifications Center, click **Configure Options**, as shown in [Figure 6-16](#).

Figure 6-16 You Can Determine How Often You Will be Notified for Specific Portlets



3. Select the check boxes to enable the following features:
 - **Enable interim message retrieval between page navigation** – Select this check box to view Notifications without doing a full page refresh. If you do not select this check box, you will still see the Notifications but they do not dynamically update unless you

use the GroupSpace application and manually refresh the pages that generate the Notifications.

Note: The default Notification time for the poller to run is every 15 seconds for Announcements, Invitations, E-mail, Calendar, Tasks, and Invitations. Administrators can change this default value by editing an XML file; see the *Communities Guide* for instructions.

- **Email** – Select the **Email** check box to be notified when you have an e-mail. Use the drop-down list to select when the sent Notification will expire.
- **Calendar** – Select the **Calendar** check box to be notified when you have a Calendar item that is due. Use the drop-down list to select when the sent Notification will expire. You can also set a reminder by choosing to be notified before a Calendar event occurs.
- **Tasks** – Select the **Tasks** check box to be notified when you have a Task item that is due or overdue. Use the drop-down list to select when the sent Notification will expire.

Figure 6-17 shows the configuration choices.

Figure 6-17 Configure the Notifications Center

The screenshot shows a dialog box titled "Notifications" with a sub-header "Notification Center Configuration". It contains the following elements:

- Enable interim message retrieval between page navigation
- Please select which collaboration items you would like notifications from:
- Email
 - Automatically expire notifications: 15 Minutes after the notification was sent.
- Calendar
 - Automatically expire notifications: 15 Minutes after the notification was sent.
 - Notify me when an event will occur within the next: 15 Minutes
- Tasks
 - Automatically expire notifications: 15 Minutes after the notification was sent.

At the bottom of the dialog are "Save" and "Cancel" buttons.

4. Click **Save**.

Viewing Notifications

Perform the following steps to view a Notification:

1. Click the Notification link at the top of the GroupSpace application.

2. Select the type of Notification (for example, Announcements).
3. Click the Notification to view more detail about it.

Note: To remove the Notification after you view it in the Notifications Center, select the check box and click **Clear Selected**.

Searching Your GroupSpace Community

All Community members can retrieve information in and outside the GroupSpace application using the following three methods:

- **Search an individual portlet** – Use the portlet’s **Search** tab or its Search bar to search and display information contained in that portlet. For example, a contacts Search for *john* retrieves all contacts listed in your address book with a first name of John.
- **Search this GroupSpace Community** – Use the GS Search portlet to search the current Community’s resources, such as Issues, Announcements, Document Library, RSS feeds, and so on. You can search the Community where you are logged in.
- **Search outside of the GroupSpace Community** – Use the GS Enterprise Search portlet to locate information outside the GroupSpace Community. You can search information stored on your server’s file system or on a web site. An Enterprise Search does not retrieve GroupSpace Community data.

See [“Using the Search Portlets” on page 7-44](#) for more information.

Customizing Your GroupSpace Community

GroupSpace contains a set of Visitor Tools in the **Customize** menu. You can use these tools to change the content and appearance of your GroupSpace Community.

You can perform the following tasks to customize your GroupSpace Community:

- Add and remove portlets, pages, and books
- Update the layout of portlets, pages, and books
- Change the GroupSpace application’s look and feel
- Rename a portlet, page, or book
- Change the theme of a portlet, page, or portlet
- Make changes to the layout and appearance of the Community that affect all users

This section contains the following topics:

- [Enabling GroupSpace Customization](#)
- [Changing the Appearance of Your GroupSpace Community](#)

Enabling GroupSpace Customization

When you create a GroupSpace Community, the default is to be able to customize the new Community by adding new pages or portlets, changing the look and feel, adjusting the number of columns, and adding content to pages.

Tip: If you cannot see the **Customize** menu in your GroupSpace application, the Community template used to create your GroupSpace Community does not allow you to add pages and other customization. You can change this by choosing **Communities > Manage This Community**. In the **Properties Page** tab, click **Edit Location & Access**. Select the **Allow people to customize their view and add personal pages** check box and click **Save**. Click **Return to Desktop** and the **Customize** menu now appears.

The **Customize** menu is part of the Visitor Tools that ships with WebLogic Portal 9.2. For more information on Visitor Tools and how to enable the tools in your application, see the [Portal Development Guide](#) for more information.

Changing the Appearance of Your GroupSpace Community

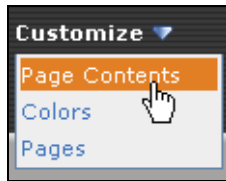
You can change the contents on a page and the layout of the page's columns.

Changing the Page Layout

Perform the following steps to change the layout of a page in your GroupSpace application:

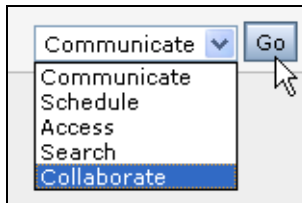
1. Log into your GroupSpace application.
2. Choose **Customize > Page Contents**, as shown in [Figure 6-18](#).

Figure 6-18 Choose Page Contents to Change the Layout or Contents of a Page



3. Select the page you want to customize by selecting an item from the drop-down menu and clicking **Go**, as shown in [Figure 6-19](#).

Figure 6-19 Select a Page to Customize



4. The dialog reflects the portlets that you are changing. For example, the Collaborate page contains one portlet. Change the layout of the page you are in by clicking **Change Layout**.

Tip: You can also click the up and down arrows to change the portlet's position on the page.

5. Select one of the layouts to determine the number of columns and click **Change Layout**.
6. Click **Save Changes**. [Figure 6-20](#) shows how the Collaborate page was changed from a single column layout to a two-column layout.

Figure 6-20 The Collaborate Page Now Has a Two-Column Layout

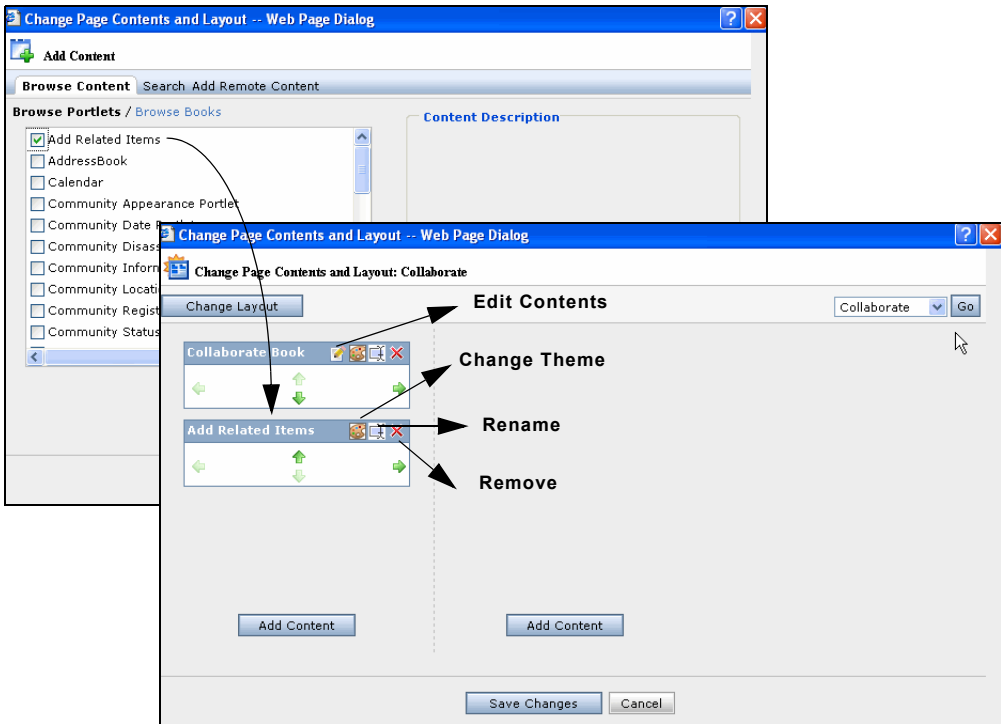


Changing the Content on the Page

Perform the following steps to change the content that displays on a page in your GroupSpace application:

1. Choose **Customize > Page Contents**.
2. Select the page you want to customize by selecting an item from the drop-down menu and clicking **Go**.
3. Click **Add Content** to display the available portlets.
4. In the **Browse Content** tab in the **Browse Portlets** view, pick a portlet by selecting the check box next to it and clicking **Save Changes**. Figure 6-21 shows how to select the Related Items portlet check box and where it appears on the page.

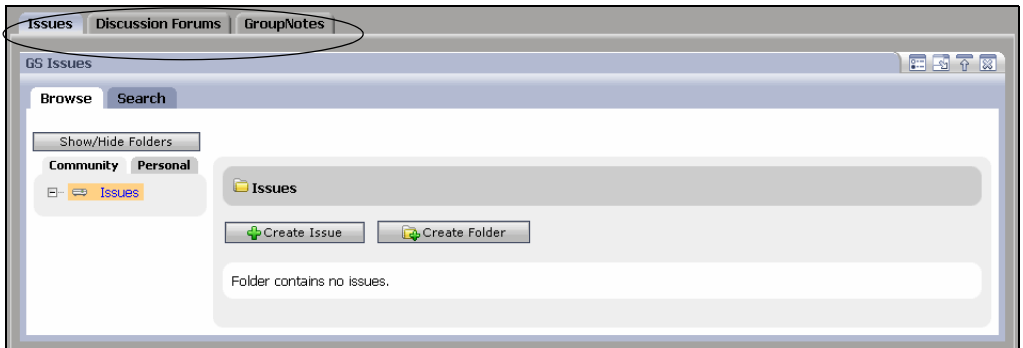
Figure 6-21 Adding Content, such as the Related Items Portlet to a Page



Tip: You can change a portlet’s theme, rename the portlet, delete the portlet, or edit the portlet’s content (available only in a book) by clicking the portlet’s icons. See [Figure 6-21](#). A theme is the look and feel of part of the GroupSpace application, such as a page or a portlet.

You can also add content with the following steps:

- In the **Browse Content** tab in the Change Page Contents and Layout dialog, click **Browse Books** to add the contents of an existing GroupSpace tab. For example, if you add the Collaborate book, the three Collaborate portlets (GS Issues, Discussion Forums, and GS GroupNotes) are added in a tabbed format, as shown in [Figure 6-22](#).

Figure 6-22 Adding the Collaboration Book

If you add each portlet separately, the tabs shown above do not appear.

- Search for a specific portlet by selecting the **Search** tab in the Change Page Contents and Layout dialog, entering a search term, and clicking **Search**. The search is not case sensitive. Search displays a maximum of 200 items.
- Add remote portlets by selecting the **Add Remote Content** tab, entering a search term, and clicking **Search**. Select the check box next to the remote portlet and click **Save Changes**. For example, entering *organiz* might retrieve portlets, such as the Daily Organizer, Lotus Organizer, RSS NonProfit Organizations, and so on. This type of search queries the Universal Description, Discovery and Integration (UDDI) registry for the name and all available metadata of a particular content item, including the producer. The UDDI registry contains all available portlets on the server and is used in an enterprise to share web services.

Changing the Look and Feel of a Page

A theme lets you override a portal desktop's overall Look & Feel on individual books, pages, and portlets.

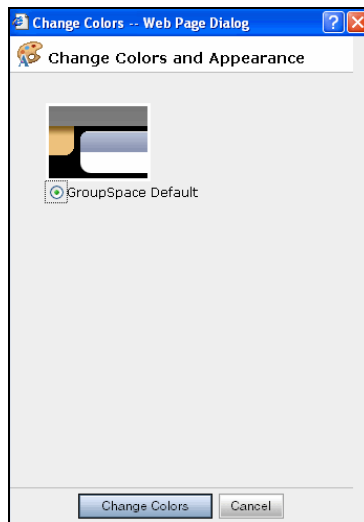
If you modified the default GroupSpace Look & Feel, or created a new GroupSpace Look & Feel from the default GroupSpace Look & Feel, you can apply that change to a book, page, or portlet. (You can also change the Look and Feel for the entire GroupSpace Community; see [“Changing the GroupSpace Look & Feel”](#) on page 4-15.)

Tip: Only the GroupSpace default (gsdefault) Look & Feel is compatible with GroupSpace; you should make all other Look & Feel files (Default, Classic, All Text, and Legacy) unavailable to users. The best way to do this is to create an entitlement role to which no one belongs, and then entitle the other Look & Feel files so that they are available only to that role. Leave the GroupSpace default Look & Feel unentitled so that it is available to all users.

Perform the following steps to change the theme (the colors and appearance) for pages, portlets, and books:

1. Choose **Customize > Colors**.
2. Select a new Look & Feel and click **Change Colors**, as shown in [Figure 6-23](#).

Figure 6-23 Select a New Look & Feel



Adding and Creating a New Page

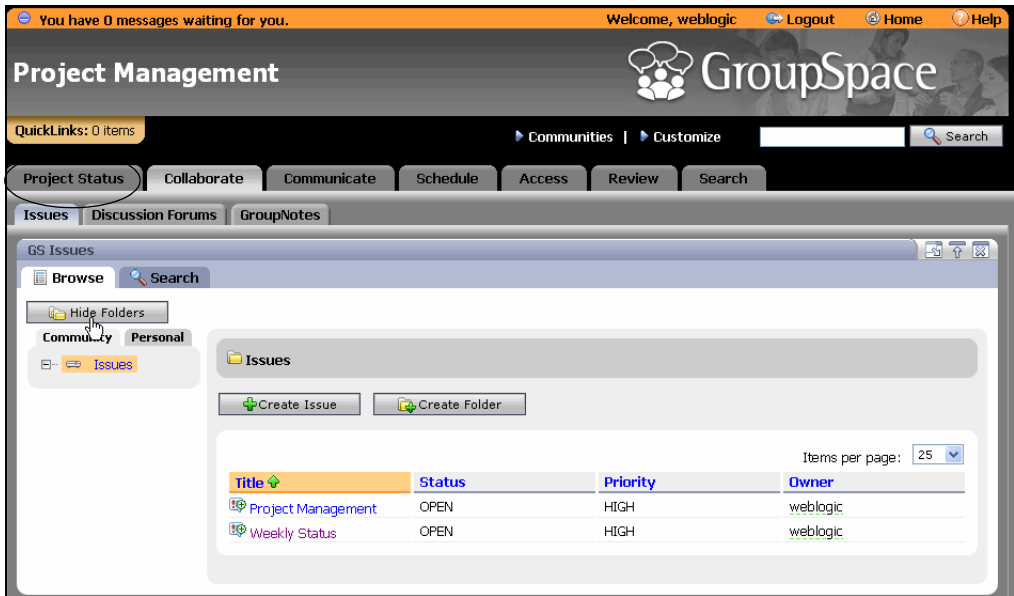
Perform the following steps to change the order of the tabs that appear in your GroupSpace application, add existing pages, and create new pages (which appear as tabs):

1. Choose **Customize > Pages**.

Tip: If you cannot see the **Customize** menu, the Community template used to create your GroupSpace Community does not allow you to add pages and other customization. You can change this by choosing **Communities > Manage This Community**. In the **Properties Page** tab, click **Edit Location & Access**. Select the **Allow people to customize their view and add personal pages** check box and click **Save**. Click **Return to Desktop** and the **Customize** menu now appears.

2. Select a page from the drop-down menu. This tab will be highlighted when you log in.
3. Change the order of the tabs by clicking the up or down arrow and clicking **Save Changes**.
4. Add a new page by clicking **Add and Create Pages**. Select the **Select Pages Below** field and select the check box next to the page you want to add. Click **Add Page**.
5. Create a new page by clicking **Add and Create Pages**. Select the **Create New Page** option and enter a **Page Name**, type an optional **Description**, and select an optional **Layout** from the drop-down list. For example, create a new tab called Project Status to track specific milestones related to your project. Click **Create Page**. After you create a new page, add it to the GroupSpace application by following the instructions in [step 4](#).
6. Click **Save Changes** and the new tab appears. [Figure 6-24](#) shows the new **Project Status** tab.

Figure 6-24 The New Page Appears as a Tab



Changing the Look and Feel for the Community

You can use Admin Mode to make changes to the layout and appearance that all Community members will see. (You can also create a new Look and Feel for the GroupSpace Community; see “Creating a New GroupSpace Look & Feel” on page 4-17.)

Perform the following steps to change the look and feel for the entire Community:

1. Choose **Customize > Switch to Admin Mode**.
2. Click **OK**.
3. In Admin Mode, use the **Customize** menu to make changes to the layout of the pages, each page’s content, look and feel, and so on.
4. When you finish your changes, choose **Customize > Exit Admin Mode**.

Customizing Template JSPs

GroupSpace Community administrators might add customized properties to the object class, in order to customize the portlets. If you want these properties to appear in a different location in the portlet, you must modify the template JSP file. For example, if you add a property called

Tracking Number to the Issue Type definition, you might want that Tracking Number field to appear first in the Issues portlet when you click **Details**.

You can customize the templates to change the appearance of the following GroupSpace portlets:

- GS Announcements
- GS Document Library
- GS Issues
- GS Links
- GS RSS Reader
- CM Browser (see the *Content Management Guide* for more information)

You can customize the portlets in WebLogic for Workshop by copying the template JSP files into your web application and modifying the template JSPs. Your changes are included in the GroupSpace library modules, and the changes are applied automatically and detected by the GroupSpace Community portlets. If you customize the look and feel of your portlets, those changes will be reflected in your modified GroupSpace portlets. If you apply a WebLogic Portal Service Pack, your JSP modifications will be saved.

Tip: Modifications that you make to the template JSP files are not supported by BEA's Customer Centric Engineering group.

Perform the following steps to customize a template JSP:

1. In Workshop for WebLogic, create a GroupSpace-enabled portal. See the instructions in the *Portal Development Guide*.
2. In the Merged Projects view, expand your *<web project>* folder and the **templates** subfolder. (The files in the templates directory are part of the **wlp-groupsace-web-lib** library module.)
3. Locate the display template file you want to modify. Some files and folders in your web project might be italicized, which means that you are using the original copy of the contents on the library module. Right-click the display template file in the **templates** subfolder and choose **Copy To Project**. This action creates a duplicate copy of this file and stores it in your web project. Do not rename the file; keep the existing name. After the file is copied to your web project, the file's name is no longer italicized.
4. Open the template JSP file you want to modify by double-clicking the file. For example, double-click the `displayAnnouncementsTemplate.jsp` file in the **templates** subfolder.

5. Modify the JSP by moving the properties up or down in the JSP to change the order in which the properties appear, or making a property not display by placing it in the Excluded Properties list. Modify the following items in the JSP:
 - **Included properties** – The `includedProperties` section lists the properties in the order that they are displayed in the GroupSpace portlet. For example, in the `displayAnnouncementsTemplate.jsp` file, the included properties are Title, Description, Effective Date, Expiration Date, Severity, and so on.
 - **Excluded properties** – The `excludedProperties` section contains the properties that do not display in the GroupSpace portlet. For example, in the `displayAnnouncementsTemplate.jsp` file, the excluded properties are Related Nodes, Attachments, Community ID, and so on.
 - **Dynamic properties** – If a property is not listed in the included or excluded properties sections, the property appears in the dynamic properties section (called `other`). For example, User Time Zone could be a dynamic property and it then appears at the bottom of the portlet. The GS Links portlet is the only portlet does not have a separate dynamic properties section, so new properties appear at the bottom of the list.
6. Save the file. Your changes are automatically applied.

Using the GroupSpace Portlets

This chapter describes how to use the BEA WebLogic Portal 9.2 GroupSpace Community portlets. A portlet is a Web-based component that processes requests and generates dynamic content. GroupSpace portlets can communicate with each other. You can customize the content and appearance of a portlet to meet your specific business needs.

GroupSpace contains 13 Community-enabled portlets that work inside the GroupSpace Community. The portlets that do not begin with *GS* (such as Tasks) can be used outside of a GroupSpace Community in a Community or in a standard desktop.

This chapter contains the following sections:

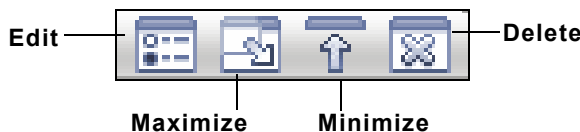
- [Using the Portlet Icons](#)
- [Using the GS Issues Portlet](#)
- [Using the GS Links Portlet](#)
- [Using the GS RSS Reader Portlet](#)
- [Using the GS Announcements Portlets](#)
- [Using the GS Document Library Portlet](#)
- [Using the GS GroupNotes Portlet](#)
- [Using the Tasks Portlet](#)
- [Using the Discussion Forums Portlet](#)
- [Using the Mail Portlet](#)

- [Using the Calendar Portlet](#)
- [Using the Contacts Portlet](#)
- [Using the CM Browser Portlet](#)
- [Using the Search Portlets](#)
- [Optimizing Portlet Performance](#)

Using the Portlet Icons

Each portlet contains icons that allow you to edit the portlet’s properties, delete it, enlarge it, or reduce it, as shown in [Figure 7-1](#).

Figure 7-1 Portlet Icons



Editing the portlet’s preferences lets you change the language, time zone, and other portal-specific settings.

Using the GS Issues Portlet

Use the GS Issues portlet to create lists of topics that are related to a project. For example, project managers can maintain a list of open issues that are migrated to closed issues as they are resolved. Any Community member in a contributor or owner role can create an Issue.

You can create Issues that are Private, Personal, or visible to the Community. See [“Controlling Who Can View Portlet Data”](#) on page 6-15 to learn more about who can view portlet data.

You can also filter the list of Issues by status (for example, to show all Open Issues).

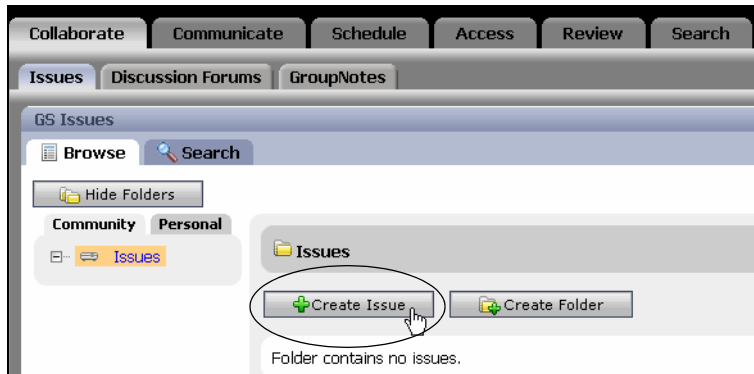
Tip: Issues are different than Tasks because Issues do not have a due date. Users could create a Task based on an Issue, to track the work required to resolve the Issue.

Adding an Issue

Perform the following steps to add a new Issue:

1. Select the **Collaborate** tab and the **Issues** tab.
2. In the **Browse** tab, select the **Community** tab to create a Community Issue that all members of the Community can view. Select the **Personal** tab to create a Personal Issue that the user can view across all the Communities to which the user belongs. (You can also create a Private Issue by creating a Community Issue and marking it as Private. See [step 5](#) for instructions.)
3. You can create an Issue and place it in the top-level **Issues** folder, or you can put the Issue in a subfolder. Select the location in the tree where you want the folder and click **Create Folder**. Enter the name in the **Folder Name** field and click **Create Issue Folder**.
4. Select the folder where you want to place the Issue and click **Create Issue**, as shown in [Figure 7-2](#).

Figure 7-2 Create a New Issue to Track Comments and Progress



5. The text fields for an Issue are limited to 256 characters. In the Create New Issue area, enter the following information:
 - **Title** – Enter a brief title that describes the Issue. The field is limited to 254 characters.
 - **Description** – Enter more detail about the Issue. The field is limited to 254 characters.
 - **Make Private** – Select this check box to ensure that only you can view this Issue in this GroupSpace Community. If you do not select the **Make Private** check box, all Community members can view the Issue. Community issues are stored in the database at `\GroupSpace\collaborationApp\collaborationWebApp\community\publicCommunity\Issues` hierarchy, while Private Issues are stored in your personal

folder in the database at `\users\ hierarchy. In the example, the <a> directory reflects the first letter of the user name and the <ProjectStatusIssue> represents the name of the Issue.`

- **Owner** – Enter the Community member you are assigning to the Issue, or click **Find User** to locate the user. In the Member Picker window, you can click **Show All Members** to view all Community members, or select a letter to view member names that begin with that letter. Select the radio button next to the member’s name and click **OK**.
- **Notes** – Enter more information about the Issue, or report progress on resolving the Issue. If your System Administrator and Portal Administrator enabled the rich text editing formatting toolbar and the bottom toolbar for this portlet, you can use the formatting toolbar (see [Figure 4-5](#) in Chapter 4) to format your text. Clicking the bottom toolbar’s **HTML** button lets you view the body with the HTML tags inserted, and clicking the **Preview** button allows you to view the Issue before you save it.

Tip: If you do not see the formatting toolbar or the bottom toolbar, rich text editing and the bottom toolbar are not enabled for this portlet. The rich text editing formatting bar is enabled by default (but the bottom toolbar is disabled) in the GS Example Community that ships with WebLogic Portal. In other web projects, rich text editing and the bottom toolbar are disabled by default. For instructions on enabling rich text editing, see [“Setting Up the Rich Text Editor” on page 4-18](#).

- **Priority** – Select the drop-down list and choose `High`, `Medium`, or `Low`. This field is internationalized so you can change the displayed language if you want.
- **Status** – Select the drop-down list and choose `Opened`, `In Progress`, or `Closed`. This field is internationalized so you can change the displayed language if you want.
- **Resolution** – Enter comments after the issue is resolved by editing the Issue and completing this field. For example, you could use these Resolution summaries to review all Issues with a `Closed` status.
- **Flagged** – Select this check box to set the **Flagged** field to `true`. Use the **Flagged** field to monitor Issues that are important to you. Select the **Search** tab in the **Issues** tab to search for issues you have flagged.
- **Related Items** – Click **Add Related Items** to insert a relationship to certain content or artifacts, or a QuickLink item to include information that pertains to this issue. The Add Related Items window lets you search for content by choosing a QuickLink item or entering a search query. You can select a **Full Text Search** (to search all available text) or **Field Search** (to search specific fields), enter a search query or keyword, and

click **Search**. You can also narrow your search by selecting a type of resource from the **Resource Type** drop-down list. When you locate a content item, select the check box next to it and click **Add**. A reference to the document appears in the **Related Items** field.

Figure 7-3 shows the fields to complete to create an Issue.

Figure 7-3 Create a New Issue

The screenshot shows the 'Create New Issue' form with the following fields and values:

- Title:** Review Specifications
- Description:** Development specs
- Make Private:**
- Owner:** dsmith (with a 'Find User...' button)
- Notes:** A rich text editor containing the text: "Should we set milestones based on project specs or on the master project schedule?"
- Details:**
 - Priority:** High
 - Status:** Opened
 - Resolution:** (empty text field)
 - Flagged:**
- Related Items:**
 - Left side: 'Add' button, 'Project Mana...' (with a checkmark), 'Remove' button.
 - Right side: 'Related Items' label, 'Add Related Items...' button, 'Project Status' (with a checkmark), 'Remove Selected Items' button.

At the bottom of the form are 'Create Issue' and 'Cancel' buttons.

6. Click **Create Issue**.
7. Click **Done**, and the Issue appears in the GS Issues portlet, as shown in [Figure 7-4](#).

Figure 7-4 New Issue

Title 	Status	Priority	Owner
 Review Specifications	Opened	High	dsmith
 Schedules	In Progress	Medium	weblogic

Note: An Issue can reside in only one folder. You can move (or drag and drop) an Issue to a folder in the tree where the Issue was created. For example, you can move a Community Issue from one folder to another folder in the Community tree, but you cannot move a Community Issue to the Personal tree. Personal data is stored in a different folder than the Community data.

8. After you create an Issue, you can create Tasks to do to resolve the Issue. See “[Using the Tasks Portlet](#)” on page 7-21.

Managing Issues

You can also perform the following tasks with Issues:

- **Edit an Issue** – Modify the Issue by clicking the Issue’s name in the Title column and clicking **Edit**. Click **Update Issue** when you are done.
- **Sort the Issue Columns** – Click the column’s heading to re-sort the list.
- **Delete an Issue** – Hover the mouse over the Issue, hover over the arrow that appears, and choose **Delete Issue**. Deleting an Issue removes it from the database.
- **Copy an Issue to QuickLinks** – Hover the mouse over the Issue, hover over the arrow that appears, and choose **Copy to QuickLinks**.

Searching Issues

See “[Using the Search Portlets](#)” on page 7-44 for instructions on searching the GS Issues portlet, performing a GroupSpace search, and searching outside GroupSpace.

Using the GS Links Portlet

The GS Links portlet helps you create and manage Links to URLs, as well as to content that is internal to the Community. For example, you might use the GS Links portlet to manage a development project, providing links to schedules, progress reports, and software defects.

Links can be created and edited by Community owners, creators, and contributors.

You can use categories to organize your links. Each category appears as a tab in the GS Links portlet. You can add a Link that is visible only to the Community, just to you in this Community (Private), or just by you in all the Communities to which you belong (Personal).

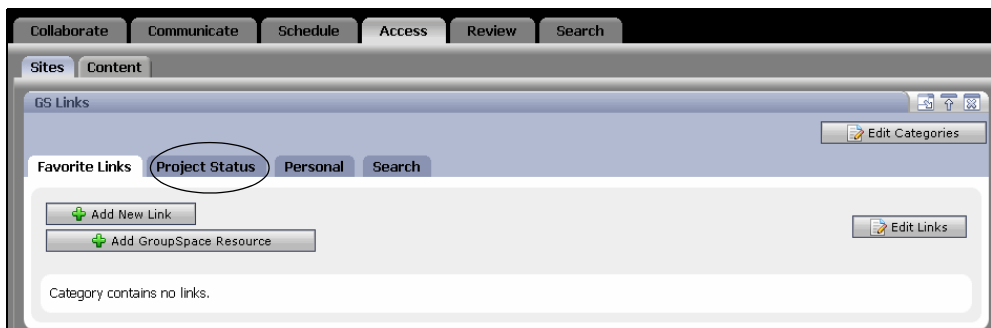
Creating a New Category

The GroupSpace application contains a default Category called **Favorite Links**. When you create a new category, a new tab appears in the GS Links portlet.

Perform the following steps to create a new category in the GS Links portlet:

1. Select the **Access** tab and the **Sites** tab.
2. In the GS Links portlet, click **Edit Categories**.
3. Click **Add New Category**.
4. Enter a name for the new category and click **OK**. The field is limited to 50 characters.
5. Click **Done**. The new Category appears as a tab, as shown in [Figure 7-5](#).

Figure 7-5 Create a New Category



You can rename a category by selecting the category tab, clicking **Edit Categories**, and clicking **Rename**. Enter the new name and click **Update Category Name**.

Managing Your Categories

You can re-order the category tabs in the GS Links portlet, and you can also delete categories. When you delete a category from the GS Links portlet, all links associated with the category are also deleted from the portlet.

Perform the following steps to change the tab order in the GS Links portlet:

1. In the GS Links portlet, click **Edit Categories**.
2. In the **Reorder** column for the category you want to change, click the up or down arrow to change its order.

Note: To delete a category, select the check box next to the category and click **Delete Categories**.

3. Click **Done**.

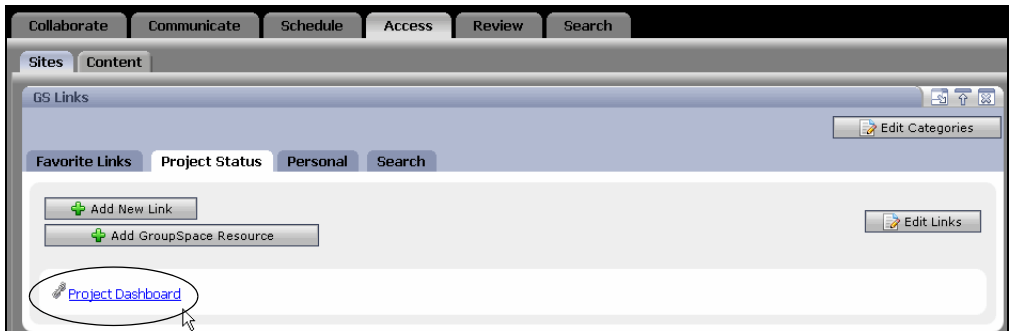
Adding a New Link

A Link can reside in only one folder.

Perform the following steps to add a new link:

1. Select the **Access** tab and the **Sites** tab.
2. In the GS Links portlet, select a category tab and click **Add New Link**.
3. Enter the following information.
 - **Title** – Enter text that describes the link. The field is limited to 254 characters.
 - **Description** – Enter more detail about the link. The field is limited to 254 characters.
 - **URL** – Enter the URL you want to use as a link. The field is limited to 254 characters.
 - **Make Private** – Select this check box to be the only user who can view the data in this Community.
4. Click **Add New Link**. The new link appears in the GS Links portlet, as shown in [Figure 7-6](#). Clicking a Link opens the link in a browser.

Figure 7-6 New Link



Adding a GroupSpace Resource

You can add a new GroupSpace Resource, which is a link to another GroupSpace artifact.

Perform the following steps to add a GroupSpace Resource:

1. Select the **Access** tab and the **Sites** tab.
2. In the GS Links portlet, select a category tab and click **Add GroupSpace Resource**.
3. You can insert a relationship to certain content or artifacts, or a QuickLink item. The Add Related Items window lets you search for content by choosing a QuickLink item or entering a search query. You can select a **Full Text Search** (to search all available text) or **Field Search** (to search specific fields), enter a search query or keyword, and click **Search**. You can also narrow your search by choosing the type of resource from the **Resource Type** drop-down list. When you locate a content item, select the check box next to it and click **Add**. The link appears in the category tab.

Managing Your Links

You can also perform the following tasks:

- **Edit a Link** – Modify the link by hovering your mouse over the Link, hovering over the arrow that appears, and choosing **Edit Link**. Enter your changes and click **Update Link**.
- **Re-order the Links** – Re-order how the Links appear by clicking **Edit Links**. Click the up or down arrow to reorder the link and then click **Done**.
- **Move a Link** – Move a Link to another category by dragging the Link to the category's tab.

- **Delete a Link** – Remove a link from the GS Links portlet by hovering your mouse over the Link, hovering over the arrow that appears, and choosing **Delete Link**.

Searching Links

See “[Using the Search Portlets](#)” on page 7-44 for instructions on searching the GS Links portlet.

Using the GS RSS Reader Portlet

The GS RSS Reader portlet connects to external sites that provide Rich Site Summary (RSS) information and displays the channels as clickable links. RSS is a format used to syndicate news and other web content. RSS channels can include web sites and weblogs. Examples of RSS channels include NewsGator, Safari, and newyorktimes.com.

An RSS channel can be plain text, HTML, or XML. You can set up an RSS channel to be visible to everyone in the Community, just to you in this Community, or just to you in all the Communities to which you belong.

By default, owners, creators, and contributors can add RSS channels; see “[Editing Default Role Capabilities](#)” on page 6-14 for more information.

The GS RSS Reader portlet stores the URLs, title, header, and author in the Content Management System, but not the body of the article. An archive feature stores the body of the article.

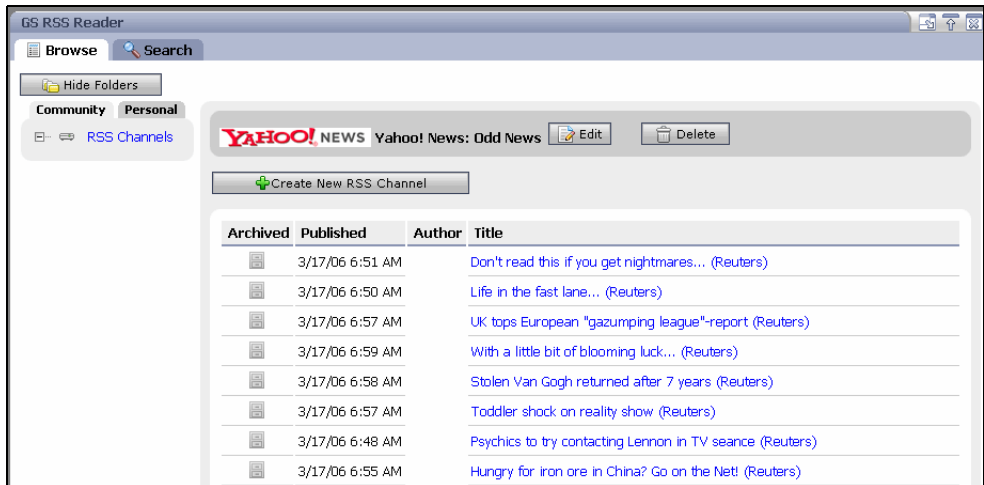
Subscribing to an RSS Channel

Perform the following steps to subscribe to an RSS channel:

1. Select the **Access** tab and the **Sites** tab.
2. In the GS RSS Reader portlet’s **Browse** tab, select the **Community** tab or the **Personal** tab. Selecting the **Community** tab allows other Community members to see the new RSS information and places the item in the **RSS Channels** folder. If you select the **Personal** tab, only you can see the new RSS information (in all the Communities to which you belong) and the channel is placed in the **RSS Feeds** folder.
3. Click **Create New RSS Channel**.
4. Enter the URL to the RSS channel. For example, <http://rss.news.yahoo.com/rss/oddlyenough>.
5. If you are in the **Community** tab, you can select the **Make Private** check box to be the only user who can view the data in this Community.

6. Click **Create RSS Channel**.
7. Click the RSS channel to select it and see its entries, as shown in [Figure 7-7](#).

Figure 7-7 New RSS Channel



Managing RSS Channels

You can also perform the following tasks in the GS RSS Reader portlet:

- **Edit an RSS Channel** – Change the visibility of a private RSS channel to a Community RSS Channel by hovering your mouse over the channel, hovering over the arrow that appears, and choosing **Edit Channel**. Change the visibility and click **Update RSS Channel**. You cannot change the visibility of a Community-scoped channel.
- **Delete the RSS Feed** – Remove the RSS feed by hovering your mouse over the channel, clicking the arrow that appears, and choosing **Delete Channel**.
- **View a Channel Entry** – Click the channel to view all of its entries. Click a specific entry to view a summary of the article. Click **Read more** to see the full article.
- **Archive an RSS Channel** – Click the channel to view its entries. Hover your mouse over a specific feed entry, click the arrow that appears, and choose **Toggle Archival for this Article** or click the file cabinet icon. The Archive icon becomes active. An archived feed is saved to the database.

Searching RSS Feeds

You can use the GS Search portlet (in the **Search** tab) or the GS RSS Reader's **Search** tab to search RSS channels. Both types of search let you do a Full Text Search or a Field Search. A Full Text Search is performed against the channel summaries, rather than the feed itself. A Field Search is performed on the properties of individual feed entries (title, visibility, and so on).

See [“Using the Search Portlets” on page 7-44](#) for instructions on searching the GS RSS Reader portlet.

Using the GS Announcements Portlets

The GS Announcements portlets displays important notices to the Community. Two GroupSpace portlets let you create and view Announcements:

- **GS Announcements** – View Announcements
- **GS Announcements Manager** – Create, edit, and delete an Announcement

An Announcement contains a Title, Description, Body, Effective Date and Expiration Date, Severity, and an Address To recipient.

Any Community member with create capabilities can create an Announcement. All Community members can view the Announcement (based on the Address To field). An Announcement is sent only once. When an Announcement expires, it automatically disappears from the GS Announcements portlet and the GS Announcements Manager portlet.

Creating an Announcement

Perform the following steps to create a new Announcement:

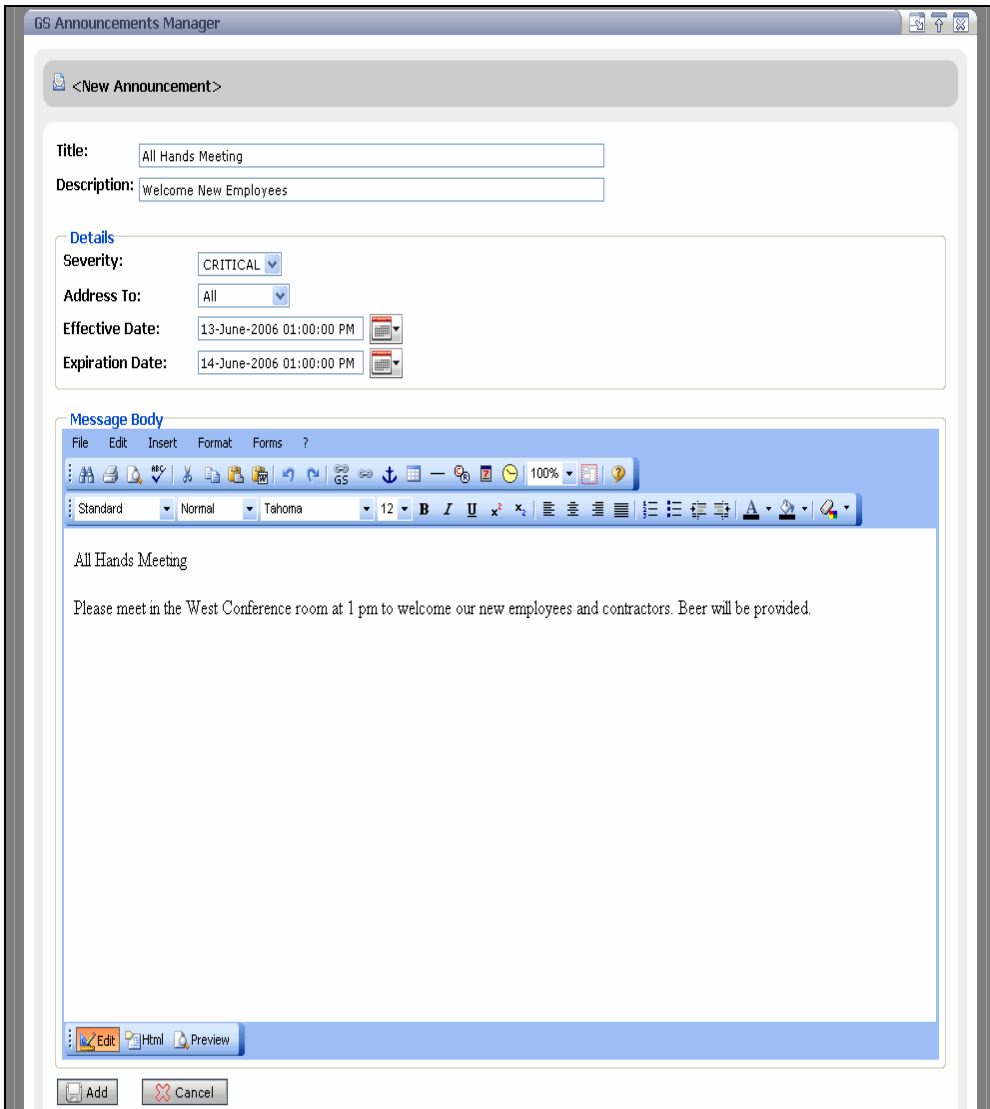
1. Select the **Communicate** tab and the **Announcements** tab.
2. In the GS Announcements Manager portlet, click **Create Announcement**.
3. In the New Announcement area, enter the following information:
 - **Title** – Enter text that briefly describes the Announcement.
 - **Description** – Enter additional text about the Announcement.
 - **Severity** – Select one of the following items from the drop-down list:
 - **Normal** – The Notification is sent based on the normal timer sequence.

- **Critical** – One Notification alert is sent per session according to the time you set in the **Effective Date** field. The GroupSpace application checks every five minutes for Critical Announcements and it sends the Critical Alert, which appears as a pop-up window.
- **Low** – The Notification is sent based on the normal timer sequence.
- **Address To** – Choose **All** or a subset of the Community that will receive the Announcement:
- **Effective Date** – Click the calendar icon to choose the date and time you want to send the Announcement. The effective date must be later than the current date.
- **Expiration Date** – Click the calendar icon to choose the date and time you want the Announcement to expire. The Expiration Date must be later than the Effective Date; the default is one week later. The Announcement must be effective for at least 24 hours.
- **Body** – In the text area, enter the body of the Announcement. If your System Administrator and Portal Administrator enabled the rich text editing formatting toolbar and the bottom toolbar for this portlet, you can use the formatting toolbar (see [Figure 4-5](#) in Chapter 4) to format your text. Clicking the bottom toolbar’s **HTML** button lets you view the body with the HTML tags inserted, and clicking the **Preview** button allows you to view the Announcement before you save it.

Tip: If you do not see the formatting toolbar or the bottom toolbar, rich text editing and the bottom toolbar are not enabled for this portlet. The rich text editing formatting bar is enabled by default (but the bottom toolbar is disabled) in the GS Example Community that ships with WebLogic Portal. In other web projects, rich text editing and the bottom toolbar are disabled by default. For instructions on enabling rich text editing, see [“Setting Up the Rich Text Editor” on page 4-18](#).

[Figure 7-8](#) shows a new Announcement.

Figure 7-8 New Announcement



4. Click **Add**. Based on the **Address To** field, some or all Community members receive a Notification when the Announcement is created. A Notification also appears in your Notifications Center.

Managing Announcements

Owners and contributors can also perform the following tasks in the GS Announcements Manager portlet:

- **Edit an Announcement** – Modify the Announcement by clicking it and clicking **Edit**. You cannot modify an Announcement that has already been sent.
- **Delete an Announcement** – Remove the Announcement that you created by selecting the check box next to it and clicking **Delete**. Deleting an Announcement removes it from the database. If you do not manually delete an Announcement, it is deleted after it expires.

Editing or deleting an Announcement affects its status in the Notifications Center.

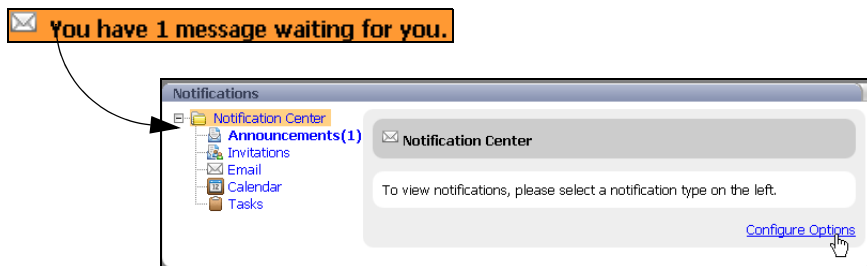
Viewing Announcements

All users can view the GS Announcements portlet.

You can perform the following actions in the GS Announcements portlet:

- View more details about the Announcement by clicking its title in the GS Announcements portlet.
- Click the Notifications Center link to view the Announcement, as shown in [Figure 7-9](#).

Figure 7-9 Notifications Center



After you click **Announcements(1)** (see [Figure 7-9](#)), you can remove the notification for the Announcement by selecting the **Delete** check box and clicking **Delete Selected**.

The Announcement disappears from the GroupSpace application when it expires.

Using the GS Document Library Portlet

The GS Document Library portlet provides access to a collection of documents and other content for GroupSpace Community members. This document library lets you create, group, and share documents with other Community members. The GS Document Library portlet lets you place items in folders and subfolders. Content is saved to the BEA Virtual Content Repository.

GroupSpace creators, owners, and contributors can create documents and content items. The GS Document Library portlet also allows users to browse the directory where they have access privileges. If the user belongs to more than one Community, all personal content that the user is allowed to see is displayed.

Documents can be any type of file; for example, MS Word files, text files, or binary files.

Tip: You might want to create a folder before you create a document; so that you can place the document directly in the folder. Click **Create Folder**, enter a name, and click **Create Document Folder**. You can create folders for Community documents, but not for Personal documents.

Perform the following steps to add a new document or file to the GS Document Library:

1. Select the **Access** tab and the **Content** tab.
2. In the **Browse** tab of the GS Document Library portlet, select the **Community** tab to add a document that is visible to all Community members. In the Community tab, you can choose to make the document Private (visible only to you in this Community). You can select the **Personal** tab to add a document that is visible to you in all the Communities to which you belong.
3. Select the folder where you want to place the document and click **Create Document**. (You cannot create folders for Personal documents.)
4. Enter the following information:
 - **Title** – Enter a unique name for this document.
 - **Description** – Enter text that describes the document.
 - **Make Private** – Select the check box to make this document visible only to you in this Community. If you do not select the check box, the document is visible to all Community members.
 - **Author** – Enter the Community member who created this document.

- **Keywords** – Enter searchable words that are contained in this document. This field allows you to quickly retrieve the document when you perform a property search.
- **File** – Attach a file. Click **Browse**, locate the file, and click **Open**. The file can be any type of file, including an MS Word file, text file, or a binary file.
- **Related Items** – Click **Add Related Items** insert a relationship to certain content or artifacts, or a QuickLink item to include information that pertains to this document. The Add Related Items window lets you search for content by choosing a QuickLink item or entering a search query. You can select a **Full TextSearch** (to search content or metadata) or **Field Search** (to search specific fields), enter a search query or keyword, and click **Search**. You can also narrow your search by selecting a type of resource from the **Resource Type** drop-down list. When you locate a content item, select the check box next to it and click **Add**. A reference to the document appears in the **Related Items** field.

Review [Figure 7-10](#) to see all the fields.

Figure 7-10 New Document

The screenshot shows the 'Create New Document' form in the GS Document Library portlet. The form is titled 'Create New Document' and has a 'Browse' button and a 'Search' button at the top. On the left, there is a navigation pane with 'Community' and 'Personal' tabs, and a 'Documents' folder. The main form area contains the following fields and controls:

- Title:** Project Schedule Status
- Description:** Six-month plan
- Make Private:**
- Document Details:**
 - Author:** Macki Anderson
 - Keywords:** schedule, status
 - File:** C:\schedule.xls (with a 'Browse...' button)
- Related Items:**
 - Add Related Items...** (button)
 - Remove Selected Items** (button)

At the bottom of the form, there are two buttons: 'Create Document' and 'Cancel'.

5. Click **Create Document**. The new document appears in the GS Document Library portlet.

Managing Documents

Creators, owners, and contributors can perform the following tasks in the GS Document Library portlet (except where indicated):

- **Download a Document** – Viewers (as well as creators, owners, and contributors) can retrieve a copy of the file by clicking the document’s title and then clicking **Download**. Choose **Open** or **Save**.
- **Edit a Document** – Modify the document or the attached file by clicking the document’s title and then clicking **Edit**. Enter your changes and click **Done**.
- **Delete a Document** – Remove the document by hovering your mouse over it, clicking the arrow that appears, and choosing **Delete Document**. Deleting a document removes it from the database. By default, a contributor cannot delete a document.
- **Copy a Document to QuickLinks** – Copy a document to the QuickLinks area by hovering your mouse over it, clicking the arrow that appears, and choosing **Copy to QuickLinks**.
- **Edit a Community Folder** – Rename a folder by selecting it and clicking **Edit**.
- **Create a Community Subfolder** – Select the parent folder, hover your mouse over it, click the arrow that appears, and choose **Create New Subfolder**.

Searching Documents

See [“Using the Search Portlets” on page 7-44](#) for instructions on searching the GS Document Library portlet.

Using the GS GroupNotes Portlet

Owners and Contributors can use the GS GroupNotes portlet to create and update formatted documents to share with the Community. Standard formatting includes bullets, italics, bold, or colored text, and so on. You can also insert links or references to web sites, other GroupNotes documents, and GroupSpace content items (such as Issues).

Tip: You might want to create a folder before you create a document, so that you can place the document directly in the folder. Click **Create Folder**, enter a name, and click **Create Folder**.

Creating a GroupNote

Perform the following steps to create a new document:

1. Select the **Collaborate** tab and the **GroupNotes** tab.

2. In the GS GroupNotes portlet, expand the tree and select the folder where you want to place the document.
3. Click **Create GroupNote** to start a new document.
4. In the **Title** field, enter a name for this document.
5. In the **Description** field, enter text that describes your document.
6. Select the **Make Private** check box to make this document viewable only by you in this Community. If you do not select the **Make Private** check box, the document is available to the entire Community, or to all Communities to which you belong. Personal documents are stored in a separate folder from Community and Private information.
7. In the Body area, type information about the GroupNote. If your System Administrator and Portal Administrator enabled the rich text editing formatting toolbar and the bottom toolbar for this portlet, you can use the formatting toolbar (see [Figure 4-5](#) in Chapter 4) to format your text. Clicking the bottom toolbar's **HTML** button lets you view the body with the HTML tags inserted, and clicking the **Preview** button allows you to view the GroupNote before you save it.

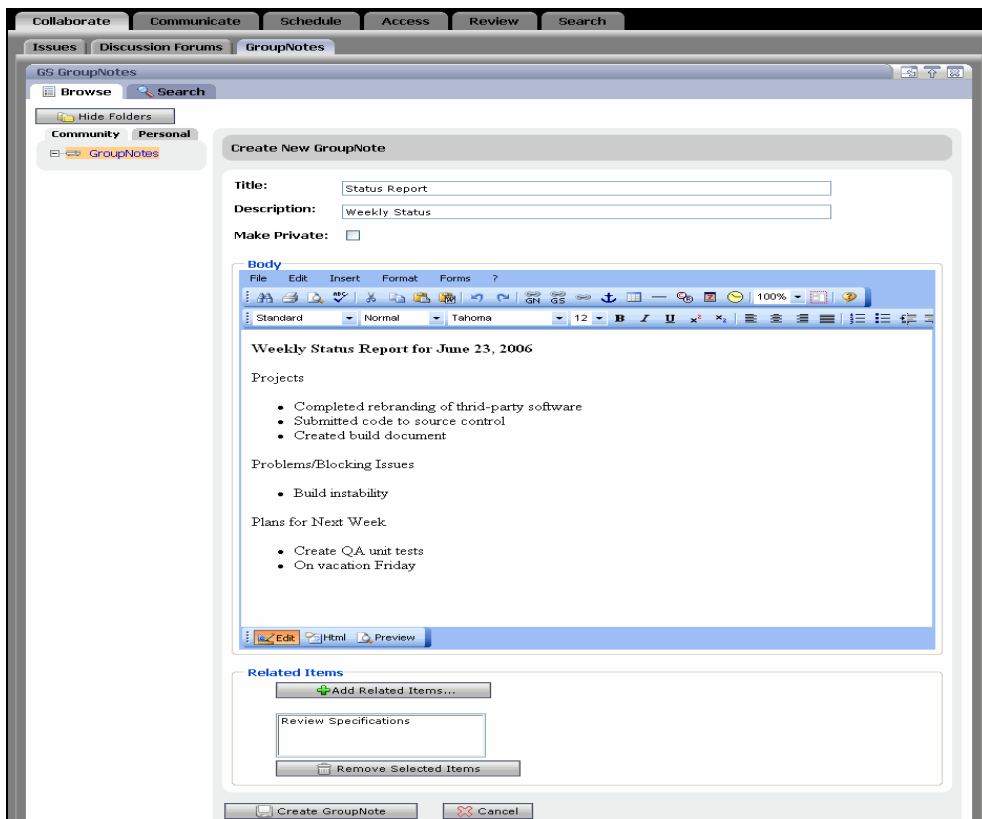
Tip: If you do not see the formatting toolbar or the bottom toolbar, rich text editing and the bottom toolbar are not enabled for this portlet. The rich text editing formatting bar is enabled by default (but the bottom toolbar is disabled) in the GS Example Community that ships with WebLogic Portal. In other web projects, rich text editing and the bottom toolbar are disabled by default. For instructions on enabling rich text editing, see "[Setting Up the Rich Text Editor](#)" on page 4-18.

8. In the Body, you can also insert the following kinds of links in a GroupNotes document:
 - **Web Site** – Choose **Insert > Link** to insert a link to a web site by adding the URL to a fully qualified URL. The fields in the Link Properties window correspond to standard HTML attributes for an anchor tag. Click **OK**.
 - **GroupNote Rich Text Document** – Choose **Insert > GroupNote Link** to insert a link to another rich text object. Use the portlet search tool to locate the document you want to insert in this GroupNote.
 - **GroupSpace Content item** – Choose **Insert > GroupSpace Link** to insert a link to a content item, such as an Issue, contained in the virtual content repository. Use the portlet search tool to locate the content you want to insert in this GroupNote.

9. Click **Add Related Items** to insert a relationship to certain content or artifacts, or a QuickLink item to include information that pertains to this GroupNote. The Add Related Items window lets you search for content by choosing a QuickLink item or entering a search query. You can select a **Full Text Search** (to search content or metadata) or **Field Search** (to search content properties), enter a search query or keyword, and click **Search**. You can also narrow your search by selecting a type of resource from the **Resource Type** drop-down list. When you locate a content item, select the check box next to it and click **OK**. A reference to the document appears in the **Related Items** field.

Figure 7-11 shows a GroupNote document.

Figure 7-11 Creating a New GroupNote



10. Click **Create GroupNote**. The document appears in the GS GroupNotes portlet.
11. Click **Done**.

Managing GroupNotes

Owners, creators, and contributors can also perform the following tasks in the GS GroupNotes portlet:

- **Edit a GroupNote Document** – Modify the GroupNote document by hovering your mouse over the title of the GroupNote. Click the arrow that appears and choose **Edit GroupNote**.
- **Change the Display Mode** – Modify what displays by opening an existing GroupNote and clicking **Display Mode**. Select **Normal Mode** to display GroupNote folders and perform administrative tasks. Select **Display Mode with Selected GroupNote** to display only the content of this GroupNote.
- **Delete a GroupNote Document** – Remove the GroupNote document by hovering your mouse over the GroupNote. Click the arrow that appears and choose **Delete GroupNote**. Deleting a GroupNote removes it from the database. A contributor cannot delete a GroupNote.
- **Rename a folder** – Select the GroupNotes folder and click **Edit**. Enter a new folder name and click **Update Folder**.

Searching GroupNotes

See [“Using the Search Portlets” on page 7-44](#) for instructions on searching the GS GroupNotes portlet.

Using the Tasks Portlet

The Tasks portlet allows you to create and track Community items or personal items on a To Do list. You can view recent tasks and quickly add new tasks. The Tasks portlet can store personal information and Community information.

The Tasks portlet provides summary information about a list of tasks including priority, attachments, subject, status, and due date. Tasks can be sorted by each of these fields, except file attachments and priority.

Adding a Task

Perform the following steps to create a new Task:

1. Select the **Schedule** tab and the **Tasks** tab.

2. Select the **Community** tab to add a Community task or the **Personal** tab to add a personal task.
3. Click **Add Task**
4. Enter the following information:
 - **Primary Information** – Click **Primary Information** and enter the following information:
 - **Subject** – Enter text describing the Task.
 - **Due Date** – Click the calendar icon and select a due date and time.
 - **Start Date** – Click the calendar icon and select a start date and time.
 - **Status** – Click the drop-down list and choose `Not Started`, `Completed`, or `In Progress`.
 - **Importance** – Click the drop-down list and choose `High`, `Low`, or `Medium`. On the Tasks portlet, high priority tasks are denoted with a red exclamation point, while low priority tasks have a blue down arrow.
 - **Other Information** – Click **Other Information** to add categories for this Task (separated by a semicolon), adjust the **Percent Complete**, or add detailed **Comments**. If your System Administrator and Portal Administrator enabled rich text editing for this portlet, you can click **Rich text** to use the formatting toolbar to format your text, or click **Plain text** to enter text without formatting. If rich text editing is disabled for this portlet, the **Rich text** and **Plain text** links are not available.

Tip: Rich text editing is enabled by default in the GS Example Community that ships with WebLogic Portal, but not in other web projects. For instructions on enabling rich text editing in a portlet, see [“Setting Up the Rich Text Editor” on page 4-18](#).

- **Attachments** – Click **Attachments** to add a document to this Task. Click **Browse** to locate the document and click **Attach**. The Task is saved before you add the attachment.

See [Figure 7-12](#).

Figure 7-12 New Task with an Attachment

5. Click **Save**. This Task appears in the Tasks portlet with a red exclamation point to show it has a high priority, as shown in [Figure 7-13](#).

Figure 7-13 High Priority Task

Subject	Status	Due Date
Functional Specifications	In Progress	None

You can view information differently by clicking the columns to reorder them.

Managing Tasks

- **View Detail About a Task** – See more information about the Task by clicking the Task name in the Subject column.

- **Edit a Task** – Modify the Task’s details by clicking the Task name in the Subject column and clicking **Edit**.
- **Mark a Task as Completed on Your To Do List** – If the task is completed, you can cross it off your list. Select the check box next to the Task and click **Mark Complete**. The Task now has a line through it. The line remains even if you refresh the page.
- **Find Tasks** – Enter the subject of the Task in the Search bar and click **Search**.
- **Delete a Task** – Remove a Task from your To Do list by selecting the check box next to the Task and clicking **Delete**. Click **OK**.
- **View Notifications for Tasks** – View a notification when a Task is due or overdue by clicking the Notification link at the top of the GroupSpace application. In the Notifications Center, click **Tasks**, select the **Delete** check box for the task, and click **Delete Selected**. To set when the notification will expire, see “[Configuring the Notifications Center](#)” on [page 6-22](#).

Using the Discussion Forums Portlet

The Discussion Forums portlet lets users post and monitor topics of interest. A Community owner or creator creates categories (folders) and Discussion Forums, and other Community members can post topics and reply to the threaded discussions. Community owners and creators can create, edit, and delete categories, Discussion Forums, and topics. Community owners, creators, and contributors have create and edit capabilities, and viewers have read capability only.

A Discussion Forum exists within the Community, rather than outside the Community (such as an RSS channel).

You can organize your Discussion Forums by creating categories to organize Forums with similar topics.

Adding a Category and a Discussion Forum

Perform the following steps to create a category and a Discussion Forum:

1. Select the **Collaborate** tab and the **Discussion Forums** tab.
2. You can create a category to organize Discussion Forums with similar topics. Click **Add Category**.
3. Enter the following information for the new category:
 - **Name** – Enter text describing the category that will contain the Discussion Forums.

- **Keywords** – Enter searchable words that are contained in this Discussion Forum. Keyword searching does not support search connectors; if you enter *car truck*, only discussion forums that have *car truck* in that order will be retrieved. This field allows you to quickly retrieve relevant Discussion Forums when you perform a property search.
- **Description** – Enter text describing the category. If your System Administrator and Portal Administrator enabled rich text editing for this portlet, you can click **Rich text** to use the formatting toolbar to format your text, or click **Plain text** to enter text without formatting. If rich text editing is disabled for this portlet, the **Rich text** and **Plain text** links are not available.

Tip: Rich text editing is enabled by default in the GS Example Community that ships with WebLogic Portal, but not in other web projects. For instructions on enabling rich text editing in a portlet, see [“Setting Up the Rich Text Editor” on page 4-18](#).

See [Figure 7-14](#).

Figure 7-14 New Category

The screenshot shows the 'Add Category' form within the 'Discussion Forums' portlet. The form has a title bar with 'Collaborate', 'Communicate', 'Schedule', 'Access', and 'Search' tabs. Below the title bar are 'Issues', 'Discussion Forums', and 'GroupNotes' tabs. The 'Discussion Forums' tab is active. The form contains the following elements:

- Add Category** title
- Save** and **Cancel** buttons at the top.
- Name:** Project Status
- Keywords:** project;status;schedule (separated by semicolon)
- Description:** Plain text (selected)
- Description text:** Should this software project develop milestones mapped by feature?
- Formatting toolbar:** Includes options for font color (Tahoma), font size (12), bold (B), italic (I), underline (U), text color (A), bulleted list, numbered list, link, unlink, insert table, table, insert image, insert video, insert audio, and other standard rich text editor tools.
- Save** and **Cancel** buttons at the bottom.

4. Click **Add**. The category appears in the portlet.
5. Create a Discussion Forum by selecting the category and clicking **Add Forum**.
6. Enter the following information for the new Discussion Forum:
 - **Name** – Enter text describing the purpose of the Discussion Forum.
 - **Keywords** – Enter searchable words that are contained in this discussion. Keyword searching does not support search connectors; if you enter *car truck*, only discussion forums that have *car truck* in that order will be retrieved. . This field allows you to quickly retrieve the Discussion Forum when you perform a property search.
 - **Author Masked** – Select this check box to not display the author.
 - **Description** – Enter text describing the Discussion Forum topic. If your System Administrator and Portal Administrator enabled rich text editing for this portlet, you can click **Rich text** to use the formatting toolbar to format your text, or click **Plain text** to enter text without formatting. If rich text editing is disabled for this portlet, the **Rich text** and **Plain text** links are not available.

Tip: Rich text editing is enabled by default in the GS Example Community that ships with WebLogic Portal, but not in other web projects. For instructions on enabling rich text editing in a portlet, see [“Setting Up the Rich Text Editor” on page 4-18](#).

7. Click **Add**. The new Discussion Forum appears in the portlet, as shown in [Figure 7-15](#).

Figure 7-15 New Discussion Forum



Adding a Discussion Topic

After you create a Discussion Forum, Community members can add topics to it.

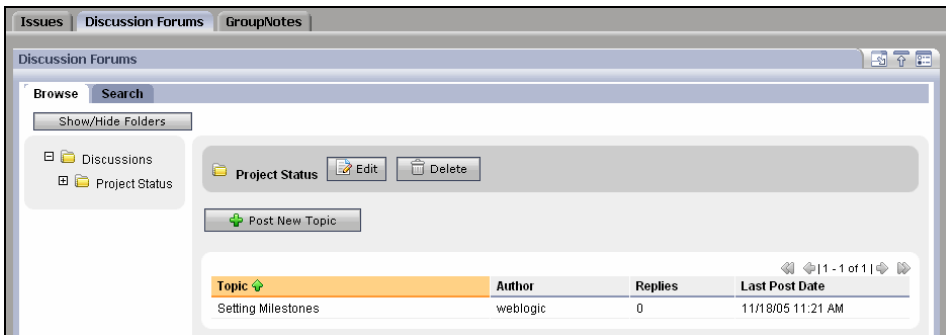
Perform the following steps to add a topic to a Discussion Forum:

1. Select the **Collaborate** tab and the **Discussion Forums** tab.
2. Select the category and click the name of the Discussion Forum in the Forum column.
3. Click **Post New Topic**.
4. Enter the following information:
 - **Name** – Enter text describing this topic. The topic name must be unique, and the following characters are not permitted: \ and /.
 - **Keywords** – Enter searchable words that are contained in this topic. Keyword searching does not support search connectors; if you enter *car truck*, only discussion topics that have *car truck* in that order will be retrieved. This field allows you to quickly retrieve topics when you perform a property search.
 - **Author Masked** – Select this check box to not display the author.
 - **Description** – Enter text for your topic. If your System Administrator and Portal Administrator enabled rich text editing for this portlet, you can click **Rich text** to use the formatting toolbar to format your text, or click **Plain text** to enter text without formatting. If rich text editing is disabled for this portlet, the **Rich text** and **Plain text** links are not available.

Tip: Rich text editing is enabled by default in the GS Example Community that ships with WebLogic Portal, but not in other web projects. For instructions on enabling rich text editing in a portlet, see [“Setting Up the Rich Text Editor” on page 4-18](#).

 - **Attachments** – Add a file by clicking **Attachments** and clicking **Browse**. Locate your file and click **Open**. Add the file by clicking **Attach**.
5. Click **Save**. The Discussion Topic appears in the Discussion Forums portlet. See [Figure 7-16](#).

Figure 7-16 The New Discussion Topic Appears in the Discussion Forums Portlet



Replying to a Discussion Topic

After you create topics, Community members can post replies to topics.

Perform the following steps to add a topic to a Discussion Forum:

1. Select the **Collaborate** tab and the **Discussion Forums** tab.
2. In the **Browse** tab, select the category and the Discussion Forum.
3. Click the name of the Discussion Forum in the Forum column.
4. Click the topic's name in the Topic column and click **Reply**.
5. Enter your reply information and click **Save**.

Managing Discussion Forums

GroupSpace owners, creators, and contributors can also perform the following tasks in the Discussion Forums portlet:

- **Edit a Discussion Forum** – Select the Discussion Forum's category, click the Forum's name in the Category column, and click **Edit**.
- **Edit a Category** – Click the category's name in the Category column and then click **Edit**.
- **Delete a Discussion Forum** – Click the Discussion Forum's name and click **Delete**.
Deleting a Discussion Forum removes it and all its topics from the database.

In addition to adding a topic to a Discussion Forum, Community members can also perform the following tasks:

- **Edit Your Topic** – Select the category and select the Discussion Forum. Click the topic's name in the Topic column and click **Edit**.
- **Control What You See** – Select the Discussion Forum and the topic, and click **Discussion Overview** to view the topics and replies in the Discussion Forum. Select **Small**, **Medium**, or **Large** for the amount of space available to display topics and replies. You can also select the **Hide Previews** check box.
- **View More Details** – Click **Discussion Details** to view the author of the topic, date and time the topic was posted, and the body of the topic.

Using the Mail Portlet

The Mail portlet allows users to send and receive personal e-mail to other members in your GroupSpace Community and to people outside the Community.

Unread messages are highlighted and display a closed envelope icon. Messages in the Inbox that you have already read are not in bold text and the icon is not highlighted.

Configuring the Mail Portlet

You must configure your mail account and add information about your incoming and outgoing mail server.

Perform the following steps to configure your mail account for incoming and outgoing mail:

1. Select the **Communicate** tab and the **Mail** tab.
2. If the Add Account page does not display, click the Mail portlet's **Edit** button.
3. Enter information by clicking **Account Information**, **General Mail Settings**, **Incoming Mail Settings**, and **Outgoing Mail Settings**:
 - **Account Information** – Enter the name of your mail account. Do not use special characters. Select the **Set as the default account** to make this your default mail account.
 - **General Mail Settings** – In the **Mail message 'display from'** field, enter the name you want to appear in the From field in your e-mails. In the **From email address** field, enter your e-mail address.
 - **Incoming Mail Messages** – Complete all of the fields to set up your incoming mail server. Each field is required:
 - **The incoming mail username** – The username to access your incoming mail server.

- **The incoming mail password** – The password to access your incoming mail server.
 - **Incoming mail host name or IP address** – The server name or IP address of the incoming mail server.
 - **Incoming mail protocol** – The protocol the incoming mail server supports. You can select `POP3` or `IMAP`.
 - **Incoming mail port** – The port to connect to the incoming mail server. This defaults to the value for the selected protocol. Enter port `110` for `POP3` or `143` for `IMAP`.
 - **The mail timer retrieve mail interval** – The time out value in seconds for the incoming mail server to poll for new messages.
- **Outgoing Mail Messages** – Complete all of the fields to set up your outgoing mail server. Each field is required:
- **Outgoing mail username** – The username to access your outgoing mail server.
 - **Outgoing mail password** – The password to access your outgoing mail server.
 - **Outgoing mail host name or IP address** – The outgoing host name or IP address.
 - **Outgoing mail protocol** – The protocol the outgoing mail server supports. You can select `SMTP`.
 - **Outgoing mail port** – The port to connect to the outgoing mail server. This defaults to the value for the selected protocol. For `SMTP`, enter `25`.

See [Figure 7-17](#).

Figure 7-17 Configuring the Mail Servers

Mail

Add Account

Save Cancel

Account Information

Name: Must be 128 characters or less

Set as the default account.

Connection Information

General Mail Settings

Mail message 'display from':
String will be set in the mail message From header

From email address:
From email address

Incoming Mail Settings

The incoming mail username:
The incoming mail username

The incoming mail password:
The incoming mail password

Incoming mail host name or IP address:
Incoming mail host name or IP address

Incoming mail protocol:
Incoming mail protocol

Incoming mail port:
Incoming mail port

The mail timer retrieve mail interval (in seconds):
The mail timer retrieve mail interval (in seconds)

Outgoing Mail Settings

Outgoing mail username:
Outgoing mail username

Outgoing mail password:
Outgoing mail password

Outgoing mail host name or IP address:
Outgoing mail host name or IP address

Outgoing mail protocol:
Outgoing mail protocol

Outgoing mail port:
Outgoing mail port

Save Cancel

4. Click **Save**.

Sending E-Mail

Perform the following steps to send an e-mail:

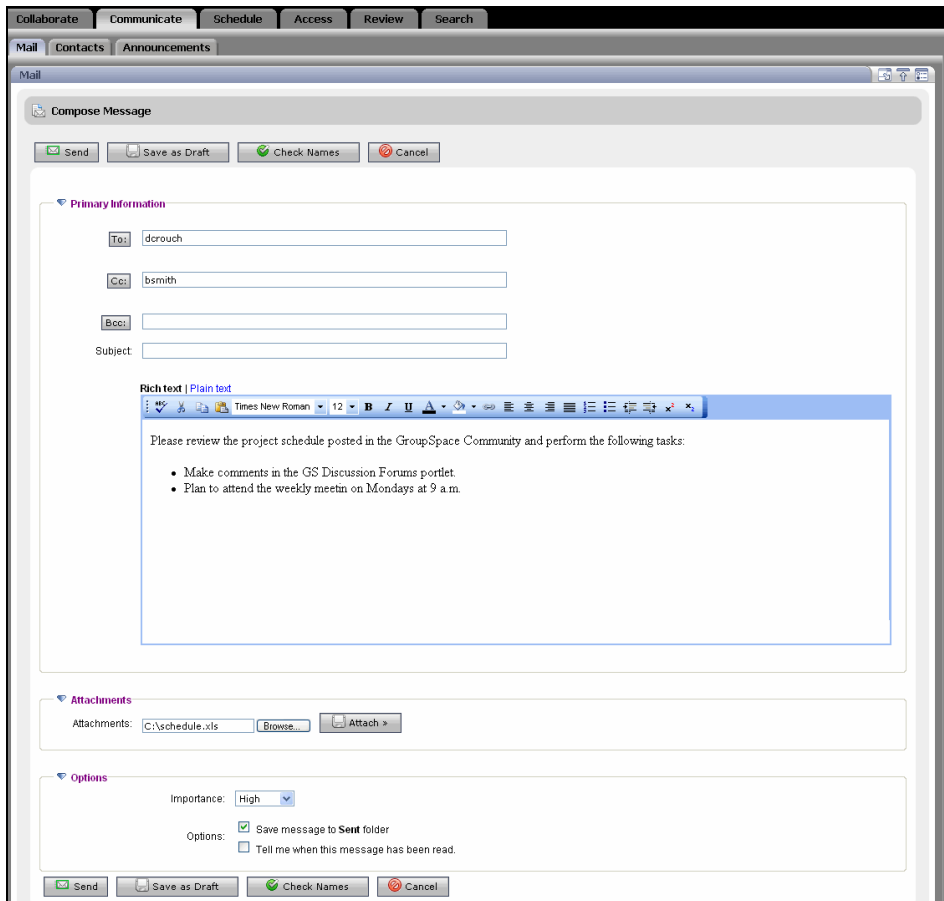
1. Select the **Communicate** tab and the **Mail** tab.
2. Click **New Message** to send a new e-mail.
3. Enter information by clicking **Primary Information**, **Attachments**, or **Options**:
4. **Primary Information** – Click **Primary Information** and enter the recipients, subject, and additional text. The **To** field is the only required field. You can also click **To** to pick a recipient from your list of personal contacts. You can click **Check Names** to view your contacts. In the text area, enter text for the body of the e-mail. If your System Administrator and Portal Administrator enabled rich text editing for this portlet, you can click **Rich text** to use the formatting toolbar to format your text, or click **Plain text** to enter text without formatting. If rich text editing is disabled for this portlet, the **Rich text** and **Plain text** links are not available.

Tip: Rich text editing is enabled by default in the GS Example Community that ships with WebLogic Portal, but not in other web projects. For instructions on enabling rich text editing in a portlet, see [“Setting Up the Rich Text Editor” on page 4-18](#).

- **Attachments** – Click **Attachments** to add a file to the e-mail. Click **Browse**, select the file, click **Open**, and click **Attach**. The file can be a document or a binary file.
- **Options** – Click **Options** and select a priority for your e-mail. You can also save a copy of the e-mail to your Sent folder and be notified when the recipient reads the mail.

See [Figure 7-18](#).

Figure 7-18 New E-Mail Message



5. Click **Send**. (Clicking **Save as Draft** saves the e-mail in your Drafts folder so you can send it later.) You cannot delete your Inbox, Sent Items, or Drafts folders.

Viewing Mail

Perform the following steps to send and view your e-mail and attachments:

1. View an e-mail by clicking the item.
2. You can click **Reply** to send a reply to the e-mail, or **Forward** to send the e-mail to someone else.

3. If the e-mail has an attachment, click it and click the attachment name, and **Open** to view it or **Save** to download it.
4. Click **Done** to return to your other mail messages.

Tip: Click **Check Messages** to refresh the page and display new e-mails.

Managing Mail

You can also perform the following tasks in the Mail portlet:

- **Change an E-Mail's Status** – Select the check box next to the e-mail, select **Mark as Unread** or **Mark as Read** from the drop-down list, and click the arrow next to the **Message Actions** field. For example, if you selected **Mark as Unread**, the e-mail changes from bold text to normal text and the envelope icon is no longer green.
- **Filter Your E-Mails** – Click **Unread** or **High Priority** to view messages with that status. Click **All** to view all e-mails in your Inbox.
- **Create, Rename, Move, and Delete Folders** – Manage your mail folders by clicking **Manage Folders**. Create a new folder by selecting where you want the folder, clicking the **Create Subfolder** link, entering a name, and clicking **OK**. You can also click **Rename**, **Delete**, **Move**, or **Copy** to make changes to folders you created.
- **Change E-Mail Accounts** – Select a different account name from the **Accounts** drop-down list on the Mail portlet.
- **Delete an E-Mail** – Remove an e-mail by selecting the check box next to it and clicking **Delete**. The deleted e-mail is placed in a **Deleted** folder. When you delete items from that folder, the e-mail and any attachments are removed from the database.
- **Create an E-Mail Signature** – Enter text that you can attach to the bottom of outgoing messages by clicking the portlet's **Edit** icon and clicking **Mail Preferences**. Enter the information in the **Signature** field and select the **Add signature to outgoing messages** check box and click **Save**. Click the **Leave Edit** icon to return to return to the Mail portlet.
- **Change the Number of E-Mails Displayed** – Control how many e-mails display in the Mail portlet by clicking the portlet's **Edit** button and clicking **Mail Preferences**. Select 10, 25, or 50 from the **Messages Per Page** drop-down list and click **Save**. Click **Leave Edit** to return to the Mail portlet.

- **View Notifications for E-Mail** – View a notification when an e-mail item is delivered by clicking the Notification link at the top of the GroupSpace application. In the Notifications Center, click **Email**, select the **Delete** check box for the item, and click **Delete Selected**. To set when the e-mail notification will expire, see [“Configuring the Notifications Center” on page 6-22](#).

Searching Mail

You can search for individual Mail folders and messages for keywords that appear in the **Subject**, **Body**, **From**, or **Date** fields.

See the [“Using the Search Portlets” on page 7-44](#) for more information on searching the Mail portlet, the GroupSpace Community, and the enterprise.

Using the Calendar Portlet

The Calendar portlet lets you create and schedule appointments. The Calendar portlet can store personal Calendar information and Community Calendar information.

You can customize the number of Calendar days that display. A Calendar appointment shows up in the Notifications Center when the appointment time is within the amount of time you specify.

Adding a Calendar Appointment

Perform the following steps to add an appointment to your calendar:

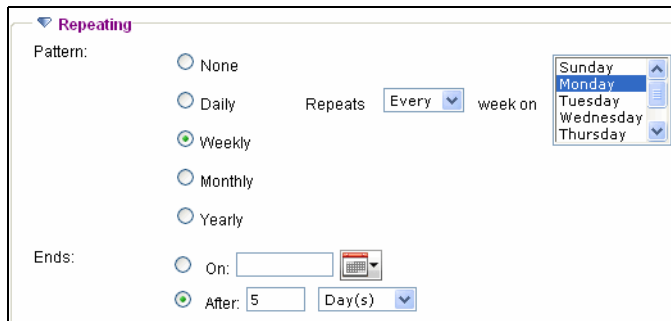
1. Select the **Schedule** tab and the **Calendar** tab.
2. Select the **Community** tab or the **Personal** tab to add an item to each of those Calendars.
3. Click **Add Appointment**. You can also click the appropriate time in the calendar and add the appointment.
4. Enter the following information about the appointment:
 - **Primary Information** – Click **Primary Information** and enter the subject, time, date, description, and location of your appointment. You can indicate whether the calendar shows your appointment time as busy or free. You can also indicate the importance of the appointment: *High*, *Medium*, or *Low*. These settings are reflected on the calendar.
 - In the **Description** field, enter text describing the appointment. If your System Administrator and Portal Administrator enabled rich text editing for this portlet, you can click **Rich text** to use the formatting toolbar to format your text, or click **Plain text**

to enter text without formatting. If rich text editing is disabled for this portlet, the **Rich text** and **Plain text** links are not available.

Tip: Rich text editing is enabled by default in the GS Example Community that ships with WebLogic Portal, but not in other web projects. For instructions on enabling rich text editing in a portlet, see [“Setting Up the Rich Text Editor” on page 4-18](#).

- **Repeating** – Click **Repeating** and indicate the frequency of the appointment. For example, if you select `weekly`, the appointment is scheduled automatically for the same day and time each week. By default, meetings do not repeat. You can also specify an end date for repeating meetings. [Figure 7-19](#) shows a recurring meeting every Monday for five months.

Figure 7-19 Repeating Calendar Appointment



The screenshot shows a form titled "Repeating" with a dropdown arrow. It contains the following elements:

- Pattern:** Radio buttons for "None", "Daily", "Weekly" (selected), "Monthly", and "Yearly".
- Repeats:** A dropdown menu set to "Every" followed by the text "week on".
- Ends:** Radio buttons for "On:" (with an empty text box and a calendar icon) and "After:" (with a text box containing "5" and a dropdown menu set to "Day(s)").
- Day Selection:** A vertical list of days: "Sunday", "Monday" (highlighted), "Tuesday", "Wednesday", and "Thursday", each with a dropdown arrow.

- **Attachments** – Click **Attachments** and add a file to the appointment by clicking **Browse**, choosing a file on your file system, and clicking **Attach**.

See [Figure 7-20](#) to view information for a new appointment.

Figure 7-20 New Calendar Appointment

The screenshot shows a web-based form titled "Add Appointment" within a "Calendar" portlet. The form is organized into several sections:

- Primary Information:**
 - Subject:** A text input field containing "Project Meeting Schedule".
 - Title:** A section with a radio button for "This is an all day event" (which is selected) and two date pickers for "Start Date" (set to 12/15/04) and "End Date" (set to 12/15/04).
 - Date:** A date picker set to 12/15/04.
 - Location:** A text input field containing "Conference Room".
 - Description:** A rich text editor area containing the text "Please be prepared to receive project submissions and presentations".
- Other Options:**
 - Repeat:** A dropdown menu set to "None".
 - Priority:** A dropdown menu set to "High".
- Repeating:** A section with the heading "Enter Recurrence Information".
- Attachments:** A section with the heading "Enter Attachments".

At the bottom of the form, there are "Save" and "Cancel" buttons.

5. Click **Save**. The new appointment appears in the Calendar portlet.

Managing Your Calendar

You can also perform the following tasks:

- **Edit an Appointment** – You can reschedule or change an appointment's time, date, or location by selecting the appointment and clicking **Edit**.

- **Changing the View** – Modify what you see in the portlet by clicking Day, Week, Month, or Upcoming. All day appointments are shown at the top of the calendar page and indicated with a yellow bullet point to clearly distinguish them from timed appointments. Set the default view by clicking the Calendar portlet’s **Edit** icon.
- **Editing Preferences** – Click the Calendar portlet’s **Edit** icon to specify the following preferences:
 - **Time Zone** – Select the time zone in which you are working.
 - **Default View** – Select Day, Week, or Month to change the scope of your displayed calendar. Select Upcoming Events to display the upcoming events view by default.
 - **Number of days in Upcoming Events** – Select the number of days to display for the Upcoming Events view.
 - **Time Intervals** – Select the interval of time you want your calendar to display by selecting one of the pre-set intervals for Day, Week, or Month views.
 - **Week Starting Day** – Select the day your typical work week begins.
 - **Working Hours** – Select starting and ending hours for your typical work day.
- **Deleting an Appointment** – Select the appointment and click **Delete**.
- **View Notifications for Calendar Items**– View a notification when a Calendar item is due by clicking the Notification link at the top of the GroupSpace application. In the Notifications Center, click **Calendar**, select the **Delete** check box for the item, and click **Delete Selected**. To set when the notification will expire, see [“Configuring the Notifications Center” on page 6-22](#).

Using the Contacts Portlet

Use the Contacts portlet to view and manage names, addresses, phone numbers, e-mail addresses, and other information in a personal address book. The Contacts portlet can store Personal Contacts and Community Contacts.

The Contacts portlet works with the Mail portlet. If you receive an e-mail from someone, you can open the e-mail in the Mail portlet and click **Add to Contacts** to add the sender to your Contacts list.

Adding a Contact

Perform the following steps to add a new Contact:

1. Select the **Communicate** tab and the **Contacts** tab.
2. Select the **Community** tab to add a Community contact or the **Personal** tab to add a personal contact.
3. Click **Add Contact**. The Add Contact dialog appears.
4. Enter information about the contact by clicking each of the following:
 - **Primary Information** – Enter the contact’s name, including first, middle, and last name, as well as title and name suffix. You can also enter the contact’s e-mail address.
 - **Business Information** – Enter the contact’s business details in the Business Information section. This section is optional.
 - **Personal Information** – Enter the contact’s personal information, such as home phone, personal cell phone, birthday, and so on. This section is optional.
 - **Other Information** – Enter information about the contact. This section is optional. If your System Administrator and Portal Administrator enabled rich text editing for this portlet, you can click **Rich text** to use the formatting toolbar to format your text, or click **Plain text** to enter text without formatting. If rich text editing is disabled for this portlet, the **Rich text** and **Plain text** links are not available.

Tip: Rich text editing is enabled by default in the GS Example Community that ships with WebLogic Portal, but not in other web projects. For instructions on enabling rich text editing in a portlet, see [“Setting Up the Rich Text Editor” on page 4-18](#).

See [Figure 7-21](#) to view the fields for a new business contact.

Figure 7-21 Adding a New Business Contact

Add Contact

Save Cancel

Primary Information

Name:

First Middle Last

E-mail:

Address

Business Information

Company:

Name Job Title

Business Phone:

Business Fax:

Business Pager:

Business Address:

Street

City State Postal Code Country

Web Site:

Associates:

Manager's Name Assistant's Name

Misc:

Department Office

Personal Information

Enter Personal Information

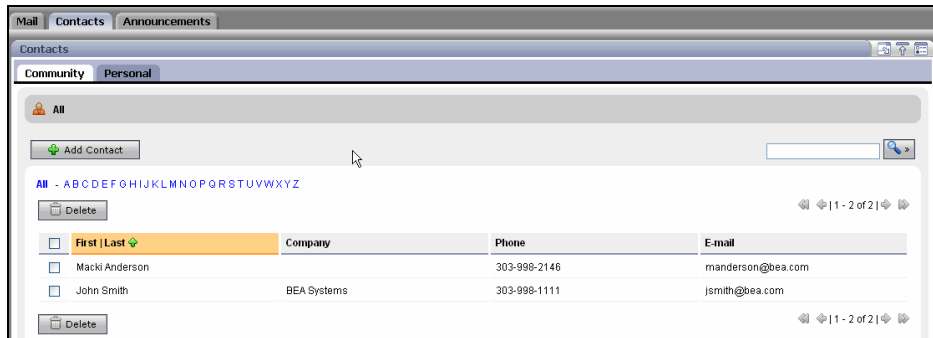
Other Information

Enter Other Information

Save Cancel

5. Click **Save**. The contact appears in the Contacts portlet, as shown in [Figure 7-22](#).

Figure 7-22 New Contact



Filtering and Navigating Contacts

The Contacts portlet provides several ways to filter and navigate through your list of contacts. If the list of contacts is long, the GroupSpace application breaks it into pages. Navigate these pages using the arrow buttons.

To change the default number of contacts per page, click the portlet's **Edit** icon. Click **Addressbook Preferences** and use the **Contacts per Page** drop-down list to change the default number of contacts that appear.

The Contacts portlet lets you filter the contacts that are displayed in the table in several ways, including the following:

- **View All** – Click **All** to list all contacts in the portlet, as shown in [Figure 7-23](#).

Figure 7-23 Viewing All Contacts



- **Alphabetical** – Click a letter link to list the contacts whose last names start with that letter.
- **Sort Contacts** – You can sort the list of contacts by clicking the title of a column. For instance, to sort your contacts by last name in ascending order, click the heading of the Last column. The up arrow indicates that the column is sorted in ascending order. A down arrow indicates descending order.
- **Search for Contacts** – You can search for contacts by entering a search term and clicking **Search**. For more information on searching contacts, see [Searching Contacts](#).

Managing Contacts

You can also perform the following tasks:

- **Editing a Contact** – Modify a contact’s information by clicking the contact’s name, clicking **Edit**, and modifying the information.
- **Deleting a Contact** – Remove one or more contacts by selecting the check box next to the contact and clicking **Delete**. To select all check boxes in a column, click the check box in the table’s heading row.

Searching Contacts

You can use the following information to search for contacts:

- First name
- Middle name
- Last name
- Company name
- E-mail address

To perform a search, enter the search string in the **Search** field and click **Search**. The results appear in the portlet.

See the “[Using the Search Portlets](#)” on page 7-44 for more information on searching the Contacts portlet, the GroupSpace Community, and outside the GroupSpace Community.

Using the CM Browser Portlet

Use the CM Browser portlet to read content in BEA content repositories and non-BEA content repositories. The Shared Content Repository is the default content repository for a GroupSpace application that is created when you create a new GroupSpace domain. If you used the Domain Configuration Wizard to create a domain, and you selected the **WebLogic Portal GroupSpace Application** check box, the Shared Content Repository is installed automatically. You can browse this repository in your GroupSpace Community; to edit the content, use the WebLogic Portal Administration Console.

If you create a *new* enterprise application in Workshop for WebLogic and select the GroupSpace facets, the BEA Repository is added to it (rather than the Shared Content Repository).

You can browse this repository in your GroupSpace Community. You can set Visitor Entitlements on a repository or its sub folders; see the [Security Guide](#) for more instructions on setting up Visitor Entitlements.

Browsing Content

Perform the following steps to read content in the repository:

1. Select the **Access** tab and the **Content** tab.
2. In the **Browse** tab of the CM Browser portlet, select the repository with the documents you want to read. If a subfolder exists, click the subfolder to view its documents. The GS Example Community uses the Shared Content Repository. The Shared Content Repository is the default content repository for a GroupSpace application that is created when you create a new GroupSpace domain.
3. View a document by clicking the document name.

Managing Content

You can also perform the following tasks:

- **View Details** – Click **Show Details** (or click the document’s name) to see the content’s properties, type, and history.
- **View an Attachment** – Retrieve a document’s attachment by clicking the item in the Attachment column. Click **OK** to view it or click **Save** to copy it to another location.
- **Editing Content** – Use the Administration Console to modify and delete content in your repository.
- **Control the Number of Documents that Display** – Click **Get Item and Page Count** to display the number of items retrieved and the page count.

Searching Content

To perform a search, click the **Search** tab in the CM Browser portlet. Enter the search string and click **Search**. The results appear in the portlet. You can also search using a Saved Search. See [“Using the Search Portlets” on page 7-44](#) for more information on searching the content in the CM Portlet, the GroupSpace Community, and outside the GroupSpace Community.

Using the Search Portlets

The Search portlets let you perform full text searches and browse information. All American Standard Code for Information Interchange (ASCII) characters are supported in a search expression.

You can perform three types of search in the GroupSpace Community:

- **Portlet Search** – Allows you to search the portlet you are using. For example, a Contacts Search for *Smith* retrieves contacts named Smith listed in your Addressbook.
- **GroupSpace Search** – Lets you search the current GroupSpace Community for content (by searching Links, Issues, Announcements, Documents, and so on). You can search the Community where you are logged in. You cannot search other Communities if you are not logged into that Community.
- **Enterprise Search** – Helps you locate information outside the GroupSpace Community. You can search information stored on your server's file system or on a web site. An Enterprise Search does not retrieve GroupSpace Community data or data stored in other BEA content repositories. Use the Content Management Browser portlet to retrieve data stored in other BEA content repositories.

Configuring an Enterprise Search

You must configure the Enterprise Search portlet to narrow its scope. For example, if you want to search URLs, you must add the URLs where the search can be performed to a configuration file. If you do not restrict an Enterprise Search, the results could be too large for you to manage.

Three configuration files exist for an Enterprise Search:

- **The `AutonomyIDOLServer.cfg` file** – Performs a keyword search of databases that you specify in the configuration file. Do not modify the `AutonomyIDOLServer.cfg` file.
- **The `HTTPFetch.cfg` file** – Performs a keyword search of the URLs that you added to the configuration file. The `HTTPFetch.cfg` file is located in the `\bea\weblogic90\portal\thirdparty\autonomy-wlp902\win32\HTTPFetch\` directory. Go to the `[SPIDER]` section and add the URLs to the web sites that you want users to be able to search. For example, the following entry in the `HTTPFetch.cfg` file makes the web sites `www.johnsmith.com` and `www.yahoo.com` targets for an Enterprise Search:

```
[SPIDER]
IMPORTPATH=../HTTPFetch
INDEXPATH=../HTTPFetch
```

```

NUMBER=2
0=CANDER
1=YAHOO
[CANDERS]
URL=http://www.johnsmith.com
Directory=JSMITH
LogFile=JSMITH.log
[YAHOO]
URL=http://www.yahoo.com
Directory=YAHOO
LogFile=YAHOO.log

```

Tip: If you perform a search immediately after modifying the `HTTPFetch.cfg` file, the indexing is not completed and the search will not retrieve any results. Allow time for the indexing to finish.

- **The `FileSystemFetch.cfg` file** – Performs a keyword search of the files on your hard drive or network drive. The `FileSystemFetch.cfg` file is located in the `\<WEBLOGIC_HOME>\portal\thirdparty\autonomy-wlp902\win32\FileSystemFetch\` directory. Go to the `[IMPORT]` section and specify the path to the data directory that you want users to be able to search and specify the types of documents to search. The following example shows the document types you can search:

```

[Import]
DirectoryPathCSVs=./data
DirectoryFileMatch=*.txt,*.htm?,*.pdf,*.doc,*.xls,*.ppt,*.rtf,*.sgml,*.xml,*.wml,*.qxd
DirectoryRecurse=on

```

Performing an Enterprise Search

Perform the following steps to perform an Enterprise search:

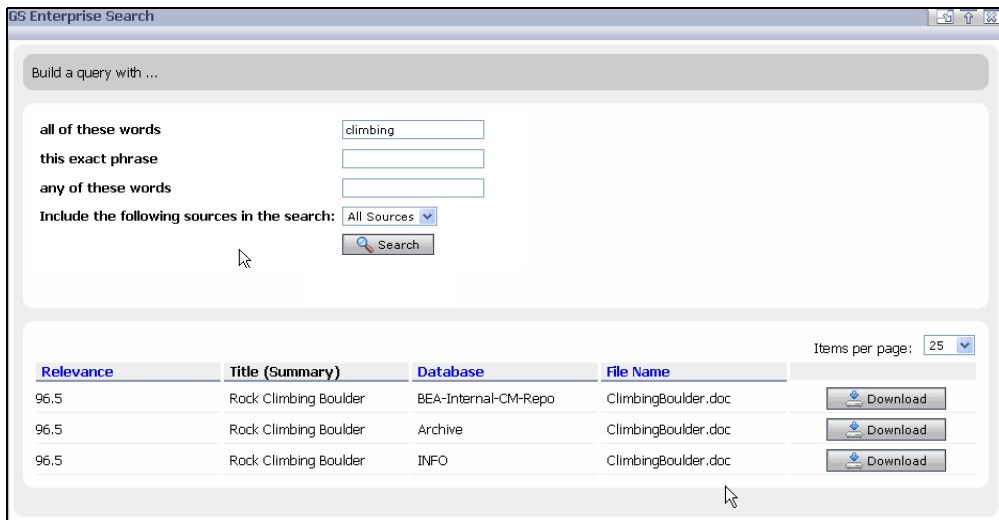
1. Log in as a GroupSpace Community owner, creator, or member.
2. Select the **Search** tab.
3. In the GS Enterprise Search portlet, enter the keywords for your query by completing the following fields:
 - **All of these words** – Retrieves documents that contain every word listed in this field, in any order.

- **This exact phrase** – Retrieves documents that contain an exact match, in this precise order.
- **Any of these words** – Retrieves documents that contain at least one of the words listed in this field.
- **Include the following sources in the search** – Select the drop-down list to pick individual content repositories or all databases that were configured to be searched. See “Configuring an Enterprise Search” on page 7-44.

See [Figure 7-24](#) for an example.

4. Click **Search**. The results display at the bottom of the Search portlet.

Figure 7-24 An Enterprise Search of Three Databases for the Word Climbing



5. Click **Download** to save a local copy of a document.

Performing a GroupSpace Search

A GroupSpace Search retrieves content and properties that are contained in the GroupSpace Portlets (Links, Issues, Document Library, Discussion Forums, and so on). For example, searching your GroupSpace application for an author with a specific name can retrieve documents written by the person, topics the person posted in a Discussion Forum, and so on.

If you want to perform a GroupSpace Search for restricted values (values that appear in a drop-down list, such as Priority or Status), you should perform a Field Search, rather than a Full

Text Search. Within your Field Search, select the value from the drop-down list, such as **In Progress** for a **Status** field when searching Issues.

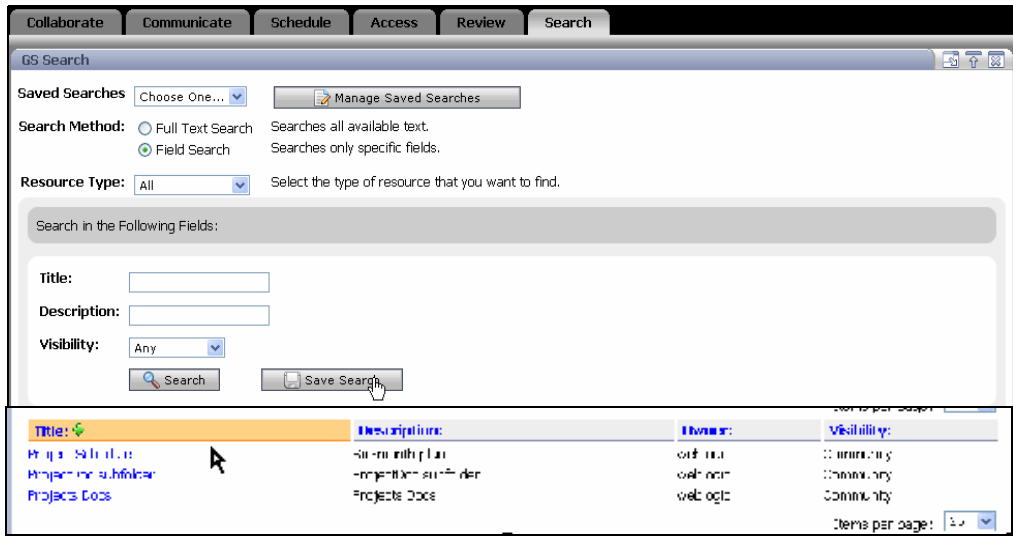
Perform the following steps to perform a GroupSpace search:

1. Select the **Search** tab or click the global **Search** button.
2. If you have already created a Saved Search, select the drop-down list to pick a search that you created and stored. See [“Saving Your Search Queries” on page 7-49](#) for instructions on saving a search phrase.
3. In the GS Search portlet, select **Full Text Search** or **Field Search**. A Full Text Search lets you search on specific words that might be part of either the property or the binary data. A Field Search searches just content properties, such as title, description, owner, status, resolution, and so on for the terms you specify for the portlets you want to search.
4. In the **Resource Type** drop-down list, select which GroupSpace portlet you want to search. You can search all the data in the portlets that are listed, or you can narrow your search to a specific portlet.

Tip: You cannot perform a Field Search for the Discussion Forums portlet; **Discussions** does not appear in the **Resource Type** drop-down list.

5. Depending on the option you specified in [step 4](#), complete the fields for the search query.
6. Click **Search**. The results display at the bottom of the Search portlet, as shown in [Figure 7-25](#).

Figure 7-25 A GroupSpace Search of All Portlets for the Word Project



Performing a Portlet Search

You can search the following portlets:

- GS Issues
- GS GroupNotes
- Discussion forums
- Mail
- Contacts
- Tasks
- GS Document Library
- GS Links
- CM Browser
- GS RSS Reader

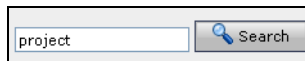
If you want to perform a Portlet Search for restricted values (values that appear in a drop-down list, such as Priority or Status), you should perform a Field Search, rather than a Full Text Search.

Within your Field Search, select the value from the drop-down list, such as **In Progress** for a **Status** field when searching Issues.

Perform the following steps to perform a portlet search:

1. Select the tab for the portlet you want to search and select the **Search** tab or locate the Search bar in the portlet.
2. If you are using the portlet's Search bar, enter the keyword, as shown in [Figure 7-26](#).

Figure 7-26 Portlet Search for the Word Project



If you are using the query builder in the portlet's **Search** tab, select **Full Text Search** or **Field Search**. A Full Text Search lets you search on specific words that might be part of either the property or the binary data. A Field Search searches just content properties, such as title, description, owner, status, resolution, and so on for the terms you specify for the portlets you want to search.

Enter the keywords for your query by completing the following fields:

- **All of these words** – Retrieves items with every word listed in this field.
 - **This exact phrase** – Retrieves items that contain an exact keyword match.
 - **Any of these words** – Retrieves items that contain at least one of the words listed in this field.
3. Click **Search**. The search results appear in the portlet. You can change the order in which they appear by clicking a column header.

Saving Your Search Queries

You can save your search terms so that you or other Community members can run them again later. A saved search consists of the search term, but not the search results. You can re-run the search exactly as it was saved or you can edit the search query before you run it. When you save the search term, you can determine who can view the saved search by marking it as Community, Personal, or Private.

You can save your search queries and run them against the following portlets:

- GS Issues
- GS Links

- GS GroupNotes
- GS Document Library
- GS RSS Reader
- Discussion Forums

Creating a Saved Search

Perform the following steps to create and save a search query:

1. Select the **Search** tab.
2. Select **Full Text Search** or **Field Search**. A Full Text Search searches all properties for your search term, while a Field Search searches specific properties, such as Title, Description, or Visibility for the values you enter.
3. At **Resource Type**, use the drop-down list to select which portlet you want to search. You can also select **All** to search all five portlets.
4. Complete the remaining fields for your query and click **Save Search**.
5. Complete the **Title** and **Description** fields for the saved search. The **Title** field must be unique according to the visibility—you can have a Private Default Search in the GS Issues portlet called *Project* and a Community Default Search in the GS Issues portlet called *Project*, but you cannot have two Community Default Searches in GS Issues that are both called *Project*.
6. At **Visibility**, select one of the following options to determine who can see the saved search:
 - **Community** – The saved search query is visible to the entire Community
 - **Personal** – The saved search query is visible to all Communities to which you belong
 - **Private** – The saved search query is visible just to you in this Community
7. Click **Save** to store and run the search.
8. Click **Search** to run the search.

Tip: You can also search an individual portlet by selecting the **Search** tab within a portlet. For example, you can search only the GS Issues portlet.

Running a Saved Search

Perform the following steps to run a saved search:

1. Select the **Search** tab.
2. In the **Saved Searches** field, select a search query from the drop-down list. The fields are populated with the choices you made when you saved the search.
3. Click **Search**.

Editing the Properties of a Saved Search

Perform the following steps to change the name, description, and visibility (only from Private to Community) of a saved search:

1. View your saved searches by clicking **Manage Saved Searches**.
2. Click **Edit Search** to change the name or description of the search, or who can see the saved search. (If you want to change the search term, create a new search.) You can change the visibility of a saved search query only from **Private** to **Community**. You can also delete a saved search from the Manage Saved Searches page by selecting the check box next to the search and clicking **Delete Searches**.
3. From the Manage Saved Searches page, click **Done**.

Optimizing Portlet Performance

When you perform a GroupSpace search or a portlet search, the speed of the search can be affected by how you sort the columns and properties in the portlets. Some GroupSpace data has explicit properties, such as Title, Description, Owner, and Visibility. You can efficiently sort these explicit properties. All other properties are implicit. An implicit property sort is performed in memory after the data is retrieved. If your implicit property sort results in a large amount of data, you could experience a small delay in viewing the data.

Using the GroupSpace Portlets