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PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration

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Contents

Chapter 3

Administering Portals and Sites 13

Part 2

Portal Administration

Chapter 4

Configuring Enterprise Portal 17

Chapter 5

Chapter 6

Chapter 10

Part 3

Administering the Search Infrastructure

Chapter 11

Part 4

Site Management

Part 5

Integration

Chapter 26

Using the Integrated Task List **257**

Chapter 27

Publishing Content from Third-Party Applications **259**

Chapter 28

Using Public Web Services **269**

PeopleSoft Enterprise Portal Preface

This preface discusses:

- About PeopleSoft Enterprise Portal.

- Using this PeopleBook.

- Related PeopleBooks.

- PeopleBooks and the PeopleSoft Online Library.

About PeopleSoft Enterprise Portal

This section discusses:

- PeopleSoft Portal Solutions product family.

- PeopleSoft Enterprise Portal feature overview.

- PeopleSoft Enterprise Portal and PeopleTools.

PeopleSoft Portal Solutions Product Family

This section discusses the products that are part of the PeopleSoft Portal Solutions product family:

- PeopleSoft Enterprise Portal.

- PeopleSoft Community Portal.

- PeopleSoft Enterprise Internal Controls Enforcer.

PeopleSoft Enterprise Portal

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

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

PeopleSoft Enterprise Portal 9.1 provides these important new features:

- Blogs.

- Feed publishing.

- Related content services—specifically, the Related Discussion service, the Related Links service, and the Related Tags service.

- Tagging (also known as social bookmarking).

- Wiki content.

These new features add to the existing features already present in PeopleSoft Enterprise Portal:

- Action items

- Collaborative workspaces

- Community calendars

- Context Manager

- Discussion forums

- Document management

- Polls and surveys

- Resource Finder

- Searches and saved searches

PeopleSoft Community Portal

Oracle's PeopleSoft Community Portal joins PeopleSoft Enterprise Portal as an option for creating a portal experience using the PeopleSoft Portal Solutions product family.

PeopleSoft Community Portal has the same collaborative features and functions as PeopleSoft Enterprise Portal. However, with PeopleSoft Community Portal, you are limited to creating and managing a maximum of three sites. With PeopleSoft Enterprise Portal, you can create and manage an unlimited number of sites.

PeopleSoft Enterprise Internal Controls Enforcer

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

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

See *PeopleSoft Enterprise Internal Controls Enforcer 9.1 PeopleBook.*

PeopleSoft Enterprise Portal Feature Overview

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

- First, PeopleSoft Enterprise Portal is a traditional portal framework that can be used for aggregating and managing content.

- Second, its collaborative capabilities make PeopleSoft Enterprise Portal a functional application that complements the features found in PeopleSoft applications.

PeopleSoft Enterprise Portal is built on the same architecture and with the same tools as PeopleSoft applications. This provides native integration and single sign-on with PeopleSoft applications. Because PeopleSoft Enterprise Portal is built on the PeopleTools platform, these core characteristics are also available in your portal implementations:

- Branding.

- Common toolset across all PeopleSoft applications.

- Database, application server, and web server independence.

- Feed Publishing Framework.

- Related Content Framework.

- Rich text editor.

- Role-based security and access management.

- Single sign-on.

- SOA support through Integration Broker.

Combined with pre-built application content delivered as PeopleSoft application portal packs, these features make configuration and deployment of PeopleSoft Enterprise Portal for a PeopleSoft-rich environment much easier than with other portals.

PeopleSoft Enterprise Portal provides numerous collaboration and Web 2.0 features such as blogs, content management, discussion forums feeds, tagging, collaborative workspaces and others. Each of these features is discussed briefly in this section.

Action Items

Miscellaneous to-do's and issues are frequently assigned during project status meetings and in workspaces. Successful resolution of these detailed action items is critical to meeting broader business objectives. PeopleSoft Enterprise Portal provides an action items feature that helps project leaders track open action items assigned to various team members as well as capture their resolution for a given project.

Blogs

Blogs (or weblogs) are a familiar and useful means for authoring and broadcasting information for an individual or team. Blogs are also participatory in that they allow for commentary and feedback from the audience. In PeopleSoft Enterprise Portal, blogs are integrated with other features such as feeds, notifications, search, tagging, and workspaces.

Branding

A WYSIWYG interface allows branding administrators to define and deploy header and footer elements for the portal. Because branding is integrated with site management as well as collaborative workspaces, subject matter experts can override these branding elements locally, making it easier for non-portal experts to create compelling sub-communities within the portal.

Calendars

In PeopleSoft Enterprise Portal, calendars allow communities to manage events within portals, sites, and workspaces. Individual communities or workgroups can maintain their own distinct calendars. Users can subscribe to any or each of the calendars to which they have access and display the results as a unified calendar on their homepage or within a workspace.

Collaborative Workspaces

A collaborative workspace is a virtual team room. Workspaces can be created to facilitate the completion of any project that requires a team to work collaboratively to accomplish its goals. Some collaborative projects focus on temporary issues that require short, intense collaborative sessions, such as closing a sales deal or an open problem incident. Other projects may be ongoing, such as coordinating the work for a department.

In PeopleSoft Enterprise Portal, collaborative workspaces incorporate the product's other collaborative features including action items, blogs, calendars, discussions, documents, feeds, polls, search, tagging, and wikis. In addition, workspaces can be contextually linked to PeopleSoft application pages to provide robust collaboration in the context of transactions and business processes.

Content Management

PeopleSoft Enterprise Portal's content management system enables you to organize all your content creation processes. The content management system helps you to manage, create, and organize content, through approval, version management, and publication features. The resulting content is ready and available for browsing by users and for reuse in portal pagelets, news publications, related information, and workspaces. Content migration allows you to author content in a staging database and then migrate the finalized content to a production database.

Context Manager

In PeopleSoft Enterprise Portal, Context Manager appears as a frame on the right side of the page displaying pagelets that are loaded with appropriate information based on the target page or transaction. Context Manager is the framework within which features—such as, related information, related contacts, related resources, related discussions, related workspaces, related links, and content ratings—operate. PeopleSoft Enterprise Portal also delivers related content services to provide PeopleSoft Enterprise Portal features on any PeopleSoft application pages.

Discussion Forums

Discussion forums provide a platform that groups can use to discuss topics of interest. Participants can post discussion topics, such as issues, suggestions, or questions, and receive replies and feedback. In PeopleSoft Enterprise Portal, discussion forums are integrated with other features such as action items, alerts, documents, feeds, notifications, search, tagging, and workspaces. Standalone forums within a portal or site can be managed as moderated or unmoderated.

Feed Publishing and Consumption

PeopleSoft Enterprise Portal leverages the PeopleTools Feed Publishing Framework to deliver feeds for several features including blogs, discussion forums, news publications, and workspaces. You can use the framework to publish secure or public feeds. These feeds make it easy for people to subscribe to information that interests them, rather than logging into the application that delivers this information. PeopleSoft Enterprise Portal also provides pagelets and features that facilitate the discovery and consumption of internal and external feeds.

My Links

My Links functionality provides an easy way for to bookmark your most frequently needed and accessed content. My Links serves as a collection of bookmarks to specific PeopleSoft Enterprise Portal pages, to PeopleSoft transactions, and to non-PeopleSoft content such as external websites.

Polls and Surveys

PeopleSoft Enterprise Portal provides polls as a simple way to gather opinions and comments from portal users using a pagelet that is displayed on the portal or site homepage, in a workspace, or attached to a menu item. While polls cover a single question only, surveys allow you to create and distribute questionnaires and evaluate the responses.

Related Content Services

The PeopleTools Related Content Framework provides the tools for subject matter experts or portal administrators to contextually link application pages with collaborative content provided as related content services. PeopleTools provides the service definitions for three PeopleSoft Enterprise Portal related content services:

*   Related Discussion service

*   Related Links service

*   Related Tags service

These related content services provide features of PeopleSoft Enterprise Portal that can be added to PeopleSoft application pages through the framework. While the service definitions are provided in PeopleTools, an installed PeopleSoft Enterprise Portal database is required to provide the services and to store the related data.

Resource Finder

Resource Finder is a highly flexible repository that you can configure to receive data loads containing information about any organizational resource, along with links that relate these resources to each other. These resources are typically things like customers, suppliers, employees, departments, locations, companies, and business units, but can also be easily expanded to include things like products and projects, for example.

Search

In PeopleSoft Enterprise Portal, searches can be executed from the portal header, from within specific features, and via saved searches. From the portal header and the search page, searches can be scoped or limited to specific types of content. Because tags are integrated into search indexes, search results improved based on user tagging. Integration with Oracle's Secure Enterprise Search (SES) exposes PeopleSoft Enterprise Portal content to external systems via web services.

Tags

Tags, also known as social bookmarks, provide the means for users to store, organize, search, and manage content bookmarks in PeopleSoft Enterprise Portal. Tagging increases the probability of properly characterizing the content and hence its discovery and use. In PeopleSoft Enterprise Portal, tagging is integrated directly with other content types including blogs, collaborative workspaces, content management system items, and discussion forums. In addition, the tagging framework is available through the Related Tags service and to non-PeopleSoft applications as a web service.

Third-Party Integration

PeopleSoft Enterprise Portal supports integration with:

- Calendar servers: Lotus Domino or Microsoft Exchange 2003 and 2007.

- Email servers: IMAP, Lotus Domino, Microsoft Exchange 2003 and 2007, or POP.

- Instant messaging domains: GTalk, Sametime, XMPP, or Yahoo.

- Oracle Secure Enterprise Search (SES).

Wikis

Wikis support the collaborative authoring needs of portal users. In PeopleSoft Enterprise Portal, wikis are available in collaborative workspaces, which means that the security controls of workspaces apply to wikis. Wikis incorporate the easy to use rich text editor and other features to provide a collaborative authoring environment.

User Interface Features

The PeopleSoft Enterprise Portal user interface relies on these features and others from PeopleTools:

- AJAX features such as modal dialog boxes, drop-down menu navigation, and partial page and pagelet refreshes.

- Branding updates incorporating the SWAN style sheet.

- Menu bread crumbs.

- Pagelet drag-and-drop.

- Pagelet Wizard pagelets with help and search.

PeopleSoft Enterprise Portal and PeopleTools Portal Technology

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

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

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

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

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology.*

Using this PeopleBook

This section discusses:

- About this book.

- Common elements used in PeopleSoft Enterprise Portal.

About this Book

This PeopleBook comprises the following parts:

- Part 2: Portal Administration

   This part describes the tools for installing, configuring, and administering PeopleSoft Enterprise Portal and Portal features.

   See Portal Administration.

- Part 3: Administering the Search Infrastructure

  This part details the administration of search indexes to support Portal search features.

  See Administering the Search Infrastructure.

- Part 4: Site Management

  This part describes creating and managing sites, managing site security, moving sites, and publishing Portal content to sites.

  See Site Management.

- Part 5: Integration

  This part details the setup of email and calendar systems and instant messaging. It also describes integrating the Portal with external content, including internet news content, public web services, content from third-party application, and Oracle Secure Enterprise Search.

  See Integration.

Common Elements Used in PeopleSoft Enterprise Portal

This section discusses the rich text editor.

About the Rich Text Editor

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

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

See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications,* "Working With Pages," Working With Rich Text-Enabled Fields.

Related PeopleBooks

This section discusses:

- PeopleSoft Enterprise Portal PeopleBooks.

- PeopleTools PeopleBooks.

PeopleSoft Enterprise Portal PeopleBooks

The PeopleSoft Enterprise Portal PeopleBook library includes:

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*

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

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding.*

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*

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

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces.*

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

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

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System.*

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

  The PeopleBook you are reading, this PeopleBook covers tasks for administering portals and sites including product configuration, system-wide setup and administration, integration with third-party systems, and so on.

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration.*

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*

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

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder.*

- *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*

  This book covers setup and usage of items such as blogs, calendars, discussion forums, feeds, tagging, searching, related content services, and other features of PeopleSoft Enterprise Portal.

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features.*

PeopleTools PeopleBooks

The PeopleTools 8.50 PeopleBook library contains the complete set of books covering PeopleTools 8.50. In particular, several of these books are useful to the setup, administration, and use of PeopleSoft Enterprise Portal including:

- *Enterprise PeopleTools 8.50 PeopleBook: Feed Publishing Framework*

  The PeopleTools Feed Publishing Framework supports the publication of PeopleSoft Enterprise Portal data as feeds. In addition, the framework can be used to develop custom feed types.

- *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration*

  Integration Broker facilitates the exposure of PeopleSoft business logic as services and the consumption of external web services. Integration Broker also supports synchronous and asynchronous messaging between PeopleSoft applications and with third-party systems.

- *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*

  PeopleTools portal technology is the foundation of the PeopleSoft Enterprise Portal product. This book covers critical portal technologies such as portal implementation, PeopleSoft Pure Internet Architecture, Pagelet Wizard, the Related Content Framework, and others.

- *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*

  This book covers important security-related topics including PeopleTools user profiles, roles, permission lists, single sign-on (SSO), and others.

- *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*

  This PeopleBook provides general information about PeopleSoft applications useful to all users of PeopleSoft systems. Topics include an introduction to the PeopleSoft Pure Internet Architecture, explanation of how to navigate through the system, how to perform searches, elements of application pages, and so on.

Note. These and other PeopleBooks in the PeopleTools library are referenced as needed.

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.

- How to send PeopleSoft documentation comments and suggestions to Oracle.

- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.

- Understanding PeopleBook structure.

- Typographical conventions and visual cues used in PeopleBooks.

- ISO country codes and currency codes.

- PeopleBooks that are common across multiple applications.

- Common elements used in PeopleBooks.

- Navigating the PeopleBooks interface and searching the PeopleSoft online library.

- Displaying and printing screen shots and graphics in PeopleBooks.

- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.

- Understanding documentation integration and how to integrate customized documentation into the library.

- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Part 1

Introduction

Chapter 1
Getting Started With PeopleSoft Enterprise Portal

Chapter 2
PeopleSoft Community Portal

Chapter 3
Administering Portals and Sites

Chapter 1

Getting Started With PeopleSoft Enterprise Portal

This chapter provides an overview of PeopleSoft Enterprise Portal discusses:

- PeopleSoft Enterprise Portal integrations.

- PeopleSoft Enterprise Portal implementation tasks.

PeopleSoft Enterprise Portal Overview

Reviewing all elements of the PeopleSoft portal offerings helps you better understand how the PeopleSoft Enterprise Portal fits within your own portal strategy. The PeopleSoft offerings focus on providing you with products that can be combined in multiple ways to produce the enterprise portal configuration that addresses your organization's requirements. The fact that the PeopleSoft Enterprise Portal and PeopleSoft business applications share a common PeopleTools technology base makes integration easy. While our portal packs provide this prepackaged integration to PeopleSoft applications, you can also integrate with any web-enabled application by using the PeopleTools integration technologies.

This section discusses each element in the overall PeopleSoft portal infrastructure:

- PeopleSoft Enterprise Portal.

- PeopleTools portal technology.

- Application portal packs.

Note. This PeopleBook documents only the functionality of the PeopleSoft Enterprise Portal. Detailed documentation for PeopleTools portal technology and the application portal packs is delivered separately with respective products.

PeopleSoft Enterprise Portal provides a selection of out-of-the-box features that enable you to quickly implement the portal. You can deploy enterprise-wide access to internet-based applications, unstructured content, a searchable resource repository, and collaborative services through an internet browser.

Deploying PeopleSoft Enterprise Portal provides you with peace of mind, knowing that your software investment is protected against rapidly changing technology standards through our full-service support, maintenance, and upgrade programs.

PeopleSoft Enterprise Portal Homepage

The PeopleSoft Enterprise Portal homepage aggregates a variety of content gathered from sources across an organization:
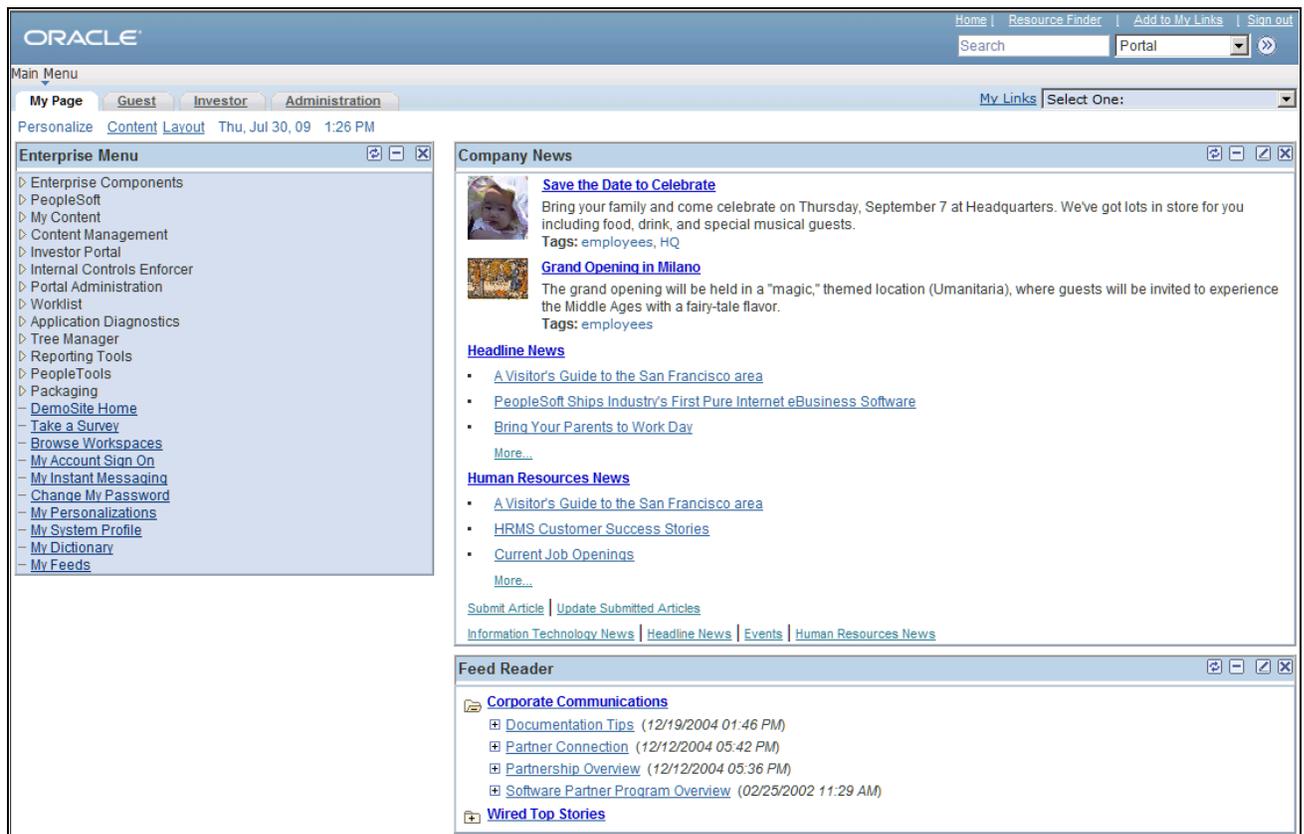
PeopleSoft Enterprise Portal homepage example

Users can configure their PeopleSoft Enterprise Portal homepages to display a variety of pagelets. Numerous pagelets are delivered with the PeopleSoft Enterprise Portal product.

These features are available on the PeopleSoft Enterprise Portal homepage header:

Search	Submit a portal search request and access the Search page.
	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Submitting Searches in the Portal."
Home	Select to return to your PeopleSoft Enterprise Portal homepage (My Page).
Worklist	Select to access your worklist.
	See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications,* "Using Workflow."

Resource Finder	Select to access the Resource Finder - Advanced Search page, where you can perform detailed searches for resources in your enterprise and access relevant resource profiles.
	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Performing Resource Finder Searches," Performing Advanced Resource Finder Searches.
MultiChannel Console	Select to launch the MultiChannel Console.
	See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft MultiChannel Framework,* "Understanding PeopleSoft MultiChannel Framework."
Add to My Links	Select to access the Add to My Links page, where you can add a My Link to the currently accessed component of your My Links collection.
	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Using My Links," Adding the Current Page to My Links.
My Page	Select to access your PeopleSoft Enterprise Portal homepage tab.
Guest	Select to access a sample tab that is configured for guest users.
	See Chapter 5, "Managing Guest User Accounts," page 39.
Investor	Select to access the Investor Portal homepage tab.
Administration	Select to access the PeopleSoft Enterprise Portal Administration homepage tab.

PeopleSoft Enterprise Portal Administration Homepage

The PeopleSoft Enterprise Portal Administration homepage tab displays homepage pagelets for administrative tasks:
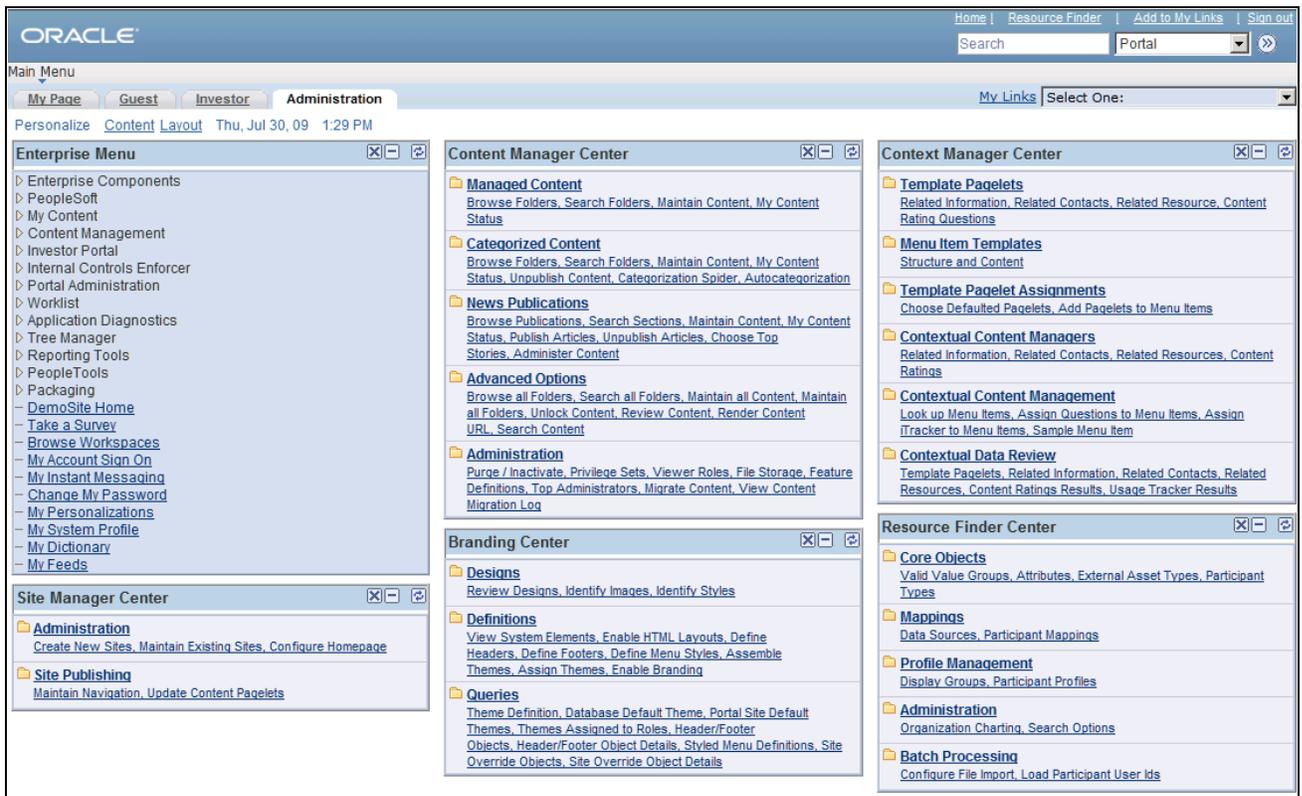
PeopleSoft Enterprise Portal Administration tab

These homepage pagelets display the same content as the navigation collection pages that are linked from the Enterprise Menu under Portal Administration:

• Site Manager Center.

  See Chapter 17, "Navigating in PeopleSoft Enterprise Portal Site Management," page 163.

• Content Management Center.

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Understanding the Content Management System."

• Branding Center.

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Navigating in PeopleSoft Enterprise Portal Branding."

• Context Manager Center.

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Context Manager in PeopleSoft Enterprise Portal," Working With the Context Manager Center Pagelet.

• Resource Finder Center.

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Enterprise Portal Resource Finder Overview."

Users can select which pagelets appear by personalizing content for their administration homepage tabs.

PeopleTools Portal Technology

All PeopleSoft applications are developed using PeopleTools application development technology. PeopleTools, an object-oriented development environment, allows for the rapid and efficient development of applications by storing application design as metadata. The PeopleTools development and runtime environment includes the basic technology features on which PeopleSoft Enterprise Portal is built.

PeopleSoft Application Portal Packs

Portal packs are predefined collections of pagelets that provide access to key data from PeopleSoft Enterprise business applications. Each product line has various portal pack offerings. They supplement PeopleSoft Enterprise Portal by adding a selection of pre-integrated application pagelets for placement on the homepage. After administrators register application pagelets in the PeopleSoft Enterprise Portal registry, or registries, and configure them to appropriate tabs, users manage which pagelets appear on their homepages by selecting the Personalize Content link on their homepages.

This diagram shows PeopleSoft Enterprise Portal as the integrating layer between the portal audience and the PeopleSoft applications and their associated portal packs:
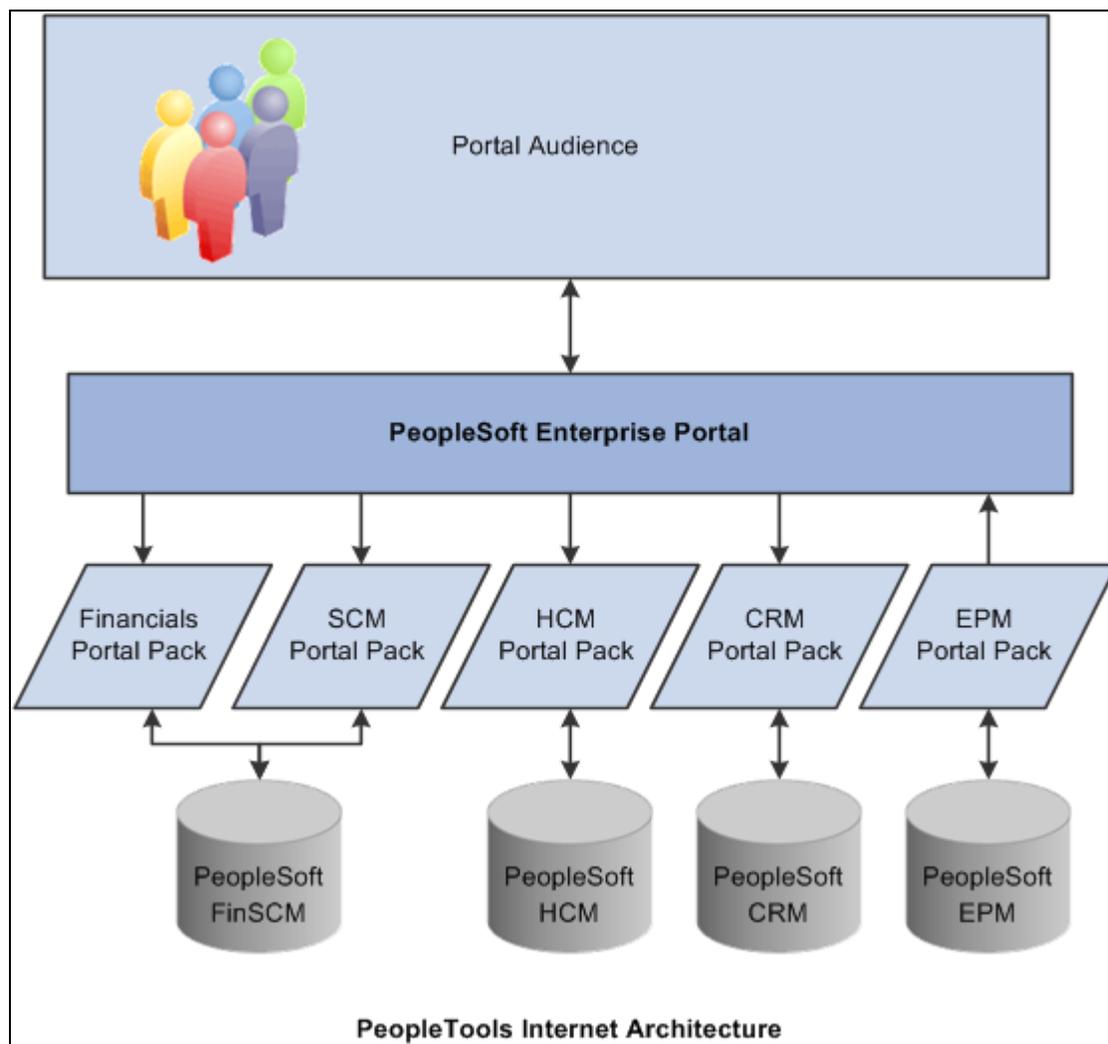
PeopleSoft Enterprise Portal as an integrating layer

PeopleSoft Enterprise Portal Integrations

PeopleSoft Enterprise Portal can integrate with all of the following:

- PeopleSoft applications.

- Non-PeopleSoft applications.

- Third-party internet services.

- Internet content.

- Extranet content.

- Intranet content.

PeopleSoft Enterprise Portal Implementation Tasks

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the PeopleSoft Enterprise Portal Application Technology PeopleBook, with information about where to find the most current version of each.

Chapter 2

PeopleSoft Community Portal

This document provides an overview of the PeopleSoft Community Portal and discusses:

* PeopleSoft Community Portal sites.

* PeopleSoft Community Portal content.

* PeopleSoft Community Portal inter-portal integration capabilities.

PeopleSoft Community Portal Overview

PeopleSoft Community Portal joins PeopleSoft Enterprise Portal as an option for creating a portal experience using PeopleSoft's portal platform.

The PeopleSoft Community Portal provides collaborative tools, content management, context management, transactions, documents, news, events, and business system access to groups of users who typically work in a shared business area such as financial, supply chain, or human resources management. From a single spot with one sign-in, the PeopleSoft Community Portal connects groups of users to resources they need to do their jobs more effectively.

The PeopleSoft Community Portal has the same features and functions as the PeopleSoft Enterprise Portal. However, with the PeopleSoft Community Portal, you are limited to creating and managing a maximum of three sites. With the PeopleSoft Enterprise Portal, you can create and manage an unlimited number of sites.

PeopleSoft Community Portal Versus PeopleSoft Enterprise Portal

PeopleSoft recognizes that there are different strategies when it comes to implementing portals.

Some organizations need a multi-portal, or federated strategy, to better meet their needs. In this case, we provide the PeopleSoft Community Portal as an option. PeopleSoft Community Portal provides a solution that maps with the portal strategy of an organization that has already deployed an enterprise portal within their organization.

Some organizations prefer to have a single portal platform to handle all of their portal requirements. In this case, we provide the PeopleSoft Enterprise Portal as an option.

PeopleSoft Community Portal Sites

A site is a logical grouping of content that supports the activities of a defined set of community members. A community site may be narrowly defined, such as a marketing or benefits community; or broadly defined, such as an employee community. Typically, organizations define communities by mapping them to business functions such as finance, supply chain, sales, and human resources; or by an audience, such as customer or employee.

The PeopleSoft Community Portal provides two methods for creating and managing sites. Your maximum of three community sites can be created using one or a combination of the following methods:

- Decentralized communities.

  Each community is implemented and managed separately, with its own hardware environment.

  For example, you might use the decentralized community method to implement a customer community when you must follow a standard business practice that internet accessible sites, such as customer-facing systems, must be implemented separately from intranet applications for security reasons. In this case, a customer community would be implemented as a separate, decentralized site.

- Centralized communities.

  Site Management, a key feature of the PeopleSoft Community Portal, is used to create and manage multiple community sites within a single portal environment.

  For example, you might use the centralized community method to implement a financial community and a human resource community as logically separate sites within a single environment using the Site Management feature. These two communities would share a common hardware environment, security model, support structure, and so forth. Using the centralized community model, the portals appear to be separate to end-users, but in fact, share a single infrastructure.

The decentralized customer community site and centralized financial and human resource community sites described here provide an example of three community sites that can be created and managed using the PeopleSoft Community Portal.

PeopleSoft Community Portal Content

In this section, we discuss some of the more common types of content that can be displayed in the PeopleSoft Community Portal.

PeopleSoft Content Provider Content

You can display content from PeopleSoft applications; FSCM, CRM, and HRMS systems, for example; in a single community site. Displaying PeopleSoft content provider content in the PeopleSoft Community Portal is not limited by content or domain.

PeopleSoft Portal Pack Content

You can implement PeopleSoft portal pack pagelets in the PeopleSoft Community Portal. This portal pack content can be used in conjunction with the PeopleSoft Community Portal in the same way it can be used with the PeopleSoft Enterprise Portal.

Non-PeopleSoft Content

The PeopleSoft Community Portal is designed with the expectation that much of the content needed by your communities will originate from non-PeopleSoft sources. For this reason, the PeopleSoft Community Portal is delivered with robust features that enable the integration of non-PeopleSoft content.

PeopleSoft Community Portal Inter-Portal Integration Capabilities

PeopleSoft recognizes the need for inter-portal integration and supports the use of standards to accomplish this. The PeopleSoft Community Portal and PeopleSoft Enterprise Portal support the consumption of portlets developed using JSR168 and WSRP standards.

The following example illustrates the type of inter-portal integration possible using the PeopleSoft Community Portal.

A financial controller interacts with an enterprise portal and a financial community site created in the PeopleSoft Community Portal. She may access the enterprise portal to view company news, HR information, reports, email, calendar entries, and so forth. One of her user homepage portlets, supplied by the finance community site, might inform her of activities or points of interest occurring in the community. These might include notices for required approvals, reports ready to be viewed, pending documents, new discussion threads, and so forth.

The financial controller can click one of these notifications in the portlet to be seamlessly placed into the PeopleSoft Community Portal-managed financial community site and presented with the selected task. Once she completes the task, she can work with other applications in the financial community site, or return to the enterprise portal.

Chapter 3

Administering Portals and Sites

This PeopleBook covers portal-wide and site-wide administration tasks only, and is not intended to be an all-encompassing administration guide. Administration of specific features remains with the other content on those features.

Understanding Portal Administration

The Portal Administration portion of this PeopleBook details how to perform these functions:

- Configuring and Managing Enterprise Portal

- Administering the Search Infrastructure

- Administer Integration with Third-Party Systems, Messaging, and Internet Content

Understanding Site Administration

Site Management facilitates the creation and management of multiple sites from within one installation of PeopleSoft Enterprise Portal. Each site is managed separately.

The Site Administration portion of this PeopleBook discusses:

- Managing and administering sites.

- Defining site security.

- Defining Site Publication Defaults.

- Configuring the Site Homepage.

- Managing Site Branding.

- Publishing to a Site.

- Moving Sites Between Databases.

Understanding Administration of Specific Features

Specific features such as the Content Management system, Workspaces, Calendars and Discussion Forums also require administration. However, such administration is typically at the level of the specific instance of each feature, not site-wide.

Here is a list of feature-specific administration topics within the PeopleSoft Enterprise Portal PeopleBooks, followed by links to these topics.

• Administering Action Items

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Action Items," Administering Action Item Lists.

• Administering a Blog

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

• Administering Community Calendars

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Community Calendars," Administering Community Calendars.

• Administering a Discussion Forum

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

• Administering Polls

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Managing Polls," Administering Polls.

• Setting Up Enterprise Portal Branding

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Setting Up PeopleSoft Enterprise Portal Branding."

• Administering Collaborative Workspaces

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces."

• Administering the Content Management System

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up the Content Management System," Administering the Content Management System.

• Administering News Content

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Working With News Publications," Administering News Content.

Part 2

Portal Administration

Chapter 4

Configuring Enterprise Portal

This chapter discusses how to:

• Set the default style sheet.

• Define Enterprise Portal installation options.

• Enable the signon PeopleCode.

• Set up multichannel framework (MCF) for PeopleSoft Enterprise Portal.

• View menu item details.

• Choose the Enterprise Menu homepage pagelet.

• Use PeopleSoft Enterprise Portal content reference attributes.

Setting the Default Style Sheet

This section discusses how to set the default style sheet in the PeopleTools Options component (PSOPTIONS).

Page Used to Set Default Style Sheet

Page Name	Definition Name	Navigation	Usage
PeopleTools Options	PSOPTIONS	PeopleTools, Utilities, Administration, PeopleTools Options	Set the default style sheet.

Setting the Default Style Sheet Definition

Access the PeopleTools Options page (PeopleTools, Utilities, Administration, PeopleTools Options).

PeopleTools Options

Environment Long Name: [_____] Environment Short Name: [_____]

System Type: Undefined Database ▾

Language Settings

Language Code: English *Sort Order Option: English ▾

☐ Translations Change Last Update

Background Disconnect Interval: 30 Temp Table Instances (Total): [__]

☐ Multi-Company Organization Temp Table Instances (Online): [__]

☑ Multi-Currency

☑ Use Business Unit in nVision *Maximum Message Size: 10,000,000

☑ Use Secure Rep Rqst in nVision

☐ Multiple Jobs Allowed Base Time Zone: PST 🔍

☑ Allow DB Optimizer Trace Last Help Context # Used: 100222

☑ Grant Access *Data Field Length Checking: Others ▾

☑ Platform Compatibility Mode *Maximum Attachment Chunk Size: 28,000

☑ Allow NT batch when CCSID<>37

☐ Save Error is Fatal Upgrade Project Commit Limit: 50

☐ Set Focus on Save Button *Enable Switch User: All ▾

*Case Insensitive Searching: Off ▾ Max rows in search results: 300

Style Sheet Name: EPPSTYLEDEF_SWAN 🔍

Branding Application Package: EPPBR_BRANDING Default rows in search results: 300

Branding Application Class: RoleBasedBranding

Tree Manager Options

☐ Use Tree Update Reservation

Max Tree Inactivity Period,min: 20

Help Options

F1 Help URL: http://ple-infodev- ⬍

Ctrl-F1 Help URL: [_____] ⬍

WSRP Display Mode

WSRP Display Mode: Display as Portlet ▾

Database Encryption Algorithm

Database Encryption Algorithm: [_____]

Style Sheet Name field on the PeopleTools Options page

The PeopleSoft system delivers various style sheets for use with PeopleTools and PeopleSoft Enterprise Portal. Style sheets control the various display elements of target pages and pagelets, and the overall branding of the portal. The Style Sheet Name field on the PeopleTools Options page stores a default style sheet name.

You can create your own style sheets and use one of them in place of the delivered style sheet by selecting it in the Style Sheet Name field on the PeopleTools Options page.

Note. You can also create your own alternate style sheet and have browser specific adjustments. Create an additional style sheet, including the adjusted styles, and define it with the exact same name with _ALT appended to it. For example, PeopleSoft Enterprise Portal sets the style sheet name in PSOPTIONS to EPPSTYLEDEF; therefore, EPPSTYLEDEF_ALT is automatically applied to alternate browsers.

Defining Installation Options

This section discusses how to define Enterprise Portal installation options in the Installation Options component (EO_PE_OPTIONS).

Page Used to Define Installation Options

Page Name	Definition Name	Navigation	Usage
Installation Options	EO_PE_OPTIONS1	Portal Administration, System Data, Installation Options	Define Enterprise Portal installation options.
Portal and Security Defaults	EO_PE_OPTIONS2	Portal Administration, System Data, Installation Options, Portal and Security Defaults	Select the portal and security defaults used when creating portal registry structures.
Last ID Values	EO_PE_OPTIONS3	Portal Administration, System Data, Installation Options, Last ID Values	Displays the last ID created for a given feature. This data is used in generating the next available ID.

Defining Installation Options

Access the Installation Options page (Portal Administration, System Data, Installation Options).

Installation Options page (1 of 2)

Installation Options page (2 of 2)

Portal installation option values are entered at the time of portal implementation.

Search Results Weighting

Include Content Rating Results   Select to apply survey results to search rankings. Placement on search results will be upgraded for highly rated content.

Search Alert

Enable Saved Search Alerts   Controls wether the Saved Searches page shows or hides the option to set alert notifications for the given saved search.

Note. Record-based saved search indexes do not support alert notifications, so you may want to deselect this option just for the record-based search indexes.

Branding

Enable Branding Themes   Select to enable the branding that appears to dynamically change according to the role of the user.

Selecting this option also enables the My Links functionality and the display of the Add to My Links link on the portal header.

Enable Adding Image Objects   Select to enable the branding administrator to upload images from the branding administrative pages. This option is available to users who have access to the branding pages where the image upload option is available.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Configuring and Assembling Branding Themes," Specifying Header and Footer Images.

Enable Adding HTML Objects   Select to enable the branding administrator to add HTML objects from the branding administrative pages.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Configuring and Assembling Branding Themes," Enabling HTML Area Elements in Headers and Footers.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "PeopleSoft Enterprise Portal Branding Overview" and *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Using My Links."

Resource Finder

Enable Resource Finder   Select to use the Resource Finder feature.

Use Resource Finder for Profile Pages
Select to use Resource Finder participant profiles as the source for participant information for Collaborative Workspaces and Content Management.

In Collaborative Workspaces, these Resource Finder participant profiles will be used as the source for member profiles accessible from the Members module. When a user clicks a member name link in the Members module, the member profile that appears will be based on the member's Resource Finder participant profile.

In Content Management, these Resource Finder participant profiles will be used as the source for user profiles accessible by clicking user name links in the components. For example, fields such as Created By,Checked Out By, and so forth will contain user name links.

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

• Resource Finder is set up and loaded with data.

  This setup includes the generation of associated Resource Finder search collections.

• Resource Finder participants are loaded with their associated user IDs, where applicable, using the Load Participant User IDs Application Engine process (EPX_LOAD_OPR).

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Importing Participant Data," Loading Participant User IDs.

If you leave this option blank, when a user clicks a member name link in the Members module, the member profile that appears will be based on information from these tables: PSOPRDEFN, PSUSEREMAIL, EPPCW_MEMBERS, and PS_EPPRC_IM_USERVW.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Viewing Member Profiles.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Enterprise Portal Resource Finder Overview."

Content Management

Image Attachment URL Path
Enter the web server's relative or absolute URL of the extended path that will contain the image files from the FTP server. The choice of URLs is based on the information from the URL Maintenance page that is found in the PeopleTools, Utilities, Administration, URLs menu path, for the URL ID EPPCM_IMAGE.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up the Content Management System," Setting Up an FTP Service for Image Attachments.

Discussion Forums

Discussions Viewing Default	Select *Flat View* to display all discussion postings in chronological order with details.
	Select *Threaded View* to display the hierarchy of the discussion without the details.
Site Specific	Select to make a discussion forum viewable only within the site in which it was created. For example, if Site Specific is selected and a user is in the Customer portal, then in the Discussions pagelet, that user will see discussion forums that were created in the Customer portal only.
	Deselect this option to make all discussion forums appear regardless of the portal in which it was created. For example, if the user is in the Customer portal, then in the Discussions pagelet the user will see discussion forums created in the Customer portal, Employee portal, Supplier portal, and so on.

Collaborative Workspaces

Maximum Email Notifications	Enter the maximum number of email messages you want to be able to send in the member invitation notification process for a Collaborative Workspace.
	If the number of email messages sent in the notification process exceeds this number, an error appears and the system sends no email.
Default Module Image	Enter the name of the image that you want to display by default in the Collaborative Workspace menu to the left of module names.
Default Presence Indicators in Members Module	Select to display instant messaging presence indicators in the Members module. If you decide to display presence indicators, keep in mind that one server trip is executed per indicator per member.
	See Chapter 23, "Setting Up Instant Messaging in PeopleSoft Enterprise Portal," page 231.
Enable External Users	Select this option to enable workspace owners to invite external users to participate in the workgroup.

Calendar Events/Action Items

Export Option	Select the option for the Export link on the Event View page. Valid options are

- *Not Used,* which will hide the export link on the page.

- *Open Calendar Program,* which will open the file with the default local calendar application that is associated with the *.ics file.

- *Send as Email Attachment,* which sends an email with the iCal attachment.

- *User Prompt,* which enables the user to either open the file or send an email.

Alerts iCal Attachment   Select settings for iCal attachments and for event alert notification email messages. Valid options are:

- *No attachment with Alerts*

- *Attach iCal file with Alerts*

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Community Calendars" and *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Action Items."

Setting Portal and Security Defaults

Access the Portal and Security Defaults page (Portal Administration, System Data, Installation Options, Portal and Security Defaults).

Installation Options	Portal and Security Defaults	Last ID Values

Select the portal and security defaults used when creating portal registry structures. Define the logged-in user base role for your system. It is recommended to use the role PAPP_USER. The base user role is used on system items secured by privilege sets. If you change the role name, you should also select the option to update the privilege sets on save.

Portal Registry Structures

*Registry Object Prefix:	ADMN	
*Menu Template Pagelet:	PAPP_PT_NAVIGATION_SCR	
*Base Workspace Template Name:	PAPP_BASE_WORKSPACE_TMPL	Base Workspace Template
*Base Wiki Space Template Name:	PAPP_BASE_WS_WIKI_TMPL	Base Workspace Template Wiki

Site Manager Security

*Administrator Perm Template:	PAPP5000	Administer Sites - Template
*Publisher Permission Template:	PAPP5060	Publish in Sites - Template
*Viewer Permission Template:	PAPP5070	View Sites - Template

Workspace Security

*Administrator Permission List:	PAPP5350	Administer Workspaces
*Manager Permission List:	PAPP5360	Manage Workspaces
*User Permission List:	PAPP5300	Access Workspaces
*Administrator Role:	PAPP_WORKSPACE_MANAGER	Workspace Manager

User Base Role

*Logged-In User Base Role:	PAPP_USER	Enterprise Portal User
	☐ Update Privilege Sets on Save	

Related Discussion Forum

*Moderator Role:	PAPP_DISCUSSIONS_ADMIN	Discussions Administrator
*Contributor Role:	PAPP_DISCUSSIONS_CONTRIBUTOR	Discussions Contributor

Content Migration

Approver Role:	PAPP_CONTENT_ADMIN	Content Administrator

Portal and Security Defaults page

Select the portal and security defaults for creating portal registry structures and define the user base role for your system.

Since the base user role on system items is secured by privilege sets, PeopleSoft recommends that you use the delivered role PAPP_USER. If you change the role name, you should also select the option to update the privilege sets on save.

Portal Registry Structures

Registry structures are the stored menu items, pagelets, templates, and such. Many features automatically create portal registry structures, including Pagelet Wizard pagelets, News Publication pagelets, Submitted Menu Items, Manage Navigation, and Shortcut Collections.

Registry Object Prefix	Enter a value to use as a prefix for all automatically created portal registry structures.
	Note. This value allows easy identification of the objects that are in PeopleSoft Application Designer.
Menu Template Pagelet	Enter the menu template pagelet value that is to be used when rendering target pages by using Intelligent Context Manager.
	Note. PAPP_PT_NAVIGATION_SCR is the delivered default value. If you want to customize and use your own menu template pagelet, enter its value here.
Base Workspace Template Name	Select the portal registry template on which all Collaborative Workspace templates and their portal registries are based.
Base Wiki Space Template Name	Select the portal registry template on which all Wiki Space templates and their portal registries are based.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Setting Up Collaborative Workspace Options and Templates," Setting System Options.

Site Manager Security

The created site uses these permissions to limit access to the navigation and administration of the new site.

Administrator Perm List Template (Administrator Permission List Template)	Enter the administrator template permission lists that are cloned during the creation of a new site.
Publisher Permission Template	Enter the publisher template permission lists that are cloned during the creation of a new site.
Viewer Permission Template	Enter the viewer template permission lists that are cloned during the creation of a new site.

Workspace Security

Administrator Permission List	Select the permission list for administrators of the workspace. The delivered permission list is PAPP5350.
Manager Permission List	Select the permission list for managers of the workspace. The delivered permission list is PAPP5360.
User Permission List	Select the permission list for users of the workspace. The delivered permission list is PAPP5300.

Administrator Role	Enables you to select a different role name that is automatically used as the workspace instance portal administrator. This role is granted to users who are listed as workspace managers.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Understanding Workspace Privilege Sets.

User Base Role

Logged-In User Base Role	Select the role that enables access to the base objects in the PeopleSoft Enterprise Portal features that use privilege sets. The delivered role is PAPP_USER. Every user in the system, other than Guest, must be assigned this role along with the PeopleSoft User role.
	Note. If you select a role other than PAPP_USER, make sure to select Update Privilege Sets on Save to automatically update the privilege set assignments to the new role.
Update Privilege Sets on Save	Select this checkbox to update all privilege set assignments to the base user role when you select Save. This option enables you to change the role name in the privilege set assignment for all the features that have the concept of privilege sets.
	This enables you to use your own 'base' role instead of the delivered role. So, if you change your base role, it's not a customization. This setting lets you update all the privilege set assignments to your role. We deliver some system data using this role, but some of these privilege set assignments (like for discussions) are not accessible online.

See Appendix A, "PeopleSoft-Delivered Security Data," Roles with Special Uses, page 307.

Related Discussion Forum

Moderator Role	Select a role for the moderator.
Contributor Role	Select a role for contributors.

Content Migration

Approver Role	Select a role for approvers.

Last ID Values

Displays the current greatest value for IDs that are used in Content Management, Related Content, and Discussion Forums.

Each time a new item is added, the counter is automatically incremented by one. This feature eliminates locking issues.

Installation Options	Portal and Security Defaults	Last ID Values

The last ID values store the last created ID for a given feature. This data is used in generating the next available ID.

Last ID Values

Last CM Folder ID:	2002
Last CM Content ID:	2000
Last CM Migration ID:	2000
Last Related Content ID:	2000
Last Related Publication ID:	2000
Last Discussion Forum ID:	2000
Last Discussion Post ID:	2000
Last Action Items List ID:	2000
Last Action Item ID:	2000
Last Calendar ID:	2000
Last Event ID:	2000
Last Event Recurrence ID:	2000
Last Package ID:	2000
Last Wiki Identifier:	2000
Last Service ID:	2000
Last Instance ID:	2000

Last ID Values page

Enabling the Signon PeopleCode

This section provides an overview of enabling the signon PeopleCode and discusses how to enable the signon PeopleCode in the Signon PeopleCode component (SIGNONPPC_PAGE_COM).

Understanding Enabling the Signon PeopleCode

You must enable the signon PeopleCode to be able to view logon statistics on the User Logon Statistics pagelet. The portal administrator can add the User Logon Statistics pagelet to her homepage to provide convenient access to the number of users who log on to the portal during each month and the number of distinct user logons.

By enabling the signon PeopleCode, you enable the portal database to track and store user login information each time that a user logs on to the portal. Portal administrators can view this data to obtain statistics about portal traffic and which users are contributing to the traffic. Data that is viewed can pertain to which users log on to the portal, along with logon statistics for the months of the year, days of the month, and hours of the day.

When using pagelets and pages, the tracking of user logon times is recorded in minute increments. If a user logs out and then logs back in within the same minute, that login instance is not recorded. But if a user logs in and then logs out, and then, one minute from the time that the user originally logged in, the user logs in again, that login instance is recorded.

Note. The distinct number of users eliminates the counting of the same user logging on to the portal more than once during the specified period. For example, if 30 logons access the portal during one day but 10 are the same user, then the number of distinct users for that day is 21.

Page Used to Enable Signon PeopleCode

Page Name	Definition Name	Navigation	Usage
Signon PeopleCode	SIGNONPPC_PAGE	PeopleTools, Security, Security Objects, Signon PeopleCode	Enable the StoreUserLogonInfo function to update the portal statistics table and enable the tracking and storage of data needed to feed the User Logon Statistics pagelet.

Enabling Signon PeopleCode

Access the Signon PeopleCode page (PeopleTools, Security, Security Objects, Signon PeopleCode).

Signon PeopleCode page

Enable the row that contains the Function Name field value of *StoreUserLogonInfo.* When a user logs on to the portal, a row is inserted into a portal statistics table. The table stores the user ID, date, and time of logon.

Setting Up MCF For PeopleSoft Enterprise Portal

Special considerations exist when using the MCF with PeopleSoft Enterprise Portal. Typically, this feature is leveraged directly within a PeopleSoft application database, such as CRM, HCM, or SCM. If you use PeopleSoft Enterprise Portal to log on to these databases, then MCF-related content references must be modified in the PeopleSoft Enterprise Portal registry so that they point to your PeopleSoft application database, such as CRM.

Note. The PeopleSoft system delivers MCF-related content references in all databases as part of PeopleTools; therefore, as delivered, they point to components that are local to the PeopleSoft Enterprise Portal database.

To modify MCF-related content references:

1. Go to PeopleTools, Portal, Structure and Content.

2. Navigate to the content references.

   The content references follow this list.

3. Change the Node Name value from *Always use local* to the appropriate content provider.

4. Click *Save.*

The content references that need to be modified are.

- Root, Tools - Hidden, MCF Console.

- Root, Tools - Hidden, CTI Console.

- Root, PeopleTools, MultiChannel Framework, Universal Queue - All CREFs in this folder.

- Root, PeopleTools, MultiChannel Framework, CTI Configuration - All CREFs in this folder.

The MCF is now able to access the setup that is performed in the content provider database.

Viewing Menu Item Details

This section discusses the pages used to view menu item details.

Pages Used to View Menu Item Details

Page Name	*Definition Name*	*Navigation*	*Usage*
Menu Item Detail	PT_IQREGITEM	PeopleTools, Portal, View Menu Item Detail	Review the portal registry (menu navigation) information for a menu item.

Page Name	Definition Name	Navigation	Usage
Menu Folder Structure	PT_IQREGFOLDERS	PeopleTools, Portal, View Menu Folder Structure	Provides a list of content references for a selected portal registry folder.
Menu Security	PT_IQREGSECURTY	Portal Administration, Navigation, View Menu Security.	Provides a list of folders or content references that a user ID, role, or permission list has access to.

Choosing the Enterprise Menu Homepage Pagelet

Two versions of the homepage menu pagelet are available in the Enterprise Portal installation.

Note. The My Page, Guest Page, and Administration Page homepage tab definitions are delivered with the Enterprise Menu already assigned.

To select the Enterprise Menu version of the Menu pagelet:

1. Go to Portal Administration, Navigation, Structure and Content.

    The Structure and Content page appears.

2. Select Portal Objects, Homepage, Tabs.

3. At the bottom of the page, locate the My Page content reference, and click the Edit link.

    The Content Ref Administration page appears.

4. Select the Tab Content page.

5. Locate the PeopleSoft Applications group box.

    a. Select Enterprise Menu.

        Be sure to clear the Menu selection.

    b. Select *Opt_Dflt* from the drop-down list box for the Enterprise Menu.

6. Click Save.

Using PeopleSoft Enterprise Portal Content Reference Attributes

This section discusses the content reference attributes recognized by the following PeopleSoft Enterprise Portal features:

•   Intelligent Context Manager

•   Content Management

- Navigation

- Collaborative Workspaces

- Site Manager

For information about PeopleTools base portal content reference attributes, please see the "Release Notes for PeopleSoft Enterprise PeopleTools 8.50" document in the Documentation section of the My Oracle Support website.

Navigation Content Reference Attributes

This section discusses content reference attributes used for navigation.

Content Reference Attribute	Description
NAVNEWWIN	Launches a content reference in a new window when the content reference link is selected. A value in the attribute is not required. Leave the Translate option clear. You do not need to enter a Label value. Enter an Attribute Value of *true.*
NAVEXTENSIONFOLDER	Defines a virtual folder (different from NAVVIRTUALFOLDER). Specify the Application Package that will process the virtual folder.

Intelligent Context Manager Content Reference Attributes

This section discusses the content reference attributes used by Intelligent Context Manager.

Content Reference Attribute	Description
CLASS_STR	Enables Intelligent Context Manager to execute a template pagelet directly for improved performance. For example, you can execute the template pagelet on the application server instead of through the psc servlet. You can use this only on the database on which the Intelligent Context Manager feature resides.
CANBEINVISIBLE	Enables a template pagelet to hide itself completely when no keys are passed to it.

Collaborative Workspace Content Reference Attributes

This section discusses content reference attributes used by Collaborative Workspaces.

Content Reference Attribute	Description
EPPCW_MOD_NAME	Specifies that a CREF is a Collaborative Workspace module. This is the key attribute in identifying that a content reference is a Collaborative Workspace module. Enter the value in the Attribute Value field.

Content Reference Attribute	Description
EPPCW_MOD_LABEL	Specifies the name of the Collaborative Workspace module displayed in the modules list and in the Collaborative Workspace menu.
EPPCW_MOD_DESCR	Provides the description of the Collaborative Workspace module.
EPPCW_MOD_IMG	Specifies the name of the image used in the Collaborative Workspace menu to the left of the Collaborative Workspace module name.
EPPCW_MOD_REQ	Specifies whether or not the Collaborative Workspace module is required. A value of *Y* implies that it cannot be removed from the Collaborative Workspace by way of the creation wizard. A value of *N* implies that it can be removed from the Collaborative Workspace by way of the creation wizard. Enter the desired value in the Attribute Value field.
EPPCW_MOD_APPCLASS	Specifies the application class for a Collaborative Workspace module used for adding, deleting, and archiving module data. Enter the value in path format delimited by *:* in the Attribute Value field.
EPPCW_MOD_ADM	Specifies whether or not this is an Collaborative Workspace administration module. This setting affects the security placed on the content reference. Enter a value of *Y* or *N* in the Attribute Value field.
EPPCW_PAGELET	Identifies a pagelet as a Collaborative Workspace related pagelet.
EPPCW_REL_MODE	Specifies the contextual mode in which a pagelet is related to a Collaborative Workspace. Entering a value of *KEYS* passes the Collaborative Workspace keys and their values to the pagelet. Entering a value of *WORKSPACE* passes the Collaborative Workspace name to the pagelet. Enter this value in the Attribute Value field.
EPPCW_KEY_MAPPING	This content reference attribute applies to related pagelets on templates only. It enables the mapping of Collaborative Workspace key names to names within the related pagelet. Enter valid value formats of *KEY1ORIGNAME=KEY1NEWNAME;KEY2ORIGNAME=KEY2NEWNAME; KEYNORIGNAME=KEYNNEWNAME;* and so forth in the Attribute Value field.
EPPCW_IGNOREKEYNAME	Enables the skipping of specified keys as parameters passed to links within Collaborative Workspaces. Key names listed in the Attribute Value field will not be passed to the link as query string parameters. Enter valid value formats of *KEY1NAME;KEY2NAME;KEYNNAME;* and so forth in the Attribute Value field.

Site Manager Folder Reference Attributes

This section discusses the folder reference attributes used by Site Manager.

Folder Reference Attribute	Description
PAPP_SITE	This folder reference attribute applies to the root folder of a portal registry. Specifies that the portal registry is a Site Manager-created site.

Folder Reference Attribute	Description
PAPP_SITE_PUB_TMPL	This folder reference attribute applies to the root folder of a portal registry site created by Site Manager. Specifies the publishing template behavior within the Manage Navigation component of a site. Enter valid values of *OWN* (publishers can select their own template) or *DFT* (publishers must use the site default template).
PAPP_SITE_PUB_DATE	Specifies the default publication (effective) date for content created through the Manage Navigation component of a site.
PAPP_SITE_EXP_DATE	Specifies the default expiration date for content created through the Manage Navigation component of a site.

Defining Privilege Sets

This section provides an overview of privilege sets and discusses the pages used to define privilege sets.

Understanding Privilege Sets

A privilege set is composed of base privilege definitions that define the actions a member can take in the feature.

Privilege sets are used with these features:

- Action Items

- Blogs

- Community Calendars

- Collaborative Workspaces

- Discussion Groups

- Polls

- Wiki Pages

The following table lists the privilege sets according to feature.

Feature	Privilege Set Name	Privilege Set ID
Action Items	Administrator	EPPAI_ADMINISTRATOR
Action Items	Contributor	EPPAI_CONTRIBUTOR
Action Items	Viewer	EPPAI_VIEWER
Blogs	Administrator	EPPBL_ADMINISTRATOR

Feature	Privilege Set Name	Privilege Set ID
Blogs	Author	EPPBL_AUTHOR
Blogs	Reader	EPPBL_READER
Collaborative Workspaces	Administrator	EPPCW_ADMIN
Collaborative Workspaces	Approver	EPPCW_APPROVER
Collaborative Workspaces	Contributor	EPPCW_CONTRIBUTOR
Collaborative Workspaces	Moderator	EPPCW_MODERATOR
Collaborative Workspaces	Owner	EPPCW_OWNER
Collaborative Workspaces	Viewer	EPPCW_VIEWER
Community Calendars	Administrator	EPPCA_ADMINISTRATOR
Community Calendars	Contributor	EPPCA_CONTRIBUTOR
Community Calendars	Viewer	EPPCA_VIEWER
Discussion Forums	Contributor	EPPDF_CONTRIBUTOR
Discussion Forums	Moderator	EPPDF_MODERATOR
Discussion Forums	Viewer	EPPDF_VIEWER
Question Polls	Administrator	EPPSP_ADMIN
Question Polls	Author	EPPSP_AUTHOR
Question Polls	Moderator	EPPSP_MODERATOR
Question Polls	Publisher	EPPSP_PUBLISHER
Question Polls	Viewer	EPPSP_VIEWER
Wiki	Administrator	EPPWI_ADMINISTRATOR
Wiki	Contributor	EPPWI_CONTRIBUTOR
Wiki	Viewer	EPPWI_VIEWER

Pages Used to Define Privilege Sets

Page Name	Definition Name	Navigation	Usage
Privilege Set	EO_PE_PRIVSET_DEFN	Portal Administration, Define Privilege Set	Select a feature and define a privilege set.
Privileges	EO_PE_PRIVSET_PRIV	Portal Administration, Define Privilege Sets Access the Privileges tab.	Select privileges for the privilege set.

Defining a Privilege Set

Access the Privilege Set page (Portal Administration, Define Privilege Sets).

Privilege Set page

Feature Code	Select the feature for which you want to define privileges.
Active	Displays the list of definitions that you can view.
System Item	Select to make this privilege set available for use.

Selecting Privileges

Access the Privilege Set page (Portal Administration, Define Privilege Sets) and access the Privileges page.

Privileges page

Select the privileges for this privilege set. The list of available features varies depending on the feature selected.

Chapter 5

Managing Guest User Accounts

This chapter provides an overview of guest user accounts and discusses how the portal administrator can:

* Set up security for guest user accounts.

* Create a guest user ID.

* Configure the guest homepage.

* Personalize pagelets for guests using the User Personalization component.

* Personalize guest pagelets unavailable by way of the User Personalization component.

* Extend the Language Selection pagelet.

Understanding Guest User Accounts

The guest user account is an optional configuration that enables anyone to access the portal as a guest. You can configure the guest homepage with pagelets and transactions that are suitable for the guest, and by setting up the guest user security properly, you can limit which aspects of the portal guests can access.

PeopleSoft Enterprise Portal includes a guest user ID, which allows access to the base portal features as well as selected portal applications. The PeopleSoft system delivers a Guest homepage that contains the pagelets that are suitable for guest users.

Note. The Guest homepage does not include personalization options. Therefore, the navigation header does not display the Personalize Content and Personalize Layout links, nor the Add to My Links link.

This is an example of the Guest homepage:
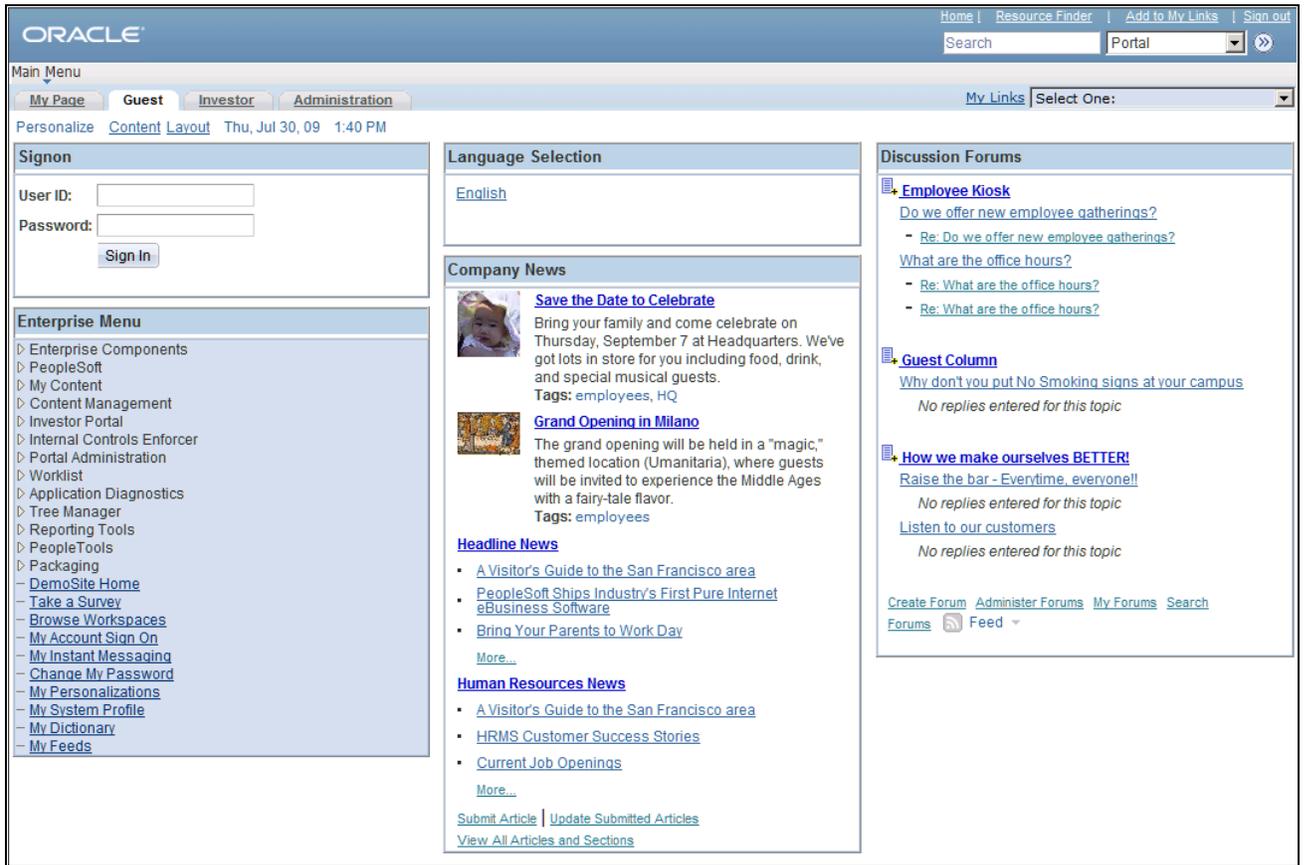
Guest page example

Setting Up Security for Guest User Accounts

This section discusses how to:

* Access the Guest homepage.

* Set up the guest default login.

Accessing the Guest Homepage

Access to portal features and applications for the guest user is based on the roles and permission lists that are attached to the guest user ID. The PAPP_GUEST and PeopleSoft Guest roles are attached to the guest user ID that is delivered. The following table lists the permission lists that are included in these guest roles.

Note. The delivered Guest homepage displays the database pagelets and iScripts that are attached to these permission lists.

Guest Roles	Permission Lists	Comments
PAPP_GUEST	PAPP0000 - Base Enterprise Portal Objects.	Provides access to the Enterprise Portal base applications. **Note.** Should not be removed from the PAPP_GUEST role.
	PAPP0001 - Base Guest Objects.	Provides access to the Guest homepage. **Note.** Should not be removed from the PAPP_GUEST role.
	PAPX0000 - Base Repository Objects.	Provides access to the resource repository. **Note.** Should not be removed from the PAPP_GUEST role.
	PAPP1100 - Company News pagelet.	Provides access to view company news content from the Guest homepage.
	PAPP1110 - Promotions pagelet	Provides access to view promotions content from the Guest homepage.
	PAPP1120 - Web Magazine pagelet	Provides access to view web magazine content from the Guest homepage.
	PAPP1500 - Internet Information pagelets.	Provides access to view internet information content from the Guest homepage.
PeopleSoft Guest	PTPT1400 - Base Access	Provides the base access to the homepage and navigation menu. **Note.** Should not be removed from the PeopleSoft Guest role.

To add new pagelets to the delivered Guest homepage:

• Ensure that the pagelets are attached to a permission list that is included in a guest role.

• Ensure that the menu items that are accessible to a guest are attached to a permission list that is included in a guest role, or add the role to the guest user ID.

Note. Be sure that the guest user does not include the role PeopleSoft User or any role that includes the permission list PTPT1000. Also be sure that the Guest user does not include the role PAPP_USER or any role that includes the permission list PAPP0002. The role of PAPP_USER specifically gives a signed-in user access to the links on the homepage for personalizing content and layout. Guest users should not be able to personalize anything.

Setting Up the Guest Default Login

Users should access the Guest homepage with a uniform resource locator (URL) that is based on the following format:

```
http://server:port//psp/ps/defaultportalname/registrynode/h/?tab=guesttabname
```

where:

• *server* is the PortalServlet web server host name.

• *port* is the PortalServlet web server port number

• *defaultportalname* is the defined default portal name for the portal application database (EMPLOYEE, SUPPLIER, or CUSTOMER).

• *registrynode* is the portal registry definition hosted node (EMPL, CUST, or SUPP) that matches the defined default portal name.

• *guesttabname* is the defined guest tab portal object name.

An example of the URL is:

```
http://janedoescomputer/psp/ps/EMPLOYEE/EMPL/h/?tab=PAPP_GUEST
```

This URL bypasses the initial login and uses the default login, which you set to GUEST in the web profile.

To set up auto sign-on with the guest account:

1. Go to PeopleTools, Web Profile, Web Profile Configuration, Security to access the web profile for your portal.

2. Access the Public Users group box and ensure that options are set as follows:

   • The Allow Public Access option is selected.

   • The User ID field is set to *GUEST*.

   • The Password field is set to *GUEST*.

These settings apply to portal databases that enable guests to log on to the system.

Creating a Guest User ID

The PeopleSoft system delivers a guest user ID with the two guest roles assigned. The sample Guest homepage displays the database pagelets and iScripts that are attached to the permission lists that are included in the guest roles.

Note. The following procedure is for informational purposes only.

To create a guest user ID:

1. Navigate to PeopleTools, Security, User Profiles, User Profiles.

2. Add a new user ID for guests by clicking Add.

    The User Profiles - General tab appears.

3. Access the Logon Information group box.

    •   Select a symbolic ID for the database.

    •   Enter the password *GUEST*.

    •   Confirm the password *GUEST*.

4. Click the ID tab and select an ID Type field value of *None.*

5. Click the Roles tab and insert the following role names:

    •   *PAPP_GUEST*

    •   *PeopleSoft Guest*

6. Click Save.

Configuring the Guest Homepage

This section discusses how to:

•   Prevent guest users from changing personalizations.

•   Set the Guest homepage security.

•   Prohibit guest user access to My Page homepage.

•   Select pagelets for the Guest homepage.

Pages Used to Configure the Guest Homepage

Page Name	Definition Name	Navigation	Usage
Content Ref Administration - General	PORTAL_CREF_ADM	PeopleTools, Portal, Structure and Content, Portal Objects, Homepage, Tabs In the Content References scroll area, click the Edit link for the Guest value.	Hide pagelet action buttons to prevent guest users from accessing personalization options for displayed pagelets.

Page Name	Definition Name	Navigation	Usage
Content Reference Security (for the Guest homepage)	PORTAL_CREF_SEC	PeopleTools, Portal, Structure and Content, Portal Objects, Homepage, Tabs In the Content References scroll area, click the Edit link for the Guest value. Click the Security tab.	Limit access to the guest homepage to only guest users.
Content Reference Security (for the My Page homepage)	PORTAL_CREF_SEC	PeopleTools, Portal, Structure and Content, Portal Objects, Homepage, Tabs In the Content References scroll area, click the Edit link for the My Page value. Click the Security tab.	Prohibit guest access to the My Page homepage.
Tab Content	PORTAL_TAB_CON_ADM	PeopleTools, Portal, Structure and Content, Portal Objects, Homepage, Tabs In the Content References scroll area, click the Edit link for the Guest value. Click the Tab Content tab.	Select pagelets to display on the guest homepage.
Tab Layout	PORTAL_TAB_LAY_ADM	PeopleTools, Portal, Structure and Content, Portal Objects, Homepage, Tabs In the Content References scroll area, click the Edit link for the Guest value. Click the Tab Layout tab.	Position pagelets on the guest homepage. See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Administering Portal Homepages and Pagelets," Specifying Tab Layout.

Preventing Guest Users from Changing Personalizations

The Content Ref Administration - General tab contains a special attribute you can use to prevent guest users from changing the personalization of a displayed pagelet. Selecting this option hides the following action buttons for any pagelet on the Guest homepage:

Pagelet action buttons

To prevent guest users from changing pagelet personalizations:

1. Access the Content Ref Administration - General page.

2. Select the Hide pagelet action bar option in the Homepage tab attributes group box.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Administering Portal Homepages and Pagelets."

Setting Homepage Security for Guests

To set security for the Guest homepage:

1. Access the Content Reference Security page for the Guest homepage.

2. Insert a row in the Security Authorizations scroll area.

3. Set the Type field value to *Permission List.*

4. Set the Name field value to *PTPT1400* or *PAPP0001.*

   Adding either the *PTPT1400* or the *PAPP0001* permission list to the Content Reference Security page for the Guest homepage limits access to the selected homepage to only guest users. You can add both permission lists as a precaution just in case the attributes for one are changed.

To prohibit guest users from accessing the My Page homepage:

1. Access the Content Reference Security page for the My Page homepage.

2. Insert a row in the Security Authorizations scroll area.

3. Set the Type field value to *Permission List.*

4. Set the Name field value to either *PTPT1000* or *PAPP0002.*

   The PTPT1000 permission list is attached to the PeopleSoft User role, which is the counterpart to the PeopleSoft Guest role. PAPP0002 is attached to the PAPP_USER role, which is the counterpart to the PAPP_GUEST role.

Selecting Pagelets for the Guest Homepage

To select pagelets for the Guest homepage:

Important! Do not select the Include all? option to display all pagelets from the portal registry for a pagelet category unless you want all pagelets in the category to be available to a guest user.

1. Access the Tab Content page for the Guest homepage.

2. Select the pagelets that you want guest users to be able to access on the Guest homepage.

Note. Select the Enterprise Menu pagelet value if you want to the guest user to have access to portal navigation.

Do not select the PeopleTools-delivered Menu pagelet value.

The guest user account must have security access to the pagelet component or iScript for pagelets to be properly displayed on the homepage.

---

3. Use the drop-down list boxes to set pagelet behaviors.

   Optional. The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

   Opt-Dft (optional-default). The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepage. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

   Req-Fix (required-fixed). The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet cannot be changed and the pagelet cannot be removed from the homepage.

   Required. The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet can be changed, but it cannot be removed from the homepage.

4. Click Save.

Personalizing Pagelets for Guests Using the User Personalization Component

This section provides an overview of personalizing pagelets for a guest using the User Personalization component and discusses the pages used to personalize pagelets for guest users.

Understanding Personalizing Pagelets for Guest Using the User Personalization Component

Based on the roles and permission lists that are assigned to the guest user ID, as well as settings on the Guest homepage, the guest user cannot personalize the layout, content, or even the individual pagelets on the homepage.

Because guest users cannot perform their own pagelet personalizations, we provide the PAPP_GUEST_ADMIN role that you can attach to a user who you want to perform the role of Guest User Administrator.

PeopleSoft Enterprise Portal includes the User Personalization component, which can be used to personalize individual pagelets with the guest user in mind. This is especially useful when used with Pagelet Wizard with News Publications. You can use personalization options to force the display sections that are not set to required or that you only want a guest user to see.

Note. All pagelets accessible by way of the User Personalization feature can be personalized by the guest user administrator.

Pages Used to Personalize Pagelets for Guest Users

Page Name	Definition Name	Navigation	Usage
Personalize <Pagelet Wizard pagelet name>	PTPPB_USER_PREF	Portal Administration, Pagelets, User Personalization, Pagelet Wizard Select the *GUEST* user ID and the Pagelet Wizard-generated pagelet for which you want to define guest user personalizations.	Configure available personalization options for guest users of pagelets generated by Pagelet Wizard.
Personalize Company Promotions	EO_PE_PR_PERS	Portal Administration, Pagelets, User Personalization, Promotions	Filter the content available on the Company Promotions pagelet displayed for guest users. If all promotion categories are required, the system displays a message indicating that personalization is not available. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Managing Company Promotions," Personalizing the Company Promotions Pagelet.
Feed Reader	EO_PE_RSS_NEWS	Portal Administration, Pagelets, User Personalization, Feed Reader	Specify URLs to RSS news content you want to display on the Feed Reader pagelet that displays for guest users. Define display pagelet options. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Homepage Pagelets," Personalizing the Feed Reader Pagelet.

Personalizing Guest Pagelets Unavailable by Way of the User Personalization Component

This section provides an overview of personalizing guest pagelets unavailable by way of the User Personalization component and discusses how to:

1. Make the pagelet available for personalization on the Guest homepage.

2. Edit the pagelet personalization on the Guest homepage.

Understanding Personalizing Guest Pagelets Unavailable by Way of the User Personalization Component

If a pagelet that you want to personalize for the guest user is not available by way of the User Personalization component, you can still set personalization options for it. However, you can only personalize a pagelet that lists an edit URL to a personalization page in its content reference definition.

You can run a query to find pagelets that are available for personalization. To do this, access the Query Viewer page and run the PAPP_PAGELET_PERSONALIZATION query.

Pages Used to Personalize Guest Pagelets Unavailable By Way of the User Personalization Component

Page Name	Definition Name	Navigation	Usage
Query Viewer	QUERY_VIEWER_SRCH	Reporting Tools, Query, Query Viewer Select the *PAPP_PAGELET_PERSONALIZATION* value.	Run a query that lists the pagelets that already have edit URL information defined.
Tab Content (for the Guest homepage)	PORTAL_TAB_CON_ADM	PeopleTools, Portal, Structure and Content, Portal Objects, Homepage, Tabs Click the Edit link for the Guest value. Click the Tab Content tab.	Make the pagelet available for personalization on the Guest homepage.
Tab Layout (for the Guest homepage)	PORTAL_TAB_LAY_ADM	PeopleTools, Portal, Structure and Content, Portal Objects, Homepage, Tabs Click the Edit link for the Guest value. Click the Tab Layout tab.	Set the layout position of the pagelet you just made available for personalization on the Guest homepage.

Page Name	Definition Name	Navigation	Usage
Content Ref Administration (for the Guest homepage)	PORTAL_CREF_ADM	PeopleTools, Portal, Structure and Content, Portal Objects, Homepage, Tabs Click the Edit link for the Guest value.	Make the pagelet action buttons available on the pagelet title bar of the pagelet you just made available on the Guest homepage.

Making the Pagelet Available for Personalization on the Guest Homepage

To make the pagelet available for personalization on the Guest homepage:

1. Access the Tab Content page for the Guest homepage.

2. Select the pagelet you want to display on the Guest homepage and select the Required option.

3. Access the Tab Layout page for the Guest homepage.

4. Select the layout position you want for the pagelet.

5. Access the Content Ref Administration page and clear the Hide pagelet action bar option.

   Important! This action displays the pagelet action buttons on the pagelet and should only be performed when guest user access is minimal.

6. Click Save.

Editing the Pagelet Personalization on the Guest Homepage

To edit the pagelet personalization on the Guest homepage:

1. Click the Sign out link and log back in to the PeopleSoft Enterprise Portal as a guest user.

2. Click the Customize button on the pagelet title bar of the pagelet you just added.

   Clicking this button accesses the personalization page you defined for the pagelet.

3. Set the pagelet personalizations.

4. Repeat for each new pagelet.

5. Save your changes and sign out.

Important! As soon as the personalizations are complete, log back in to the PeopleSoft Enterprise Portal as a portal administrator. Access the Content Ref Administration page for applicable guest homepage pagelets and reselect theHide pagelet action bar option. Selecting this option hides the action buttons on the pagelet title bars.

You can create more than one homepage tab for a guest user. Personalizations cannot be enabled or disabled at the role level, so Oracle recommends enabling or disabling them at the tab label.

Extending the Language Selection Pagelet

This section provides an overview of the Language Selection pagelet and describes how to extend the Language Selection pagelet to include access to languages not delivered with the PeopleSoft system.

Understanding the Language Selection Pagelet

The Language Selection pagelet enables a user to change the displayed language without having to log out and log back in. If the configurations.properties file is set so that users are automatically logged in as a GUEST user, the users do not see the login screen. Consequently, they cannot change their language at login unless they actively sign out and log in again.

Further, when the GUEST user is set as the default login, guest users do not know that the login and password are *GUEST*/*GUEST,* and thus do not have the sign out and log back in option. The Language Selection pagelet enables the guest user to change the displayed language while remaining signed in as the guest user. Logged in users as well as guest users can use this pagelet. No special setup is required—all languages that are enabled for the application database are available for selection.

Extending the Language Selection Pagelet

The Language Selection pagelet displays image links for each PeopleSoft-delivered translation. Each image shows the language name in its own native language. If you enable a language that is not delivered by the PeopleSoft system, a default image appears. You can create and display an image instead of the default image.

To create and display an image:

1. Create a *.GIF or *.JPG image.

2. Import the new image into the database through PeopleSoft Application Designer by navigating to File, New, Image.

3. Save the image object with a unique object name.

    For example, *MY_XXX_IMAGE.*

4. In PeopleSoft Application Designer, open the EPPLS_DSPL_WRK.EPPLS_LNGCD_IMG.RowInit record PeopleCode object .

5. Adjust the PeopleCode by adding the code shown below in bold, where *XXX* represents the translate value of your language in the LANGUAGE_CD field, and *MY_XXX_IMAGE* represents the image object's name.

```
...
When = "ZHT"
   EPPLS_DSPL_WRK.EPPLS_LNGCD_IMG.LabelImage = Image.EPPLS_ZHT;
When = "XXX"
   EPPLS_DSPL_WRK.EPPLS_LNGCD_IMG.LabelImage =
Image.MY_XXX_IMAGE;
When-Other
   EPPLS_DSPL_WKR.EPPLS_LNGCD_IMG.LabelImage = Image.EPPLS_NOT_FOUND;
End-Evaluate;
```

Chapter 6

Enabling the Account Sign On Utility

This chapter provides an overview of the Account Sign On utility and discusses how to create and maintain sign-in data.

Understanding the Account Sign On Utility

Portal users might need to access other websites, such as external email accounts or news sites that require additional user IDs and passwords. To enable a seamless transition from the portal to the external site, PeopleSoft Enterprise Portal can bypass external login screens by using URL sign-in functionality.

Note. This feature works only for sites that use simple POST sign on forms. It does not work for sites that perform special encryption of sign on credentials or use any advanced sign on methodology.

Sites that require their own user IDs and passwords display information requests in their source code. You can view this source code, determine the information is needed, and register that information in the portal. Once users sign on to the site, the portal can store their passwords and user IDs so that they don't need to sign on again to access the external site from within the portal.

Using the Account Sign On utility to connect to websites with built-in frame breakers (such as My Oracle Support) does not work using the standard default frame template. For these types of websites, you can select the No Template option on the Content Ref Administration page for the entry generated by the Account Sign On utility. This forces the website to open without the portal wrapper, and the Account Sign On utility then logs in automatically.

Note. Selecting the No Template option on the CREF may require that you restart your application server and web server after stopping them and clearing their respective caches.

Creating and Maintaining Signon Data

This section discusses how to use the Account Sign On Utility component (EO_PE_EXT_SIGNIN) and Edit Account Sign On component (EO_PE_EXT_USRIDPWD) to:

- Extract URL sign on information.

- Create seamless links to external websites.

- Manage user account sign on entries.

Pages Used to Create and Maintain Signon Data

Page Name	Definition Name	Navigation	Usage
Account Sign On Utility	EO_PE_EXT_URL_ADMN	Portal Administration, Account Sign On, Account Sign On Utility	Create seamless links to external websites that require user IDs and passwords. Register external URLs within the portal registry.
Add Account Sign On Information for the Site	EO_PE_EXT_USR_ADMN	Page appears the first time a user uses the portal to access an external URL with registered account signon information.	Enter your user ID and password the first time that you use the portal to access an external URL with registered account signon information. These values are used to automatically authenticate access when you access the site from the portal in the future. Use the Edit Account Sign On page to edit your user ID and password information.
Edit Account Sign On	EO_PE_EXT_USRIDPWD	• Portal Administration, Account Sign On, Edit Account Sign On • My Account Sign On	When a portal administrator accesses this page from the Edit Account Sign On menu link, this page is ideal resetting user passwords to external sites registered using the account signon utility. When accessed from the My Account Sign On link, this page can be used to update your own account signon data for external sites you have registered using the account signon utility.

Extracting URL Sign On Information

To extract the URL sign on information:

1. Determine the field names and values the external site uses for authentication.

   a. Examine the signon page for the site by viewing the HTML source from a browser.

   b. Determine whether the site uses a simple POST authorization form for signon.

      If it does not, you cannot use this feature with this site.

   c. Search the authorization form and make a note of the input parameter names that are needed for authentication.

      If the site uses additional parameters, beyond user ID and password fields, make a note of those parameters and values.

2. Enter the data from step 1c into the Account Sign On Utility page.

Creating Seamless Links to External Web Sites

Access the Account Sign On Utility page (Portal Administration, Account Sign On, Account Sign On Utility).

Account Sign On Utility page

URL	Enter the URL to the external site's sign on page.
Menu Label	Displays as the link text used to access the site.
User Field Name	Enter the user ID field name as displayed in the external website's code.

Pwd Field Name (password field name)	Enter the password field name as displayed in the external website's code.

Additional Form Fields and Values

Order	Displays the order in which any necessary field names and values are passed to the external website.
Field Name	Enter each field name for which a field value is required by the external site.
Field Value	Enter each field value that is required by the external site.

Register and Save URL

Menu Folder	Enter the name of the menu folder in which you want the link to the external site to appear.
Creation Date, Updated by, and **Updated on**	These fields display information once the URL is registered.
Registered	Displays as selected once the URL is registered.
Register URL	Click to register the URL in the portal registry.

Managing User Account Sign On Entries

Access the Edit Account Sign On page (Portal Administration, Account Sign On, Edit Account Sign On).

Edit Account Sign On

Update your account sign on User ID and or Password for the site.

URL: PAPP_NYTIMES

Menu Label: NYTIMES

*User ID: psmith

*Password: ********************************

Delete

Edit Account Sign On page

Enter user ID and password information to be used to access the external sites registered using the account signon utility.

Chapter 7

Administering the Alerts Framework

This chapter provides an overview of the Alerts framework and discusses how to:

*   Set up alerts.

*   Manage alert subscriptions.

*   Send email alerts.

Understanding Email Alerts

Configuring your Alerts framework enables users to subscribe to email alerts from the discussion forums and calendars. Administrators and users can configure the Alerts framework to send text- or HTML-based emails to users to alert them of updated information. For example, users can subscribe to alerts that notify them when discussion forums and topics in which they are interested are updated. These alerts can be configured to be sent daily or weekly. Administrators use an Application Engine process to send the alerts.

Setting Up Alerts

This section discusses how to use the Alerts Setup component (EPPAN_ALERTS_SETUP) and Email Options component (EPPAN_EMAIL_OPTNS) to:

*   Define alert options by feature.

*   Define email alert options.

Pages Used to Set Up Alerts

Page Name	Definition Name	Navigation	Usage
Alerts Setup	EPPAN_ALERTS_SETUP	Portal Administration, Alerts, Alerts Setup	Define alert options by feature.
Define Alerts Email	EPPAN_EMAIL_OPTNS	Portal Administration, Alerts, Email Options	Define email alert options.

Page Name	Definition Name	Navigation	Usage
Preview Alerts Email - Header Text	EPPAN_EMLPREV_SEC2	Click the Preview button for the *Header Text* item on the Define Alerts Email page.	Preview the email alert header text entered on the Define Alerts Email - Header Text page.
Define Alerts Email - Header Text	EPPAN_EMLTXT_SEC	Click the Edit button for the *Header Text* item on the Define Alerts Email page.	Enter default header text that you want to send out in text-based email alerts.
Preview Alerts Email - Footer Text	EPPAN_EMLPREV_SEC2	Click the Preview button for the *Footer Text* item on the Define Alerts Email page.	Preview the email alert footer text entered on the Define Alerts Email - Footer Text page.
Define Alerts Email - Footer Text	EPPAN_EMLTXT_SEC	Click the Edit button for the *Footer Text* item on the Define Alerts Email page.	Enter default footer text that you want to send out in text-based email alerts.
Preview Alerts Email - Header HTML	EPPAN_EMLPREV_SEC	Click the Preview button for the *Header HTML* item on the Define Alerts Email page.	Preview the email alert header HTML entered on the Define Alerts Email - Header HTML page.
Define Alerts Email - Header HTML	EPPAN_EMLHTML_SEC	Click the Edit button for the *Header HTML* item on the Define Alerts Email page.	Enter default header HTML that you want to send out in HTML-based email alerts.
Preview Alerts Email - Footer HTML	EPPAN_EMLPREV_SEC	Click the Preview button for the *Footer HTML* item on the Define Alerts Email page.	Preview the email alert footer HTML entered on the Define Alerts Email - Footer HTML page.
Define Alerts Email - Footer HTML	EPPAN_EMLHTML_SEC	Click the Edit button for the *Footer HTML* item on the Define Alerts Email page.	Enter default footer HTML that you want to send out in HTML-based email alerts.
Send Test Email	EPPAN_EMAIL_TEST	Click the Send Text Test Email button on the Define Alerts Email page. Click the Send HTML Test Email button on the Define Alerts Email page.	When you click the Send Text Test Email button, you can send a test email to a desired email address using the default text header and footer definitions. When you click the Send HTML Test Email button, you can send a test email to a desired email address using the default HTML header and footer definitions.

Defining Alert Options By Feature

Access the Alerts Setup page (Portal Administration, Alerts, Alerts Setup, Alerts Setup).

Alerts Setup

Feature: Community Calendars
☑ Active

Feature Details   Customize | Find | ⤢ | ▦ First ◄ 1-2 of 2 ► Last

Type	*Description	Image Type	Image Object Name	URL		
CALENDAR	Calendar	Catalog ▼	PT_CALENDAR 🔍		➕	➖
EVENT	Event	Catalog ▼	EOCF_ANALYTIC_EVENT🔍		➕	➖

Alerts Setup page

Feature	Displays the name of the feature for which you are setting up alerts options.
Active	Select to enable alerts for the feature.

Feature Details

Type	Displays the aspect of the feature for which alerts can be configured.
Description	Enter a description of the aspect of the feature for which alerts can be configured. This description text appears on the Add Alerts Subscription page and Update Alerts Subscription page within the selected feature.
Image Type	Select the type of image source that you want to use to provide the image for the alert subscription. Available values include:
	Catalog.
	URL.
Image Object Name	If you have selected an image type of *Catalog,* select the image that you want to appear with the description text on the Add Alerts Subscription page and Update Alerts Subscription page within the selected feature.
URL	If you have selected an image type of *URL,* enter the URL to the image that you want to appear with the description text on the Add Alerts Subscription page and Update Alerts Subscription page within the selected feature.

Defining Email Alert Options

Access the Define Alerts Email page (Portal Administration, Alerts, Email Options).

Define Alerts Email page

You must have an SMTP server set up to send email alerts. When sending test emails using the Define Alerts Email page, the system uses the SMTP server specified in the application server configuration file.

Allow HTML Email   Select to enable the Alerts framework to send HTML-formatted emails using the Header HTML and Footer HTML data you have entered.

Header and Footer Setup

Items	*Header Text.* Click the Preview button to access the Preview Alerts Email - Header Text page, where you can preview the email alert header text entered on the Define Alerts Email - Header Text page.
	Click the Edit button to access the Define Alerts Email - Header Text page, where you can enter email alert header text.
	Footer Text. Click the Preview button to access the Preview Alerts Email - Footer Text page, where you can preview the email alert footer text entered on the Define Alerts Email - Footer Text page.
	Click the Edit button to access the Define Alerts Email - Footer Text page, where you can enter email alert footer text.
	Header HTML. Click the Preview button to access the Preview Alerts Email - Header HTML page, where you can preview the email alert header HTML entered on the Define Alerts Email - Header HTML page.
	Click the Edit button to access the Define Alerts Email - Header HTML page, where you can enter email alert header HTML.
	Footer HTML. Click the Preview button to access the Preview Alerts Email - Footer HTML page, where you can preview the email alert footer HTML entered on the Define Alerts Email - Footer HTML page.
	Click the Edit button to access the Define Alerts Email - Footer HTML page, where you can enter email alert footer HTML.

Email

Subject	Enter the default subject text that you want to send out with email alerts.
Reply To	Enter the default reply email address that you want to provide in email alerts.
Send Text Test Email	Click to access the Send Test Email page, where you can send a test email using the header and footer text you have defined in the Header and Footer Setup group box.
Send HTML Test Email	Click to access the Send Test Email page, where you can send a test email using the header and footer HTML you have defined in the Header and Footer Setup group box.

Managing Alert Subscriptions

This section discusses how to:

• Administer user alert subscriptions.

• Maintain your alert subscriptions.

Pages Used to Manage Alert Subscriptions

Page Name	Definition Name	Navigation	Usage
User Alerts	EPPAN_MY_ALERTS	Portal Administration, Alerts, User Subscriptions	Manage user alert subscriptions.
Update Alerts Subscription	EPPAN_ALERTS	Click the Edit button on the User Alerts page.	Portal administrators can update alert subscription preferences for users.

Administering User Alert Subscriptions

Access the User Alerts page (Portal Administration, Alerts, User Subscriptions).

User Alerts page

A user ID description displays if you access this page for a user other than the current user.

Alerts Subscriptions

Use the drop-down list to filter the alerts that appear by feature.

Title	Displays the title of the item to which the user has subscribed to email alerts.
	When used with the Collaborative Workspaces Discussions module and calendars, these are the titles of the forums and topics to which a user has subscribed to email alerts.
Delivery	Displays the frequency at which the user selected to receive email alerts.
Edit	Click to access the Update Alerts Subscription page, where you can update alert subscription preferences.
Delete	Click to delete the alert subscription. You will be prompted to confirm the deletion.
Delete All Subscriptions	Click to delete all alert subscriptions displayed in the Alert Subscriptions group box. You will be prompted to confirm your deletion. If you do not want to complete the deletion, do not click Save.

Delivery Preferences

Email Address	Displays the email address to which the email alerts are being sent. This email address is defined on the General Profile Information page.
	See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications,* "Setting User Preferences," Setting Up Your System Profile
Email Format	Select the format in which email alerts should be sent to the user.
	Text Only. Select to indicate that text-based email alerts should be sent to the user. The contents of the email will use any text header and footer definitions you have entered on the Define Alerts Email page.
	HTML. Select to indicate that HTML-based email alerts should be sent to the user. To use this option, the Allow HTML Email option must be selected on the Define Alerts Email page. The contents of the email will use any HTML header and footer definitions you have entered on the Define Alerts Email page.
Content	*Links Only.* Select to indicate that the email alert should contain only links to the items about which the user is being notified.
	Links with Summaries. Select to indicate that the email alert should contain links to and summaries about the items about which the user is being notified.
Include Overview/Outline	Select to have email alerts sent with an overview at the beginning of the email. The overview contains an outline of email contents.

Scheduling Alert Notifications

This section provides an overview of the Send Alerts Notifications processes and discusses how to use the Send Notifications component (EPPAN_ALERT_RUN) to configure and run the processes to send email alert notifications. The Send Notifications component is only used for daily and weekly alerts subscriptions, such as Discussions. Calendar subscriptions are sent real-time and do not require set up using this component.

Understanding the Send Alerts Notification Process

The primary process used to send email alerts to subscribed users is the Send Alerts Notification Application Engine process (EPPAN_ALERTS). This process should be run at least once a day to process any requested daily alert notifications.

The Send Alerts Notification process (EPPAN_ALERTS) is the parent process of the EPPAN_ALRTST child process. This secondary process performs the actual work of constructing and sending alert emails.

The administrator sets the number of child processes to spawn from the parent process using the Number of Parallel Processes field on the Send Alerts Notifications page. The parent process works to derive the appropriate range of notifications that need to be sent by each child process and spawns them with the appropriate run control settings.

First, this involves getting the number of unique users who have qualifying subscriptions. This means selecting daily subscriptions whose last notification date reflects a date of one or more days ago, or weekly subscriptions whose last notification date reflects a date of seven or more days ago. Based on this count of how many users have qualifying subscriptions, the range of users can then be split into the appropriate number of sets to be handled by each child process.

These child processes send out one email for each subscribed user for each process run. Multiple qualifying subscriptions for a user are consolidated into one email message.

Email alert notifications are sent by way of the PeopleTools-supplied Notification class. This class uses the same SMTP server as configured in PeopleTools.

You must have an SMTP server set up to send email alerts. When sending emails using the Send Alerts Notification Application Engine processes, the system uses the SMTP server specified in the Process Scheduler configuration file.

Page Used to Schedule Alert Notifications

Page Name	Definition Name	Navigation	Usage
Send Alerts Notifications	EPPAN_ALERT_RUN	Portal Administration, Alerts, Send Notifications, Send Alerts Notifications	Configure and run the Send Alerts Notifications process.

Scheduling Email Alert Notifications

Access the Send Alerts Notifications page (Portal Administration, Alerts, Send Notifications, Send Alerts Notifications).

Send Alerts Notifications

Enter the number of child processes with which you would like to divide the parallel processing. Select Create Log File to create a log during processing. Click Run to launch the process to send qualifying notifications to users who have subscribed to alerts.

Run Control ID: 121204   Report Manager   Process Monitor   [Run]

Last Run Date:

*Number of Parallel Processes: 1

☑ **Create Log File**

Send Alerts Notification page

Last Run Date	Displays the date on which this process was last run.
Number of Parallel Processes	Select the number of child processes to spawn and run in parallel. See Chapter 7, "Administering the Alerts Framework," Understanding the Send Alerts Notification Process, page 66.
Create Log File	Select to indicate that you want additional process information, beyond the information in the message log, to be generated into a log file. The log file is generated and placed in the Process Scheduler directory; <tools>/appserv/prcs/<database name>/files, for example.

Chapter 8

Administering the Tagging Framework

A tag is a relevant keyword or term associated with a piece of information such as a picture, a geographic map, a blog entry, a video clip, and so on. In this way tags describe an item and enable keyword-based classification and searching.

Tags are commonly used as means for users to store, organize, search, and manage bookmarks of web pages. The bookmarks can be viewed and searched chronologically, by category or tags, or using a search engine.

The PeopleSoft Enterprise Portal tagging framework enables users to tag Portal content and search the Portal using tags. Tags appear in the search results of the Portal search page and also in the search pages for various Enterprise Portal features, such as Content Management, Discussion Forums, Workspaces, and so on. Users can also perform searches using tags. A search using tags returns all the content tagged for that tag.

Private tags are not searched and are not returned with search results. The exception is in the Tag Browser page the user's own private tags are returned with the search results when a search scope of *All My Tags* is selected.

This chapter presents an overview of the tagging framework and discusses:

- Enabling web services.

- Managing the tagging framework.

- Implementing tagging web services.

Understanding the Tagging Framework

Tagging provides the means for Enterprise Portal and applications users to store, organize, search, and manage content bookmarks. It enables both publishers of content and consumers of that content to classify the material in a way that is meaningful to them. Significantly, users are able to share their tags or bookmarks with other users, thus benefitting the user community from the shared information--in this case tags. This increases the probability of properly characterizing the content and hence its discoverability and use. Tags are also a way to measure what particular topics are of relevance to the user community.

Tagging capability also provides for navigation to other content that is related through the same tags without the need to hard-code those connections.

Thus, tagging is both a means of classifying things and a way of creating ad hoc navigation paths among related items.

A PeopleSoft Enterprise Portal tag search page uses a database search, not Verity search. A user can immediately search for newly created tags because the tag search is not dependent on the Verity indexes being refreshed. Search results are filtered based on the users security permissions before being displayed. However, because the search is not performed using Verity, the results are not ranked.

The exception is that on the Portal search page and the search pages for Portal features, the tag search is based on Verity indexes. After new tags are added, the corresponding index has to be rebuilt before a the new tags will be returned in a search on the Portal search page.

Tags on any page are hyperlinks to the tag browser page with default search results of the tag selected. For instance, clicking on a tag labeled Community in a managed content item redirects the user to the tag browser page with search results for Community displayed.

Enabling Web Services

Enterprise Portal is delivered with tagging enabled for Content Management, Discussion Forums, and Workspaces. To use tagging with applications outside of Enterprise Portal you will need to enable tagging through web services.

Enabling web services requires single signon between the consuming application, such as HCM,)and Enterprise Portal, and user profile synchronization. The web services interface provided through Integration Broker contains the following services:

- Add tags

- Remove tags

- Clear tags

- Modify tags

- Get tags

- Search

- Tag Cloud

See

See

Managing the Tagging Framework

This section describes how to:

- Define tagging domains.

- Define tag namespaces.

- Map namespaces to search index groups.

Pages Used to Managing the Tagging Framework

Page Name	Definition Name	Navigation	Usage
Tagging Application Domain	EPPTG_APPDOMAIN	Portal Administration, Tagging, Tagging Domain	Define application tag domains.
Tax Namespace	EPPTG_NAMESPACE	Portal Administration, Tagging, Tagging Namespace	Define application tagging namespaces.
Search Index	EPPTG_NSSRCHIDX	Portal Administration, Tagging, Tagging Namespace, Search Index	Associate index groups with tagging namespaces.

Defining Tag Domains

Access the Tagging Application Domain page (Portal Administration, Tagging, Tagging Domain).

Tagging Application Domain page

Description   The description text entered here appears as the Search Scope name in the Scope dropdown list on theTag Browser.

71

Tag Browser URL   Specify the URL for the tag browser page for this domain. This URL will be prepended to the tags.

 If this is specified, it is assumed that the domain has its own tag browser page to display search results of the tags. If this field is left blank the domain will use the default Enterprise Portal tag browser.

Note. If the Enterprise Portal tag browser is used, there will only be limited support for the search results of remote tags because of the limited amount of information that is stored for the tags in the repository. The search will not be able to query the source database for additional title or description information.

Message Node Name   Identifies the node in the PeopleSoft Enterprise Portal environment with which the tag domain is associated.

Defining Tag Namespaces

Tag namespaces prevent conflicts among unique identifiers in different features and enable categorizing tags at the namespace level. For instance, suppose both Discussion Forums and Managed Content have a content with an ID of 3421. To prevent these conflicts, each should reside in its own namespace.

A domain can contain many tag namespaces, but each namespace can only be associated with one domain.

Local Interface

Access the Tag Namespace page (Portal Administration, Tagging, Tagging Namespace).

Tagging Namespace page for local interface

Use a local interface to implement tagging within the Enterprise Portal application. Use the Package Name, Path, and Application ID fields to identify the application class that will be used with the namespace. The application class specifed here must implement the EPPTG_TAGS:TaggedContent application class.

Remote Interface

The following page shows the Tagging Namespace page with the Remote Interface option selected.

Tagging Namespace page for remote interface

Mapping Namespaces to Search Index Groups

Namespaces are mapped to Enterprise Portal search index groups. One namespace can be mapped to only one search index group. Tags are added to only those indexes in the index group that are selected in the grid labeled Select Index to Add Tags. If the index group name is changed then all the indexes selected in the grid are dropped from the mapping.

Implementing Tagging Web Services

A PeopleSoft application can incorporate tagging in its pages by configuring the tag service using the related content framework. However, these tags are primarily tied to the transcation instances of the business component and do not give the flexibility to add tags to data elements that are available across the various levels of the page. Using the tagging web service, developers can add tags to any data element at any level in the page.

Adding a Tag

The following parameters are required to add a tag:

Node	Node corresponds to the tag domain. Nodes can be associated with a domain using the Tagging Application Domain page in Enterprise Portal (Portal Administration, Tagging, Tagging Domain). Nodes used in tagging web service must be of the type *External*. When a search is performed, this differentiates between the tags added through the web service and those added through the related content framework.
Portal	This corresponds to the portal name of the application. The Portal value can be any string.
Namespace	Namespace is like a Java package. It helps in logical grouping of tags. If the namespace is not preconfigured in PeopleSoft Enterprise Portal then a namespace is automatically created in the name of the domain.

URL	URL acts as a key. URL maps directly to content. If two URLs are the same then the tags are added to the same content. It is the user's responsibilty to provide unique URLs for the content that is to be tagged. Unique URLs can be generate by concatenating the relative URL of a component with the necessary keyvals. The URL supplied for tagging a PeopleSoft application must be a relative URL and not an absolute URL. This way if the server name changes then the URL also changes. When the user tries to retrieve the tags for content tagged prior to the server name change the operation will fail as the new url will not point to the tags previously added. Use the GenerateComponentRelativeURL function or GenerateComponentPortalURL function to generate the relative URL. The relative URL that is passed with the input message is concatenated with the node URI set in the node definition page to get the complete URL.
	See *Enterprise PeopleTools 8.50 PeopleBook: PeopleCode Language Reference,* PeopleCode Built-in Functions, GenerateComponentRelativeURL*Enterprise PeopleTools 8.50 PeopleBook: PeopleCode Language Reference,*PeopleCode Built-in Functions, GenerateComponentContentRelURL

Ideally a content reference (CREF) corresponds to a namespace, but it is not necessary. A namespace is just a logical grouping of tags, just as a domain is a logical grouping of tags in an application.

Tagging an External Application

Tags can also be used by external (non-PeopleSoft) applications using the tagging web service. However, in this case the complete URL has to be sent in the input message instead of the relative URL. The important point to note here is that the URL string must start with HTTP://.

This differentiates external application tags from PeopleSoft system tags. The differentiation is needed to prevent the suffixing of a portal URI to form an absolute URL, which occurs in the case of PeopleSoft system tags. In this case the portal name is just a string.

Configuring Tagging Web Services

Follow these steps to configure tagging web services:

1. Create a tag domain using the Application Tag domain page (Portal Administration, Tagging, Tagging Domain) before using the web service.

2. Create a separate domain that is mapped to a node for each PeopleSoft and each non-PeopleSoft application.

   The node type of the node used in the web service must be *External.*

3. Create unique URLs.

   The URL for different content in a PeopleSoft system or non-PeopleSoft system must be unique.

   With a PeopleSoft system you must use the GenerateComponentRelativeURL function to provide a relative URL. This will be concatenated with the portal URI of the node assigned to the system. Use a relative URL instead of an absolute URL to address the issue of possible change of the server.

   With external system tags you must provide the absolute URL. The URL provided for external system content must start with `http://`. A URL is identified as belonging to an external system only by the presence of the string `http://` at the beginning.

Web Services Command Format

Tagging web services use the following command format:

```xml
<?xml version="1.0"?>
<tagging>
  <tagop lang="ENG" userid="VP1">
    <cmd>ADD_TAGS</cmd>
    <id>
      <node>PSHR</node>
      <portal>EMPLOYEE</portal>
      <ns>JOBS</ns>
      <url>s/JOBPAGE.GBL/?ID=1</url>
    </id>
      <tags>dream</tags>
      <type>public</type>
      <label>Job Page</label>
      <descr>Job Details Page</descr>
  </tagop>
</tagging>
```

Command Format Parameters

lang	This corresponds to the language the user has entered their tags in. Use PeopleSoft language codes. The default is the system default (%language_base).
userid	The user ID that entered the tag. The user ID must be a valid PeopleSoft user.

cmd   The command value.

Possible values are:

- ADD_TAGS

- MODIFY_TAGS

- CLEAR_TAGS

- REMOVE_TAGS

- GET_TAGS

- SEARCH_TAGS

- TAG_CLOUD

Basic Tag Commands

This section describes the implementation of the basic tag commands:

- ADD_TAGS

- MODIFY_TAGS

- CLEAR_TAGS

- REMOVE_TAGS

- GET_TAGS

Basic Input

This is an example of input for a basic tag command:

```xml
<?xml version="1.0"?>
<tagging>
  <tagop lang="ENG" userid="VP1">
    <cmd>ADD_TAGS</cmd>
    <id>
      <node>PSHR</node>
      <portal>EMPLOYEE</portal>
      <ns>JOBS</ns>
      <url>s/JOBPAGE.GBL/?ID=1</url>
    </id>
      <tags>dream</tags>
      <type>public</type>
      <label>Job Page</label>
      <descr>Job Details Page</descr>
  </tagop>
</tagging>
```

This is an example of input for a basic external system tag.

```
<?xml version="1.0"?>
<tagging>
  <tagop lang="ENG" userid="VP1">
    <cmd>ADD_TAGS</cmd>
    <id>
      <node>Tag</node>
      <portal>EMPLOYEE</portal>
      <ns>JOBS</ns>   [ case sensitive]
      <url>http://Monster.com/?ID=2</url>
    </id>
      <tags>bad, low-paying</tags>
      <type>public</type>     [ public or private ]
      <label>Find Jobs</label>
      <descr>You can search for Jobs here...</descr>
  </tagop>
</tagging>
```

Basic Input Parameters

id	This is a required parameter for the following commands:

- ADD_TAGS

- MODIFY_TAGS

- CLEAR_TAGS

- REMOVE_TAGS

- GET_TAGS

node	The name of the node that sent the command
portal	The portal name. If the tagging system is non-PeopleSoft, define a standard value that is used by all your tag commands.
ns	The tagging namespace.
url	The URL the tags are associated with.
tags	The comma separated list of tags that are being manipulated.
	This is a required parameter for the following commands:

- ADD_TAGS

- MODIFY_TAGS

- REMOVE_TAGS

type	Valid values are:

- *public* – these tags are viewable by all users for the content.

- *private* – these tags are viewable only by the user who created the tags.

    This is a required parameter for the following commands:

- ADD_TAGS

- MODIFY_TAGS

- CLEAR_TAGS

- REMOVE_TAGS

- GET_TAGS

label	The label parameter is used for tag searching in the tag browser. This value is shown as the link title of the piece of content that contains the tag that has been searched.

This is a required parameter for ADD_TAGS.

It is an optional parameter for MODIFY_TAGS.

descr	This is the description for tag searching in the tag browser. This value is shown as the short description below the title for the piece of content that's been searched.

This is a required parameter for the following commands:

- ADD_TAGS

- MODIFY_TAGS

Basic Output

The following xml is an example of output for these commands:

- ADD_TAGS

- MODIFY_TAGS

- CLEAR_TAGS

- REMOVE_TAGS

```
<?xml version=""1.0""?>
<TagResponse>
  <Status>1</Status>
  <ErrorMsg>Invalid Node</ErrorMsg>
</TagResponse>
```

Basic Output Parameters

Status	The status of the command.

  - *0* - Success

  - *Non 0* - Error. (All errors default to 1.)

ErrorMsg	If Status is a value other than *0,* then the xml node is returned with a message detailing the error.

Get Ouput

This is an example of output for the GET_TAGS command:

```
<?xml version=""1.0""?>
<TagResponse>
  <Status>0</Status>
  <Tag type="public">
    <a class="EPPTGTAGTEXT" href="http://localhost/psc/ps_newwin/EMPLOYEE/EMPL/c/
      EPPTG_TAGGING.EPPTG_TAG_BROWSE.GBL?
Page=EPPTG_TAG_BROWSE&amp;Action=U&amp;EPTG=1&amp;TAG=dream"
  target="newwin">dream</a>
  </Tag>
  <Tag type="private">
    <a class="EPPTGTAGTEXT" href="http://localhost/psc/ps_newwin/EMPLOYEE/EMPL/c/
      EPPTG_TAGGING.EPPTG_TAG_BROWSE.GBL?
Page=EPPTG_TAG_BROWSE&amp;Action=U&amp;EPTG=1&amp;TAG=private"
  target="newwin">private</a>
  </Tag>
</TagResponse>
```

Get Output Parameters

Status	The status of the command.

  - *0* − Success

  - *Non 0* − Error. (All errors default to 1.)

ErrorMsg	If Status is a value other than *0,* then the xml node is returned with a message detailing the error.
Tag	One tag node is returned for each tag.

type   Valid values are:

  • *public* — these tags are viewable by all users for the content.

  • *private* — these tags are viewable only by the user who created the tags.

The anchor tag is a standard HTML link for the tag to the defined tag browser page.

Add Operation

The Add operation adds tags to content. Repeated invocation of Add on the same content URL will append tags to the existing list of tags for the content.

Modify Operation

Modify is similar to Add except that each invocation of Modify on a content URL will overwrite the existing tags for the content. Add and Modify have the same message format.

Clear Operation

The Clear operation is used to clear all the tags of a content for a particular user.

The Clear operation has a `<type>` parameter that can take the values *public,private,* and *all.* Invoking Clear with `<type>all</type>` is equivalent to invoking clear twice, once with `<type>public</type>` and once with `<type>private</type>.`

Clear Input

This is an example of input for Clear:

```
<?xml version="1.0"?>
<tagging>
  <tagop lang="ENG" userid="VP1">
    <cmd>CLEAR_TAGS</cmd>
    <id>
      <node>TAG</node>
      <portal>EMPLOYEE</portal>
      <ns>JOBS</ns>
      <url>S/JOBPAGE.GBL/?ID=4</url>
    </id>
      <type>public</type>   [ public or private or all ]
  </tagop>
</tagging>
```

Remove Operation

The Remove operation removes the tags specified in the request message. Tag removal can be performed for a particular user or for all users using the `<all_user>` node. If `<all_user>` is set to *Y* then tags will be removed for all users. `Type = private` and `all_user=Y` is an invalid combination and will be captured in the validation.

Remove Input

The following is an example of input for Remove:

```xml
<?xml version="1.0"?>
<tagging>
  <tagop lang="ENG" userid="VP1">
    <cmd>REMOVE_TAGS</cmd>
    <id>
      <node>TagHR</node>
      <portal>EMPLOYEE</portal>
      <ns>JOBS</ns>
      <url>s/JOBPAGE.GBL</url>
    </id>
      <tags>Colloborative, Best, dram, Schrewd</tags>
      <type>public</type>
      <all_user>y</all_user>  [ y or n]
  </tagop>
</tagging>
```

Get Operation

The Get operation returns the public and private tags available for a particular content URL.

Search Operation

A search can be performed at the domain or namespace level. While *domain* is mandatory for any search operation, *namespace* is an optional parameter for the Search web service.

The number of results that are returned is set using the optional node <num_results>. Output contains a search result label, description, URL, and related tags information. A tag browser URL (which can be set in the Application Domains page) is provided once in the output message at the same level as the results node.

Search Input

This is an example of input for Search:

```xml
<?xml version="1.0"?>
<tagging>
  <tagop lang="ENG" userid="VP1">
    <cmd>SEARCH_TAGS</cmd>
    <domain>PSHR</domain>
    <ns>PSHR</ns>
    <num_results>5</num_results>
    <search>dream</search>
  </tagop>
</tagging>
```

Search Input Parameters

lang	This corresponds to the language the user has entered their tags in. Use PeopleSoft language codes. The default is the system default (%language_base).
userid	The user ID that entered the tag. The user ID must be a valid PeopleSoft user.

cmd	The command value – SEARCH_TAGS
domain	The tagging domain that is being searched. This is a required parameter.
ns	The namespace that is being searched. This is an optional parameter. The default is to search all namespaces within the domain.
num_results	The maximum number of results to return. This is a required parameter.
search	The tag that is being searched.

Search Output

This is an example of output for Search:

```xml
<?xml version="1.0"?>
<TagSearchResults>
  <Status>0</Status>
  <Result>
    <Label>Job Page</Label>
    <Description>Job Details Page</Description>
    <RelatedTags>dream</RelatedTags>
    <Url>http://ape.peoplesoft.com/psp/ps_newwin/S/JOBPAGE.GBL</Url>
  </Result>
  <Result>
    <Label>BenefitsPage</Label>
    <Description>BenefitsPage Details Page</Description>
    <RelatedTags>dream</RelatedTags>
    <Url>http://ape.peoplesoft.com/psp/ps_newwin/S/JOBPAGE.GBL/ID=2</Url>
  </Result>
  <Result>
    <Label>Movies</Label>
    <Description>Great Movies</Description>
    <RelatedTags>Sequel, dream</RelatedTags>
    <Url>HTTP://WWW.YAHOO.COM/ID=2</Url>
  </Result>
</TagSearchResults>
```

Search Output Parameters

Status	The status of the command. • *0* - Success • *Non 0* - Error. (All errors default to 1.)
ErrorMsg	If Status is a value other than *0,* then the xml node is returned with a message detailing the error.

Result   Each row of data is returned as a Result.

- *Label* – The short description of a search result.

- *Description* – The long description of a search result.

- *RelatedTags* – Any tags associated with the search result are listed here, comma separated.

- *Url* – link to the search result.

Tag Cloud Operation

The tag cloud is a visual representation of tags currently used in the system. Different font sizes help visualize the usage patterns of tags. Larger fonts depict more frequently used tags, while smaller fonts depict less frequently used tags.

Tag Cloud Input

This is an example of input for Tag Cloud:

```
<?xml version="1.0"?>
<tagging>
  <tagop lang="ENG" userid="VP1">
    <cmd>TAG_CLOUD</cmd>
    <scope>DOMAIN=PSFT_HR,TAG_NS=JOBS</scope>
     <num_results>100</num_results>
    <sort>ALPHA-D</sort>
    <period>90</period>
    <personal_cloud>true</personal_cloud>
  </tagop>
</tagging>
```

Tag Cloud Input Parameters

lang   This corresponds to the language the user has entered their tags in. Use PeopleSoft language codes. The default is the system default (%language_base).

userid   The user ID that entered the tag. The user ID must be a valid PeopleSoft user.

cmd   The command value – TAG_CLOUD

scope   This defines where tags are retrieved to generate the cloud. Specify values in KEY=VALUE pairs separated by a comma. Valid Keys are:

- *DOMAIN* – The tagging application domain. This key is required.

- *TAG_NS* – A namespace associated in the domain.

This key is optional.

If no namespace is defined, all tags from the domain are used.

num_results	The maximum number of results to show in the tag cloud.
	This is a required parameter.
search	The tag that is being searched.
sort	The sort order of the tag cloud.
	Possible values are:

- *ALPHA-A* – Alphabetical ascending A-Z

- *ALPHA-D* – Alphabetical descending Z-A

- *COUNT-A* – Count ascending 0-X

- *COUNT-D* – Count descending X-0

- *ATIME-A* –: List tags oldest added time first.

- *ATIME-D* – List tags newest added time first.

This is an optional parameter.

The default is *ATIME-D*.

Tag Cloud Output

This is an example of output for Tag Cloud:

```
<?xml version="1.0"?>
<TagSearchResults>
  <Status>0</Status>
  <TagBrowserUrl>http://localhost/psc/ps_newwin/EMPLOYEE/EMPL/c/
   EPPTG_TAGGING.EPPTG_TAG_BROWSE.GBL?
   Page=EPPTG_TAG_BROWSE&amp;Action=U&amp;EPTG=1&amp;TAG=</TagBrowserUrl>
  <TagCloud>
    <Tag Count="1" Size="80%" Weight="normal">VP</Tag>
    <Tag Count="10" Size="120%" Weight="normal">Sequel</Tag>
    <Tag Count="5" Size="100%" Weight="normal">Mobile</Tag>
    <Tag Count="5" Size="100%" Weight="normal">Manager</Tag>
  </TagCloud>
</TagSearchResults>
```

Tag Cloud Output Parameters

Status	The status of the command.

- *0* - Success

- *Non 0* - Error. (All errors default to 1.)

ErrorMsg	If Status is a value other than *0,* then the xml node is returned with a message detailing the error.

TagBrowserUrl	The URL to the tag browser.
TagCloud	Contains all the tags in the tag cloud.
Tag	The tag with these attributes:

- *Count* – How often the tag is used to link a piece of content.

- *Size* – The default suggested sizing of the tag.

- *Weight* – Suggested weighting of the tag.

    Possible values are:

    - *lighter*

    - *normal*

    - *bold*

Tag Browser

The search result links that correspond to tags added using web service must open in a new window.

 For search results that correspond to PeopleSoft system tags, the portal URI entered at the node definition page must be concatenated with the relative URL provided in the input message. The complete URL that is obtained by appending the node's portal URI and relative URL should give a complete and valid PeopleSoft URL.

The search results corresponding to non-PeopleSoft system tags will have the same URL as supplied in the input message. In the case of external system tags the URL supplied must be a full URL and must start with `http://`. The URL is used as such in the search results in tag browser as it is a complete URL.

Each domain in the application domain page will have a scope corresponding to it in the tag browser page.

Chapter 9

Managing Menu Item Requests

This chapter provides an overview of Menu Item Requests feature and a list of common elements used in this chapter. This chapter also discusses how to:

* Set up menu item request email notifications.

* Submit and edit menu item requests.

* Manage menu item requests.

* Register approved menu item requests.

Understanding the Menu Item Requests Feature

Menu items are pages, websites, or files accessible from the navigation menu. PeopleSoft Enterprise Portal's Menu Item Requests feature enables portal users to contribute information to their organization's intranet by submitting a menu item request for a file attachment, managed content, a website Uniform Resource Locator (URL), or a PeopleSoft URL.

The Menu Item Requests feature contains three levels of security, which allow users to submit menu item requests, managers to approve or reject the requests, and the portal administrator to register approved requests. Security for this feature is based on the following three permission lists, which are delivered with your software:

* PAPP4100.

  Submit menu item requests.

* PAPP4020.

  Approve and manage menu item requests.

* PAPP4025

  Register menu item requests.

PeopleSoft also delivers user roles that are configured to perform PeopleSoft Enterprise Portal functions. The following three roles have been configured to include menu item functions:

Role	*Role Description*
PAPP_AUTHOR	Content Author

Role	Role Description
PAPP_NAVIGATION_MANAGER	Navigation Manager
PAPP_NAVIGATION_ADMIN	Navigation Administrator

The Menu Item Requests feature can be set up to send email notifications of status changes to menu item requests. Manager notifications are sent for newly submitted requests pending review and approval. Administrator notifications are sent for approved requests pending portal registration.

Common Elements Used in This Chapter

Status   Displays the current status of the associated request.

Content Type   Displays the content type of the associated request.

Creation Date   Displays the creation date of the request.

Created By   Displays the user ID of the person who created the request.

Setting Up Menu Item Request Email Notifications

This section discusses how to use the Request Notification component (EPPMI_NOTIFY) to set up users to receive email notification of status changes to menu item requests.

Page Used to Set Up Menu Item Request Email Notifications

Page Name	Definition Name	Navigation	Usage
Menu Item Request Notification	EPPMI_NOTIFY	Portal Administration, Menu Item Requests, Request Notification	Set up menu item request email notifications.

Setting Up Menu Item Request Email Notifications

Access the Menu Item Request Notification page (Portal Administration, Menu Item Requests, Request Notification).

Menu Item Request Notification

The listed users will receive e-mail notification of status changes to a Menu Item Request. Manager notification is sent for newly submitted Menu Item requests pending review and approval. Administrator notification is sent for approved Menu Items pending portal registration.

*User ID	Manager	Administrator	*Email Address		
PAPP_AUTHOR	☐	☐	psmith@company.com	+	−
PAPP_NAVIGATIONADM	☐	☑	ljones@company.com	+	−
PAPP_NAVIGATIONMGR	☑	☐	jthomas@company.com	+	−

Menu Item Request Notification page

User ID	Select the ID of the user to which you want to send email notifications of menu item request status changes.
Manager	Select if the user is a navigation manager and requires notifications for newly submitted requests pending review and approval.
Administrator	Select if the user is a navigation administrator and requires notifications for approved requests pending portal registration.
Email Address	If available, the email address will default from the user profile, but can be overridden. Menu item request notifications will be sent to this address.

Managing Menu Item Requests

This section discusses how to:

- Approve menu item requests.

- Update menu item requests.

- Delete rejected menu item requests.

Pages Used to Manage Menu Item Requests

Page Name	Definition Name	Navigation	Usage
Manage Menu Item Requests	EPPMI_MANAGE_LST	Portal Administration, Menu Item Requests, Manage Requests	Approve or reject submitted menu item requests.
Edit Menu Item Request	EPPMI_ITM_EDIT_SEC	Click the Menu Item Request link for a menu item request in *Rejected, Submitted,Rework,* or *Approved* status on the Manage Menu Item Requests page.	Edit a menu item request.
View Menu Item Request	EPPMI_ITM_VIEW_SEC	Click a Menu Item Request link for a menu item request in *Registered* status on the Manage Menu Item Requests page.	View the details of a menu item request.
Delete Menu Item Requests	EPPMI_DEL_LST	Portal Administration, Menu Item Requests, Delete Requests	Delete rejected menu item requests.

Approving Menu Item Requests

Access the Manage Menu Item Requests page (Portal Administration, Menu Item Requests, Manage Requests).

Manage Menu Item Requests page

Menu Item Requests

Menu Item Request	Click the Menu Item Request link to access the Edit Menu Item Request page, where you can access and edit information about the selected menu item request.
	See Chapter 9, "Managing Menu Item Requests," Updating Menu Item Requests, page 91.
Publish Date	Displays the date on which the submitter wants to publish the requested menu item.
Save Menu Items	Click to save changes made on the Edit Menu Item Request page.
	Warning! Although you clicked the OK button on the Edit Menu Item Request page to update the request, your changes will *not* be saved until you click the Save Menu Items button.
	This action triggers an email notification to the submitter with a link to the Submit Menu Item page.
	Note. Requests with a status of *Rework* can be resubmitted, deleted, or saved as draft. Requests with a status of *Rejected* can be viewed or deleted. Requests with a status of *Approved* can be viewed.
	Approved menu item requests will also trigger an email notification to the navigation administrator with a link to the Administer Menu Item Requests page.

Updating Menu Item Requests

Access the Edit Menu Item Request page (Click the Menu Item Request link for a menu item request in *Rejected,Submitted,Rework,* or *Approved* status on the Manage Menu Item Requests page).

Edit Menu Item Request page

Menu Item Request

Request Status	Update the status of the request based on your review and updates. Available values include:
	Approved.
	Rejected.
	Rework.
	Submitted.
Email Address	Displays the email address of the person who submitted this request.

Comments	Add any comments based on your review of the menu item request. For example, you can enter details about the changes you made to specific fields, as well as the reasons why the menu item request was rejected or needs to be reworked.

Menu Item Identifier

Changes can be made to all fields in this section.

Menu Item Content

Click the Content Title or File Attachment link to view the content.

Search Key Words

Changes can be made to all fields in this section.

OK	Click to update your changes to the menu item request and return to the Manage Menu Item Requests page.
	Warning! You must click the Save Menu Items button on the Manage Menu Item Requests page to save any changes you made on this page.
Return to Menu Item List	Click to return to the Manage Menu Item Requests page.
	Warning! Any changes you made on this page will not be saved.
Go to Administer Requests	After saving your changes by clicking the Save Menu Items button on the Manage Menu Item Requests page, you can return to this page and click this link to access the Administer Menu Item Requests page, where you can register the menu item, once it has been approved.
	Note. This link displays only if you have been granted permission to register menu item requests.
	See Chapter 9, "Managing Menu Item Requests," Registering Approved Menu Item Requests, page 94.

Deleting Rejected Menu Item Requests

Access the Delete Menu Item Requests page (Portal Administration, Menu Item Requests, Delete Requests).

Delete Menu Item Requests page

Only menu item requests with a status of *Rejected* are available for deletion.

Click the Delete button to delete the associated menu item request.

Click the Delete All button to delete all menu item requests.

You will be prompted to confirm your deletion.

Registering Approved Menu Item Requests

This section discusses how to:

- Register approved menu item requests.

- Define the menu item registry entry.

- Select a menu item folder.

- View menu item registry details

Pages Used to Register Approved Menu Item Requests

Page Name	Definition Name	Navigation	Usage
Administer Menu Item Requests	EPPMI_REG_LST	Portal Administration, Menu Item Requests, Register Requests	Register approved menu item requests.
Edit Menu Item Request	EPPMI_ITM_EDIT_SEC	Click the Menu Item Request link for a menu item request in *Rejected, Submitted,Rework,* or *Approved* status on the Administer Menu Item Requests page.	Access and edit details of a menu item request.

Page Name	Definition Name	Navigation	Usage
View Menu Item Request	EPPMI_ITM_VIEW_SEC	Click the Menu Item Request link for a menu item request in *Registered* status on the Administer Menu Item Requests page.	View menu item request details.
Define Registry	EPPMI_REG_DFN	Click the Register Item button on the Administer Menu Item Requests page.	Determine how the menu item will be rendered online, such as the site and menu folder to which it will be published.
Select Menu Folder	EPPMI_REG_FLD	Click the Select Menu Folder button on the Define Registry page.	Choose the parent folder in which you want to register the menu item.
Confirm Registry	EPPMI_REG_CNF	Click a folder link on the Select Menu Folder page.	Confirm menu item registration.
Registry Details	EPPMI_REG_VIEW	• Click the Yes - Register button on the Confirm Registry page. • Click the Registry Details button on the Administer Menu Item Requests page.	Review registry information for the menu item, or remove the menu item from registry.

Registering Approved Menu Item Requests

Access the Administer Menu Item Requests page (Portal Administration, Menu Item Requests, Register Requests).

Administer Menu Item Requests page

Menu Item Request	Click for a menu item request in *Rejected,Submitted,Rework,* or *Approved* status to access the Edit Menu Item Request page.
	Click for a menu item request in *Registered* status to access the View Menu Item Request page.
Register Item	Click to access the Define Registry page, where you can register the menu item.
	This button displays for menu item requests in *Approved* status.
Registry Details	Click to access the Registry Details page, where you can view registry details for a menu item, or remove the menu item from the registry.
	This button displays for menu item requests in *Registered* status.
Save Menu Items	Click to save the changes made on the Edit Menu Item Request page.

Warning! Even though you clicked OK to update the request on the Edit Menu Item page, your changes will *not* be saved, until you click Save Menu Items.

This action will trigger an email notification to the submitter with a link to the Submit Menu Item page.

Note. Only requests with a status of *Registered* have the Registry Details option available.

Defining the Menu Item Registry Entry

Access the Define Registry page (click the Register Item button on the Administer Menu Item Requests page).

Administer Menu Item Requests

Define Registry

Documentation Tips

The portal registry data determines how the Menu Item is rendered on-line. Click 'Select Menu Folder' to choose the parent folder for the Menu Item.

*Site Name:	EMPLOYEE ▼
Product:	
*Access Type:	Permission ▼ ☑ Author Access

Permission Lists

Permission List	Permission List Description		
PAPP4120 🔍	Submit News Articles	➕	➖

[Select Menu Folder]   Return to Menu Item List

Define Registry page

Site Name	Select the portal or site in which you want to register the menu item. This value defaults to the current portal or site.
Node Name	This field displays when the Content Type field is set to *PeopleSoft URL.*
	Select the database node that contains the PeopleSoft page that you want to register as a menu item. The node is used to derive the web server URL used to access the content provider database.
	Select *Always use local* to indicate that you want to use the current portal database.
Template Name	This field displays when the Content Type field is set to *PeopleSoft URL* or *Web Site URL.*
	Select a template to determine how the URL content will be displayed on the page. PeopleSoft delivers a number of standard templates, or you can design your own. PeopleSoft recommends leaving this field clear unless there is a special circumstance. Leaving this field clear, invokes the system to use the default template.
Product	Optionally, enter text to tag menu items for SQL queries against the registry tables.
Access Type	Select the type of security access you want to grant for the menu item. Available values include:
	Permission. Select to indicate that you want to specify permission lists that define access rights to the menu item.
	Public. Select to indicate that you want the menu item to be accessible by all users.

Author Access   This option displays when the Access Type field is set to *Permission.*

Select to indicate that you want the user who submitted the menu item request to have access to the menu item regardless of any other permissions that are defined for the menu item. However, if the user does not have access to the menu component, the system will issue an authorization error.

Permissions   This option displays when the Access Type field is set to *Permission.*

Select the permission lists that you want to have access to the menu item.

Select Menu Folder   Click to access the Select Menu Folder page, where you can choose the parent folder for the menu item.

Selecting a Menu Item Folder

Access the Select Menu Folder page (click the Select Menu Folder button on the Define Registry page).
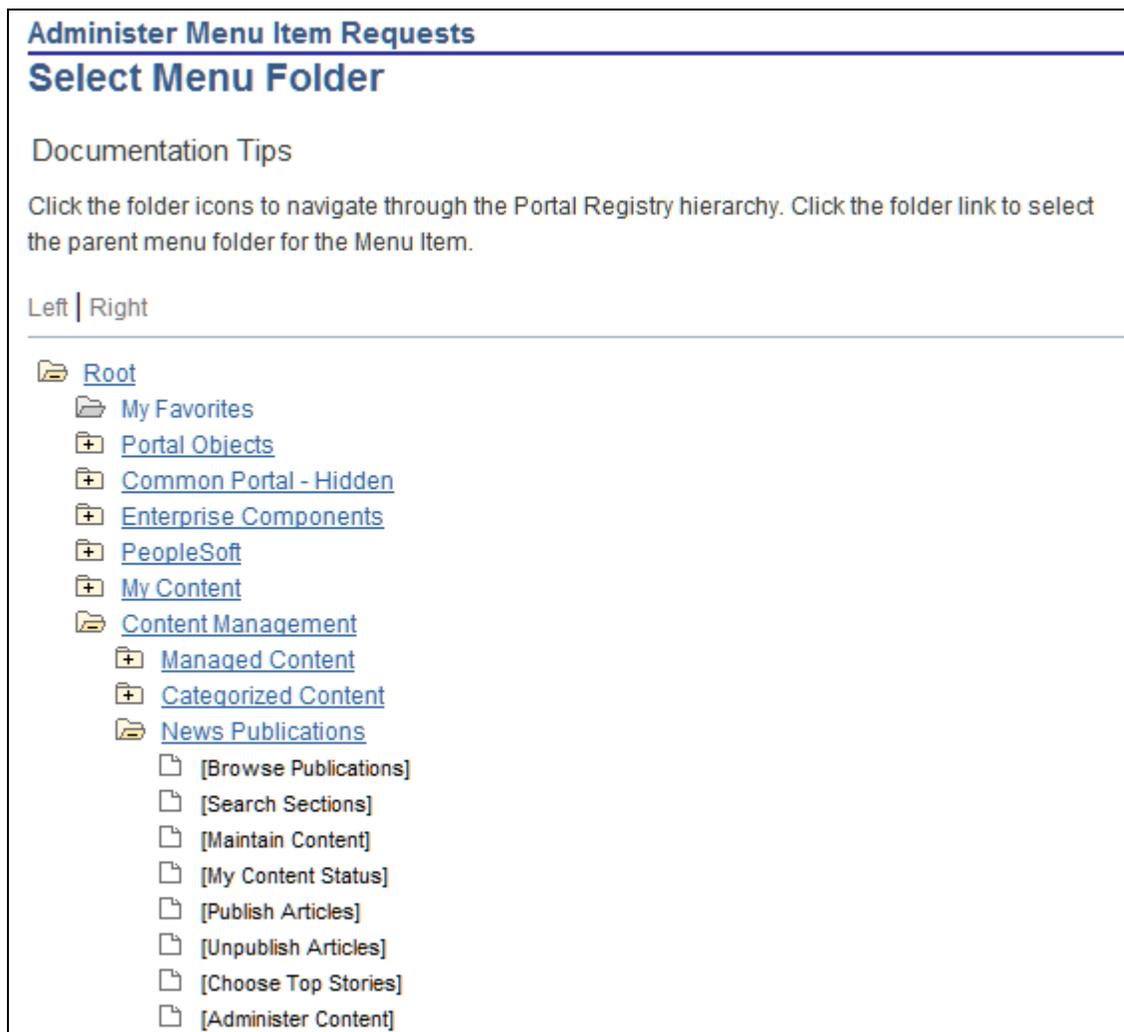
Select Menu Folder page

Click the folder icons to navigate through the portal registry hierarchy. Click a folder link to select the desired folder and access the Confirm Registry page, where you can confirm the registration of the menu item.

Viewing Menu Item Registry Details

Access the Registry Details page (Click the Yes - Register button on the Confirm Registry page).

Registry Details page

Site Name	Displays the portal or site in which the menu item is registered.
Node Name	Database node that contains the PeopleSoft page.
Template Name	Determines how the menu item content is displayed on the page. A value of *(Not Specified)* indicates that the default template will be used to display the page.
Access Type	Valid values include:
	Public. All users can access the menu item.
	Permission. Only users who are associated with the selected permission list are able to access the menu item.
Remove from Registry	Click to remove the menu item from the registry.
	A new page displays confirming the removal.

Go To Registry Structure & Content

Click to access the Content Ref Administration page for the menu item.

This link displays if the current user has security access to the Structure and Content component.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Administering Portals," Administering Content References

Chapter 10

Using the Portal Registry Load Process

This chapter provides overviews of the Registry Load Application Engine process (EO_PE_R_LOAD) and portal registry load files. It also discusses how to:

• Create a portal registry load file.

• Start the portal registry load message.

• Run the Registry Load process.

Note. The information in this chapter is for system administrators who implement and maintain the PeopleSoft Enterprise Portal.

Understanding the Portal Registry Load Process

The Portal Registry Load process is a file-based method to bulk-load content and folder references into the portal registry.

Loading data into the portal registry involves two staging tables:

• EO_PE_LOAD_DTL

• EO_PE_LOAD_FLDR

The PORTAL_REG_LOAD Enterprise Integration Point (EIP) delivers both an application message and a file layout in the form of a comma-separated value (CSV) file. You can:

• Use your own application programming interfaces (APIs) to match the PORTAL_REG_LOAD message format.

• Export the data to a spreadsheet, save it as a CSV file, and follow the steps we provide for the inbound flat-file utility.

For the inbound flat-file definition, use the layout and message combination: PORTAL_REG_LOAD.

The result of the flat-file utility is a published PORTAL_REG_LOAD message. When the portal subscribes to the message, you see the data in the tables EO_PE_LOAD_DTL and EO_PE_LOAD_FLDR.

Note. The message subscription was set to generate a subscription ID. This subscription ID was used to populate the Process Instance field in the EO_PE_LOAD_DTL and EO_PE_LOAD_FLDR records.

After the file data is in the staging tables, run the Registry Load process to load the data into the portal registry.

Note. To research the technical details of any integration point used by PeopleSoft applications, refer to the Interactive Services Repository that can be found in the Documentation section of the My Oracle Support website.

Understanding the Portal Registry Load Files

The inbound flat-file utility requires a CSV file. To work with the Registry Load process, the data in the file must be in a specific order. We deliver two sample files to provide a basis for creating your own inbound files for the Registry Load process.

Delivered Sample File Name	*Usage*
PORTAL_REG_LOAD_SAMPLE.xls	Microsoft Excel spreadsheet file with column headings. This file contains registry data for sample folders, sample pagelets, and sample target pages.
PORTAL_REG_LOAD_SAMPLE.csv	Comma-separated value file without column headings. This file is created by deleting the column heading row from PORTAL_REG_LOAD_SAMPLE.xls and saving the file as type CSV (*.csv). The resultant data is in the format that is required by the Registry Load process.

Note. The delivered files are samples only. PORTAL_REG_LOAD_SAMPLE.csv can be loaded into a testing demonstration portal database. The Registry Load process does not overwrite existing registry content references. After the file data is loaded, you must delete it manually from the portal registry to reload the same data.

The PORTAL_REG_LOAD_SAMPLE.xls file contains column headings that describe the data required for that column. The column data reflects the data that is entered when you register a content reference in the portal.

External Uniform Resource Locators (URLs), PeopleSoft components, and PeopleSoft iScripts are the only types of content that can be registered as content references using the registry load file. Only homepage pagelets and target pages can be registered using the registry load file. Each row in the file represents a different content reference.

Note. Templates and template components cannot be registered using the portal registry load file. These types of content references must be registered online.

With the Registry Load process, content is registered down through six folder levels. The process starts at the first level and works its way through the folders that are listed for the content reference. The content reference is registered under the lowest level folder that is not blank. If a specified folder label is not found in the registry, the registry load process creates this folder. The object name for created folders is formatted to match the uppercase value of the label. If this object name already exists, a numeric value is appended to make the object name unique in the portal registry. If no folder is specified for a particular content reference row, the content reference is registered at the root level.

The columns in the file must be in the exact order and format as delivered in the sample files for use by the Registry Load process. The following table explains the format and use of each column. Failure to provide a value for the required columns results in an error status for that content reference row during the Registry Load process. Content reference rows with a status of *E* in the staging table are not registered. You can view the errors for your data using the View Registry Load Data page.

Note. You can use the View Registry Load Data page before or after you run the Registry Load process to see what is in the staging tables.

Column Heading	Format	Use	Required?
Portal Name	30 characters, uppercase, no spaces.	This value must match the portal definition object name. The valid values are EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER	Required
Content Provider	30 characters, mixed case, no spaces.	This value must match the exact spelling and case of an existing content provider node name. This is the content provider node for the content reference. Delivered content provider nodes include BP, CRM, EPM, ELM, ERP, GFHA, HRMS, LOCAL_NODE, SA, and SAHA.	Required for components and iScripts
Portal Template	30 characters, uppercase, no spaces.	This value must match a registered template object name. This template is used by the content reference. You must specify the template object name, not the template label.	Optional
Product	4 characters, mixed case, truncated after 4 characters.	Optional value that is stored with the content reference registry entry. Select this value in the registry load process to limit the rows in this file that are to be registered as content references.	Optional
Category	30 characters, uppercase, no spaces.	Used for user organization of the load file. Select this value in the Registry Load process to limit the rows in this file that are to be registered as content references.	Optional
URL Type	1 character, uppercase	Used to define the type of content reference target page. Values are: *S:* iScript *C:* Component *X:* External	Required

Column Heading	*Format*	*Use*	*Required?*
Usage Type	1 character, uppercase	Used to define the use of the content reference target page. Values are: *P:* Pagelet *T:* Target	Required
Hidden	1 character, uppercase	Specifies whether the content reference is hidden in the menu navigation. Values are: *N:* Not hidden *Y:* Hidden	Required
Fldr 1 Seq (Folder 1 sequence)	4 digits, numeric	Specifies the display order of the level 1 folder.	Optional
Fldr 1 Name	30 characters, free-form	Level 1 folder label.	Optional
Fldr 1 Desr (folder 1 description	254 characters, free-form	Level 1 folder description.	Optional
Fldr 2 Seq	4 digits, numeric	Specifies the display order of the level 2 folder.	Optional
Fldr 2 Name	30 characters, free-form	Level 2 folder label.	Optional
Fldr 2 Desr	254 characters, free-form	Level 2 folder description.	Optional
Fldr 3 Seq	4 digits, numeric	Specifies the display order of the level 3 folder.	Optional
Fldr 3 Name	30 characters, free-form	Level 3 folder label.	Optional
Fldr 3 Desr	254 characters, free-form	Level 3 folder description.	Optional
Fldr 4 Seq	4 digits, numeric	Specifies the display order of the level 4 folder.	Optional

Column Heading	Format	Use	Required?
Fldr 4 Name	30 characters, free-form	Level 4 folder label.	Optional
Fldr 4 Desr	254 characters, free-form	Level 4 folder description.	Optional
Fldr 5 Seq	4 digits, numeric	Specifies the display order of the level 5 folder.	Optional
Fldr 5 Name	30 characters, free-form	Level 5 folder label.	Optional
Fldr 5 Desr	254 characters, free-form	Level 5 folder description.	Optional
Fldr 6 Seq	4 digits, numeric	Specifies the display order of the level 6 folder.	Optional
Fldr 6 Name	30 characters, free-form	Level 6 folder label.	Optional
Fldr 6 Desr	254 characters, free-form	Level 6 folder description.	Optional
Cref Seq (content reference sequence	4 digits, numeric	Specifies the display order of the content reference in the lowest level folder.	Optional
Cref Name	30 characters, free-form	Content reference label.	Required
Cref Desr	254 characters, free-form	Content reference description.	Optional
Menu Name	30 characters, uppercase, no spaces	Menu name that stores the component. Used only by components.	Required for components.
Market	3 characters, uppercase, no spaces	Market associated with the component (usually GBL). Used only by components.	Required for components.

Column Heading	*Format*	*Use*	*Required?*
Panel group	18 characters, uppercase, no spaces	Component name that stores the pages. Used only by components.	Required for components.
Record Name	15 characters, uppercase, no spaces	Record name that stores the iScript. The record must begin with WEBLIB_. Used only by iScripts.	Required for iScripts.
Field Name	18 characters, uppercase, no spaces	Field name that stores the iScript. Used only by iScripts.	Required for iScripts.
Pcode Event Type (PeopleCode event type)	14 characters, mixed case, no spaces	PeopleCode function event that stores the iScript (usually FieldFormula). Used only by iScripts.	Required for iScripts.
Pcode Function Name	30 characters, mixed case, no spaces	PeopleCode function name that is used to invoke the iScript. This value might contain appended query string parameters if length permits. The function must begin with iScript. Used only by iScripts.	Required for iScripts.
Portal Object Name	30 characters, uppercase, no spaces	Object name for the content reference. If this column is blank, the value in the content reference label column (Cref Name) is in uppercase and used.	Optional
Default Column	1 digit, numeric	Defines the default column for the pagelet in the homepage layout. If this column is blank, the default value is 1. Used only by pagelets. Values are: *1:* First column. *2:* Second column	Optional
Edit URL Content Provider	30 characters, mixed case, no spaces	Content provider for the edit URL that is used to access the Pagelet Personalization page. The edit URL is listed in the External URL/Edit URL/Related Link column. If no edit URL is specified, leave this column blank. Used only by pagelets.	Optional

Column Heading	*Format*	*Use*	*Required?*

External URL/Edit URL/Related Link	Unlimited long character, free-form	Use of this column depends on the URL type and the usage type of the content reference:
		
		• Component or iScript Pagelets: (Optional). The URL that is used to access the pagelet personalization page. The Edit URL value for a PeopleSoft personalization page must be of the following form (replacing MENU, MKT, and COMPONENT name with the PeopleSoft values:
		
		  • For an 8.44 content provider:
		
		    c:/MENU.COMPONENT.MKT
		
		  • For an 8.1x content provider:
		
		    ICType=Panel&Menu=MENU&Market=MKT_NAME&PanelGroupName=COMPONENT
		
		• Component or iScript Targets: (Optional). The URL that is used to access the pagelet personalization iScript. The Edit URL value for a PeopleSoft personalization page must be of the following form (replacing RECORD, FIELD, EVENT, FUNCTION name with the PeopleSoft values).
		
		  • For an 8.4x content provider:
		
		    s/RECORD.FIELD.EVENT.FUNCTION
		
		  • For an 8.1x content provider:
		
		    ICType=Script&ICScriptProgramName=RECORD.FIELD.EVENT.FUNCTION
		
		• External Targets: (required). URL that is used to access the external content reference. If no content provider is listed for this content reference, state the complete URL *http://*... If a content provider is used, state only the remaining portion of the URL.
			Required for External URLs

Keyword List	254 characters, free-form	List of keywords, delimited by spaces, that are used by the search engine index to return this content reference when a user invokes the portal search. You can enclose keywords in quotes for the search to handle the keywords as a single phrase.	Optional
Permission Lists	254 characters, uppercase, spaces allowed	List of up-to-30-characters-long permission lists, delimited by semicolons, that are used to secure access to this content reference.	Required

Creating a Portal Registry Load File

To be usable by the Registry Load process, the number of columns and format in your registry load file must match those in the delivered PORTAL_REG_LOAD_SAMPLE.xls file.

To create a portal registry load file:

1. Save PORTAL_REG_LOAD_SAMPLE.xls with a different name.

2. Replace the existing rows with your data. The number of rows of data is not limited.

    Note. Do not put commas or tabs in any of the Microsoft Excel file cells, including the description fields. Commas and tabs disrupt the data stored as a CSV file.

3. Save the file with your data.

4. Delete the row that contains the column headings.

5. Save the file again, with the file type CSV (*.csv).

6. Place the file in a directory that is accessible to the application server for the portal database.

Running the Portal Registry Load

This section discusses how to:

1. Set up the portal registry load message.

2. Define inbound file processing.

3. Run a process request.

4. Monitor application messages.

Pages Used to Start the Portal Registry Load Message

Page Name	Definition Name	Navigation	Usage
Node Definition - Transactions	IB_NODETRXLIST	PeopleTools, Portal, Node Definitions, Transactions	Attach Application Message transactions to a message node definition.
File Inbound	EO_FILE_INBOUND	Enterprise Components, Integration Definitions, Inbound File Rule	Define inbound file processing.

Page Name	Definition Name	Navigation	Usage
Inbound File Publish	EO_FILETOMSG	Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish	Initiate file-to-message processing. The file-to-message processing function reads the file rowset and publishes it as a message.
Registry Load Data	EO_PE_REG_LOAD	Portal Administration, Navigation, View Registry Load Data	Check the data in the PS_EO_PE_LOAD_DTL and PS_EO_PE_LOAD_FLDR staging tables.

Setting Up the Portal Registry Load Message

To set up the portal registry load message:

1. In PeopleSoft Application Designer, access the *PORTAL_REGISTRY* message channel.

2. Navigate to File, Definition Properties to display the Message Channel Properties panel.

3. Click the Use tab.

4. Click Run in the Message Channel Status group box.

5. Click OK to save the channel.

6. In PeopleSoft Application Designer, access the *PORTAL_REG_LOAD* message.

7. Navigate to File, Definition Properties and click the Use tab.

8. Select the *Active* option in the Status group box.

9. Click OK to save the message.

10. Use your browser to log in to your PeopleSoft Enterprise Portal database. Access the Node Definitions page.

    Select the local default message node, delivered as *PSFT_PA*.

11. Click the Transactions tab. Insert the Inbound Asynchronous request message *PORTAL_REG_LOAD,* and the Outbound Asynchronous message *PORTAL_REG_LOAD*.

12. Click Save to save the attached message transactions.

Defining Inbound File Processing

To define inbound file processing:

1. Access the File Inbound page (Enterprise Components, Integration Definitions, Inbound File Rule).

2. In the Inbound File field, enter the directory information for the file location on the application server machine.

Note. The inbound file PORTAL_REG_LOAD_SAMPLE.csv must reside in a directory that is accessible to the application server.

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3. Select the *Active* value in the Status drop-down list box.

4. Clear the Create Message Header and Create Message Trailer options.

5. In the File Layout group box, select *PORTAL_REG_LOAD* for the Definition Name and Message Name fields.

Running the Inbound File Publish Process

To run the Inbound File Publish Application Engine process (EOP_PUBLISHF):

1. Access the Inbound File Publish page (Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish).

2. Enter a request ID and description.

3. In the Process Frequency group box, select one of the following: *Once,Always,* or *Don't Run.*

4. Select the file identifier that you created on the File Inbound page.

5. Click Save.

6. Click Run. Record the process instance number.

7. Click the Process Monitor link to monitor the status of the process.

Monitoring Application Messages

To monitor application messages:

1. Access the Application Message Monitor page.

2. Select the Pub Contracts tab.

3. Select a publish node.

4. Select a channel name.

5. Select the message name.

6. Click Refresh.

7. Check the Status field to see if *Done* is displayed for the published message.

8. Select the Sub Contracts tab.

9. Click Refresh.

10. Check the Status field to see if *Done* is displayed for the message subscription contract.

11. Access the Registry Load Data page to check the data in the EO_PE_LOAD_DTL and EO_PE_LOAD_FLDR staging tables.

12. Enter in the inquiry fields specific to your loaded data. Leave the Load Status field blank.

13. Run the Registry Load process.

Running the Registry Load Process

This section provides an overview of Registry Load process prerequisites and discusses how to:

• Run the Registry Load process.

• Review and correct errors.

Note. The user running the Registry Load process should have the role of PeopleSoft Administrator. This will ensure that they have the necessary security to successfully load any and all content references.

Understanding Registry Load Process Prerequisites

Before you can run the Registry Load process, perform these tasks:

• Configure and start PeopleSoft Process Scheduler for the application server.

• Set up a run control ID.

Pages Used to Run the Registry Load Process

Page Name	Definition Name	Navigation	Usage
Run Registry Load	EO_PE_RUN_LOAD	Portal Administration, Navigation, Run Registry Load Click Add a New Value.	Run the Registry Load process.
Registry Load Data	EO_PE_REG_LOAD	Portal Administration, Navigation, View Registry Load Data	Review and correct loaded data or errors.
Registry Load Folders	EO_PE_FLDR_SEC	Click the View Folders link on the Registry Load Data page.	View the folder hierarchy for the folders that were created by the Registry Load process.

Running the Registry Load Process

Access the Run Registry Load page (Portal Administration, Navigation, Run Registry Load).

Registry Load page

To run the Registry Load process:

1. Select the Register Content option.

2. Leave the Registry Load Limit field clear or enter *1000* to limit the number of rows that are loaded.

3. Select the Update Folder Permissions option to update the parent folders with their children's content reference permission lists.

   Updating the folder permissions can be done at any time. The Registry Load process uses the portal registry data to update the folder permissions for the entire portal registry. It does not use the data in the staging tables.

4. Define the portal registry definition that matches your staged registry data in the Portal Name field.

   The default portal definition is *EMPLOYEE.*

5. Enter an effective date.

6. Enter an expiration date.

7. Click Run.

8. After the process runs, view and correct errors to the data in the staging tables using the Registry Load Data page. Rerun the process as needed.

Reviewing the Registry Load Data

Access the Registry Load Data page (Portal Administration, Navigation, View Registry Load Data).

Registry Load Data page

Portal Name	Enter the portal name that was specified when you ran the process.
Load Status	Select the load status of the rows that you want to view. Values are:
	Error in Load Data: Content references were marked in error during the load process and were not registered.
	Not Registered: The load process did not pick up the content references. For rows that were processed but have a *Not Registered* status, check to see if the content references object name already exists in the portal registry.
	Successfully Registered: Load data was successfully entered into the portal registry.
	Leave this field clear to view all rows of the staging tables, including those rows that have not been processed.
Search	Click to retrieve applicable registry load data to the page.
View Folders	Click to access the Registry Load Folders page, where you can view the folder hierarchy. The page displays the folder created as well as the folder reference.

Registry Load Details

Error Detail   Click for rows that are returned with the load status criteria set to *Error in Load Data.* A message box displays to provide you with the data that prevented the data row from being registered. Types of errors include:

- Invalid portal name. Use the prompt button to see valid values.

- Blank content reference name (label).

- Blank URL type (component, iScript, or external).

- Incomplete data required for each URL type (for example, a menu name for a component URL type).

- Invalid content provider.

- Invalid template name.

Part 3

Administering the Search Infrastructure

Chapter 11
Understanding PeopleSoft Enterprise Portal Search

Chapter 12
Administering Search Indexes

Chapter 13
Defining Search Index Groups

Chapter 14
Building Search Indexes

Chapter 15
Administering Saved Searches

Chapter 11

Understanding PeopleSoft Enterprise Portal Search

This chapter provides overviews of:

- PeopleSoft Enterprise Portal search.

- PeopleSoft Enterprise Portal search infrastructure.

- Search indexes for PeopleSoft applications.

Understanding PeopleSoft Enterprise Portal Search

PeopleSoft Enterprise Portal delivers enhanced search functionality that builds on the PeopleTools search technologies.

PeopleSoft Enterprise Portal search enables users to incorporate additional sources of content into search collections and adds additional features for end users.

- Users can perform a search from anywhere in the portal and retrieve links to documents, managed content, websites, and transactions, all in one place.

- Searches can be performed across the entire portal or confined to a local site.

- Searches can be limited to a predefined scope.

  Search results are filtered for security to ensure that users see only content to which they have access.

- Content categories are retrieved along with the search results for managed content.

Understanding the Search Infrastructure

The following process occurs when you submit a search request:

1. A user enters a search request on the Search field located in the portal header frame.

   Depending on access security and portal configuration a user can search the entire portal, only the local site, or within a predefined scope.

2. The query text is submitted to the PeopleSoft web server.

3. The query string is passed to the Search API.

4. The results are filtered for security based on the roles defined by the search administrator.

5. The Search page echoes the user's original query string and displays a list of content that matches the request.

The search administrator is responsible for defining, building, and maintaining the search indexes, index groups, and index security that are integral to the portal search functionality.

Understanding Search Indexes

A search index is a collection of files that is used during a search to quickly find documents of interest. You build a search index to enable searching on a given set of documents. The set of files that make up the index is a collection. This collection contains a list of words in the indexed documents, an internal documents table containing document field information, and logical pointers to the actual document files. Most content in Enterprise Portal can be searched after creating indexes.

Enterprise Portal uses the PeopleTools search engine to define and build search indexes for use with Portal searches.

Enterprise Portal Search uses three types of search indexes:

*   Record-based indexes.

    Record-based indexes are used to create indexes of data in PeopleSoft tables. For example, if the PeopleSoft application has a catalog record that has two fields, Description and PartID, you can create a record-based index to index the contents of the Description and PartID fields.

*   HTTP spider indexes.

    HTTP spider indexes index a web repository by accessing the documents from a web server. You specify the starting URL, then the spider walks through and indexes all documents in that repository by following the document links. You choose which documents to include or exclude based on file types and Multipurpose Internet Mail Extensions (MIME) types. You can control to what depth the spider traverses.

*   File system indexes.

    File system indexes are similar to HTTP spider indexes, except that the repository that is indexed is a file system. You typically specify the path to a folder or directory, then the indexer indexes all documents within that folder. HTTP spider indexes and file system indexes are sometimes collectively referred to as spider indexes. The indexer recognizes a wide variety of document formats, such as Word or Excel documents. Any document that is in an unknown format will be skipped by the indexer. You choose which documents to include or exclude based on file types and MIME types. You can control to what depth the spider traverses.

Scoped Search

Scoped search enables users to search within specific portal features, such as Action Items, Calendar, Content Manager, Discussions, Resource Finder, and Workspaces.

Scoped search is available by default in the Home page header. A user can select only one scope at a time.

Search scopes are defined based on index groups.

Chapter 12

Administering Search Indexes

This chapter provides an overview of search indexes and discusses how to define search indexes.

Understanding Search Indexes in Enterprise Portal

A search index is a collection of files that is used during a search to quickly find documents of interest. You build a search index to enable searching on a given set of documents. The set of files that make up the index is a collection. This collection contains a list of words in the indexed documents, an internal documents table containing document field information, and logical pointers to the actual document files. Most content in Enterprise Portal can be searched after creating indexes.

Search Limitations

Managed Content that has been imported into another feature is not searchable. You can search for it in the Content Management search, but you will not retrieve results when searching for imported Managed Content in the following features: Action Items, Calendar Events, and Discussions. Content that has been created directly in these features is searchable as well as attachments that have been added in the feature. In addition, the Calendar feature will not index the actual website for a website that has been added directly, but it will index the metadata.

Defining Search Indexes

This section discusses how to:.

- Administer search index definitions.

- Edit a record-based search index definition.

- Edit keys.

- Edit a file system search index definition.

- Edit an HTTP spider search index definition.

- Define what to include in file system and HTTP search indexes.

- Define search index security.

- Define search index filters.

Note. Use only the Enterprise Portal search administration functionality to manage search indexes within Enterprise Portal (Portal Administration, Search). Do not use PeopleTools search administration (PeopleTools, Portal, Build Search Index).

Pages Used to Define Search Indexes

Page Name	Definition Name	Navigation	Usage
Administer Indexes	EO_PE_SIDX_SUMMARY	Portal Administration, Search, Administer Indexes	Administer all PeopleSoft Enterprise Portal search indexes.
Add Index	EO_PE_ADD_INDEX	Click the Add Index button on the Administer Indexes page.	Add a record-based, file system spider, or HTTP spider index.
Record Indexes	EO_PE_RECD	Click the Edit Properties link for a record-based index on the Administer Indexes page.	Create and build record-based search indexes.
Edit Key	VEGGIE_SEC	Click the Edit Key link on the Record Indexes page.	Change the results that are returned by the Key returned in search results functionality. Oracle recommends that you retain the *<pairs/>* value in the Key returned in search results field.
Subrecords	EO_PE_RGW_SUBRECRD	Portal Administration, Search, Administer Indexes Click Edit Properties. Select the Subrecords tab.	Define the subrecords that you want to include in the search index. This page is available only for record-based indexes.
Filesystem Index	EO_PE_FSYS	Click the Edit Properties link for a file system spider index on the Administer Indexes page.	Create and build file system spider search indexes.
HTTP Index	EO_PE_HTTP	Click the Edit Properties link for an HTTP spider index on the Administer Indexes page.	Create and build HTTP spider search indexes.
What To Index	EO_PE_WHATTOINDEX	Portal Administration, Search, Administer Indexes, What To Index	Define the MIME types and file names you want to include in the search index. This page is available only for file system spider and HTTP spider indexes.

Page Name	Definition Name	Navigation	Usage
Security	EO_PE_SIDXPERM	Portal Administration, Search, Administer Indexes Click Edit Properties. Select the Security tab.	Define security access for the search index.
Filters	EO_PE_SIDX_PKG	Portal Administration, Search, Administer Indexes Click Edit Properties. Select the Filters tab.	Define application classes to use as filters for the search index.

Administering Search Index Definitions

Access the Administer Indexes page (Portal Administration, Search, Administer Indexes).

Administer Indexes page (1 of 2)

☐	EPPCW_ACTION_ITEM_DOC	Record-based Index	Workspace Action Item File Attachments	Edit Properties
☐	EPPCW_ACTION_ITEM_REM	Record-based Index	Workspace Action Item Remarks	Edit Properties
☐	EPPCW_BLOGPOST_DOC	Record-based Index	Workspace Blogpost File Attachments	Edit Properties
☐	EPPCW_BLOGS	Record-based Index	Blogs	Edit Properties
☐	EPPCW_BLOG_POST	Record-based Index	Workspace Blog Posts	Edit Properties
☐	EPPCW_DISCUSSIONS	Record-based Index	Workspace Discussion Forums	Edit Properties
☐	EPPCW_DISCUSSION_AI	Record-based Index	Workspace Discussions on Action Items	Edit Properties
☐	EPPCW_DISCUSSION_CM	Record-based Index	Workspace Discussions on Documents	Edit Properties
☐	EPPCW_DISCUSSION_DOC	Record-based Index	Workspace Discussion File Attachments	Edit Properties
☐	EPPCW_DISCUSSION_FORUM	Record-based Index	Workspace Discussion Forum Posts	Edit Properties
☐	EPPCW_DOC	Record-based Index	Workspace Document File Attachments	Edit Properties
☐	EPPCW_EVENTS	Record-based Index	Workspace Calendar Events	Edit Properties
☐	EPPCW_EVENT_DOC	Record-based Index	Workspace Calendar Event File Attachments	Edit Properties
☐	EPPCW_EVENT_HTML	Record-based Index	Workspace Calendar Event HTML/Text	Edit Properties
☐	EPPCW_EVENT_URL	Record-based Index	Workspace Calendar Event Web Site URLs	Edit Properties
☐	EPPCW_HTML	Record-based Index	Workspace Document HTML/Text	Edit Properties
☐	EPPCW_LINKS	Record-based Index	Workspace Links	Edit Properties
☐	EPPCW_MEMBERS	Record-based Index	Workspace Members	Edit Properties
☐	EPPCW_URL	HTTP Spider Index	Workspace Document Web Site URLs	Edit Properties
☐	EPPCW_WIKI	Record-based Index	Index to Search into Wiki content	Edit Properties
☐	EPPCW_WORKSPACES	Record-based Index	Workspaces	Edit Properties
☐	EPPDF_DISCUSSIONS	Record-based Index	Discussion Forum Posts	Edit Properties
☐	EPPDF_DISCUSSION_AI	Record-based Index	Discussions on Action Items	Edit Properties
☐	EPPDF_DISCUSSION_CM	Record-based Index	Discussions on Content Management	Edit Properties
☐	EPPDF_DISCUSSION_DOC	Record-based Index	Discussion Forum File Attachments	Edit Properties
☐	EPPDF_DISCUSSION_FORUM	Record-based Index	Discussion Forums	Edit Properties

[Add Index] [Delete Selected Indexes]   Schedule Indexes   Process Monitor

Administer Indexes page (2 of 2)

Index   Displays the name of the search index. To select an index, select the check box to
                            the left of the index name. Delivered indexes are unavailable for selection
                            because they should not be altered.

Gateway Type   Displays the type of gateway the search index uses to access its content.

                            Portal Index: Based on the portal registry.

                            Record-based Index: Based on records.

                            HTTP Spider Index: Based on a URL.

                            Filesystem Spider Index: Based on a file system location.

Edit Properties	Click for a record-based index to access the Record Indexes page, where you can edit index properties.
	Click for an HTTP spider index to access the HTTP Index page, where you can edit index properties.
	Click for a file system index to access the Filesystem Index page, where you can edit index properties.
Add Index	Click to access the Add Index page, where you can add a new index.
Delete Selected Indexes	Click to delete any indexes you have selected. Deleting an index definition also removes the actual collections stored in the file system, if any have been built.
Schedule Indexes	Click to access the Build Search Indexes page, where you can configure and launch the Build Search Indexes process (EO_PE_IBLDR).

Editing a Record-Based Search Index Definition

Access the Record Indexes page (click the Edit Properties link for a record-based index on the Administer Indexes page).

Record Indexes page

Build Index	Click to run the Build Search Indexes process (EO_PE_IBLDRB) for the selected search index.
System Index	This is a delivered index and is not available for editing.

Index Location   Displays the current location of the index.

By default, the files for an index are located in
<PS_CFG_HOME>/data/search/<INDEXNAME>/<db name>/</language cd>.
However, you can change this location by specifying the search index location
property in the application server and Process Scheduler configuration files.

See *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration,*
"Building and Maintaining Search Indexes," Specifying the Index Location

Menu Name   Select the menu name that is associated with the records you want to include in
the index.

Market   Select the market that is associated with the records you want to include in the
index.

Component   Select the component that is associated with the records you want to include in
the index.

Key returned in search Displays information that you have entered on the Edit Key page.
results

This data is used to synthesize the VdkVgwKey, which supports an XML-like
syntax enabling you to modify the tag that is returned by Verity. Oracle
recommends that you retain the *<pairs/>* value, which means that the format of
the Verity entry key will be FIELDNAME=VALUE.

Edit Key   Click to access the Edit Key page, where you can change the results that are
returned by the Key returned in search results functionality. Oracle recommends
that you retain the default value delivered.

Parent Data Record

Record   Enter records or views that contain data. Only one record is allowed in a record
search index definition. To create a record search index definition that includes
multiple records, create a view of multiple records and select the view here.

WHERE clause to   Enter a SQL WHERE clause that you want to use to fine tune the search result
append   data. For example, if you are indexing a table of all counties in all states in the
United State, but you want only counties in California in this particular index,
you could add a SQL WHERE clause of *STATE = 'CA'.*

Fields

How to zone the index   *Field zone.* Select to create one zone for each PeopleSoft field on the record.
Applications can specify that they want to access that particular zone in their
searches.

One zone. Select to put all of the data into one zone. With this option, the index
builds more quickly, but the application can't restrict searches to the portions of
the index that come from a particular field.

Click here for help with the Field Columns	Displays a page of help text.
Record and Field Name	After you select a value in the Record field, the record name and record fields appear in this grid.
Verity Field	Select to indicate that you want the field to be included in style.ufl and indexed as a Verity field. Verity fields are returned with search results and can be compared numerically. Generally, PeopleSoft fields that contain metadata about what is being indexed (such as ProductID) should be indexed as Verity fields.
Word Index	Select to indicate that you want the field to be included in the word index. Anything that is not included in the word index cannot be searched for as plain text, although it may still be returned in a Verity field if you have selected the Verify Field option. In general, PeopleSoft fields that contain a lot of descriptive text, such as description fields, should be included in the word index.

129

Has attachment	Select to indicate that the field contains binary large object (BLOB) data that will be detached and indexed along with the record. You should not select this option unless the attachment is stored as a BLOB.
	Select this option if the selected field contains the URL to an attachment. In this way, this option enables you to index attachments that are referenced by URL and include their stored data in the Verity collection. Refer to the PeopleCode Developer's Guide for a description of file attachments.
	The indexer downloads the attachment and indexes it as part of the Verity search collection document. This option is not available for selection for numeric fields, as numeric fields cannot contain URLs. It is available for selection only if the selected field contains character data.
	You must use this option with a record that was designed for use with this feature. In the record, each row has a text field that contains a URI or an empty string.
	The text must be a valid File Transfer Protocol (FTP) URI, including the login and password string, that uses the following format:

- ftp://user:pass@host/path/to/filename.doc.

- A valid record URI of the form record://RECORDNAME/path/to/file.doc.

- A string of the form `<urlid name="A_URLID"/>/path/to/file.doc`.

The third form references an entry in the URL table defined on the URL Maintenance page. If the URL ID that is named in the name attribute is valid, the entire URI is rewritten with the part in brackets replaced by the actual URI.

For example, if A_URLID is equal to ftp://anonymous:user@resumes.peoplesoft.com, the entire string in the previous example becomes ftp://anonymous:user@resumes.peoplesoft.com/path/to/file.doc and is treated like any other FTP URI.

Rows of data with empty strings in the URI field are ignored with no error.

If the string is in one of these three valid URI formats and a document can be retrieved at the URI, the document is indexed with the same key as the rest of the row of data and is searchable.

Append to Verity Command Line	This control is intended for PeopleSoft internal use only, but can be used by users with adequate Verity knowledge.

Editing Keys

Access the Edit Key page (click the Edit Key link on the Record Indexes page).

Edit Key page

Key returned in search results	Enter information to change the results that are returned by the Key returned in search results functionality. You can enter the following values to derive results:
	<pairs/>. Inserts a string of NAME=VALUE;. One such pair is returned for each key of the record.
	<row/>. Inserts the record keys in a SQL-like syntax.
	<field fieldname='MYFIELD'/>. Inserts the value of MYFIELD, if it exists in the record.
	<sql stmt='SQL STATEMENT'/>. Inserts the value that is returned by the SQL statement. The system accepts only the first row that is returned. PeopleSoft does not support SQL statements returning more than one column.
Test VdkVgwKey (save first)	Click to test the search results returned by the values you entered in the Key returned in search results field.
	Before clicking this button be sure to have a record selected in the Record field on the Record Indexes page.

Editing a File System Search Index Definition

Access the Filesystem Index page (click the Edit Properties link for a file system spider index on the Administer Indexes page).

Filesystem Index page

Build Index	Click to run the Build Search Indexes process (EO_PE_IBLDRB) for the selected search index.
System Index	This is a delivered index and is not available for editing.
Index Location	Displays the current location of the index.
	By default, the files for an index are located in <PS_CFG_HOME>/data/search/<INDEXNAME>/<db name>/</language cd>. However, you can change this location by specifying the search index location property in the application server and Process Scheduler configuration files.
	See *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration,* "Building and Maintaining Search Indexes," Specifying the Index Location
Start Location	Specify the network file system path that contains the documents to index. Ensure that the local application server has the proper access to the file systems that you specify.
	For Microsoft Windows, this means the drive mappings must be set up from the application server. For UNIX, this means the correct network file system (NFS) mappings must be set on the application server.
Remap to URL	Enter the HTTP alias that you want to assign to the file system crawl results.
Append to Verity Command Line	This control is intended for PeopleSoft internal use only, but can be used by users with adequate Verity knowledge.

Editing an HTTP Spider Search Index Definition

Access the HTTP Index page (click the Edit Properties link for an HTTP spider index on the Administer Indexes page).

HTTP Index page

Build Index	Click to run the Build Search Indexes process (EO_PE_IBLDRB) for the selected search index.
System Index	When selected, indicates that this is a delivered index and is not available for editing.
Index Location	Displays the current location of the index.
	By default, the files for an index are located in `<PS_CFG_HOME>/data/search/<INDEXNAME>/<db name>/</language cd>`. However, you can change this location by specifying the search index location property in the application server and Process Scheduler configuration files.
	See *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration,* "Building and Maintaining Search Indexes," Specifying the Index Location

Start Location	Enter the URL to content you want to include in the index. You can include one URL per search index definition. URLs should contain only the alphanumeric characters as specified in RFC 1738. Any special character must be encoded. For example, encode a space character as %20, and encode a < as %3c. Additional examples are available.
	See RFC 1738
Stay in Domain	Select to limit indexing to a single domain. For example, suppose that you are indexing `http://www.peoplesoft.com`. If you have selected this option and a link points to a site outside the PeopleSoft domain, the indexing ignores the link.
Stay in Host	Select to further limit indexing to within a single server. If you select this option, the index contains references to content only on the current web server or host. Links to content on other web servers within the domain are ignored. For example, if you are indexing `http://www.peoplesoft.com` and you select this option, the index will include documents on `http://www.peoplesoft.com`, but not on `http://www1.peoplesoft.com`.
Link Depth	Set the level of detail to which you want to index a certain site. If you enter *1,* the indexing starts at the homepage, follows each link on that page, indexes all of the data on the target pages, and then stops. If you enter *2,* the indexing follows the links on the target pages and indexes one more level into the website.
	As you increase the number, the number of links that the indexing follows increases geometrically. Do not set this value too high, as it can impact performance negatively. You should not need to set this value higher than *10.*
Proxy Host and **Proxy Port**	Enter a host and port for the indexing to use. Enter the same settings that you would use in your web browser if you need a proxy to access the internet.
Append to Verity Command Line	This control is intended for PeopleSoft internal use only, but can be used by users with adequate Verity knowledge.

Defining What to Include in File System and HTTP Search Indexes

Access the What To Index page (select the What To Index tab).

What To Index page

Mime Types (Multipurpose Internet Mail Extension types)

Index all Mime-types   Select to index all MIME types on a website.

Index only these Mime-types   Select to index only certain MIME types. Specify the MIME types to include in the MIME/Types Allowed list box. Use a space to separate multiple MIME types.

Exclude these Mime-types   Select to exclude a set of MIME types. Specify the MIME types to exclude in the MIME/Types Allowed list box. Use a space to separate multiple MIME types.

File Names

Index all filenames   Select to index all file names.

Index only these filenames   Select to index only certain file types. Specify the file types to include in the Pathname Globs List list box. Use a space to separate multiple file types.

Exclude these filenames   Select to exclude certain file types, such as temporary files. Specify the file types to exclude in the Pathname Globs List list box. Use a space to separate multiple file types.

Pathname Globs List	Specify the file types you have chosen to include or exclude. You can use wildcard characters (*) to denote a string and "?" to denote a single character. For example, the string *.doc 19??.excel* means select all files that end with the *.doc* suffix and Microsoft Excel files that start with *19,* followed by 2 characters.

Defining Search Index Security

Access the Security page (select the Security tab).

Security page

Access Type	*Public.* Select to indicate that you want the search index to be searchable by all users.
	Roles. Select to indicate that you want the search index to be searchable only by the roles you define in the Role Name field. The search index will be included in a user's PeopleSoft Enterprise Portal search only if the user is a member of at least one role specified in Role Name.

Defining Search Index Filters

Access the Filters page (select the Filters tab).

Filters page

App Class Type (application class type)	Select the application class type you want to use as a filter for the search index. Available values include:
	Index Builder Callout. The application class used by the index builder to extend the processing of the creation of the handled index. At build time, the index builder will attempt to call out to the specified application class to perform any custom processing during the creation of the search collection.
	Search Query Filter. The application class used to process and/or filter search results returned from this search collection. The search query filters can be used to post-process raw Verity search results, as well as apply security and prevent certain search results from being returned to certain users.
Package Name	Enter the package name you want to use.
Package Path	Enter the path to the package you want to use.
Application Class Name	Enter the application class name you want to use.
CallOut Type	Lists the SQL object used to select the URLs to be indexed. Enables indexing of the actual website, not just the metadata that lists the website's URL.
	• *Content.* Selects unique content IDs.
	• *Folder.* Selects the content ID/folder ID.
	• *Portal.* Selects the content ID/folder ID/portal name.
Selection SQL	Corresponds to Selection SQL The types are predefined to uniquely select the content rows that are to be indexed.

Chapter 13

Defining Search Index Groups

This section provides an overview of search index groups and discusses how to use the Define Index Groups component (EO_PE_SIDX_GROUPS) to define a search index group.

Understanding Search Index Groups

A search index group is made up of individual search indexes. PeopleCode developers can reference search index group names as part of the search logic. Search index groups are also used to configure scoped search.

Scoped Search

Scoped search enables users to search within specific portal features, such as Action Items, Calendar, Content Manager, Discussions, Resource Finder, and Workspaces.

Scoped search is available by default in the Home page header. A user can select only one scope at a time.
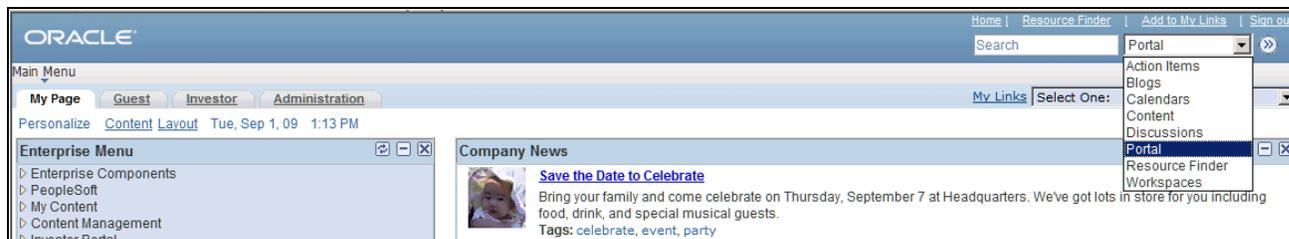
Example of a Portal header showing search with a scope dropdown

The following index groups are part of the delivered scope search:

Scope Name	Index Group Name	Description
Action Items	EPPAI_SEARCH	Action Items Search
Blogs	EPPBL_SEARCH	Blog Search
Calendars	EPPCA_SEARCH	Calendar Events
Content	EPPCM_SEARCH	Content Management Hierarchy Search
Discussions	EPPDF_SEARCH	Discussion Forum Posts Search

Scope Name	Index Group Name	Description
Portal	PAPP_PORTAL_SEARCH	Portal Registry and Content
Resource Finder	EPPCW_RF_SEARCH	Collaborative Workspaces Resource Finder Search
Workspaces	EPPCW_SEARCH	Collaborative Workspaces Search

The default search scope is Portal, which means a search is performed on the entire portal, based on the PAPP_PORTAL_SEARCH index group. Portal search scope only searches the Portal registry and published content, documents, and HTML. It does not search within other search scopes. As Portal administrator you can extend the Portal scope by adding indexes to the PAPP_PORTAL_SEARCH index group. For instance, you can set up the Portal search scope to search all portal content by adding all the indexes to the PAPP_PORTAL_SEARCH index group, or you can create a new index group to search all portal content. You can also set a different index group as the default scope.

Defining Search Index Groups

Pages Used to Define Search Index Groups

Page Name	Definition Name	Navigation	Usage
Define Index Group	EO_PE_SIDX_GROUPS	Portal Administration, Search, Define Index Groups	Create search index groups, which are made up of individual search indexes.
Search Tester	EO_PE_SIDX_GTST	Portal Administration, Search, Define Index Groups, Search Tester	Test the functionality of a search index group, and ensure that the indexes are returning results and that the proper filters are being used. Be sure to build your search indexes before using this page.

Defining a Search Index Group

Access the Define Index Group page (Portal Administration, Search, Define Index Groups).

Define Index Group page

Index Group Name	The system displays the name of the index group.
Description	Enter a description of the contents of the search indexes in the search index group.
Max Search Results (maximum search results)	Enter the maximum number of search results you want returned for the search index group. Leaving this field clear translates to a maximum search result number of 0. To indicate that you do not want to limit the number of search results, select the Unlimited Results option.

Unlimited Results	Select if you do not want to limit the number of search results returned for the search index group.
Use Thesaurus	Select if you want to use thesaurus capabilities to derive search results for the search index group.

Note. To use this option you must first create your own Verity thesaurus file.

See *Enterprise PeopleTools 8.50 PeopleBook: Verity Locale Configuration Guide v 6.1 for PeopleSoft,* "Creating a Custom Thesaurus"

Search Scope

Add to Search Scope	Select this checkbox to add this index group as a search scope.
	Clear this checkbox to remove this index group from search scopes.
	This checkbox is disabled for Portal scope. Portal scope cannot be removed from the list of scopes but the scope name can be changed.
	If a scope that has saved searches associated with it is deleted a warning message is displayed.
	If a user has a saved search that used a deleted scope, the Scope Name column on the Saved Searches page will say Scope Deleted. The user can choose to delete or edit the saved search entry.
Search Scope Name	Enter a descriptive name for the search scope.
	The Search Scope Name field is enabled and mandatory if the Add to Search Scope checkbox is selected.
Set as Default Scope	Select to set this index group as the default scope or deselect to remove this scope as default scope.
	The delivered default search scope is Portal.
	If Portal is the default scope this checkbox is disabled. Portal can be replaced as default only by making another scope the default.
	The current default scope name is displayed next to the Set as Default Scope checkbox.
	Only one scope can be configured as default scope. If a scope other than Portal is removed from default scope then the Portal scope automatically becomes the default scope.

Search Indexes

Index Name	Select a search index you want to include in the search index group.
Description	Enter a description of the search index as it is to be used with the search index group.

Override Default Results Link Select to indicate that you want to override the results link defined on the Record Indexes page. This option only applies to record-based indexes.

Search Query Filters

Package Name If you have entered filter data for the index definition, this value will be populated automatically upon saving this page. If you have not entered filter data for the index definition, you can enter the package name you want to use.

Package Path If you have entered filter data for the index definition, this value will be populated automatically upon saving this page. If you have not entered filter data for the index definition, you can enter the path to the package you want to use.

Application Class Name If you have entered filter data for the index definition, this value will be populated automatically upon saving this page. If you have not entered filter data for the index definition, you can enter the application class name you want to use.

Testing a Search Index Group

Access the Search Tester page (Portal Administration, Search, Define Index Groups, Search Tester).

Search Tester page

Index Group Name The system displays the name of the index group.

Description Enter a description of the contents of the search indexes in the search index group.

Max Search Results (maximum search results) Enter the maximum number of search results you want returned for the search index group. Leaving this field clear translates to a maximum search result number of 0. To indicate that you do not want to limit the number of search results, select the Unlimited Results option.

Unlimited Results Select if you do not want to limit the number of search results returned for the search index group.

Use Thesaurus	Select if you want to use thesaurus capabilities to derive search results for the search index group.

Note. To use this option you must first create your own Verity thesaurus file.

See *Enterprise PeopleTools 8.50 PeopleBook: Verity Locale Configuration Guide V5.0 for PeopleSoft,* "Creating a Custom Thesaurus"

Search Text	Enter the text for which you want to search in the search index group.
Search	Click to execute the search for the search text in the search index group.
Display All Result Attributes	Select to display all Verity search fields returned from the search, as opposed to only what the filter returned.

Chapter 14

Building Search Indexes

This chapter provides an overview of the Build Search Indexes Application Engine process (EO_PE_IBLDR), portal registry search indexes, and delivered portal search indexes. This chapter also discusses how to use the Build Search Indexes component (EO_PE_IBLDR_RUN) to run the Build Search Index process.

Understanding the Build Search Indexes Process

Use the Build Search Indexes Application Engine process (Portal Administration, Search, Build Search Indexes) (EO_PE_IBLDR) to build search indexes you have defined in the Administer Indexes component. PeopleSoft Enterprise Portal delivers run control IDs that you can use with the Build Search Indexes process that have been configured to enable you to conveniently build search indexes for the following portal areas:

• Action Items

• Blogs

• Calendar Events

• Collaborative Workspaces

• Content Management

• Discussion Forums

• Links Plugin

• Resource Finder

• Portal registry

• Sites

Action Items

To build a search index for the Action Items feature, select the *PAPP_ACTION_ITEMS* run control ID on the Build Search Indexes page.

The following delivered search index definitions will be used to build the search index:

Important! Do not delete or modify these indexes. They are delivered as system data, and cannot be easily restored if deleted.

- EPPAI_ACTION _ITEMS_DOC (record-based index).

  Contains document-type content with attachments from Action Items.

- EPPAI_ACTION_ITEMS_REM (record-based index).

  Contains remarks from Action Items.

- EPPAI_ACTION_ITEMS (record-based index).

  Contains content from Action Items.

Blogs

To build a search index for the Action Items feature, select the *PAPP_ACTION_ITEMS* run control ID on the Build Search Indexes page.

The following delivered search index definitions will be used to build the search index:

Important! Do not delete or modify these indexes. They are delivered as system data, and cannot be easily restored if deleted.

- EPPBL_BLOGPOST_DOC (record-based index).

  Contains blog post file attachments.

- EPPBL_BLOGS (record-based index).

  Contains blogs.

- EPPBL_BLOG_POST (record-based index).

  Contains blog posts.

Calendar Events

To build a search index for the Calendar Events feature, select the *PAPP_CALENDAR _EVENTS* run control ID on the Build Search Indexes page.

The following delivered search index definitions will be used to build the search index:

Important! Do not delete or modify these indexes. They are delivered as system data, and cannot be easily restored if deleted.

- EPPCA_EVENT_DOC (record-based index).

  Contains document-type content with attachments from Calendar Events.

- EPPCA_EVENT_HTML (record-based index).

  Contains text and HTML-type content from Calendar Events.

- EPPCA_EVENT_URL (record-based index).

  Contains Calendar Event website URLS.

- EPPCA_EVENTS (record-based index).

  Contains Calendar Events.

Collaborative Workspaces

To build a search index for the Collaborative Workspaces feature, select the *PAPP_COLLABORATIVE_WORKSPACES* run control ID on the Build Search Indexes page.

The following delivered search index definitions will be used to build the search index:

Important! Do not delete or modify these indexes. They are delivered as system data, and cannot be easily restored if deleted.

- EPPCW_ACTION_ITEMS (record-based index).

  Contains Workspace Action Items.

- EPPCW_ACTION_ITEM_DOC (record-based index).

  Contains Workspace Action Item file attachments.

- EPPCW_ACTION_ITEM_REM (record-based index).

  Contains remarks from Workspace Action Items.

- EPPCW_BLOGPOST_DOC (record-based index).

  Workspace Blogpost File Attachments

- EPPCW_BLOGs (record-based index).

  Workspace Blogpost File Attachments

- EPPCW_BLOGPOST_DOC (record-based index).

  Workspace Blog posts

- EPPCW_DISCUSSIONS (record-based index).

  Contains Workspace Discussion Forums.

- EPPCW_DISCUSSION_AI (record-based index).

  Contains Action Item discussions for Workspaces.

- EPPCW_DISCUSSION_CM (record-based index).

  Contains document-type content from Workspace discussions.

- EPPCW_DISCUSSION_DOC (record-based index).

  Contains file attachments from Workspace discussions.

- EPPCW_DISCUSSION_FORUM (record-based index).

  Contains content from Workspace Discussion forums.

- EPPCW_DOC (record-based index).

  Contains document-type content with attachments from Collaborative Workspaces.

- EPPCW_EVENTS (record-based index).

  Contains Workspace Calendar Events.

- EPPCW_EVENT_DOC (record-based index).

  Contains file attachment-type content for Calendar Event attachments.

- EPPCW_EVENT_HTML (record-based index).

  Contains text and HTML-type content from Collaborative Workspaces.

- EPPCW_EVENT_URL (record-based index).

  Contains Workspace Calendar Event website URLs.

- EPPCW_HTML (record-based index).

  Contains text and HTML-type content from Collaborative Workspaces.

- EPPCW_LINKS (record-based index).

  Contains Collaborative Workspace member role data, including which roles are currently associated with existing Collaborative Workspaces.

- EPPCW_MEMBERS (record-based index).

  Contains Collaborative Workspace member data.

- EPPCW_URL (HTTP spider index)

  Contains URL-type content from Collaborative Workspaces.

- EPPCW_WIKI (record-based index).

  Contains Wiki content.

- EPPCW_WORKSPACES (record-based index).

  Contains Workspace content.

Content Management

To build a search index for the Content Management feature, select the *PAPP_CONTENT_MANAGEMENT* run control ID on the Build Search Indexes page.

The following delivered search index definitions will be used to build the search index:

Important! Do not delete or modify these indexes. They are delivered as system data, and cannot be easily restored if deleted.

- EPPCM_CONTENT_CREF (record-based index)

  Contains Content Management menu items.

- EPPCM_CONTENT_DOC (record-based index).

  Contains document-type content with attachments from Managed Content, Categorized Content, and News Publications.

- EPPCM_CONTENT_DURL (record-based index).

  Contains Content Management file URLs from Managed Content, Categorized Content, and News Publications.

- EPPCM_CONTENT_HTML (record-based index).

  Contains text and HTML-type content from Managed Content, Categorized Content, and News Publications.

- EPPCM_CONTENT_IATT (record-based index).

  Contains Content Management image attachments from Managed Content, Categorized Content, and News Publications.

- EPPCM_CONTENT_IUPL (record-based index).

  Contains Content Management image uploads from Managed Content, Categorized Content, and News Publications.

- EPPCM_CONTENT_IURL (record-based index).

  Contains Content Management image URLs from Managed Content, Categorized Content, and News Publications.

- EPPCM_CONTENT_URL (HTTP spider index).

  Contains URL-type content from Managed Content, Categorized Content, and News Publications.

Discussions

To build a search index for the Discussions feature, select the *PAPP_DISCUSSION_FORUMS* run control ID on the Build Search Indexes page.

The following delivered search index definitions will be used to build the search index:

Important! Do not delete or modify these indexes. They are delivered as system data, and cannot be easily restored if deleted.

- EPPDF_DISCUSSION_AI (record-based index).

  Contains discussion data tied to Action Items.

- EPPDF_DISCUSSION_CM (record-based index).

  Contains discussion data tied to Content Management.

- EPPDF_DISCUSSION_DOC (record-based index).

  Contains discussion forum file attachments.

- EPPDF_DISCUSSIONS (record-based index).

   Contains discussion data entered by way of the Discussion Forums homepage pagelet, which are not tied to existing Collaborative Workspaces.

Links Plugin

To build a search index for the PSFT-Links tool of the Wiki Content module of a collaborative workspace, select the *PAPP_LINKS_PLUGIN* run control ID on the Build Search Indexes page.

The following delivered search index definitions will be used to build the search index:

Important! Do not delete or modify these indexes. They are delivered as system data, and cannot be easily restored if deleted.

- EPPBL_BLOGPOST_DOC (record-based index).

   Contains blog post file attachments.

- EPPBL_BLOG_POST (record-based index).

   Contains blog posts.

- EPPCW_BLOGPOST_DOC (record-based index).

   Contains workspace blog post file attachments.

- EPPCW_BLOG_POST (record-based index).

   Contains workspace blog posts.

- EPPCW_DISCUSSIONS (record-based index).

   Contains workspace discussion forums.

- EPPCW_WIKI (record-based index).

   Index to search into wiki content.

- EPPCW_WORKSPACES (record-based index).

   Contains workspaces.

- EPPDF_DISCUSSIONS (record-based index).

   Contains discussion forums posts.

Resource Finder

To build a search index for the Resource Finder feature, select the *PAPP_RESOURCE_FINDER* run control ID on the Build Search Indexes page.

The CPX_EPX_SRCHDB search index definition will be used to build the search index.

Important! Do not delete or modify this index. It is delivered as system data, and cannot be easily restored if deleted.

Portal Registry

To build a search index for all content references in the main portal registry, select the *PAPP_PORTAL_REGISTRY* run control ID on the Build Search Indexes page and select the Build Portal Search Index option.

Important! Do not delete or modify this index. It is delivered as system data, and cannot be easily restored if deleted.

---

* EPPCM_DOC (record-based index).

    Contains Content Management file attachments that are approved and publishable.

* EPPCM_HTML (record-based index).

    Contains Content Management HTML and text items that are approved and publishable.

* EPPCM_URL (record-based index).

    Contains Content Management web site URLs that are approved and publishable.

Sites

To build a search index for all search indexes for the main portal registry and also for all sites created with Site Wizard, select the *PAPP_SITES* run control ID on the Build Search Indexes page and select the Build All Site Search Indexes option.

Building Search Indexes

This section discusses building search indexes.

Pages Used To Build Search Indexes

Page Name	*Definition Name*	*Navigation*	*Usage*
Build Search Indexes	EO_PE_IBLDR_RUN	Portal Administration, Search, Build Search Indexes	Set up and run the Build Search Index process.

Running the Build Search Index Process

Access the Build Search Indexes page (Portal Administration, Search, Build Search Indexes).

Build Search Indexes

List the search indexes to be built. Select 'Build Portal Search Index' to build the index collection for the current site. Select 'Build All Site Search Indexes' to build the indexes for all Site Management created sites.

Run Control ID: PAPP_PORTAL_REGISTRY   Report Manager   Process Monitor   [Run]

Site Index Options	Portal Index Options
☐ Build All Site Search Indexes	☑ Build Portal Search Index (EMPLOYEE)

Search Indexes   Customize | Find | 🔳 | 🔲 First 🔼 1-3 of 3 🔽 Last

*Index Name	Gateway Type	Description	*Language	Include In Log		
EPPCM_DOC 🔍	Record-based Index	CM File Attachments - approved and publishable	English ▾	☑	➕	➖
EPPCM_HTML 🔍	Record-based Index	CM HTML/Text - approved and publishable	English ▾	☑	➕	➖
EPPCM_URL 🔍	HTTP Spider Index	CM Web Site URLs - approved and publishable	English ▾	☑	➕	➖

☐ Create Log File

Build Search Indexes page

Run	Click to access the Process Scheduler Request page, where you can run the Build Search Indexes process using the settings you have defined on this page.

Site Index Options

Build All Site Search Indexes	Select to build a search index for all search indexes for the current portal registry and also for all sites created with Site Wizard. See Chapter 14, "Building Search Indexes," Understanding the Build Search Indexes Process, page 145.

Portal Index Options

Build Portal Search Index	Select to build a search index for all content references in the current portal registry. See Chapter 14, "Building Search Indexes," Understanding the Build Search Indexes Process, page 145.
Index Name	Select a search index that you want the process to build.
Gateway Type	Describes the type of index.
Description	Displays a brief summary of the index contents.
Language	Select the language code for which you want to build the search index. This field value defaults to the database's base language.

Include In Log   This option becomes available for selection if you have selected the Create Log File option. Select to include the selected search index in the log file.

Create Log File   Select to create a log file for the process run. Select the Include In Log option for the search indexes you want to be included in the log.

The log is stored in the <PS_CFG_HOME>/appserv/prcs/<PRCS_SERVER_NAME>/files directory and contains debugging information about the various stages of the index processing and collection build. Any output from any callouts will also be in this log.

Chapter 15

Administering Saved Searches

This chapter discusses how to schedule Saved Search Email Notifications.

Scheduling Saved Search Email Notifications

When new portal content is added or existing portal content is modified, the date is stored in the search index. The search notification service considers only those results that correspond to the index group PAPP_PORTAL_SEARCH.

When you run the Search Notification process, the process looks at the date on which the portal content was added or modified. If the current date is greater than either the portal content's original posting date or its modification date, the process sends email notifications to all subscribed users who have Saved Searches that match the portal content.

Prior to sending the emails, the Search Notification process stores the process run date in a table. When the Search Notification process is run in the future, the process checks this date and selects only portal content that has been added or modified since that date. Portal administrators should run the Search Notification process on a regular schedule.

Note. You must create index groups for all structured and unstructured portal content prior to running the Search Notification process.

Users will receive an email identifying new or modified content for the Saved Searches for which they have subscribed to search notification. The email is presented in simple text form with an overview of the results. An HTML attachment is provided that contains more details about the results. Each result contains a summary and a URL link. Users can click a link to view the new or modified content in the portal.

Note. If the PeopleSoft Enterprise Portal is configured for automatic Guest signon, users must log in to the portal separately before clicking any of the links in the notification email.

An Unsubscribe link is provided in the email to allow users to easily remove themselves from their Saved Search email notification lists.

Page Used to Send Search Notifications

Page Name	Definition Name	Navigation	Usage
Run Search Notification	RUN_EO_PE_NOTIFY	Portal Administration, Search, Run Search Notification	Run the process to generate email messages to users who have subscribed to Saved Search notifications. These subscriptions are defined on the Saved Searches Detail page. **Note.** Saved search notifications are not supported for record-based indexes.

Scheduling Notifications

Access the Run Search Notification page (Portal Administration, Search, Run Search Notification).
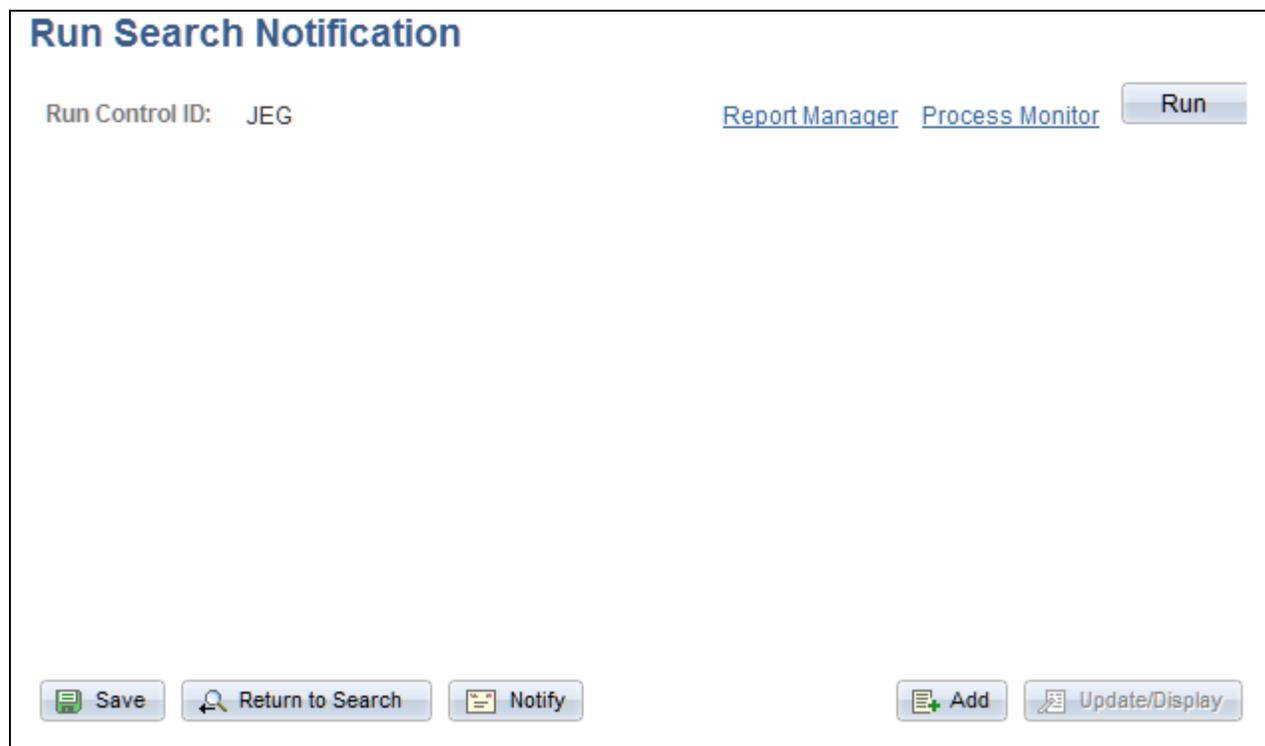
Run Search Notification page

Click Run to access the Process Scheduler page to schedule or run the *EO_PE_NOTIFY* process.

Part 4

Site Management

Chapter 16

Site Management Overview

This chapter provides an overview of PeopleSoft Enterprise Portal Site Management.

Understanding Site Management

Site Management facilitates the creation and management of multiple sites from within one installation of PeopleSoft Enterprise Portal. These sites can provide content to targeted audiences or focused content to the general PeopleSoft Enterprise Portal audience. Each site is managed separately and may have its own branding. For example, an enterprise can create a site for each division or department with unique branding themes, navigation, and content, and with their own site administrators and publishers.

The following graphic illustrates the Site Management process flow.
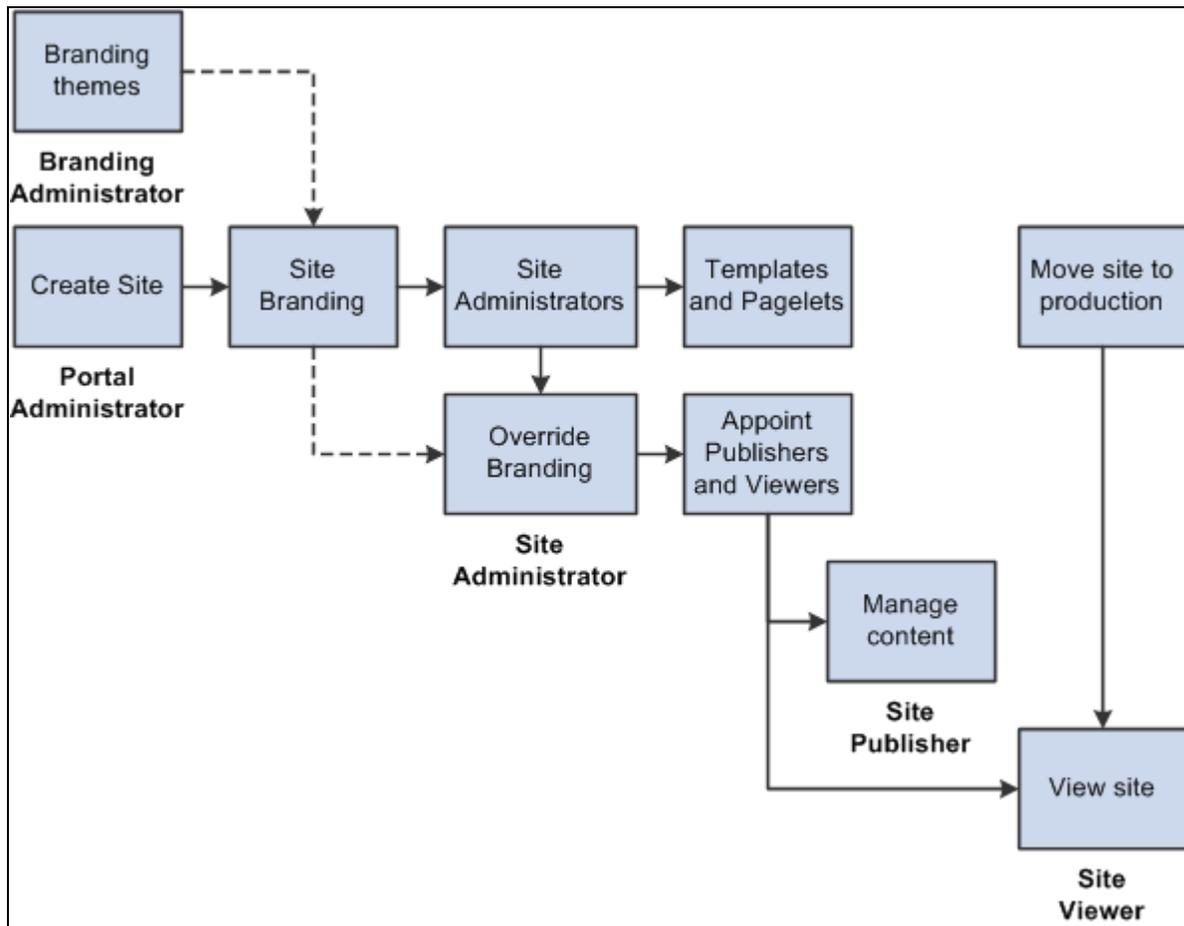
Site Management flow

The functions of Site Management can be performed by users or roles appointed by the portal administrator.

1. A branding administrator creates branding theme elements that can be used on sites.

2. A portal administrator creates a site, authorizes site branding, appoints site administrators, and selects templates and pagelets available to the site.

3. A site administrator can override branding themes (if authorized), appoint site publishers and viewers, set default security and templates, and configure the site's front page.

4. A site publisher can manage site navigation and content.

5. A site viewer can view the site.

Using Portal Features on Sites

This section describes which features of PeopleSoft Enterprise Portal are available for use on sites. We also indicate whether the features available on sites can be configured uniquely for that site, or must be shared across the entire PeopleSoft Enterprise Portal.

Feature	Site Specific Configuration?
Branding	Yes
Intelligent Context Manager: Content Ratings	Yes
Intelligent Context Manager: Related Contacts	Yes
Intelligent Context Manager: Related Discussions	Yes
Intelligent Context Manager: Related Information	Yes
Intelligent Context Manager: Related Links	Yes
Intelligent Context Manager: Related Resources	Yes
Discussion Forums	Yes
Email pagelet and Calendar Events pagelet	No
External News pagelets	No
Inquire Menu Item	Yes
Tasks pagelet	No
Internet pagelets (weather, stock, and so forth)	No
Language Selection pagelet	No
User Logon Statistics pagelet	No
Manage Navigation	Yes
Managed Content	Yes
My Links	Yes

Feature	Site Specific Configuration?
News Publications (and News Publication pagelets)	Yes, with appropriate security.
Pagelet Wizard	Yes—Pagelet definitions are not site specific, but pagelets can be registered to specific sites.
Portal Registry (Favorites, tabs, pagelets, content references, and so forth.)	Yes
Portal Options	No—Not delivered to sites by default.
Resource Finder	No
Saved Searches	No
Search Results	Yes—Results can either be local or include all sites in the portal.
Navigation Collections	Yes
Site Manager Center	Yes

Chapter 17

Navigating in PeopleSoft Enterprise Portal Site Management

This chapter discusses how to navigate in PeopleSoft Enterprise Portal Site Management.

Navigating in PeopleSoft Enterprise Portal Site Management

PeopleSoft Enterprise Portal Site Management provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note. In addition to the PeopleSoft Enterprise Portal Site Management custom navigation pages, the PeopleSoft system provides menu navigation and standard navigation pages.

Using the Site Manager Center

Access a site. Click the Site Manager Center link at the root level of the menu.

These options are also available from the Administration tab on the site's homepage.
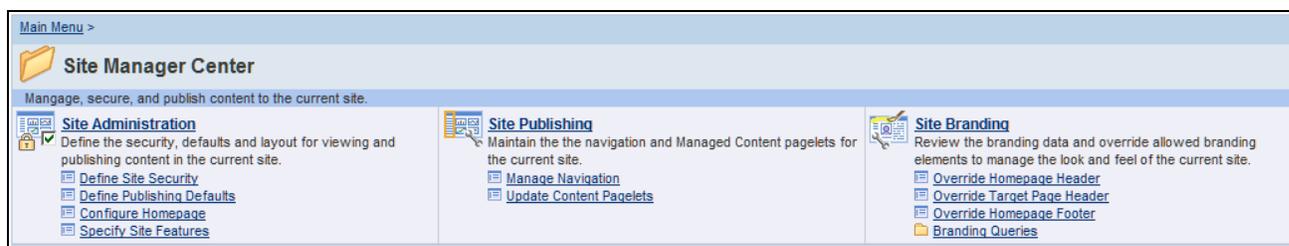
Site Manager Center page

Use the Site Manager Center accessed from within a site to manage the site's security, layout, publishing, and branding.

This table lists the custom navigation pages and how to use them to navigate in PeopleSoft Enterprise Portal Site Management:

Site Administration

This table lists the features that you can access from Site Administration:

Page Name	Usage
Define Site Security	Specify who is authorized to publish or view site content.
Define Publishing Defaults	Specify the publishing defaults that apply to each new element added to the site unless specifically overridden on that element.
Configure Homepage	Configure the layout and select the pagelets to be displayed on the site's default homepage.
Specify Site Features	Select the features that are accessible within the site.

Site Publishing

Maintain the navigation and Managed Content pagelets for the current site. This table lists the features that you can access from Site Publishing:

Manage Navigation	This utility is used to administer the menu folders and links for this site.
Update Content Pagelets	Edit the content ID associated with existing Managed Content pagelets.

Site Branding

Review branding data and override allowed branding elements to manage the look and feel of the current site. This table lists the features that you can access from Site Branding:

Override Homepage Header	Override branding values for site's homepage header.
Override Target Page Header	Override branding values for site's target page header.
Override Homepage Footer	Override branding values for site's homepage footer.
Branding Queries	Access queries that list the details for sites and role assignments, themes, and header and footer definitions.

Using the Site Publisher Center

Access a site. Click the Site Manager Center link at the root level of the menu.

These options are also available from the Administration tab on the site's homepage.

Main Menu >

Site Publisher Center

Links to features within the site through which content can be created and published.

Manage Navigation
Manage the navigational menu items for this site.

Navigation Collections
Create and Update Navigation Collections for this site.

Pagelet Wizard
Define Pagelet Wizard pagelets. Pagelet Wizard definitions are not site specific. The published pagelet is site specific.

Content Pagelets
Edit the Content ID associated with existing Managed Content Pagelets for this site.

Action Items
Access the Action Item Lists and Action Items for this site.

Community Calendars
Access the community calendars for this site.

Discussion Forums
Access the discussion forums where you are authorized.

Create Discussion Forum
Create a new discussion forum.

Polls
Access the poll definitions where you are authorized.

Managed Content
Access the Managed Content items for this site.

Categorized Content
Access the Categorized Content items for this site.

Site Publisher Center page

Chapter 18

Managing Sites

This chapter provides an overview of PeopleSoft Enterprise Portal Site Management and discusses how to create new sites using the Site Wizard.

Understanding Site Creation and Management

The Site Manager Center page consolidates access to the activities required to create and manage sites. Enterprises that require multiple sites within their main portal can use the Site Management tools to quickly create and configure subsites to their portal. These sites inherit characteristics from the main portal, but maintain their own navigation. Sites can also carry branding specifically designed to meet the site's requirements.

Site Management enables a portal administrator to create new sites that inherit infrastructure properties of the sponsor portal. The portal administrator initially authorizes site branding, page templates, and pagelets, and assigns site administrators. Subsequent site management can be delegated to site administrators who specify site specific branding values, set publishing defaults, and lay out the sites' homepage. The site administrator also manages security for site content publishers and site viewers.

See Enterprise Portal 9.1 Installation Guide, "Appendix, J: Creating Content Provider Navigation Collections in Enterprise Portal in a Created Site" for guidelines on accessing content provider navigation pages from sites created in the Enterprise Portal.

Create and maintain a site by:

1. Creating a new site definition.

   A portal administrator normally defines portal sites.

   or:

2. Updating an existing site definition.

   A portal administrator normally manages portal sites.

3. Reviewing available branding themes.

   Note. Depending on the user's security, a user can have either add/update or read-only access to the branding feature.

   A branding administrator normally defines branding themes.

Administer a site by:

1. Setting site security.

2. Setting publishing defaults.

3. Configuring the site homepage.

4. Configuring site specific branding values (Manage Site Branding).

A site administrator normally administers site navigation.

Publish content to a site by:

1. Managing site navigation.

2. Updating homepage content.

If you choose a site administration or management task within the main portal, it takes effect for the portal. To perform administration or to manage navigation for a site, you must first access the site. To do this, select Go to Site on the Manage Sites page and then navigate to the task you want to perform. Within a site, only site administration, site navigation management, and branding management tasks will be available.

A site administrator normally administers site branding.

Control site branding by:

•   Overriding homepage headers and footers.

•   Override target page headers and footers.

•   Run branding queries.

Common Elements Used in Site Management

Branding theme	A branding theme consists of predefined headers and a style sheet, and an optional footer and restyled menu. Each site can optionally use the default portal theme or a site-specific theme.
	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "PeopleSoft Enterprise Portal Branding Overview."
Portal	As used in the context of site management, the portal is the default portal, as specified on the Portal Definitions page (PeopleTools, Portal, Portal Definitions). The portal is sometimes called the sponsor portal, because other sites can inherit elements of the sponsor portal.
	Create new sites using the Site Wizard only from the portal. The delivered default portal is the EMPLOYEE portal.
PS_SITETEMPLATE	PS_SITETEMPLATE is a defined collection of templates, pagelets, and menu items on which all new sites are based. These values are stored in a portal registry of the same name, and can be accessed in the Structure and Content component using the corresponding portal URL address.

Site	A site is created using the Site Wizard. Each site is defined in relation to the defaults and themes of its sponsor portal. Each site could be considered a separate portal, but instead PeopleSoft distinguishes between a portal and its sites.
Site administrator	A site administrator is the person authorized by a portal administrator to manage security, publishing defaults, branding overrides, and homepage layout for a site.
	The site administrator can be assigned by role or by user ID.
Site management	Site management is the set of tasks grouped together in PeopleSoft Enterprise Portal to create and manage sites.
Site publisher	A site publisher is a person authorized by a site administrator to manage site navigation and update homepage content. A site publisher can be assigned by role or by user ID.
	A site publisher is not a site viewer unless specifically authorized as a viewer.
Site viewer	A site viewer is a person authorized by a site administrator to view site content.
	A site viewer can be assigned by role or by user ID.

Creating Sites

This section discusses how to:

- Define a site.

- Authorize site branding.

- Use overrides with default portal assignments.

- Use site-specific themes.

- Appoint a site administrator.

- Specify site templates.

- Specify site pagelets.

Pages Used to Create Sites

Page Name	Definition Name	Navigation	Usage
Site Wizard - Site Definition	EPPSM_SITE_DEFN	• Portal Administration, Site Management, Create New Sites • Click the icon for step 1 while you are on any page in the Site Wizard. • Portal Administration, Site Management, Maintain Existing Sites. Click the Add New Site button. Portal Administration, Site Management, Maintain Existing Sites. Click the Edit button.	Define portal sites.
Site Wizard - Authorize Site Branding	EPPSM_SITE_BRNDING	• Click Next on the Site Wizard - Site Definition page. • Click the icon for step 2 while you are on any page in the Site Wizard.	Set branding options. **Note.** Overridable elements and branding themes must be defined in the portal before being used on a site.
Select Branding Overrides	EPPSM_ELT_ASSIGN	Click the Select Overridable Elements button on the Site Wizard - Authorize Site Branding page.	Choose to allow overrides of selected elements of the theme assigned by the main portal. This can vary by user if role-based theme assignments have been specified.
Select Branding Theme and Overrides	EPPSM_THM_ASSIGN	Click the Select Theme and Overrides button on the Site Wizard - Authorize Site Branding page.	Authorize overrides of selected branding elements of the specified theme.
Site Wizard - Appoint Site Administrator	EPPSM_SITE_ADMIN	• Click the Next button on the Site Wizard - Authorize Site Branding page. • Click the icon for step 3 while you are on any page in the Site Wizard.	Specify the users or roles authorized to administer this site.

Page Name	Definition Name	Navigation	Usage
Site Wizard - Select Site Features	EPPSM_SITE_FEATURE	• Click the Next button on the Site Wizard - Appoint Site Administrator page. • Click the icon for step 4 while you are on any page in the Site Wizard.	Specify the features you want to enable on the site.
Site Wizard - Specify Site Templates	EPPSM_SITE_TEMPLTS	• Click the Next button on the Site Wizard - Appoint Site Administrator page. • Click the icon for step 5 while you are on any page in the Site Wizard.	Specify the templates available to site publishers when adding links to the site menu navigation.
Site Wizard - Specify Site Pagelets	EPPSM_SITE_PAGELTS	• Click the Next button on the Site Wizard - Specify Site Templates page. • Click the icon for step 6 while you are on any page in the Site Wizard.	Specify which pagelets will be available to site administrators when configuring the site homepage.

Defining a Site

Access the Site Wizard - Site Definition page (Portal Administration, Site Management, Create New Sites).

Site Wizard - Site Definition page

Site ID	Specify a site ID to identify this site. The site ID cannot contain spaces.
	The site ID is used as the identifier for the portal registry created to support this site.
	The Site ID field value appears in the list of sites you can select from on the Manage Sites page.
Site Label	Enter the label you want to use for the site. This site label appears in email alerts for the site.
Long Description	Enter a description of the site.
	The long description appears as the link hover text for this site in the sponsor portal's menu navigation.
	The Long Description field value appears in the list of sites you can select on the Manage Sites page.
Default Template	Select a default template for site content from the drop-down list box.
	The default template is used for all content pages within the site unless overrides are authorized by the site administrator in the Define Publishing Defaults component. The templates available in the drop-down list box are those defined in PS_SITETEMPLATE.

Label	Specify a label that will appear in the sponsor portal's navigation.
Navigation Folder	Select the navigation folder in which you want a link to this site to appear on users' menus.
	This link definition is optional. The link can be created later using the Managing Navigation component within the portal to add a link with the type *Portal Site*.
	See Chapter 20, "Publishing to a Site," Managing Site Navigation, page 193.
	Folders available in the drop-down list box are those available in the sponsor portal.
	Note. If you choose to select a navigation folder for this site, the link may not appear in the portal menu until the menu is refreshed.
Create Site	After defining the new site, click to initiate the system processing for site creation. This process can take several minutes; do not interrupt it.
	A message appears to indicate successful creation of the new site and to prompt you to continue to the next step.

Authorizing Site Branding

Access the Site Wizard - Authorize Site Branding page (click Next on the Site Wizard - Site Definition page).

Site Wizard - Authorize Site Branding page

Note. Overridable elements and branding themes must be defined in the portal before being used on a site.

Use Default Portal Assignments	Select for this site to display the same theme as the default (sponsor) portal. Themes assigned can vary depending on user roles.
	Using the default portal assignments applies the role-based branding rules or portal branding defaults defined for the default portal. If you select the default portal theme after previously selecting a site-specific theme, data for site-specific branding is deleted.
Select Overridable Elements	Click to access the Select Branding Overrides page, where you can enable those elements that can be configured by the site administrator with site specific values. Overridable elements are optional. A new site can inherit the portal's branding theme without any changes.
	Because you will not know what theme will apply, the list includes all elements that have been specified as overridable on the system elements page in the Branding feature. Be aware that you do not know which elements will ultimately be active in your user's displayed theme. The site may have overriding branding element values that never appear.
Use Site Specific Theme	Select to enable selection of a branding theme specifically for this site. All users will see the same branding theme.
	If you select a site-specific theme after previously selecting Use Default Portal Assignments, data for the inherited theme overrides is deleted.
Select Theme and Overridables	Click to access the Select Branding Theme and Overrides page, where you can select a branding theme for this site, and to specify which elements used in that theme, if any, can be overridden by the site administrator.
	Note. Branding themes cannot be created from the Authorize Site Branding page. Only existing branding themes defined in the default portal are available for use on sites.

Using Overrides with Default Portal Assignments

Access the Select Branding Overrides page (click Select Overridable Elements on the Ste Wizard – Authorize Site Branding page).

Select Branding Overrides

▼ Instructions

First select an Override Section. Then check Select for the Elements that the Site Manager is allowed to override with their own values.

The Add button allows creation of newly dated versions to support the staging of future changes. Use the View All link to review all existing versions. Use Correct History to edit the current or past versions.

Site ID: PBDEMO

Branding Overrides   Main Content   w All First ◄ 1 of 1 ► Last

Effective Date: 05/05/2009 📅   Add   Delete

Override Section: Homepage Header   ▼

Overridable Elements   Customize | Find | View All | 🗗 | 🎛 | First ◄ 1-10 of 46 ► Last

Select	Element ID	Description
☐	1	My Links %1
☐	2	Search Options %2
☐	3	Homepage Help Display %3
☐	4	Personalization %4
☐	5	Tab Display %5
☐	6	Header Bar One %6
☐	7	Header Bar Two %7
☐	8	Header Bar Three %8
☐	9	Header Bar Four %9
☐	10	Header Bar Five %10

Return to Authorize Site Branding

Select Branding Overrides page

Before specifying site branding, you can examine the existing theme, header, and footer definitions by accessing the Site Manager Center page and navigating to Site Branding, Branding Queries. These queries enable you to see which theme each portal uses and therefore, what the site will inherit.

Effective Date   Specify the effective date for this site specific theme.

Override Section	Select from the drop-down list the section of the default theme for which you will select elements that can be overridden by the site administrator.

The override elements are grouped in three sections. Select from:

Homepage Footer.

Homepage Header.

Target Page Header.

Note that authorizing overrides does not specify or limit the resulting override; it merely authorizes the site administrator to override the selected element.

Overridable Elements

Use the Overridable Elements scroll area to specify if a site administrator can override each overridable element. The overridable elements available for selection are those elements defined as "overridable" on the System Elements page.

Using Site-Specific Themes

Access the Select Branding Themes and Overrides page (Portal Administration, Site Management, Create New Sites, Site Definition, Authorize Site Branding, Select Theme and Overridables).

Select Branding Theme and Overrides

▼ Instructions

Start by assigning a Branding Theme ID to the Site. Next select an Override Section. Then check Select for the Elements that the Site Manager is allowed to override with their own values.

The Add button allows creation of newly dated versions to support the staging of future changes. Use the View All link to review all existing versions. Use Correct History to edit the current or past versions.

Site ID: PBDEMO

Branding Theme   Find | View All   First ◄ 1 of 1 ► Last

*Effective Date: 05/05/2009 📅   Add   Delete

*Description: PeopleBooks Branding

*Theme ID: PAPPBR_THEME_CW_SWAN 🔍   CW Theme - Swan Style Details

Override Section: Homepage Header ▼

Overridable Elements   Customize | Find | View All | ⬈ | ▦   First ◄ 1-10 of 10 ► Last

Select	Element ID	Description
☐	1	My Links %1
☐	2	Search Options %2
☐	4	Personalization %4
☐	6	Header Bar One %6
☐	7	Header Bar Two %7
☐	8	Header Bar Three %8
☐	31	Custom Image %31
☐	41	Custom Image URL %41
☐	42	Custom Image URL %42
☐	51	Custom HTML %51

Select Branding Theme and Overrides page

Effective Date   Specify the effective date for this site specific theme.

Description   Specify a description for this theme as used on this site.

Theme ID   Specify the theme ID of a theme to apply to this site. The theme must already exist, with an appropriate effective date, in the main portal.

Details	Click to access the Assemble Branding Theme page, where you can view details about the selected theme.
	You can drill down to details about each theme element. Depending on your permissions, you can view, add, or edit the elements. You can also preview how the element will appear on the site.
	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Configuring and Assembling Branding Themes," Configuring Headers and Footers.
Override Section	Select the section of the default theme for which you will select elements that can be overridden by the site manager.
	The override elements are grouped in three sections. Select from:
	Homepage Footer.
	Homepage Header.
	Target Page Header.
	Note that authorizing overrides does not specify or limit the resulting override, but only authorizes the site administrator to override the selected element.

Overridable Elements

This scroll area displays once you have selected a theme ID.

Use the Overridable Elements scroll area to specify if a site administrator can override each overridable element.

The available overridable elements available for selection depend on the elements defined as overridable in the theme's header and footer definitions as of the effective date entered.

Appointing a Site Administrator

Access the Site Wizard - Appoint Site Administrator page (click the Next button on the Site Wizard - Authorize Site Branding page).
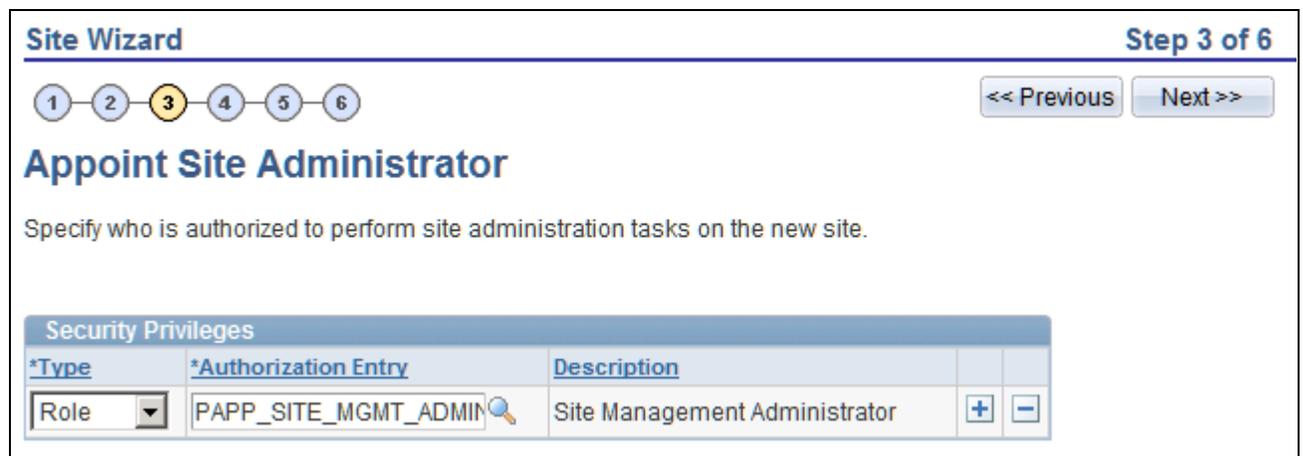
Site Wizard - Appoint Site Administrator page

Type   Select the type of site administrator you want to define for this entry: *User* or *Role.*

Authorization Entry   Based on the value you selected in the Type field, specify an authorized administrator by user ID or role.

Selecting Site Features

Access the Site Wizard - Select Site Features page (click the Next button on the Site Wizard - Appoint Site Administrator page).

Site Wizard - Select Site Features page

Use this page to enable features for your site. Features that are not selected still exist in the system, but will not be visible in the site unless they are selected. Data and content references are hidden from the portal navigation, but not deleted. The list of features comes from PS_SITETEMPLATE and includes content references, pagelets, and folders.

Specifying Site Templates

Access the Site Wizard - Specifying Site Templates page (click the Next button on the Site Wizard - Select Site Features page).

Site Wizard - Specify Site Templates

This initial set of templates is the complete list of available templates based on the PS_SITETEMPLATE registry. All templates are initially assigned to new sites. You can add or delete templates as required.

Note. Site publishers can only apply templates if the site administrator selects the Can select own template(s) option on the Set Publishing Defaults page accessed for the site. Otherwise, the default template specified during site definition always applies.

Template Name   This value is the content reference name assigned to the template in the
                              PS_SITETEMPLATE template folder.

When a site is created, all of the templates in PS_SITETEMPLATE are copied to the site. You can add site
templates from the templates in PS_SITETEMPLATE or from the default portal, but not from another site. If
you delete a template from the site, the template is deleted only from this site, not from
PS_SITETEMPLATE.

Specifying Site Pagelets

Access the Site Wizard - Specify Site Pagelets page (click the Next button on the Site Wizard - Specifying
Site Templates page).

Site Wizard - Specify Site Pagelets page

The initial list of pagelets is the complete list of pagelets based on the PS_SITETEMPLATE registry. All
pagelets are initially assigned to new sites. You can add or delete pagelets as required.

Note. The portal administrator can copy any pagelet over from the default portal into the site using the
portal's Structure and Content copy feature. Before doing so, the portal administrator must ensure that a
pagelet's functionality is suitable for use on the site, both technically and functionally.

Portal Pagelet Name   Specify the portal pagelets available from the sponsor site that will be available to users of this site.

This value is the content reference name assigned to the pagelet in the PS_SITETEMPLATE pagelet folder.

Making a portal pagelet available does not automatically make the pagelet appear on a user's homepage. Each user can configure the homepage by adding and arranging pagelets.

Managing Sites

This section discusses how to maintain sites using the Maintain Existing Sites component (EPPSM_SITE_WIZARD).

Page Used to Manage Sites

Page Name	Definition Name	Navigation	Usage
Manage Sites	EPPSM_MANAGE_SITES	Portal Administration, Site Management, Maintain Existing Sites	Access and manage portal sites.

Managing Existing Sites

Access the Manage Sites page (Portal Administration, Site Management, Maintain Existing Sites).

Manage Sites page

Edit   Click to access the Site Wizard - Site Definition page of the Site Wizard, where you can edits values entered when the site was created.

Delete   Click to delete the site. You will be prompted to confirm your deletion.

Go to Site   Click to access the site.

Add New Site   Click to access the Site Wizard - Site Definition page of the Site Wizard, where
                                              you can create a new site.

Chapter 19

Administering Sites

This chapter provides an overview of site administration and discusses how to:

- Define site security.

- Define site publication defaults.

- Configure the site homepage.

- Manage site branding.

- Run Branding queries.

Understanding Site Administration

Site administration activities can only be performed on a site created with the Site Wizard. The same functionality is not suitable for portal administration on the default portal.

An authorized site administrator performs these site administration tasks. A portal administrator assigns site administrators on the Site Wizard - Appoint Site Administrator page (step 3) when creating a site definition or maintaining existing site definitions.

Defining Site Security

This section discusses how to define site security.

Page Used to Define Site Security

Page Name	Definition Name	Navigation	Usage
Site Security	EPPSM_SITE_SECURTY	Access a site. Navigate to Portal Administration, Site Management, Define Site Security	Specify site publishers and viewers by role or user ID.

Defining Security for a Site

Access the Site Security page (Portal Administration, Site Management, Define Site Security).

Site Security page

An authorized site administrator sets site security by specifying which users and roles can publish to or view the site.

Publishers can publish content on the site, post links to the site's menu navigation, and update content for homepage pagelets.

Viewers can only view the site and its contents. A publisher cannot view the site unless specifically defined as a viewer.

Site administrators do not have rights to view or publish to the site by default. Include the site administrator by user ID or role in the list of authorized site publishers and viewers, as required.

When creating a site, a user is granted access to features and given permissions to publish for a that specific site. Because PeopleTools will automatically propagate those permissions to all sites (including Employee, Supplier, and so on), Enterprise Portal uses a filter to hide those content references from the navigation to ensure that users do not have access to the content management content references or folders in main sites. This keeps publishers from a specific site from having access to publishing options on sites where they may not have specific permissions. Those links do not show in the navigation or navigation collection. Only permissions on the native site apply..

Site Privilege	Select from:
	Publisher. A publisher can publish content on the site.
	Viewer. A viewer can view site content.
Type	Select the type of security authorization you want to define for this entry: *User* or *Role.*
Authorization Entry	Based on the value you selected in the Type field, specify a user ID or role.

Defining Site Publication Defaults

This section discusses how to define site publication defaults.

Pages Used to Define Site Publication Defaults

Page Name	*Definition Name*	*Navigation*	*Usage*
Set Publishing Defaults	EPPSM_SITE_DEFAULT	Access a site. Navigate to Portal Administration, Site Management, Define Publishing Defaults	Specify default content publication and expiration dates and set the publisher template option.

Defining Publishing Defaults for a Site

Access the Define Publishing Defaults page (Portal Administration, Site Management, Define Publishing Defaults).

Set Publishing Defaults

Specify the publishing defaults that apply to each new element added to the site unless specifically overridden on that element.

Site ID: DEMOSITE

Default Content Dates		Publisher Template Selection
Publication Date:	**Expiration Date:**	⦿ Can select own template(s)
05/05/2009	05/05/2010	○ Must use site default template

Set Publishing Defaults page

An authorized site administrator can set site defaults. The defaults set by the administrator affect the entries made on the Manage Navigation page accessed for the site.

Default Content Dates

Publication Date	Specify the default publication date for new links created using the Manage Navigation page for the site. An authorized publisher can override the default publication dates of individual content entries.
Expiration Date	Specify the default expiration date for new navigation links. The individual content expiration dates can be overridden by an authorized publisher.

Publisher Template Selection

Can select own template(s)	Select to enable an authorized site publisher to select from the templates supplied to the site during site creation.
Must use site default template	Select to require an authorized site publisher to use the default template specified on the Site Wizard - Site Definition page during step 1 of site creation.

Configuring the Site Homepage

This section discusses how to configure the site homepage.

Pages Used to Configure the Site Homepage

Page Name	Definition Name	Navigation	Usage
Configure Homepage - Tab Content	PORTAL_TAB_CON_ADM	• Access the site. Navigate to Portal Administration, Pagelets, Configure Homepage. • Access the site. PeopleTools, Portal, Structure and Content. Click the Portal Objects link. Click the Homepage link. Click the Tabs link. Click the Edit link for the My Page label. Click the Tab Content tab.	Specify the pagelets included in the homepage definition for this site.

Configuring a Site Homepage

Access the Configure Homepage Tab - Tab Content page (Portal Administration, Pagelets, Configure Homepage).

Configure Homepage Tab - Tab Content page

Select the pagelets that you want to appear on the site's homepage and specify each pagelet's behavior.

Pagelets selected to appear on the site homepage create the default homepage. If authorized to personalize their homepage, users can add pagelets and configure the homepage layout.

Managing Site Branding

This section provides an overview of site branding overrides.

Understanding Site Branding Overrides

If the portal administrator authorized overridable branding elements during site creation, a site administrator can define site-specific branding values to work in conjunction with the site's default theme. These options are discussed in detail in the Enterprise Portal Branding PeopleBook.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Configuring and Assembling Branding Themes," Defining Branding Overrides.

Running Branding Queries

Navigate to Portal Administration, Branding, Branding Queries to access a set of Branding queries you can use to facilitate your work with site branding.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Running Branding Queries."

Chapter 20

Publishing to a Site

This chapter discusses how to:

- Use the Site Publisher Center.

- Manage site navigation.

- Update homepage content.

Using the Site Publisher Center

The Site Publisher Center is a navigation collection that lists every feature that is used in publishing. Site administrators will have additional links beyond what the site publisher can access.

Managing Site Navigation

This section provides an overview of site navigation management and discusses how to manage site navigation.

Pages Used to Manage Site Navigation

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Navigation	EPPNA_REG_ADMIN	Access the site and navigate to Portal Administration, Navigation, Manage Navigation.	Add, delete, and manage menu folders and links for the site. Use the Manage Navigation page instead of directly addressing content references (CREFs) in the portal registry or through the Structure and Content pages. Provides simplified access to the portal registry for the current site. Provides a unified interface for management of the menu folders and links for the site.

Page Name	Definition Name	Navigation	Usage
Select New Parent Folder	EPPNA_NEW_PRNT	Click the Select New Parent Folder button on the Manage Navigation page.	Use a hierarchical representation of the portal registry to select the parent folder into which you want to move the selected element.

Using Manage Navigation

Access the Manage Navigation page (Portal Administration, Navigation, Manage Navigation).

Manage Navigation page

The Manage Navigation page provides an interface to the portal registry for tasks specific to the current site based on site defaults.

It is a front-end to the portal registry, which stores site navigation. Site administrators may not be familiar with the portal registry and may not have the security required to access portal administration functions. Authorized site administrators can manage their site's content and navigation without having access to the registry for other sites or to the default portal.

Site publishers can use the Manage Navigation page to post content to the site and manage its navigation. Publishers can specify the content source, template (if authorized in the Define Publishing Defaults component), and the content's placement in the site navigation, as well as create folders and delegate folder administration.

Only site administrators (as authorized by the portal administrator) and site publishers (as authorized by the site administrator) can manage site navigation. Site administrators can use the Manage Navigation page to change the navigation menu's structure or to create folders for new content, for example. Site publishers can use the Manage Navigation page to add or move folders for site content or add links to content, for example.

The Manage Navigation page initially displays the site's navigation menu and a Find group box. You can browse through the hierarchy by expanding and contracting folders. Alternatively, you can use the Find group box to locate a menu item by name.

Click on a folder or content reference link to select the item with which you want to work. The selected item will appear highlighted in yellow anywhere it appears on the page.

Managing Folders and Links

After you select or add a folder, the Folder Detail group box appears.

Folder Detail group box

After you select or add a link, the Link Detail group box appears.

Link Detail group box (1 of 2)

Link Detail group box (2 of 2)

Add Folder	Click to add a folder within the selected folder.
Add Link	Click to add a new link within the selected folder.
Save	Click to save the new or modified folder or link.
Cancel	Click to cancel the creation or modification of the folder or link.
Delete	Click to delete the folder or link. You will be prompted to confirm your deletion.
Label	Specify the label that will appear in the menu.
Long Description	Specify a description that will appear as the hover text for the label.
Link Type	This field displays in the Link Detail group box.
	Select the link type from the drop-down list box, and specify the required information for the selected link type:
	Content Management Folder. Create a link to a content management folder.
	External URL. Create a link to a URL to an external site.
	File Attachment. Create a link to a file.
	Managed Content. Create a link to managed content.
	PeopleSoft Query. Create a link to a predefined PeopleSoft database query.
	Portal/Site. Create a link to any site or main portal accessible from the current site.
	If you are a portal administrator managing navigation on the default portal, the following additional link types are available:
	PeopleSoft Component. Create a link to a PeopleSoft component.
	PeopleSoft iScript. Create a link to a PeopleSoft iScript, which can return anything. Generally, iScripts are used to return information placed on pagelets. In this case, you can point to an iScript as a target.
	PeopleSoft Generic URL. Create a link to a generic URL in your PeopleSoft database. This option enables you to point to any PeopleSoft object (iScript, component, and so forth) as a generic URL. You may choose to use this option rather than specifying an iScript or component when you are not required to inherit the security specified on that object. You can then place your own security on the target to which you are pointing.
Portal Name	Select a portal that contains the folder you want to link to using the Content Management Folder
Node Name	Select the node through which the material to which you want to create a link should be accessed. Available nodes are comprised of defined content providers from which content can be retrieved and rendered.
	This field displays in the Link Detail group box for the *PeopleSoft Component, External URL, PeopleSoft Generic URL,* and *PeopleSoft IScript* link types.

Menu Name   Enter the menu in which the component to which you want to create the link resides.

                           This field displays in the Link Detail group box for the *PeopleSoft Component* link type.

Market   Select the market for the component to which you want to link.

                           This field displays in the Link Detail group box for the *PeopleSoft Component* link type.

Component   Enter the name of the component to which you want to link.

                           This field displays in the Link Detail group box for the *PeopleSoft Component* link type.

Additional Parameters Enter any additional parameters you want to use to locate the content to which you want to link.

                           This field displays in the Link Detail group box for the *PeopleSoft Component* and *PeopleSoft IScript* link types.

URL   Enter the URL to which you want to link, including the leading http://.

                           This field displays in the Link Detail group box for the *External URL* and *PeopleSoft Generic URL* link types.

Add Attachment   Click to access a page where you can browse for and upload the file attachment to which you want to create a link.

                           This button displays in the Link Detail group box for the *File Attachment* link type.

Select Content   Click to access the Select Managed Content page, where you can search for and select the managed content to which you want to create a link.

                           This button displays in the Link Detail group box for the *Managed Content* link type.

                           See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Working With Managed Content," Importing Managed Content into Other Features.

Record (Table) Name   Enter the name of the record to which the iScript you want to link is associated.

                           This field displays in the Link Detail group box for the *PeopleSoft IScript* link type.

Field Name   Enter the name of the field to which the iScript you want to link to is associated.

                           This field displays in the Link Detail group box for the *PeopleSoft IScript* link type.

Event Name   Enter the name of the event to which the iScript you want to link to is associated.

                           This field displays in the Link Detail group box for the *PeopleSoft IScript* link type.

IScript Name	Enter the name of the iScript to which you want to link.
	This field displays in the Link Detail group box for the *PeopleSoft IScript* link type.
Query Name	Enter the query to which you want to create a link.
	This field displays in the Link Detail group box for the *PeopleSoft Query* link type.
Site ID	Select the site to which you want to create a link.
	This field displays in the Link Detail group box for the *Portal Site* link type.
Go to the Portal Registry Entry for this CREF	Select to access the Content Ref Administration page, where you can access additional options for the selected link in the portal registry.
	This link displays in the Link Detail group box for an existing link or a newly created link that has been saved.
	See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Administering Portals," Administering Content References
Go to the Portal Registry Entry for this folder	Click to access the Folder Administration page, where you can access additional options for the selected folder in the portal registry.
	Note. This option is only available to portal administrators.
	This link displays in the Folder Detail group box for an existing folder or a newly created folder that has been saved.
	See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Administering Portals," Administering Folders

Additional Options

Template Name	Select a template to apply to the new link. This option is only available if authorized by the site administrator.
	This field displays in the Link Details group box.
No Template	Select if you do not want to apply a template to the link content. When you select this option, the Template Name field does not display.
	This field displays in the Link Details group box.
Open Link in New Window	Select to indicate that you want the link contents to open in a new browser window instead of in the current browser window.
	This field displays in the Link Details group box.
Publish Date	Specify an effective date for this element.
Expiration Date	Specify an expiration date for this element.

Search Key Words   Specify keywords you want to use to identify this link in a search of this site. The search engine will pick up this text to be able to include the link in a search collection for the site.

Placement in Folder

Placement in Folder   Specify the placement of the element in the new parent folder.

Select New Parent Folder

Select the item or items that you want to move. The tree displays one level of the tree, enabling you to select a folder within that level. To select all folder items displayed in the tree, select the parent folder. To select one or more folder items in the tree, clear the check box for the parent and select the children items individually. For content references, the tree shows the parent folder and all of the sibling folders. If you select the parent, then all of the child items are selected.

Select New Parent Folder   Click to access the Select New Parent Folder page, where you can use a hierarchical representation of the portal registry to select the parent folder into which you want to move the selected element.
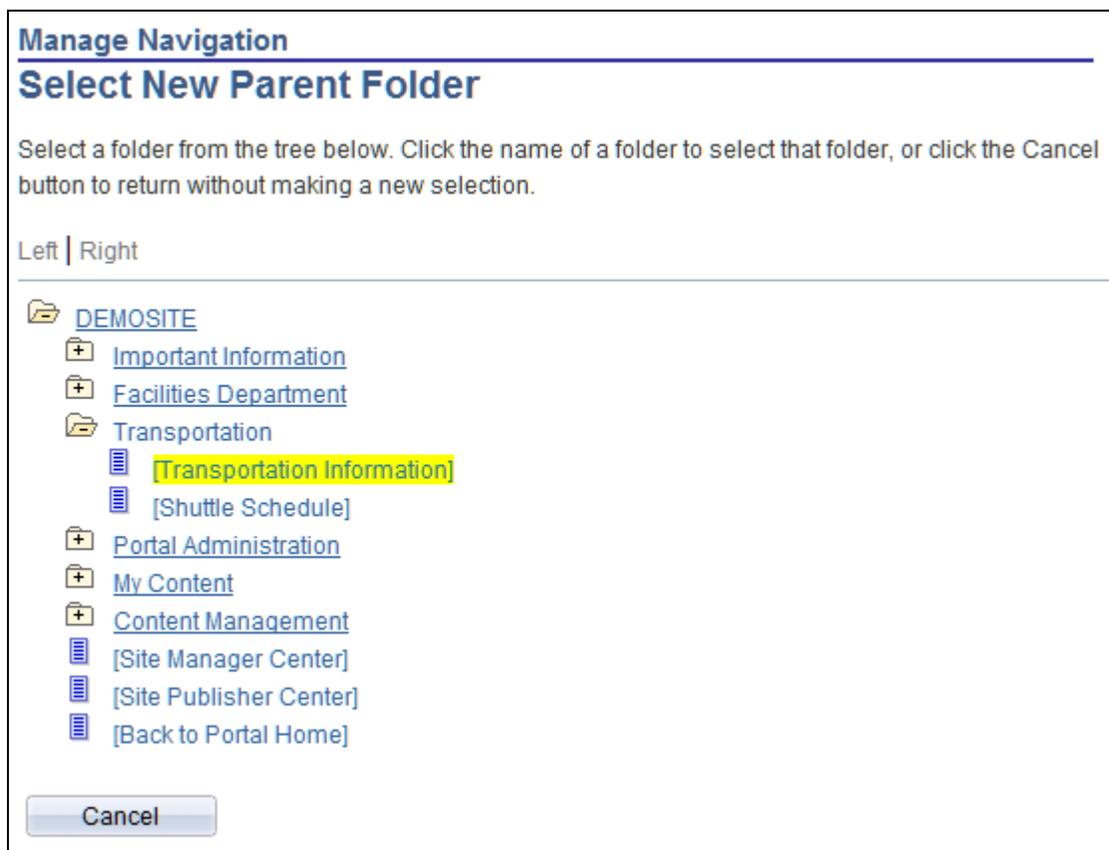
Select New Parent Folder page

The items that you have selected to move to a new folder appear highlighted. Click the name of the folder that you want to move the items to, and the system will display a confirmation message ensuring that you want to proceed with the move. Click Cancel to not move the item.

Updating Site Homepage Content

This section provides an overview of updating homepage content and discusses how to:

*   Update site homepage content.

*   Update Content Management-based site pagelet content.

Understanding Updating Site Homepage Content

A site administrator can use the Update Homepage Content page to update the content displayed on a site pagelet if the pagelet meets the following criteria:

*   The pagelet was created with Pagelet Wizard.

*   The pagelet's data source is Content Management.

For example, you can use this functionality in a scenario in which you prepare seasonal sales announcements in Content Management in advance and then access this page to post the content to the site pagelet on the date required.

Pages Used to Update Site Homepage Content

Page Name	Definition Name	Navigation	Usage
Content Pagelets	EPPPB_WRKGRP_SRCH	Access the site and navigate to: Portal Administration, Pagelets, Content Pagelets	Access Content Management-based pagelets defined as site pagelets for the current site.
Modify Content Pagelet	EPPPB_WRKGRP_DET	Click the Edit button on the Content Pagelets page.	Update content for Content Management-based site pagelets.
Preview Workgroup Pagelet Content	EPPCM_PUB_VIEWHTML	Click the Content Title link on the Modify Content Pagelet page.	Preview the content that you have selected to display on the site pagelet.
Select Managed Content	EPPCM_PUB_SELECT	Click the Change Content button on the Modify Content Pagelet page.	Select the new content you want to display on the site pagelet.

Updating Site Homepage Content

Access the Content Pagelets page (Portal Administration, Pagelets, Content Pagelets).

Content Pagelets page

Edit   Click to access the Modify Content Pagelet page, where you can assign new
                           content to the pagelet definition.

Update Content Management-Based Site Pagelet Content

Access the Modify Content Pagelet page (click the Edit button on the Content Pagelets page).

Edit Content for Pagelet page

Content Title	Click to access the Preview Workgroup Pagelet Content page, where you can preview the content that you have selected to display on the site pagelet.
	Click the prompt button to select from a list of managed content.
🔍	Click to access the Select Managed Content page, where you can select the new content you want to display on the site pagelet.
	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Working With Managed Content," Importing Managed Content into Other Features.

Chapter 21

Moving Sites Between Databases

This chapter discusses how to move a site from one database to another.

Moving a Site Between Databases

Use the steps discussed in this section to move a site and its associated data between databases. For example, you might create and configure a new site on a development database before transferring the site and its associated data to a production database.

To move a site and its associated data between databases:
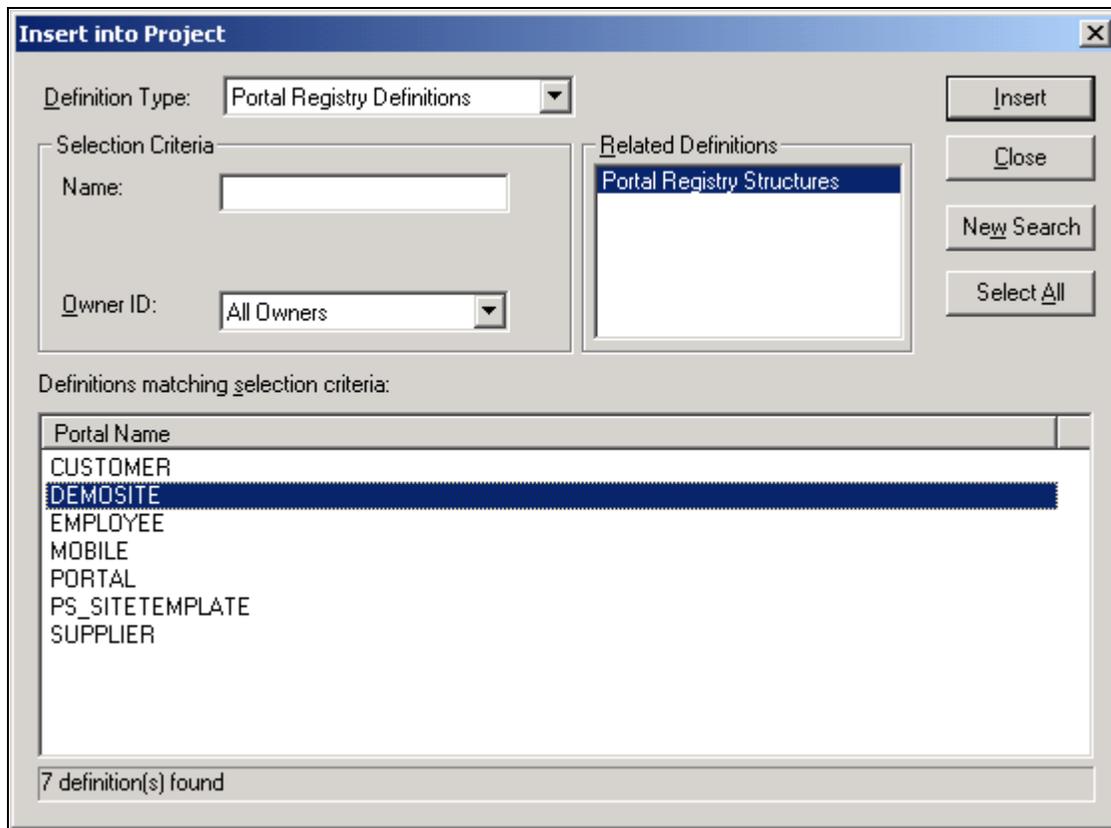
Insert into Project dialog box.

1. In PeopleSoft Application Designer, create a project containing the entire registry definition for the site.

   a. Select Insert, Definitions into project.

   b. Select the *Portal Registry Definitions* value in the Definition Type drop-down list box.

   c. Select the name of the site in the Portal Name area.

   d. Select *Portal Registry Structures* in the Related Definitions area.

   e. Click Insert.

   f. Save the project.

2. Insert any additional structures associated with the site into the project.

   These may include images, HTML objects, PeopleCode, and so forth, if such objects have been created for a customized site.

3. Move this project to the target database by navigation to Tools, Copy Project.

4. Move branding definitions associated with this site, such as headers, footers, themes, and overrides.

   See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Deploying Branding Themes."

5. Move pagelet definitions for any pagelets associated with this site that were defined with Pagelet Wizard.

   See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard"

6. If you have implemented any other features such as Content Management, News Publications, or Discussion Forums, recreate them in the site on the target database.

Part 5

Integration

Chapter 22
Setting Up Integration with Third-Party Email and Calendar Systems

Chapter 23
Setting Up Instant Messaging in PeopleSoft Enterprise Portal

Chapter 24
Working With Internet News Content

Chapter 25
Working With Internet Content Pagelets

Chapter 26
Using the Integrated Task List

Chapter 27
Publishing Content from Third-Party Applications

Chapter 28
Using Public Web Services

Chapter 29
Integrating PeopleSoft Secure Enterprise Search With Oracle Secure Enterprise Search

Chapter 22

Setting Up Integration with Third-Party Email and Calendar Systems

This chapter provides overviews of the Email pagelet and Calendar Events pagelet, basic email and calendar setup steps, application and mail server configuration, and the Microsoft Exchange/Outlook integration. This chapter also discusses how to:

* Integrate with Microsoft Exchange 2003 and 2007.

* Integrate with Lotus Domino email and calendar.

* Configure the server for POP mail and IMAP mail.

* Assign primary mail systems.

* Set up additional mail systems.

Understanding Basic Email and Calendar Setup Steps

The following steps provide a roadmap for setting up the Email pagelet and Calendar Events pagelet.

Note. Detailed setup instructions for each third-party email system are described later in this chapter.

1. The portal administrator configures application and email servers.

   • Lotus Domino.

     Install the delivered PeopleSoft jar file, *com.peoplesoft.pa.pp.jar* on the application server.

     Copy the Lotus Dominao *NCSO.jar* file to the application server.

     Make the relevant changes on the Domino server end and perform other operating-system-related setting changes.

     See <u>Chapter 22, "Setting Up Integration with Third-Party Email and Calendar Systems," Integrating With Lotus Notes Email and Calendar, page 216.</u>

   • Microsoft Exchange.

     Install the delivered PeopleSoft Active Server Page files in the relevant places and change the security.

     See <u>Chapter 22, "Setting Up Integration with Third-Party Email and Calendar Systems," Integrating With Microsoft Exchange 2003 and 2007, page 211.</u>

   • POP mail.

     Download and install the required files from the Java site.

     Install the delivered PeopleSoft jar file, *com.peoplesoft.pa.pp.jar* on the application server. Enter the POP mail server name and the URL for the POP mail inbox on the Email and Calendar Defaults page.

     See <u>Chapter 22, "Setting Up Integration with Third-Party Email and Calendar Systems," Integrating With a POP Server, page 220.</u>

   • IMAP mail.

     Download and install the required files from the Java site.

     Install the delivered PeopleSoft jar file, *com.peoplesoft.pa.pp.jar* on the application server.

     Enter the IMAP mail server name and the URL for the IMAP mail inbox on the Email and Calendar Defaults page.

     See <u>Chapter 22, "Setting Up Integration with Third-Party Email and Calendar Systems," Configuring the Primary Email System to Use IMAP, page 226.</u>

2. The portal administrator and individual users complete the integration with the Email pagelet and Calendar Events pagelet:

   a. The portal administrator selects and sets up the primary email and calendar on the E-mail and Calendar Defaults page.

      See <u>Chapter 22, "Setting Up Integration with Third-Party Email and Calendar Systems," Designating the Primary Mail System, page 222.</u>

   b. Each user sets up the pagelet's user ID and password.

Understanding Application and Mail Server Configuration

In accordance with the primary email and calendar systems that are selected for the Email pagelet and Calendar Events pagelet, system administrators must configure servers with special settings, files, and views. It might also be necessary to configure the servers for any additional POP mail systems.

This chapter provides information about setting up the following supported applications and mail server configurations:

• Microsoft Exchange/Outlook 2003 and 2007 Email and Calendar on Windows.

• Lotus Domino 6.5, 7.0, and 8.0 Email and Calendar.

• POP mail.

• IMAP mail.

Integrating With Microsoft Exchange 2003 and 2007

This section provides an overview of prerequisites for integrating with Exchange 2003 and discusses:

• How to install and configure ASP files for Microsoft Exchange 2003 and 2007.

• Implementation tips for integrating with Microsoft Exchange 2003 and 2007.

Understanding Integration with Microsoft Exchange

The Email pagelet on the portal homepage can display email from Microsoft Exchange when it is designated as the primary mail system. It requires Outlook Web Access (OWA), which enables access to Outlook using a browser. OWA requires that a Microsoft Internet Information Server (IIS) be running with access to an Exchange server. PeopleSoft Enterprise Portal supports integration with Microsoft Exchange/Outlook 2003 and 2007 on Windows.

In the PeopleCode, an iScript makes a request to the ASPs on the Exchange server. The ASPs send back a response in HTML format. PeopleCode then extracts the HTML to get the relevant email and calendar data and then formats the information and displays it in the Email and Calendar Events pagelets.

On the Exchange server side, ASPs, based on the WebDAV (Web-based distributed authoring and versioning) protocol are installed. You can search the Microsoft website to learn more about WebDAV.

Prerequisites

Before integrating Microsoft Exchange with the PeopleSoft Enterprise Portal, you must:

• Plan for the functionality that you need.

- Install the Windows 2003 server and related systems.

  Exchange must be installed in a domain that contains a Windows 2003 server that is configured as a domain controller with a global catalog.

  Note. During the Windows 2003 server setup, you must install the Network News Transfer Protocol (NNTP) service.

- Install the Microsoft Exchange 2003 or Microsoft Exchange 2007 server. Refer to the installation guide.

- Create mailboxes for users on the Exchange server.

  Select Active Directory Users and expand the domain name to see the Users folder.

Installing and Configuring Active Server Page Files for Exchange

You can perform the following steps only after the Microsoft Exchange server has been installed.

To install and configure ASP files:

1. Create a new folder, such as c:\aspcode, on the Microsoft Exchange machine.

2. Copy the following files into the newly created folder:

   - For Microsoft Exchange 2003:

     Psmsinbox2003.asp

     Psmcal2003_1day.asp

   - For Microsoft Exchange 2007:

     Psmsinbox2007.asp

     Psmcal2007_1day.asp

3. Map the new folder to the Virtual Directory for Exchange 2003/2007 using Microsoft Internet Services Manager (ISM):

    a. Access ISM from your Windows machine by navigating to Start, Programs, Administrative Tools.

    b. Expand the left-side Domain name folder to see the Default Web Site folder.

    c. Right-click and select New, Virtual Directory.

        This starts a wizard, which takes you through the relevant steps.

    d. In the wizard, select the folder that contains all of the PeopleSoft ASP files as the source (for example, c:\aspcode).

        It is important that you select the same folder in which you installed the delivered PeopleSoft ASP files.

    e. For easy reference, give the virtual directory the same name as the folder in which you installed the delivered ASP files (for example, aspfolder).

        Note. Once you have mapped the folder to the virtual directory, you will see your virtual directory and its contents in the ISM folder's Default Web Site.

4. Ensure that the *Basic Authentication* value is used as the directory security for the virtual directory.

    a. Access ISM from your Windows machine by navigating to Start, Programs, Administrative Tools.

    b. Go to the Default Web Site in the domain folder and find your mapped virtual directory, as specified in step 3e.

    c. Right-click and select Properties.

    d. Select the Directory Security tab and select *Anonymous Access and Authentication.*

    e. Select *Basic Authentication.*

Important! The URL that you use on the Email and Calendar Defaults page must use the format *http://<servername>/<aspfolder>,* where *aspfolder* is the folder name that is used in the virtual directory specified above. If this folder name is not the virtual folder name, the integration will not work.

When the configuration of applications and mail servers is complete, proceed to assigning the primary mail system in the PeopleSoft Enterprise Portal.

See <u>Chapter 22, "Setting Up Integration with Third-Party Email and Calendar Systems," Designating the Primary Mail System, page 222.</u>

Implementation Tips for Configuring Exchange

If the pagelet cannot display the messages, but the Microsoft Outlook link on the pagelet works, check the following:

1. In the browser, enter a URL using the following format, replacing the domain and user ID with the individual user's email account and user ID:

```
http://<Outlook Web Access server name>/aspfolder/Psmsinbox2003.asp?
mailbox=<userid>&exchsvr=
<Exchange Server name>&numrows=5
```

   For Microsoft Exchange 2007 replace *2003* with *2007*.

2. If there is an error on this website (that is, on an ASP page), then the folder in which you stored the delivered PeopleSoft ASP files is not properly mapped as a virtual drive.

   If the virtual drive is correctly mapped, but this URL site still generates errors that are MAPI-related, then check the IMS security to ensure that the *Basic Authentication* value has been selected.

   See <u>Chapter 22, "Setting Up Integration with Third-Party Email and Calendar Systems," Installing and Configuring Active Server Page Files for Exchange, page 212.</u>

3. If after changing the security you still receive MAPI-related errors when trying to access the above URL, then perform the following verifications on the Members Of tab of the User Properties in Active Directory Users and Computers.

   a. Navigate to the Members Of tab by going to Windows Start, Programs, Administrative Tools, Active Directory Users and Computers.

   b. Select the Users folder in the left-side domain folder.

   c. Right-click the appropriate user and select Properties.

   d. On the Members Of tab, look at all domains for which the user is a member and try to make the user a member of the relevant domains and directories.

      Correcting the Member Of properties can resolve several MAPI-related permission issues with the above URL.

Identifying Typos in Output Parameters

Make the following setting changes to display debugging information on the pagelet. It displays data that is being sent. Check the accuracy of this data.

To identify typos in output parameters:

1. In PeopleSoft Application Designer, open the record *WEBLIB_EMAIL.*

2. Open the FieldFormula PeopleCode.

3. Search for the following iScript function:

```
Function IScript_mail()
```

4. Locate the second line of the function:

```
&Debug = False;
```

5. Set the value to *True.*

6. The set of statements should now look like the following:

```
Function IScript_mail()
   /* Set the debug flag to True, for getting all the debug information,
 /* otherwise set it to false */
   &Debug = True;
   &titleStyle = "PABOLDBLUETEXT";
```

7. Save. The debugging information will display on the pagelet.

Ensuring That Microsoft Exchange is Working Over the Web

To ensure that Microsoft Exchange is working:

1. Click the Microsoft Outlook link that displays on the Email pagelet.

2. Supply the user ID and password in the dialog box.

   Ensure that you use the <DOMAIN NAME><User Id> format when specifying a user outside of the domain in which the Microsoft Exchange server resides.

3. If this link opens a web-based outlook, then proceed to the next section. If the link does not open, then contact the Exchange server administrator.

Checking the Outlook Web Access URL

To verify that the Outlook Web Access URL is working:

1. Use the following format for an Outlook Web Access URL:

```
http://<Outlook Web Access name>/aspfolder/Psmsinbox2003.asp?
mailbox=<userid>&exchsvr=
<Exchange Server name>&numrows=5
```

   For Microsoft Exchange 2007 replace *2003* with *2007*.

2. Open a new browser window and enter the appropriate URL for your version of Exchange. Login when prompted. Tabular data consisting of mail headers should be returned.

   If this step does not work, then the errors may possibly be the result of a setup issue. Return to the Exchange administration steps to verify the setup issues.

   See <u>Chapter 22, "Setting Up Integration with Third-Party Email and Calendar Systems," Installing and Configuring Active Server Page Files for Exchange, page 212</u>.

   If this step works, but email is still not accessible, then add a few emails to the account and try again.

   If this is working, then try the next section.

Understanding Browser Errors

This section explains several browser error messages that may display for the Email pagelet integration, along with possible associated errors.

- Page cannot be found error.

  This error screen could mean that the file *psmsinbox2003.asp* (or *psmsinbox2003.asp)* is not available. This can happen because:

  - Either the file is missing, or because the virtual folder is wrong or not mapped correctly.

  - There's a typographical error in the file name.

- Network password error.

  If the Enter Network Password dialog box displays after executing the OWA that was formed, it may be because the domain name, user ID, or password entered for the user is missing or wrong.

- Page cannot be displayed error.

  This page can display under two circumstances.

  - If this page appears when you place the OWA URL in the browser, verify that the OWA server name is correct.

  - This page can also appear when the URL tries to access a resource that does not exist due to a wrong mailbox or a wrong Microsoft Exchange server name.

- You are not authorized to view this page.

  This page appears if the either the user ID or password are incorrect.

Integrating With Lotus Notes Email and Calendar

This section provides overviews of the Lotus Notes email and calendar integration and prerequisites, and discusses how to integrate with a Lotus Domino server to retrieve email and calendar information.

Understanding Integration with Lotus Notes Email and Calendar

The Email pagelet on the PeopleSoft Enterprise Portal homepage can display email from Lotus Domino server when Lotus is designated as the primary mail system. Integration requires a specific configuration of the portal application server and a hub Domino server.

How the Integration Works

PeopleSoft Enterprise Portal integrates with Lotus Notes mail files to retrieve an individual's email and calendar appointment lists. To retrieve this information from each user's mail file, PeopleSoft Enterprise Portal uses the Notes Client Side Objects (NCSO) to interact with the Domino server. The NCSO uses Internet Inter-ORB Protocol (IIOP) to exchange data and communicate internally. A server task needs to be set up on the Lotus Domino server to work with the Domino Object Request Broker DIIOP (Domino Internet Inter-ORD Protocol) to allow the internal communication.

Enabling iNotes

iNotes is the web-enabled solution for Lotus Notes. To enable users to launch iNotes from the Email pagelet, you must specify the iNotes URL on the Email and Calendar Defaults page.

Prerequisites

The following prerequisites must be in place:

• All mail files at an organization must refresh from a single mail file template, or there must be some other easy way for a Lotus Notes administrator to add two hidden custom views to each user's mail file.

• There is a single Domino server that can run both the HTTP and DIIOP tasks for access by the portal.

   This server should use Java security and have the corporate name and address book on it.

• All users at the organization have an internet password stored in their Person document in the Lotus Name and Address Book on the Domino hub server.

• A custom view that is added to the address book provides the location and file name of each user's mailbox

Integrating With Lotus Notes

Complete the steps outlined in this section to configure the Lotus Notes email and calendar functions.

Placing the NCSO.Jar file on the Application Server Machine

To place the NCSO.Jar file on the application server machine:

1. Copy the Lotus Domino NCSO.jar file from LOTUS_HOME\Domino\data\domino\java\NCSO.jar.

2. Place the NCSO.jar file on the PeopleSoft application server in the appropriate directory.

   For Windows-based application servers place the file in PS_CFG_HOME\class\.

   For UNIX-based application servers place the file in PS_CFG_HOME/appserv/classes/.

3. Add the NCSO.jar and com.peoplesoft.pa.pp.jar files to the environment variable CLASSPATH.

Completing the Lotus Notes Integration

After setting up your Lotus Notes client application servers, complete the following Lotus Notes setup steps.

This section discusses how to:

• Configure the Lotus Domino server.

• Place custom views in Lotus templates.

Configuring the Lotus Domino Server

To configure the Lotus Domino Server:

1. Configure Java/COM Restrictions on the Lotus Domino Server

2. Enable IIOP

3. Set up Session Based Authentication

4. Verifying Web settings

Configuring Java/COM Restrictions on the Lotus Domino Server

To configure Java/COM restrictions on the Lotus Domino server:

1. Access the Lotus Domino Administrator.

2. Select Configuration tab from the navigation bar.

3. Select Server.

4. Double click your server name from the list (or on current server document if you have only one server).

5. Select Edit Server.

6. Click on the Security tab.

7. Scroll to the section labeled Run restricted Java/Javascript/COM and enter an asterisk character (*) in the text area provided.

8. Scroll to the section labeled Run unrestricted Java/Javascript/COM and enter an asterisk character (*) in the text area provided.

9. Click on the Save and Close link.

Enabling IIOP

The Lotus Notes Pagelets implementation uses the Notes Client Side Objects to communicate with the Lotus Domino server. The Notes Client Side Objects internally use IIOP (Internet Inter-ORB Protocol) to communicate and exchange object data. To allow this communication, a server task that runs on the Lotus Domino Server and works with the Domino Object Request Broker DIIOP (Domino Internet Inter-ORB Protocol) needs to be enabled.

To enable IIOP:

1. Access the Lotus Domino Administrator.

2. Select the Configuration tab.

3. Double click your server name from the list (or on current server document if you have only one server).

4. Select the Ports: Internet Ports tab.

5. Click on the DIIOP tab to go to the IIOP Server screen.

6. Verify that TCP/IP Port number is 63148 (default port).

7. Verify that TCP/IP Port status is Enabled.

    If not, then select Enabled and click Save and Close to save the changes.

8. Now, if it is not already started, start the DIIOP server task on the Lotus Domino Server.

    To start the DIIOP server task, enter this command on Lotus Domino Server console: load diiop.

Setting Up Session Based Authentication

Before publishing the Lotus Notes Pagelets, you need to set up Session Based Authentication for Web clients who have access to a Domino Web server.

To set up session based authentication:

1. Access the Lotus Domino Administrator.

2. Select Configuration tab from the navigation bar.

3. Select Server.

4. Double click your server name from the list (or on current server document if you have only one server).

5. Select Edit Server.

6. Select Internet Protocols: Domino Web Engine.

7. In the HTTP Sessions section, for Session Authentication, select Single Server.

8. Click on Save and Close.

Verifying Web settings

To verify web settings:

1. Access the Lotus Domino Administrator.

2. Select the Configuration tab from the navigation bar.

3. Select Server.

4. Double click your server name from the list (or on current server document if you have only one server).

5. Select Edit Server.

6. Select the Ports: Internet Ports: Web tab.

7. Under Authentication Options select Yes for the Anonymous option.

Placing Custom Views in Lotus Templates

To place custom views in Lotus templates:

1. The portal administrator sends the Portal_Lotus_Views.nsf file to the Lotus Notes administrator.

   This file is provided on the PeopleSoft Enterprise Portal CD and can be found in PS_HOME in the scripts folder.

   The Lotus Notes Administrator performs the following steps.

2. Open the Portal_Lotus_Views.nsf file in the Lotus Domino Designer.

3. Copy the two views, PS_PORTAL_MAIL and PS_PORTAL_CALENDAR, into the mail file template that is used for all mail files in the organization.

4. Copy the view PS_PORTAL_MAIL_LOCATION either into the Name and Address Book template in the organization (if one is used) or into the Name and Address Book of the hub Domino server that the portal application server accesses to retrieve user mail file information.

   a. If the organization uses customized Domino user names that are not any of the entries listed in the User Name field of the Person document in the Name and Address Book, then customize the PS_PORTAL_MAIL_LOCATION view that you just copied.

   b. To customize this view, open it in Lotus Domino Designer and change the first column of the view to reflect the customized Domino user names used in the organization.

      For example, if the entries in the User Name field are *John Smith/ACME Corp* and *John Smith,* but a custom Domino user name of jsmith is used, the column formula is @Left(FirstName;1)+LastName.

   c. Change the first column of the PS_PORTAL_MAIL_LOCATION view only if the system uses custom Domino user names that are not any of the entries in the User Name field.

Integrating With a POP Server

This section provides an overview of post office protocol (POP) configuration and prerequisites, and discusses how to extract .jar files.

Understanding POP Configuration

The setup for POP mail is optional. It is required only when the portal administrator has designated a primary mail system that is POP-based or has set up additional email selections for the email pagelet. POP mail requires correct placement of third-party .jar files from the Sun website to the portal application server.

POP mail integration requires the following:

- If you access POP mail on an *internal* mail server, that mail server must be POP-enabled.

- If you access POP mail from an *external* mail system, the remote POP mail server to which you point must be POP-enabled.

  Also, users must set up their external mail accounts to POP forward.

Extracting .jar Files for POP Email Integration

This section discusses how to extract the following Sun .jar files into the <PS_CFG_HOME>\class Directory of the NT portal application server:

• mail.jar

• activation.jar

• pop3.jar

Note. When you transfer .jar files, be sure to use binary transfers, not ASCII transfers. Also, you must install the required Java files in the proper directory for *each* portal application server.

Extracting mail.jar (JavaMail)

To download mail.jar:

1. FTP download mail.jar(JavaMail) from
   `http://www.javasoft.com/products/javamail/index.html`.

2. Extract the mail.jar file into the PS_CFG_HOME\class directory on each portal application server.

3. Delete the javamail1_1_3.zip file.

Extracting activation.jar (JavaBeans Activation Framework)

To download activation.jar:

1. FTP download activation.jar (JavaMail) from
   `http://www.javasoft.com/products/javamail/index.html`.

2. Extract the activation.jar file into the PS_CFG_HOME\class directory on each portal application server.

3. Delete the jaf1_0_1.zip file.

Extracting pop3.jar (POP3 Provider)

To download pop3.jar:

1. FTP download pop3.jar (POP3 Provider) from
   `http://www.javasoft.com/beans/glasgow/jaf.html`.

2. Extract the pop3.jar file into the PS_CFG_HOME\class directory on each portal application server.

3. Delete the pop31_1_1.zip file.

Note. The Sun Microsystems website from which the drivers are downloaded is external to PeopleSoft, and its content and layout might change at any time. For assistance in locating files on the Sun Microsystems website, contact Sun Microsystems.

Integrating With an IMAP Server

Since IMAP is an internet protocol, the only configuration required by the portal administrator is:

• Install the delivered PeopleSoft jar file, *com.peoplesoft.pa.pp.jar* on the application server.

• Enter the IMAP mail server name and the URL for the IMAP mail inbox on the Email and Calendar Defaults page.

Designating the Primary Mail System

The administrative information that you assign drives both the Email pagelet and Calendar Events pagelet. The portal supports Lotus Notes/Domino, Microsoft Outlook Web Access/Exchange, POP3, and IMAP systems for email, and Lotus and Microsoft for calendars. Remember that only one email and calendar system is designated as the portal's default system. The default system is considered primary and is the first email section on a user's pagelet. It is possible to override the system default for an individual user.

This section discusses:

• Designating the primary email and calendar system.

• Configuring the Primary Email System to Use Microsoft Outlook Web Access.

• Configuring the Primary Email System to Use Lotus Notes.

• Configuring the Primary Email System to Use POP.

• Configuring the Primary Email System to Use IMAP.

• Overriding email and calendar settings for individual user IDs.

• Support for SSL-enabled web servers.

Note. For the pagelets to be fully functional, you must complete setup procedures for the application and mail servers.

Pages Used to Assign Mail Servers

Page Name	Definition Name	Navigation	Usage
Email and Calendar Defaults	EO_PE_ADMIN	Portal Administration, Pagelets, Email / Calendar, Email / Calendar Defaults	Designate the primary email and calendar system for the portal.

Page Name	Definition Name	Navigation	Usage
Email and Calendar by User	EO_PE_ADMIN_OPR	Portal Administration, Pagelets, Email / Calendar, Email / Calendar by User	Add overriding email and calendar settings for an individual user ID.

Designating the Primary Email and Calendar System

The Portal Administrator designates the primary email and calendar system.

Email and Calendar Defaults

Set the default primary email system for the Email pagelet and Calendar Events pagelet. To add additional, non-primary POP email systems, use the PeopleTools URL maintenance utility.

Primary Email System
- ⊙ Microsoft (Outlook Web Access)   ○ POP (No Calendar)
- ○ Lotus Notes   ○ IMAP (No Calendar)

Microsoft Outlook Type
- ⊙ MS Outlook Exchange 2003
- ○ MS Outlook Exchange 2007

Hardware Configuration
- ⊙ Single Box
- ○ Distributed (Different Boxes)

URL for Mail Inbox: [   ]

Outlook Web Access/Exchange Server URL

[Save]

Email and Calendar Defaults page

Access the Email and Calendar Defaults page (Portal Administration, Pagelets, Email / Calendar, Email / Calendar Defaults).

Note. The fields shown on this page vary depending on which email system is selected as the primary email system.

Primary E-mail System Select the default email/calendar system for the portal. Additional fields display based on your selection.

Microsoft (Outlook Web Access)

Lotus Notes

POP (No Calendar)

IMAP (No Calendar)

Configuring the Primary Email System to Use Microsoft Outlook Web Access

This sections discusses the configuration for Microsoft Outlook Web Access.

Email and Calendar Defaults

Set the default primary email system for the Email pagelet and Calendar Events pagelet. To add additional, non-primary POP email systems, use the PeopleTools URL maintenance utility.

Primary Email System

- ● Microsoft (Outlook Web Access)
- ○ Lotus Notes
- ○ POP (No Calendar)
- ○ IMAP (No Calendar)

Microsoft Outlook Type

- ● MS Outlook Exchange 2003
- ○ MS Outlook Exchange 2007

Hardware Configuration

- ● Single Box
- ○ Distributed (Different Boxes)

URL for Mail Inbox: [   ]

Outlook Web Access/Exchange Server URL

[Save]

Email and Calendar Defaults page with the Microsoft (Outlook Web Access) option selected.

Access the Email and Calendar Defaults page and select the *Microsoft (Outlook Web Access)* option.

Microsoft Outlook Type This field applies when you select the *Microsoft (Outlook Web Access)* option in the Primary E-mail System group box.

MS Outlook 2003

MS Outlook 2007

Hardware Configuration These fields display when you select the *Microsoft (Outlook Web Access)* option in the Primary E-mail System group box.

Single Box. Select if your hardware configuration is a single machine setup, that is, the OWA/ASP files are on the same machine of the Exchange server.

Distributed (Different Boxes). Select if your hardware configuration is for a multiple machine setup, that is, the OWA/ASP files are on deifferent machines of the Exchange server.

URL for Mail Inbox	For Microsoft, enter the URL typically used for Outlook Web Access/Exchange Server URL. The URL should have the form:

    `http://<server>/exchange` , replacing `<server>` with the Exchange server name.

Use the folder name *exchange.* The *exchange* name is the mapped folder name in the IIS installation. It maps to the physical folder in which Exchange is installed. Always use *exchange* as the folder name in the URL for Mail Inbox field.

Configuring the Primary Email System to Use Lotus Notes

This sections discusses the configuration for Lotus Notes.

Email and Calendar Defaults

Set the default primary email system for the Email pagelet and Calendar Events pagelet. To add additional, non-primate POP email systems, use the PeopleTools URL maintenance utility.

Primary Email System

- ○ Microsoft (Outlook Web Access)   ○ POP (No Calendar)
- ● Lotus Notes   ○ IMAP (No Calendar)

Server: [   ]

Java Enabled Domino server

URL for Mail Inbox: [   ]

Required for iNotes only, e.g. http://inotestest.peoplesoft.com

File Name of Address Book: [names.nsf]

(example: names.nsf)

[Save]

Email and Calendar Defaults page with the Lotus Notes option selected

Access the Email and Calendar Defaults page and select the *Lotus Notes* option.

Server	This field displays when the *Lotus Notes* option is selected in the Primary E-mail System group box.
	Enter the server name.
	For Lotus Notes, enter the name of a Domino server on the network. Typically, this is a centralized hub server. This is the Domino server enabled with additional services and has the custom view PS_PORTAL_MAIL_LOCATION in the Name and Address Book.
URL for Mail Inbox	Enter a URL (the link on the pagelet transfers the user to this location in a new browser window):
	For Lotus, this field is relevant only for web-enabled iNotes mail.

File Name of Address Book

This field displays when the *Lotus Notes* option is selected in the Primary E-mail System group box.

Enter the file name for the Lotus Notes name and address book.

Configuring the Primary Email System to Use POP

This sections discusses the configuration for POP.

Email and Calendar Defaults

Set the default primary email system for the Email pagelet and Calendar Events pagelet. To add additional, non-primary POP email systems, use the PeopleTools URL maintenance utility.

Primary Email System

○ Microsoft (Outlook Web Access)   ⊙ POP (No Calendar)

○ Lotus Notes   ○ IMAP (No Calendar)

Server: pop.mail.yahoo.com

                         POP Mail Server

URL for Mail Inbox: http://mail.yahoo.com

                         Mail Server URL

Save

Email and Calendar Defaults page

Access the Email and Calendar Defaults page and select the *POP (No Calendar)* option.

Server

Enter the POP mail server name. For example, for Yahoo!, enter *pop.mail.yahoo.com.*

URL for Mail Inbox

Enter the mail server URL (the link on the pagelet transfers the user to this location in a new browser window).

Configuring the Primary Email System to Use IMAP

This sections discusses the configuration for IMAP.

Email and Calendar Defaults

Set the default primary email system for the Email pagelet and Calendar Events pagelet. To add additional, non-primary POP email systems, use the PeopleTools URL maintenance utility.

Primary Email System

○ Microsoft (Outlook Web Access)   ○ POP (No Calendar)

○ Lotus Notes   ● IMAP (No Calendar)

Server: imap.example.com

                        IMAP Mail Server

URL for Mail Inbox: http://webmail.example.com

                        Mail Server URL

[Save]

Email and Calendar Defaults page with the IMAP (No Calendar) option selected

Access the Email and Calendar Defaults page and select the *IMAP (No Calendar)* option.

Server   Enter the IMAP mail server name.

URL for Mail Inbox   Enter the mail server URL (the link on the pagelet transfers the user to this location in a new browser window):

Overriding the Primary System for Individual User IDs

Access the Email and Calendar by User page (Portal Administration, Pagelets, Email / Calendar, Email / Calendar by User).

Email and Calendar by User page

Select the user ID for which you want to define overriding email and calendar information. The remaining fields function like those on the Primary E-mail and Calendar Defaults page. Entries on this page override the primary email system settings entered on that page for the specified user.

Support for SSL-Enabled Web Servers

If your web server is SSL-enabled, in addition to specifying an HTTPS URL on the E-mail and Calendar Defaults page, you must do the following:

• For Microsoft Exchange, in the ASP file change the strProtocol value to *https,* or change the isFormBasedAuth flag to *true,* or both.

• For POP/IMAP, specify the SSL port number in the mail server URL.

• No extra steps are required for Domino.

Setting Up Additional Mail Systems

To enable users to add external POP email accounts to their Email pagelets, the portal administrator must set up a URL identifier and a URL for each POP mail system. Once these entries are stored in the URL Catalog, the POP mail system appears in the server and URL drop-down list boxes of the pagelet's Personalize Email Options - Add a Personal Email Account page.

This section discusses how to add and maintain mail system URLs.

Note. The POP mail system must have POP forwarding on a user's individual profile. Each user needs to set this with the external mail system. Some mail systems automatically activate POP forwarding; some (such as Yahoo!) require the user to change a profile setting, while others (such as Microsoft Hotmail) do not allow forwarding. Non-forwarding mail systems do not appear on the Email pagelet.

Pages Used to Set Up Additional Mail Systems

Page Name	Definition Name	Navigation	Usage
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Administration, URLs, URL Maintenance	Add a URL identifier and maintain a URL for a POP or IMAP mail server. This definition enables the selection on the Add a Personal Email Account page accessed from the Email pagelet.

Maintaining URLs

Access the URL Maintenance page (PeopleTools, Utilities, Administration, URLs, URL Maintenance).

URL Maintenance

URL Identifier: SERVERMAIL_YAHOO

*Description: Yahoo Mail Server

*URL: pop.mail.yahoo.com

Comments:

URL Properties

URL Maintenance page

URL Identifier	Enter a URL identifier. The URL identifier indicates whether the URL points to a web address or to a POP3 mail server that cannot be accessed through the web.
	For a webmail URL, the URL ID must start with *MAIL_*.
	For a POP3 mail server, the URL ID must start with *SERVERMAIL_*.
	Whatever follows the MAIL_ or SERVERMAIL_ prefix must be unique for each MAIL or SERVERMAIL ID.
	For example: *MAIL_YAHOO* or *SERVERMAIL_YAHOO*.
Description	This description appears in the Mail Account Server drop-down list box on the Add a Personal Email Account page. For example: *Yahoo Mail Server* or *Yahoo Mail URL.*
URL	Enter the URL associated with the URL identifier.
Comments	You may optionally enter comments. For example, you may enter your name and the date on which the URL was enabled for the Email pagelet.

Chapter 23

Setting Up Instant Messaging in PeopleSoft Enterprise Portal

This section provides an overview of instant messaging in PeopleSoft Enterprise Portal and maintain discusses how to:

*   Set up instant messaging in PeopleSoft Enterprise Portal.

*   Enter your instant messaging information as an end user.

Understanding Instant Messaging in PeopleSoft Enterprise Portal

The setup tasks described in this chapter must be completed before you can use the instant messaging functionality that is available in the following areas of PeopleSoft Enterprise Portal:

*   Related contacts.

    See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Working With Context Manager Pagelets," Working With the Related Contacts Pagelet.

*   Collaborative Workspace member profiles.

    See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Viewing Member Profiles.

*   Resource Finder profiles.

    See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Using Participant Profiles and Organization Charts."

*   Content Management user profiles.

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

Prerequisites

Users that are utilizing instant messaging functionality will need to have an instant messaging client installed on the machine from which they're accessing the PeopleSoft Enterprise Portal product. If this functionality is going to be made available to users of a shared PC, then Oracle recommends that an instant messaging account be set up on the shared machine that is available for general use by anyone that has access to the shared PC.

Setting Up Instant Messaging

This section discuss how to:

* Load instant messaging information using a comma-delimited (CSV)-formatted file.

* Load instant messaging information using a component interface.

* Manage instant messaging information.

Pages Used to Set Up Instant Messaging in PeopleSoft Enterprise Portal

Page Name	Definition Name	Navigation	Usage
Import Instant Message Users	EPPRC_IM_IMPORT	Portal Administration, Instant Messaging, Import IM Users	Run the Import User Instant Message Information Application Engine process (EPPRC_IM_IMP) to load user instant message data contained in CSV-formatted files.
Maintain Instant Messaging Users	EPPRC_IM_ADMIN	Portal Administration, Instant Messaging, Maintain IM Users	Manually enter user instant messaging information. Once the Import User Instant Message Information process has completed successfully, review or edit loaded user instant messaging information.

Loading Instant Messaging Information Using a CSV-Formatted File

Access the Import Instant Message Users page (Portal Administration, Instant Messaging, Import IM Users).

Import Instant Message Users page

The CSV-formatted file you use to load user instant message data should contain the following information in this order:

<PeopleSoft Enterprise Portal user ID>,<instant message domain>,<domain screen name>

For example, the following user's instant messaging information should appear in the CSV-formatted file entry as shown here:

PeopleSoft Enterprise Portal user ID	VP1
Instant message domain	YAHOO
Domain screen name	pat_smith
CSV-formatted file line entry	VP1,YAHOO,pat_smith

Entries in the CSV-formatted file are case sensitive. For example, instant message domains must be capitalized (XMPP, SAMETIME, and YAHOO), and the PeopleSoft Enterprise Portal user ID and domain screen name in the CSV-formatted file must use the case formatting of your actual user ID and screen name.

In addition, there should be no spaces around commas in the CSV-formatted file.

You can generate a CSV-formatted file by creating a spreadsheet formatted like the one shown in this example:

Spreadsheet to generate CSV-formatted file for import

When you save the spreadsheet, select a Save as type value of *CSV (Comma delimited (*.csv).*

If you open the file in a text editor, it should appear as follows:
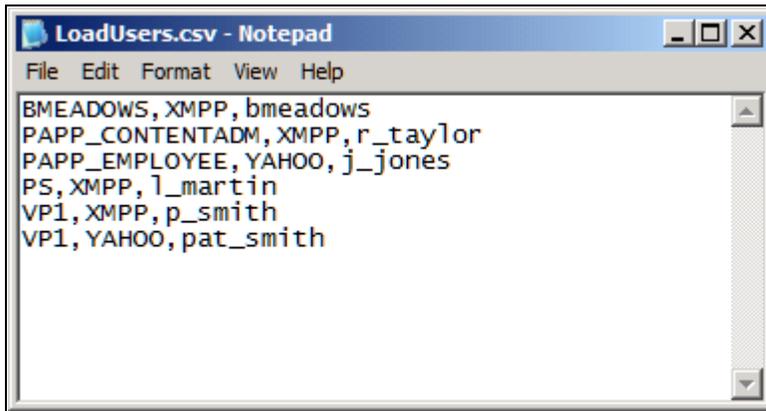
Example of CSV-formatted file content

Create one CSV-formatted line entry for each unique user ID and instant message domain combination.

Server Name	Select the server you want to use to run the process. Select a server that can access the designated file path to the CSV-formatted file.

Select Files

ID	Enter an identifier for the data in the designated CSV-formatted file.
File Path	Enter the full path to the CSV-formatted file that contains the user instant message data you want to load. The file path you enter must be accessible by the server selected in the Server Name field.
Include	Select to include the CSV-formatted file in your run of the Import User Instant Message Information process.

Once the process has completed successfully, review or edit loaded user instant messaging information on the Manage Instant Messaging page.

Loading Instant Messaging Information Using a Component Interface

Rather than using a CSV-formatted file to load user instant messaging data, you can use the EPPRC_IM_USER_CI component interface (CI) with the Excel-to-CI spreadsheet load utility to load this data from a spreadsheet, or any other external application you want to create to interact with the CI.

The Excel-to-CI spreadsheet utility supports the automatic configuration of a Microsoft Excel spreadsheet to match the properties of a designated CI. For example, the fields related to the CI; PeopleSoft Enterprise Portal user ID, instant message domain, and domain user ID as discussed earlier; appear as columns in the spreadsheet. After entering data into the spreadsheet, you load it into your PeopleSoft Enterprise Portal database using the associated CI.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Component Interfaces,* "Using the Excel to Component Interface Utility"

Managing Instant Messaging Information

Access the Maintain Instant Messaging Users page (Portal Administration, Instant Messaging, Maintain IM Users).

Maintain Instant Messaging Users page

Use the elements at the top of the page to enter user instant messaging information search criteria. Elements in the scroll area on the page display your search results. You can also use the elements in the scroll area to add, delete, and edit user instant messaging information.

| **User ID** | Enter the user ID of the user for which you want to view instant messaging information. |

Domain	Select the domain name for which you want to view instant messaging information.
Screen Name	Enter the screen name of the user for which you want to view instant messaging information.
Search	Select to execute a search using any criteria you have entered in the User ID, Domain, and Screen Name fields. Your search results are displayed in the lower portion of the page.
User ID	Add or edit a user's PeopleSoft Enterprise Portal user ID.
Domain	Select an instant message domain name.
	XMPP
	SAMETIME
	YAHOO
Screen Name	Add or edit a user's domain screen name.

Chapter 24

Working With Internet News Content

This chapter provides overviews of internet news content, news feed configuration, and internet news content providers. This chapter also discusses how to:

- Define internet news content providers.

- Define External News pagelets.

- Manage external news options.

- Schedule a news feed load.

- Manage loaded news article content.

Understanding Internet News Content

PeopleSoft Enterprise Portal provides External News pagelets and Feed Reader pagelets that you can configure to provide access to internet news content. You set up these pagelets to display headlines from a variety of news sources in a personalized format. You can create more than one version of each type of pagelet.

External News pagelets are designed to be configured and centrally administered by a portal administrator. The administrator decides which content providers to use, which categories are visible, and which users can see those categories. Run the Schedule External News Feed Application Engine process (EO_PE_EXNEWS) periodically to harvest news headlines and URLs for all categories from the content provider. Your end users can then personalize their External News pagelets by selecting individual news categories from the overall list.

You can configure the External News pagelet to receive free and subscription-based news feeds.:

A feed—also known as an RSS feed, an XML feed, syndicated content, or a web feed—is frequently updatedcontent published by a website. Particularly suitable for listing news headlines, feeds have been adopted by content providers to supply users with a sampling of the content available on their websites.

The Feed Reader pagelet provides the following features:

- News feed title, a link back to the source website, and an optional image or logo.

- Headlines and links to the associated articles on the source website.

- Optional capability to search for content on the source website.

Note. PeopleSoft cannot guarantee that content providers will continue to support the integration of internet content. PeopleSoft supports the integration as long as it has a solid partnership with a vendor. The vendor content descriptions in this chapter are subject to change. Check the vendor's website for the latest content descriptions.

Common Elements Used in This Chapter

Creation Date, Last Update User ID, and **Last Update Date/Time**	These fields are automatically generated. They are provided for reference.

Understanding News Feed Configuration

The delivered External News pagelet is preconfigured to gather news content from partners. Administrative setup involves running the Schedule External News Feed process to gather the news periodically.

PeopleSoft Enterprise Portal offers features that assist each organization in customizing news feeds and integrating subscription-based news. For example, you can deactivate news categories that are gathered by the batch process if the news is not appropriate for your users. You can then view the categories and decide which ones to make available to the rest of the organization. With this feature, you can allow users to see only business-related news by deactivating all consumer-related topics.

With additional features, you can:

*   Create custom news pagelets for specialized news feeds and distribution to selected groups.

    For example, you can add customized news feeds about competitors and display them in an existing External News pagelet or in a newly created pagelet.

*   Focus the audience on a specific news feed or category.

    For example, you can enable managers to view competitive intelligence.

Understanding Internet News Content Providers

There are two types of Internet news content providers you can use to supply news on External News pagelets and RSS News pagelets: free and subscription-based.

Free News Content Providers

You can use PeopleSoft Enterprise Portal news-related pagelets with free out-of-the-box solutions from these content providers to access the news feeds they offer. You can select and view these news feeds without additional implementation steps.

Provider	Sample News Sources	Content
Various websites that provide RSS-formatted news.	Motley Fool, Wired, Stockcharts.com, and Salon.com.	Business, Finance, Technology, Reference, Arts, Lifestyles, Recreation, Shopping, and so on.

Defining Internet News Content Providers

This section discusses how to define an internet news content provider.

Page Used to Define Internet News Content Providers

Page Name	Definition Name	Navigation	Usage
News Provider Maintenance	EO_PE_PROV_PG	Portal Administration, Pagelets, External News, Providers	Define an internet news content provider in your system. Maintain news content provider data, including a URL used to retrieve the news feed.

Defining an Internet News Content Provider

Access the News Provider Maintenance page (Portal Administration, Pagelets, External News, Providers).

News Provider Maintenance page

Note. The term "provider" can refer to both the news feed source (for example, the company), or the specific query URL(s) that the company provides to access the news. For example, a news feed source may provide a single query URL value to which different URL parameters can be appended to access different news categories. Alternatively, a news feed source may supply multiple query URLs, in which case each query URL becomes its own news feed provider.

URL   Enter the URL for the homepage of the source website. This URL is used to display links to the provider source website on the External News pagelet and personalization page.

Query URL   Enter the URL provided by the source website to retrieve data for this news feed.

Image URL   Enter a URL for a logo or image to display for news feeds for the source website.

Newsfeed Format   Select the news feed format. The Schedule External News Feed Application Engine process (EO_PE_EXNEWS) uses this value to determine how to parse the news feed data.

                            RSS 0.91 XML.

Content Access Type   Select the type of content access. Selecting any value other than *Free* enables you to enter values in the User ID and Password fields.

                            Company Subscription

                            Free

                            Registration required

                            User Subscription.

Default Lifespan (in days)	Enter the number of days during which most articles will be valid in your system. After the specified time, articles may be purged from your portal database. The recommended life span is 30 days.
	You can override this value for individual articles on the News Article Maintenance page.

Defining External News Pagelets

This section provides an overview of defining External News pagelets and discusses how to:

- Create an External News pagelet.

- Define and maintain External News pagelet news groups.

- Define and maintain External News pagelet news categories.

Understanding Defining External News Pagelets

You can also display news feeds on External News pagelets.

To display these news feeds, you must first create a specific instance of an External News pagelet, which is assigned a unique component ID. Once you have created this pagelet definition, you can create and associate news groups and categories from news providers with the pagelet. These news groups and categories are then available on the new pagelet.

You may choose to create a new pagelet for an existing provider, such as Factiva, to display specific news categories to specific users. In essence, you can split off news to specialized communities.

Note. While you can access news feed article data on the News Article Maintenance page, you do not define article data in your system. News feed article data is loaded into your system when you run the Schedule External News Feed process.

Pages Used to Define External News Pagelets

Page Name	*Definition Name*	*Navigation*	*Usage*
External News Pagelet Publications	EO_PE_NEWSCOM_SET	Portal Administration, Pagelets, External News, Publications	Define an External News pagelet with a unique component ID.
News Group Maintenance	EO_PE_NEWSGROUP_PG	Portal Administration, Pagelets, External News, Groups	Define news groups that you want to use to organize news categories that you want to make available on the External News pagelet you are defining.

Page Name	Definition Name	Navigation	Usage
News Category Maintenance	EO_PE_CATEG_PG	Portal Administration, Pagelets, External News, Categories	Define a news category within a news group.
News Article Maintenance	EO_PE_ARTICLE_PG	Portal Administration, Pagelets, External News, Articles	View and maintain news feed article data. You can define an article removal date that overrides the default article lifespan set for the article's new provider on the News Provider Maintenance page While you can access news feed article data on this page, you do not define article data in your system. News feed article data is loaded into your system when you run the Schedule External News Feed process.

Defining an External News Pagelet

Access the External News Pagelet Publications page (Portal Administration, Pagelets, External News, Publications).

External News Pagelet Publications page

Component ID	System-generated value that is used to identify the External News pagelet you are defining. This component ID is used to identify the pagelet when associating it with news groups and categories.
Pagelet Title	Enter a title for the pagelet that is used to populate the title/label field for the component reference. This text becomes the title displayed on the pagelet title bar.
Default News Category	You cannot enter a code until you have defined news categories for this pagelet component ID on the News Category Maintenance page. Once you have completed this definition, return to this page to select the code for the default news category that you want users to see on the External New pagelet when no personalizations have been defined.

For New Categories in NewsFeed

The field in the For New Categories in NewsFeed group box applies to news loaded through the Schedule External News Feed process.

Role Name	Select the default role name to associate with new categories that are loaded by the Schedule External News Feed process.
	This enables you to associate a role with news categories that are automatically created by the process. Selecting a value here ensures that you have at least one viewer role assigned to automatically created categories.

Create Homepage Pagelet

The Create Homepage Pagelet group box displays registry information generated upon saving the page. You use this information to register the pagelet in the portal registry.

Pagelet Folders	Displays PAPP_NEWS. The system stores all External News pagelets in this portal registry folder.
Public Access	Select if you want to make access to this External News pagelet available to all users. You can restrict use of the pagelet to specific groups of users using the portal registry.
	See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Administering Portals"
Registered	Displays as selected once the pagelet has been entered into the portal registry.
Portal Object Name	Displays once the pagelet has been registered and saved.
Create HomePage Pagelet	Click to register the External News pagelet.

Defining a News Group

Access the News Group Maintenance page for the External News pagelet component ID with which you want to associate a news group (Portal Administration, Pagelets, External News, Groups).

News Group Maintenance page

Description	Enter a news group description.
Active for all categories	Clear this option to disable user access to all categories in the selected news group without having to disable each individual category.
Provider ID	Select the providers that you want to associate with the news group. This establishes an association between the content provider query URL and the selected news group.

Maintaining News Categories

Access the News Category Maintenance page for the External News pagelet component ID with which you want to associate a news category (Portal Administration, Pagelets, External News, Categories).

News Category Maintenance page

News Category Title	Enter a news category title. For some news providers, the news category title text must match the news category title the provider uses. The Schedule External News Feed process attempts to match this title with the title string from the provider.
Provider ID	Select the associated news provider. The news provider you select identifies which query URL should be used for the category.
	Providers are defined on the News Provider Maintenance page.
News Group ID	Select the news group in which the end user should be able to access this category when personalizing the External News pagelet.
	News groups are defined on the News Group Maintenance page.
Newsfeed Type	Select the method to use to load the news category.
	SQL Server to XML Load. Reserved for future use.
	System Maintained.

URL   Enter a URL that you want to use to override the query URL value you provided
                                on the News Provider page.

URL Parameter   Enter text you want to be appended to the query URL provided by the news
                                provider.

Language Code   Select the language for the news category.

Viewer Roles

Select   Select for the roles that you want to be able to view and select the news category.
                                Users who do not belong to a selected role cannot access the category when
                                personalizing an External News pagelet or view articles in the category.

                                For example, you can use this option to restrict access to subscription-based
                                content.

Role Name   This is a subset of all PeopleSoft roles defined by an administrator on the
                                Maintain Viewer Roles page. This is a list of valid viewers for news, rather than
                                a list of all roles in the PeopleTools Roles table.

Managing External News Options

This section discusses how to manage external news options.

Page Used to Manage External News Options

Page Name	Definition Name	Navigation	Usage
Manage External News	EO_PE_CATEG_ADMIN	Portal Administration, Pagelets, External News, Manage External News	Set general options for the selected External News pagelet. For example, you can determine whether news articles appear in the current browser window or in a new window. There are typically many news categories available for an External News pagelet; this page provides a central location from which you can administer multiple news categories.

Managing External News Options and Categories

Access the Manage External News page (Portal Administration, Pagelets, External News, Manage External News).

Manage External News page

News Component	Displays the component ID and name of the External News pagelet for which you are managing external news option.
Default Category Status	Specify the default status for new categories automatically loaded into your system. You can change their individual statuses on the News Category Maintenance page.
Categories marked "new" (days)	Enter the number of days for which newly loaded categories are marked as such on the External News pagelet personalization page.
Display Article in New Window	Select to have news articles accessed from the External News pagelet appear in a new browser window. When articles are displayed in a new browser window, they are not wrapped in the PeopleSoft Enterprise Portal. Clear to display them in the same browser window.
	The default (and recommended setting) is to have news articles appear in the same browser window.

Category

View Categories	Select a value you want to use to filter the display of categories.
	All
	Inactive
	New
	Old
New	Displays an icon if the news category was added to the Personalize Worldwide News − Categories (page name depends on the name of the pagelet you are personalizing) within the number of days specified in the Categories marked "new" (days) field.
Active	Select to make news categories accessible to users. Clear to make them inaccessible. You can also do this individually on the News Category Maintenance page or by news group on the New Group Maintenance page.
News Group ID	Select a value to change the news group that contains the category. You can do this individually on the News Category Maintenance page.

Scheduling a News Feed Load

This section discusses how to configure and run the Schedule External News Feed process.

This is a batch process you can configure to periodically load current internet news content headlines. This periodic load is necessary as news headlines are cached locally in the database to reduce network traffic.

Page Used to Schedule a News Feed Load

Page Name	Definition Name	Navigation	Usage
Schedule External News Feed	RUN_EO_PE_EXNW	Portal Administration, Pagelets, External News, Run External News Feed	Configure and run the Schedule External News Feed process.

Running the Schedule External News Feed Process

Access the Schedule External News Feed page (Portal Administration, Pagelets, External News, Run External News Feed).

Schedule External News Feed page

Provider	Select the news provider for which you want to load Internet news content using the query URL you defined on the News Provider Maintenance page.
	Oracle recommends that you create different run control IDs to schedule news feed loads from different providers. Each provider has its own recommended news feed refresh cycle, such as hourly or twice daily.
Run/Schedule	Click to access the Process Scheduler Request page, where you can specify process parameters, including the server on which the process should be run, as well as how often you want the process to run.

Managing Loaded News Article Content

This section discusses how to maintain loaded news article contents.

Pages Used to Manage Loaded News Article Content

Page Name	*Definition Name*	*Navigation*	*Usage*
News Article Maintenance	EO_PE_ARTICLE_PG	Portal Administration, Pagelets, External News, Articles	Review article information for headlines automatically harvested from a content provider.

Managing Loaded News Article Content

Access the News Article Maintenance page (Portal Administration, Pagelets, External News, Articles).

News Article Maintenance

Article ID: 00000000000004

Article Headline: Factiva news integration has been upgraded, please customize your pagelet to

Harvest Date/Time: 08/26/03 9:06AM

Article Summary: Factiva Update

Provider ID: Factiva

Article Source: PeopleSoft

Content Type: Text

URL:

Additional URL Text:

Article Text:

Access Type: Free

Publish Dt: 08/26/2003

Remove Dt: 08/26/2003

Categories	Customize | Find | View All | 🔲 | 🔳 First ◀ 1 of 1 ▶ Last
*News Category	**News Category Title**
1 000000000000 🔍	Sample news ＋ －

News Article Maintenance page

Article ID	System-generated value that is used to identify the Article you are defining.
Article Headline	The headline for the article.
Harvest Date/Time	The date and time article was harvested.
Article Summary	Description of the article
Provider ID	The associated news provider. Providers are defined on the News Provider Maintenance page.
Article Source	Source of article.
Content Type	Text or URL.

URL   Enter a URL that you want to use for the article.

Additional URL Text   Enter URL parameter

Article Text   Body of the article

Access Type   Select the access:

- Free

- Registration Required

- Company Subscription

- User Subscription

Publish Dt   Date article is published.

Remove Dt   Date article is to be removed.

Chapter 25

Working With Internet Content Pagelets

This chapter discusses how to create and register HTML-, Java-, and HTML-object-based pagelets.

Creating HTML- and JavaScript-Based Pagelets

You can create homepage pagelets based on HTML or JavaScript, as well as HTML objects. Rather than using PeopleTools to accomplish this, you can use the Manage HTML Pagelets page delivered with the PeopleSoft Enterprise Portal. This page is designed specifically to transform your HTML or JavaScript code into a pagelet for display within the PeopleSoft Enterprise Portal.

Page Used to Create HTML- and JavaScript-Based Pagelets

Page Name	Definition Name	Navigation	Usage
Manage HTML Pagelets	EO_PE_HTML_PAGELET	Portal Administration, Pagelets, Internet, Manage HTML Pagelets	Create and register HTML-, JavaScript-, and HTML-object-based homepage pagelets.

Creating and Registering HTML-, JavaScript-, and HTML-Object-Based Pagelets

Access the Manage HTML Pagelets page (Portal Administration, Pagelets, Internet, Manage HTML Pagelets).

Manage HTML Pagelets page

HTML Pagelet Name	Enter a pagelet name. This label appears in the pagelet's title bar. This name is used to register the pagelet.
Pagelet Source Type	Select the pagelet source type.
	HTML
	HTML Object
	JavaScript

HTML Area	When the Pagelet Source Type is set to *HTML,* enter the HTML code for the pagelet you want to create and register.
	When the Pagelet Source Type is set to *JavaScript,* enter the JavaScript code for the pagelet you want to create an register. Once you enter HTML and refresh the page, the URL field no longer displays.
	This field does not appear when the Pagelet Source Type is set to *HTML Object.*
HTML Object Name	You can create an HTML object in Application Designer that contains static HTML. Enter the HTML object name to reference one of these objects.

Create Homepage Pagelet

Pagelet Folders	Select the pagelet folder in which you want to register the pagelet.
Public Access	Select to indicate that you want the pagelet to have public access. When this check box is clear, the security default is to provide access to only the user who registered the pagelet. You can modify pagelet security by accessing the content reference.
	See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Administering Portal Homepages and Pagelets"
Registered	This check box displays as selected if the pagelet has already been registered.
Portal Object Name	Displays the object name of a registered pagelet.
Create HomePage pagelet	Click to create and register the pagelet.

Last Update Date/Time

Creation Date	Displays the date on which the selected pagelet was created.
Last Update User ID	Displays the user ID of the user who last updated the pagelet.
Last Update Date/Time	Displays the date and time at which the pagelet was last updated.

Obtaining Pagelet Code

You can use your own HTML code to create pagelets on the Manage HTML Pagelets page, or you can use HTML code supplied by Internet sources. In the following example, a source has supplied the HTML code to include a source search box pagelet on your homepage.

```
<!-- Begin Search Box -->
<form action="http://cgi.trip.com/search/cgi-
bin/search.cgi" method="get">
          Search for Socks: <input type="text"
name="searchstring" size="15" maxlength="40">
          <input type="submit" value="Find!"><br>
```

Search box pagelet HTML code

Insert this HTML code in the HTML Area field on the Manage HTML Pagelets page to create and register the search box pagelet for use in your PeopleSoft Enterprise Portal.

Chapter 26

Using the Integrated Task List

This chapter provides overviews of the Integrated Task List configuration requirements and integration setup.

Understanding Integrated Task List Configuration Requirements

To enable your Integrated Task List feature to work as designed, ensure that your configuration meets the following requirements:

*   Ensure that the Tasks page uses the PAPP_NO_NAV_HTML template, or any Hypertext Markup Language (HTML) template, for registration so that the proxy is automatic.

*   Ensure that the Task Details page uses the PAPP_NO_NAV_FRAME, or any frame template, for registration. This enables the File Attachment feature.

*   Ensure that the Personalize Tasks page uses the PORTAL_HOMEPAGE_DESIGNER template, or any HTML template, to enable the Return to Home link.

*   Ensure that the WORKLIST and WORKLIST_DETAIL components are registered in an HTML template.

*   Ensure that you activated public or permission list security for all registered content references.

Understanding Integrated Task List Integration Setup

The Integrated Task List leverages PeopleSoft Integration Broker and XML technology to enable you to integrate tasks from any system in your implementation. This is also useful to aggregate worklists across PeopleSoft applications.

To use the Integrated Task List integration features, your must include the following set up in your configuration:

*   Schedule the Worklist Replicate process according to how frequently near-real-time updates are sent to and from the portal database.

*   Set PeopleSoft Integration Broker for standard operator and user security.

*   Specify a file storage location for file attachment functions using the URL Maintenance page in the portal database (select PeopleTools, Utilities, Administration, URLs). File attachments can be stored either on a File Transfer Protocol (FTP) server or in a database table. The URL identifier *TASKS* is reserved for the Integrated Task List feature. This identifier is used throughout the task PeopleCode.

The Worklist Replicate process should be run using the PeopleTools Worklist Replicate Application Engine process (WL_REPLICATE). To set up and run the Worklist Replicate process, you need to set up Integration Broker and configure routings on the sender and receiver nodes.

Chapter 27

Publishing Content from Third-Party Applications

This chapter provides an overview of web services related to incoming third-party content and discusses how to:

- Set up on the PeopleSoft side.

- Set up on the third-party side.

- View published content in the PeopleSoft Enterprise Portal.

- Understand Enterprise Integration Points for the PeopleSoft Enterprise Portal.

Note. The Resource Finder integration used to import participant data is documented in the Importing Participant Data chapter.

Understanding Web Services for Incoming Third-Party Content

This section discusses:

- Prerequisites.

- Publication of content from third-party applications to the PeopleSoft Enterprise Portal.

- The process flow for publishing content.

- PeopleSoft-delivered objects.

There are two parts to publishing content from third-party applications:

- PeopleSoft.

- Third-party application.

On the PeopleSoft side, you need to define the PeopleSoft Integration Broker Gateway, nodes, and routings

On the third-party side, you must generate and post XML messages containing metadata about the content you are publishing. PeopleTools provides the Send Master utility that you can use to test posting messages to Integration Broker.

Note. The PeopleSoft Enterprise Portal provides a basic prototype for web services. This is only a sample. You can adapt this prototype for your organization, but must also take into account additional factors that might apply in your organization in order to implement web services effectively.

Prerequisites

Before implementing web services, you must have installed:

* PeopleTools 8.4 or later.

* Portal database.

* PeopleSoft Pure Internet Architecture.

* PeopleSoft Application Server and Process Scheduler, configured using PSADMIN (a utility program that is located in your PeopleTools home directory).

Publication of Content from Third-Party Applications to the PeopleSoft Enterprise Portal

You can publish three types of content from a third-party application to the PeopleSoft Enterprise Portal. Each type of content has a category type, expressed as a code:

Type of Content	*Category Type*
New Publications	N (News)
Managed Content	R (Regular content)
Categorized Content	B (Browse)

The codes are part of the metadata that is used in the XML files that are brought over to the PeopleSoft Integration Broker.

Content Publication Process Flow

The following diagram illustrates the process flow for publishing content from third-party applications to the PeopleSoft Enterprise Portal:
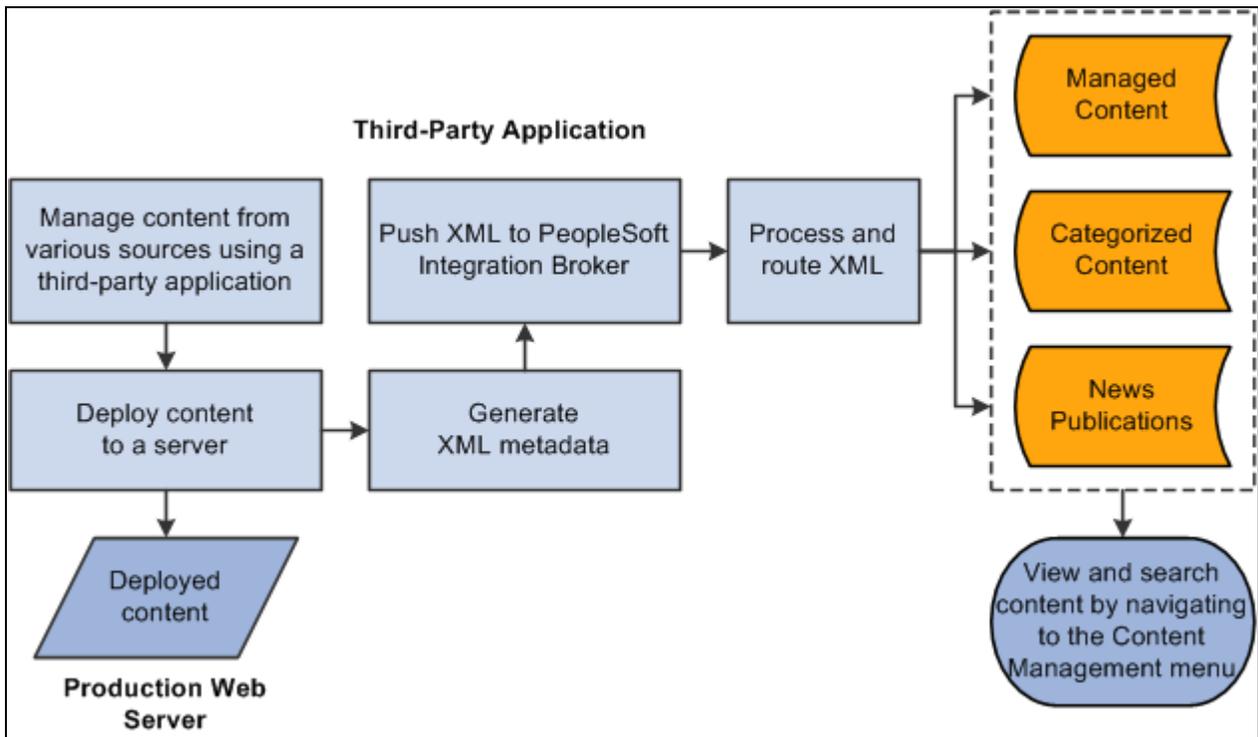
Content publishing process

The content publishing process is as follows:

1. Deploy third party, system-managed content to a production server.

2. Create XML file with metadata about content.

3. Push XML to PeopleSoft Integration Broker.

4. Process and route the XML.

5. In the PeopleSoft Enterprise Portal, navigate to the Manage Content menu to view the three different types of content.

PeopleSoft-Delivered Objects

The following objects are delivered with the PeopleSoft Enterprise Portal:

Description	Object Name
Message definition for web services.	EPPNV_NEWS_MSG
Message channel for web services.	EPPNV_IN_NEWS
Message node.	Provide any message node, but one node has to be the default local node.

Description	Object Name
File layout definition for web services.	EPPNV_IN_NEWS

Setting Up on the PeopleSoft Side

This section discusses how to:

- Set up the publish/subscribe servers using the PSADMIN utility.

- Set up the PeopleSoft Integration Broker gateway.

- Define a message node to represent the third-party application that will be publishing content messages.

- Define message channels.

Setting Up the Publish/Subscribe Servers

To set up the publish/subscribe server:

1. Access the PSADMIN menu to set up your application server for the database.

2. In the Configure this domain option, keep selecting the default values by pressing the ENTER key until you see the message *Do you want the Publish/Subscribe servers configured (y/n)?*

3. Be sure that *[y]* is selected.

   The system loads the new configuration.

4. Boot the domain.

Setting Up the PeopleSoft Integration Broker Gateway

The PeopleSoft Integration Broker Gateway receives incoming data.

To set up the PeopleSoft Integration Broker Gateway:

1. Go to PeopleTools, Integration Broker, Gateways, Find an Existing Value.

2. Search for an existing value named *Local* and click Search.

3. If *Local* does not already exist, go to the Add a New Value page and add *Local* in the Integration Gateway ID field. Click Add. This will take you to the Gateway page.

   Initially, the Gateway page is blank. Once you save and hit the Load button, this page will be populated with information.

4. Ensure that the Local Gateway check box is selected.

5. Enter a URL in the Gateway URL field. If you are using the SendMaster utility, this URL should be *http://<server hostname>/PSIGW/PeopleSoftListeningConnector.*

6. Click Save.

7. Click the Load button. A message appears to confirm that the loading process was successful.

8. Click the Refresh button.

9. Click Save.

Note. There may be slight variations on different platforms. You may also need to configure the Integration gateway.properties file for the Gateway.

Defining An External Message Node

Define an external node per the instructions in the Integration Broker PeopleBook, specifying these items:

• Enter EXT as the node name.

• For Node Type, select *External.*

• Select Active Node.

• Add a routing to the node definition, and in the routing select the appropriate service operation.

• Go your portal node definitions, access the EXT node you defined, and specify the PeopleTools and Enterprise Portal release levels.

Activating Service Operations

Activate the appropriate service operation on the Service Operations page in Integration Broker.

Setting Up on the Third-Party Side

This section discusses how to:

• Create the XML file.

• Execute the batch file that will then post the XML file to the PeopleSoft Integration Broker.

Creating the XML File

In the third-party application, you need to create an XML file. The XML file should be comprised of three sections:

• Record and field definitions that match the PeopleSoft message definition.

• The PeopleSoft common application message attributes (PSCAMA) record.

• Integration Broker Gateway data.

Record and Field Definitions in the XML that Match the PeopleSoft Message Definition

The table below lists all the fields that can be used by the message definition. These fields are being sent by the third-party application and are the only fields shown in the XML sample. At any time, more fields can be added to the message definition, but they will also need to be added to the XML definition.

Fields used by the Integration Gateway Broker

PSCAMA Fields

Define the structure of the PSCAMA record. PSCAMA is a record that PeopleTools requires for every level of the message structure during processing.

Following is a list of the field names and their descriptions that you'll find in the XML files:

Note. The AUDIT_ACTN field must have a value of *A* for the purpose of this solution.

Field Name	*Description*
LANGUAGE_CD	Required. Indicates the language in which the message is published. When publishing from components, the system sets this field to the operator's default language code. The application developer can override this if necessary. The value in the sample XML file is ENG (English).
AUDIT_ACTN	Required. Audit action code that identifies the row of data as an Add transaction.
BASE_LANGUAGE_CD	Optional. Indicates the base language of the publishing database. Used by the generic full table subscription PeopleCode to help determine which tables to update.

Field Name	Description
MSG_SEQ_FLG	Optional. Indicates whether the message is a header (H), trailer (T), or contains data (blank). The subscribing database can use this field to initiate processes. For example, the header message may cause staging tables to be cleared, while the trailer indicates that all the data has been received and an update job should be initiated.
PROCESS_INSTANCE	Optional. Process instance of the batch job that created the message. Along with the publishing node and publication ID, this field can be used by the subscribing database to uniquely identify a group of messages from the publishing node.
PUBLISH_RULE_ID	Optional. Indicates which publish rule was invoked to create the message. Used by routing PeopleCode to locate the appropriate chunking rule, which then determines to which nodes the message gets published.
MSGNODENAME	Optional. The node to which the message is published. This field is passed to the Publish utility by the Application Engine program. Routing PeopleCode must look for a value in this field and return that value to the application server.

Integration Broker Gateway Data

Enter the actual data for the record and field definitions that match the PeopleSoft message definition, as well as the PSCAMA fields.

Sample XML

Following is an example of the XML code that you'll find for Company News.

The first section of the sample XML code is where you define the attributes for the Integration Gateway Broker data. This is where you bring in the information about the record and field definitions that match the PeopleSoft message definition. The first section in the example below starts with the <EPPNV_NWS_URL class="R"> line and ends with the </EPPNV_NWS_URL> line.

The second section of the sample XML code is where you define the attributes for the PSCAMA records. The second section in the example below starts with the <PSCAMA class="R"> line and ends with the </PSCAMA> line.

The third section of the sample XML code is where you define the actual data for the record and field definitions as well as for the PSCAMA records. The third section in the example below starts with the <Transaction> line and ends with the </Transaction> line.

```xml
<?xml version="1.0"?>
<EPPNV_NEWS_MSG>
 <FieldTypes>
    <EPPNV_NWS_URL class="R">
       <EPPCM_CATG_TYPE type="CHAR"/>
       <PORTAL_NAME type="CHAR"/>
       <EPPCM_CATGID type="NUMBER"/>
       <EPPCM_CONTENTID type="NUMBER"/>
       <EPPCM_TITLE type="CHAR"/>
       <DESCR type="CHAR"/>
       <EPPCM_AUTHOR type="CHAR"/>
       <EPPCM_CONT_STATUS type="CHAR"/>
       <EPPNV_PUBLISH_DATE type="CHAR"/>
       <EPPNV_EXPIRE_DATE type="CHAR"/>
       <EPPCM_SOURCE type="CHAR"/>
       <URL type="CHAR"/>
    </EPPNV_NWS_URL>
    <PSCAMA class="R">
       <LANGUAGE_CD type="CHAR"/>
       <AUDIT_ACTN type="CHAR"/>
       <BASE_LANGUAGE_CD type="CHAR"/>
       <MSG_SEQ_FLG type="CHAR"/>
       <PROCESS_INSTANCE type="NUMBER"/>
       <PUBLISH_RULE_ID type="CHAR"/>
       <MSGNODENAME type="CHAR"/>
    </PSCAMA>
  </FieldTypes>
  <MsgData>
    <Transaction>
      <EPPNV_NWS_URL class="R">
         <EPPCM_CATG_TYPE>N</EPPCM_CATG_TYPE>
         <PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
         <EPPCM_CATGID>1052</EPPCM_CATGID>
         <EPPCM_CONTENTID>1</EPPCM_CONTENTID>
         <EPPCM_TITLE>Company News</EPPCM_TITLE>
         <DESCR>First Quarter Meeting</DESCR>
         <EPPCM_AUTHOR>VP1</EPPCM_AUTHOR>
         <EPPCM_CONT_STATUS>P</EPPCM_CONT_STATUS>
         <EPPNV_PUBLISH_DATE>01/15/2003</EPPNV_PUBLISH_DATE>
         <EPPNV_EXPIRE_DATE>03/31/2003</EPPNV_EXPIRE_DATE>
         <EPPCM_SOURCE>VP1</EPPCM_SOURCE>
         <URL>Http://www.peoplesoft.com</URL>
      </EPPNV_NWS_URL>
      <PSCAMA class="R">
         <LANGUAGE_CD>ENG</LANGUAGE_CD>
         <AUDIT_ACTN>A</AUDIT_ACTN>
         <BASE_LANGUAGE_CD>ENG</BASE_LANGUAGE_CD>
         <MSG_SEQ_FLG/>
         <PROCESS_INSTANCE>0</PROCESS_INSTANCE>
         <PUBLISH_RULE_ID/>
         <MSGNODENAME/>
      </PSCAMA>
    </Transaction>
  </MsgData>
</EPPNV_NEWS_MSG>
```

Posting XML Content from Third-Party Applications to PeopleSoft Integration Broker

To post the XML file to PeopleSoft Integration Broker, use the Send Master utility.

To use Send Master to post an XML file:

1. Access Send Master.

2. Create a new project and assign a name to the session.

3. Set the Project Type value to *X.X Integration Broker (MIME).*

4. Enter a Server URL value. This should be the same URL you specified when configuring your PeopleSoft Integration Broker Gateway.

5. Enter a Time out value greater than *0.*

6. Access the Headers tab in the Input Information group box.

7. Set the Requesting node value to *EXT.* This is the external node you previously configured.

8. Set the external operation name to <Service Operation Name>.VERSION_1, as in *EPPNV_NEWS_MSG.VERSION_1.*

9. Set the Operation Type value to *async.*

10. Enter a Password value, if the requesting node has a password.

11. Set the Destination node value. This may be your target portal database node, for example.

12. Access the Input File tab in the Input Information group box.

13. Open the file containing your sample XML message.

14. Click the Post button to send the message.

15. The Output Information group box displays a response. A MsgID value of *10000* indicates success.

At this point, if you received a MsgID value of *10000,* your message has been successfully transmitted to PeopleSoft Integration Broker.

If the message was valid and PeopleSoft Integration Broker has been configured properly, the message should have been processed by the Content Management web service, and the new content represented in the message should have been stored in the PeopleSoft Enterprise Portal database.

You can view your message results using the PeopleSoft Integration Broker Monitor. Any message subscription errors will appear in the monitor.

Viewing Published Content in the PeopleSoft Enterprise Portal

Once content has been published in the PeopleSoft Enterprise Portal, you can view the content using the Content Management menu. In this section, we discuss how to:

*   View News Publication published content.

*   View Managed Content published content.

*   View Categorized Content published content.

Pages Used to View Published Content in the PeopleSoft Enterprise Portal

Page Name	Definition Name	Navigation	Usage
Browse News Publications	EPPCM_HIERTOP_MAIN	Content Management, News Publications, Browse Publications	View published content for News Publications.
Browse Managed Content	EPPCM_HIERTOP_MAIN	Content Management, Managed Content, Browse Folders	View published content for Managed Content.
Browse Categorized Content	EPPCM_HIERTOP_MAIN	Content Management, Categorized Content, Browse Folders	View published content for Categorized Content.

Understanding Enterprise Integration Points for the PeopleSoft Enterprise Portal

Enterprise integration points (EIPs) are interfaces between PeopleSoft applications and third-party applications. They allow publication and transfer of data from a third-party application to the PeopleSoft database.

The PeopleSoft Enterprise Portal uses an EIP for web services based on PeopleSoft Integration Broker gateway technology. The following table lists the message received by the PeopleSoft Enterprise Portal.

Message Name	Channel	Message Subscription PeopleCode	Record	File Layout
EPPNV_NEWS_MSG	EPPNV_IN_NEWS	EPPNV_NEWS_MSG	EPPNV_NEWS_URL	EPPNV_IN_NEWS

The PeopleSoft Integration Broker gateway uses this EIP. The message name is based on the record, which is based on the file layout. The message subscription is what is executed when an XML file is posted to the PeopleSoft Integration Broker gateway for this transaction.

Note. To research the technical details of any integration point used by PeopleSoft applications, refer to the Interactive Services Repository that can be found in the Documentation section of the My Oracle Support website.

The Resource Finder integration used to import participant data is documented in the Importing Participant Data chapter.

Chapter 28

Using Public Web Services

This chapter provides an overview of public web services for PeopleSoft Enterprise Portal, and discusses how to:

*   Enable public web services.

*   Use Content Management public web services schemas.

Understanding Public Web Services

These public web services enable an external system to send values to PeopleSoft Enterprise Portal to create content in features such as Collaborative Workspaces, Content Management, and Discussions. In the case of CWService.FindWorkSpaceByContextData, public web service can also be used to view PeopleSoft Enterprise Portal content from within the external system.

The following public web services are available:

*   Collaborative Workspaces: CWService.CreateWorkSpace

    Enables an external system to create Collaborative Workspaces for use with the PeopleSoft Enterprise Portal database.

*   Collaborative Workspaces: CWService.FindWorkSpaceByContextData

    Enables an external system to access a Collaborative Workspace based on contextual data defined for the Collaborative Workspace.

*   Collaborative Workspaces: CWService.AddMembers

    Enables an external system to add members to a Collaborative Workspace.

*   Content Management: CMService.AddContent

    Enables an external system to add content to the Content Management feature.

*   Discussion Forums: DiscussionService.PostMessage

    Enables an external system to post a message to a Discussion Forum.

Enabling Public Web Services

Public web service access to PeopleSoft Enterprise Portal APIs requires the use of PeopleSoft Integration Broker.

To enable public web services, perform the following steps:

1. Enable publish/subscribe on the application server.

   Configure the appropriate application server to enable Pub/Sub Servers.

   See *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration,* "Setting Application Server Domain Parameters"

2. Activate the message definition EO_PE_SOAPTOCI.

   Using PeopleSoft Application Designer, open the EO_PE_SOAPTOCI message. Access the message properties and ensure that the Use tab Status value is set to *Active.*

3. Enable the message channel IB_CHNL

   Using PeopleSoft Application Designer, open the IB_CHNL message channel. Access the message channel properties and ensure that the Use tab Message Channel Status value is set to *Run.*

4. Set up the integration broker gateway URL and integrationGateway.properties file.

5. Set up the local portal node.

6. Create a new external node and add EO_PE_SOAPTOCI message transactions to it.

7. Add security to the associated component interfaces and SOAPTOCI web libraries.

   Associated component interfaces include EPPCM_ADDCONTENT, EPPCM_GETCONTENT, EPPCW_ADDMEMBER, EPPCW_CREATEWS, EPPCW_FINDWS, and EPPDF_ADDPOST.

8. Use SendMaster to test SOAP calls to the component interfaces using WSDL.

Using Content Management Public Web Services Schemas

This section presents examples of SOAP requests (this does not represent a complete reference to all available web services):

•   Add content to Content Management with a Save SOAP request.

•   Get content in Content Management with a Get SOAP request.

•   Get content in Content Management with a Find SOAP request.

Adding Content with a Save SOAP Request

Following is an example of a Save SOAP request to add content:

```
<?xml version="1.0" encoding="UTF-8" ?>
<SOAP-ENV:Envelope xmlns:SOAP
ENV="http://schemas.xmlsoap.org/soap/envelope" xmlns:SOAP
ENC="HTTP://schemas.xmlsoap.org/soap/encoding/"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema" SOAP
ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/">
<SOAP-ENV:Header>
<Security_Request>
<Username>VP1</Username>
<Password>VP1</Password>
</Security_Request>
</SOAP-ENV:Header>
<SOAP-ENV:Body>
<Update_CompIntfc_EPPCM_ADDCONTENT>
<OPRID>VP1</OPRID>
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
<EPPCM_CONT_TYPE>U</EPPCM_CONT_TYPE>
<EPPCM_TITLE>Test Sendmaster Content</EPPCM_TITLE>
<EPPCM_CONT_LONG>http://www.yahoo.com</EPPCM_CONT_LONG>
</Update_CompIntfc_EPPCM_ADDCONTENT>
</SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

The response from PeopleSoft, which uses a cloned SOAPTOCI message, is:

```
<?xml version="1.0" encoding="UTF-8" ?>
<SOAP-ENV:Envelope xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:SOAP-
ENC="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/">
<SOAP-ENV:Header />
<SOAP-ENV:Body>
<Updatedata_CompIntf_EPPCM_ADDCONTENTResponse xmlns=
"http://psfttemp.org">
<notification>The Content saved successfully.
New Content ID = 2261.(18025,1738) </notification>
<detail />
</Updatedata_CompIntfc_EPPCM_ADDCONTENTResponse>
</SOAP-ENV:Body>
<SOAP-ENV:Envelope>
```

Getting Content with a Get SOAP Request

Following is an example of a Get SOAP request to get content:

```
<?xml version="1.0" encoding="UTF-8" ?>
<SOAP-ENV:Envelope SOAP-
ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENC:="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV:="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
<SOAP-ENV:Header>
<Security_Request>
<Username>PS</Username>
<Password>PS</Password>
</Security_Request>
</SOAP-ENV:Header>
<SOAP-ENV:Body>
<Get_CompIntfc_EPPCM_GETCONTENT>
<OPRID>VP1</OPRID>
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
<EPPCM_CONTENTID>2004</EPPCM_CONTENTID>
</Get_CompIntfc_EPPCM_GETCONTENT>
</SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

The response from PeopleSoft is:

```
<?xml version="1.0" encoding="UTF-8" ?>
<SOAP-ENV:Envelope xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:SOAP-
ENC="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV="http://schemas.xmlsoap.org/soap/envelope/" SOAP-
ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/">
<SOAP-ENV:Header />
<SOAP-ENV:Body>
<Get_CompIntfc_EPPCM_GETCONTENTResponse
xmlns:="http://psfttemp.org">
<OPRID>VP1</OPRID>
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
<EPPCM_CONTENID>2004</EPPCM_CONTENTID>
<EPPCM_TITLE>Test Web Service CI HTML</EPPCM_TITLE>
<EPPCM_CONT_TYPE>H</EPPCM_CONT_TYPE>
<EPPCM_CONT_LONG />
</Get_CompIntfc_EPPCM_GETCONTENTResponse>
</SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

Getting Content with a Find SOAP Request

Following is an example of a Find SOAP request to get content:

```
<?xml version="1.0" encoding="UTF-8" ?>
SOAP-ENV:Envelope SOAP-
ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENC="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
<SOAP-ENV:Header>
<Security_Request>
<Username>PS</Username>
<Password>PS</Password>
</Security_Request>
</SOAP-ENV:Header>
<SOAP-ENV:Body>
<Find_CompIntfc_EPPCM_GETCONTENT>
<OPRID>VP1</OPRID>
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
</Find_CompIntfc_EPPCM_GETCONTENT>
</SOAP-ENV:Body>
</SOAP-ENV:Envelope>
```

Following is the response from PeopleSoft:

```
<?xml version="1.0" encoding="UTF-8" ?>
<SOAP-ENV:Envelope xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:SOAP-
ENC="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV="http://schemas.xmlsoap.org/soap/envelope/" SOAP-
ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding">
<SOAP-ENV:Header />
<SOAP-ENV:Body>
<Find_CompIntfc_EPPCM_GETCONTENTResponse
xmlsn="http://psfttemp.org">
<EPPCM_GETCONTENT>
<OPRID>VP1</OPRID>
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
<EPPCM_CONTENTID>2001</EPPCM_CONTENTID>
<EPPCM_TITLE>Michele<EPPCM_TITLE>
</EPPCM_GETCONTENT>
<EPPCM_GETCONTENT>
<OPRID>VP1</OPRID>
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
<EPPCM_CONTENTID>2004</EPPCM_CONTENTID>
<EPPCM_TITLE>Test Web Service CI HTML</EPPCM_TITLE>
</EPPCM_GETCONTENT>
<EPPCM_GETCONTENT>
<OPRID>VP1</OPRID)
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
<EPPCM_CONTENTID>2020</EPPCM_CONTENTID>
<EPPCM_TITLE>Test Web Service CI</EPPCM_TITLE>
</EPPCM_GETCONTENT>
<EPPCM_GETCONTENT>
<OPRID>VP1</OPRID)
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
<EPPCM_CONTENTID>2023</EPPCM_CONTENTID>
<EPPCM_TITLE>Test URL</EPPCM_TITLE>
</EPPCM_GETCONTENT>
<EPPCM_GETCONTENT>
<OPRID>VP1</OPRID)
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
<EPPCM_CONTENTID>2024</EPPCM_CONTENTID>
<EPPCM_TITLE>Test URL from View</EPPCM_TITLE>
</EPPCM_GETCONTENT>
<EPPCM_GETCONTENT>
<OPRID>VP1</OPRID)
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
<EPPCM_CONTENTID>2025</EPPCM_CONTENTID>
<EPPCM_TITLE>Test URL Derived Record</EPPCM_TITLE>
</EPPCM_GETCONTENT>
```

```
        </Find_CompIntfc_EPPCM_GETCONTENTRespone>
      </SOAP-ENV:Body>
    </SOAP-ENV:Envelope>
```

Chapter 29

Integrating PeopleSoft Secure Enterprise Search With Oracle Secure Enterprise Search

Oracle Secure Enterprise Search (SES) is a standalone, self-contained product for searching data.

The Suggested Content feature of Secure Enterprise Search (SES/Suggested Content) can be used to federate search requests from SES to other search engines.

In a federated search a master search engine submits a search query to one or more slave search engines, aggregates those results and presents them to the user. Slave search engines are autonomous from the master search engine, in that each slave search engine may use different techniques for indexing and searching its data repositories and subsequently ranking and ordering its search results.

This chapter provides an overview of PeopleSoft Secure Enterprise Search (PS-SES) and discusses:

- Preparing for SES Search.

- The PS-SES URL Query String.

Understanding PeopleSoft Secure Enterprise Search

PeopleSoft Secure Enterprise Search (PS-SES) enables Oracle SES to search the PeopleSoft portal registry and PeopleSoft Enterprise Portal content such as Action Items, Calendar, Discussion Forums, Collaborative Workspaces, Resource Finder, and Managed Content, and create links to PeopleSoft content.

An SES search on the PeopleSoft Enterprise Portal for "Blogs" might return results such as these:
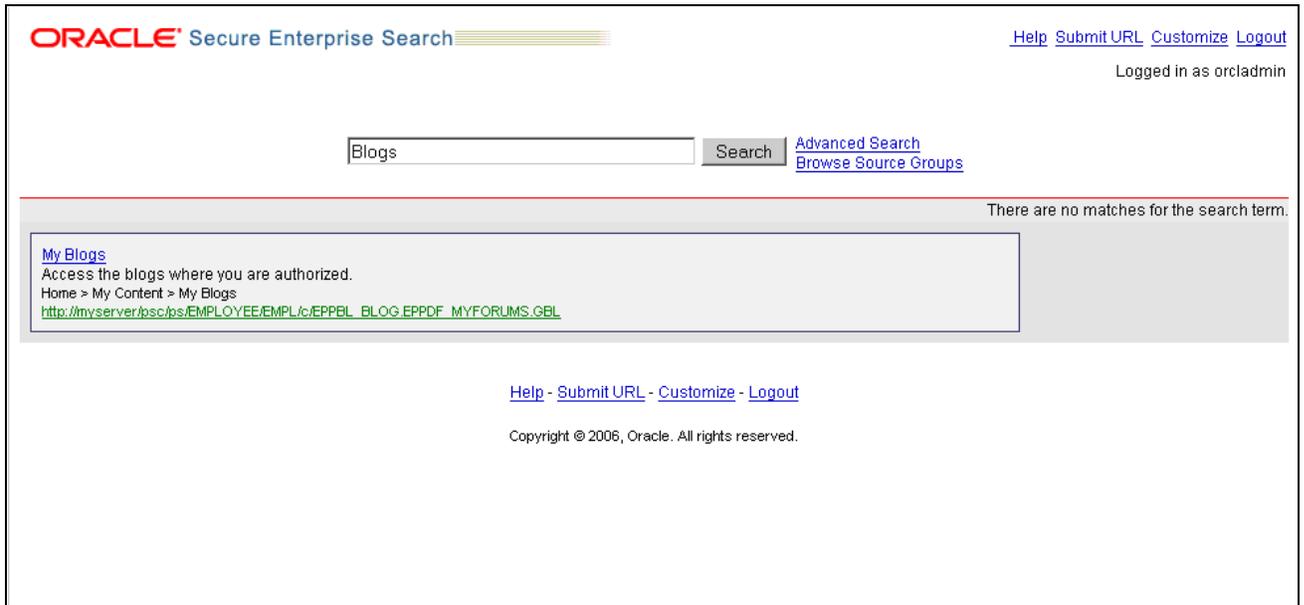
Example of an Oracle SES page showing search results for "Blogs"

No direct system administrator database access is required to use PS-SES and no intimate knowledge of PeopleSoft portal data is needed. Security is handled by the PeopleSoft Integration Broker web service framework.

PS-SES Search Request Process

The following diagram illustrates the flow for an SES search.
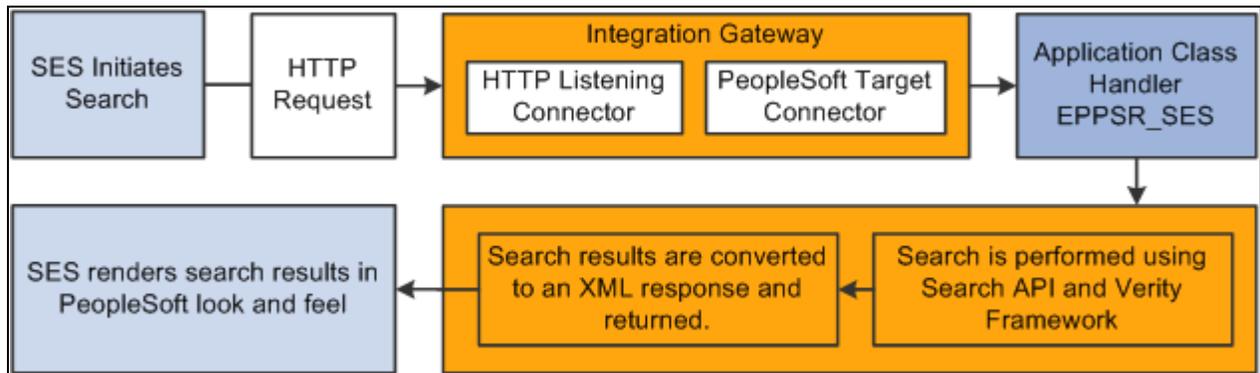
Flow chart showing the path of a search request from Oracle SES to PSSES

The flow for searching PeopleSoft Enterprise Portal for Oracle SES is:

1. Oracle SES sends an HTTP request to Peoplesoft PS-SES with these parameters:

    • Authenticate mode

    • From node and To node

    • Portal name and node

    • Service operation and portal node name

    • Search index group

    • Search string

    • Debug mode

2. The HTTPListening connector receives the request and passes it to the Integration Broker handler application class to read the URL query parameters.

3. The Integration Broker handler checks the URL query string for all the mandatory parameters, validates the parameter values, and initiates a Portal search, which is executed using Search API. This is a Verity search and is performed upon the pre-built search indexes.

    Integration broker performs a check only on those parameters that are necessary for the connector, such as From node, To node, and Service Operation name. Other parameters, such as Authenticate mode, Portal name, Portal node name, search index group, search string, debug mode are validated by the Entprise Portal application class handler (EPPSR_SES).

4. Search API applies security using the user context of the default user assigned to the From node. If no From node is assigned then Anonymous node is set as From node by default.

5. The search results are then wrapped in an XML response and sent back to SES.

6. SES renders the XML search results with a look and feel similar to a PeopleSoft Enterprise Portal search page.

Preparing for SES Search

Follow these steps to prepare for SES search.

Details for each step are presented in the sections that follow.

1. Configure for search authentication.

2. Configure PeopleSoft authentication.

3. Configure Integration Broker.

4. Create a new From node.

5. Define the search index group to be used for searching.

6. Test your PS-SES configuration.

Configuring PeopleSoft Enterprise Portal for Search Authentication

You can perform SES search in authenticated or unauthenticated mode. This section presents considerations for each mode.

Unauthenticated Mode

Unauthenticated mode is primarily used to provide Guest access. In this mode the user can search into those portal contents that are made available to all users without authentication.

In unauthenticated mode the request handler application class executes in the context of the default user ID of the From node (or the Anonymous node, if no from node is provided in the URL).

For this reason Oracle recommends that you assign a user ID to the From node that has the least privileges necessary to perform public search. Unauthenticated search is performed generally by guest users who should not be given access to secured search results. If the permissions of the user ID assigned to the From node are higher than those of the Guest profile then an unauthenticated user will be able to access search results that are above the Guest user security level.

Authenticated Mode

In authenticated mode the user is authenticated using PS_TOKEN and the returned search results are based on the security permissions available to the user.

To search in authenticated mode a user must have a user ID and that has been assigned permissions to view content on the portal. When a validated user performs a search in authenticated mode the user receives search results based on the security permissions for that user ID.

In authenticated mode a SwitchUser call is executed with the PS_TOKEN passed as a cookie. Once a switch user is performed search is executed on the context of the switched user.

Note. It is the From node and not the To node that provides the context for the search.

The following elements must be in place to perform a search in authenticated mode.

*   The SES install and the PeopleSoft web server must be configured with the same network domain and reside in that same network domain.

*   Oracle Internet Directory (OID) server must be installed and OID plug-in must be configured for SES.

    Consult your OID documentation for details.

    When OID is configured correctly a PeopleSoft login link displays on the SES search page.

- The PeopleSoft Authentication domain must be set.

  This can be done while configuring the web server or using the Web Profile Configuration page.

  To set the Authentication Domain access the Web Profile Configuration page (PeopleTools, Web Profile Configuration).

Web Profile Configuration page with Authentication Domain set to .peoplesoft.com

•   Service operation security must be set for the service operation. At least one permission list belonging to the default User ID of the From or the Anonymous node must be assigned to the service operation.

Access the Web Services page to add the EPPSR_SES_SRCH service to a permission list (PeopleTools, Security, Permission Lists, Web Services).

Permission List: Web Services page showing an example of a permission list with EPPSR_SES_SRCH web service

•   By default, Anonymous node will have PS_ADMIN as its user ID. This must be changed to a user ID upon whose context search will be conducted.

Note. Oracle does not deliver a permission list that includes the EPPSR_SES_SRCH service.

Configuring PeopleSoft Authentication

To perform a search from SES a user must first login to SES. Then, the first time a users performs a search of the PeopleSoft portal from SES, the PeopleSoft login link is presented. When the user logs in with a valid PeopleSoft user ID and password a PS_TOKEN cookie is generated and a session is established with PeopleSoft. The cookie remains available for the duration of the session.

The PS_TOKEN cookie is passed over to Peoplesoft through the HTTP request each time a search is performed.

The application class request handler retrieves the PS_TOKEN cookie from the HTTP request and uses the SwitchUser function it to change the user ID of the current user logged onto the PeopleSoft system.

The user ID under which search is performed and the user ID configured in the From (or Anonymous) node must be different. For example, suppose the user ID of the From node is PAPP_EMPLOYEE. A user performing an authenticated search from the SES search page must signon to PeopleSoft using the PeopleSoft signon. If the user signs on as PAPP_EMPLOYEE the SwitchUser function executes in the PAPP_EMPLOYEE user context. SwitchUser fails because it cannot switch to the user ID from which it is called.

Note. Oracle recommends that you assign a user ID with the minimum needed privileges to the From or Anonymous node.

Configuring Integration Broker

You do not need to modify Integration Broker unless your customize your application. To support SES these Integration Broker objects are delivered with PeopleSoft Enterprise Portal:

Object	*Description*	*Navigation*
EPPSR_SES_REQ	Request Message	PeopleTools, Integration Broker, Integration Setup, Messages
EPPSR_SES_RES	Response Message	PeopleTools, Integration Broker, Integration Setup, Messages
EPPSR_SES	Service	PeopleTools, Integration Broker, Integration Setup, Services
EPPSR_SES_SRCH	Service Operation	Service Operations group box
EPPSR_SES:SES_SRCH	Request handler	Access the Handlers tab

In addition, verify that the following are in place:

• Use PS-Admin to verify that the application server has Pub/Sub activated.

• Verify that the application server domain status is Active (PeopleTools, Integration Broker, Configuration, Quick Configuration).

Creating a New From Node

If you intend to use an exclusive From node you need a create a new node. If a From node is not specified then the default Anonymous node is used.

1. Access the Nodes page and create a new node named SES (PeopleTools, Integration Broker, Integration Setup, Nodes)

2. Access the Node Definitions page and specify the following values:

Node type —*External*

Active node — *Selected*

Default User Id — Select the userid on whose context handler is run when run in an unauthenticated mode.

Defining the Search Index Group to be Used for Searching

The search URL takes as a parameter the search index group that will be used for the search.

The PAPP_PORTAL_SEARCH index group by default includes the portal registry index (EMPLOYEE) and other content indexes (EPPCM_DOC, EPPCM_URL, EPPCM_HTML).

If you pass this index group name as the value for IndexGroup parameter then search will be limited to the portal registry and content. If you want to search into other portal search scopes, such as Discussion Forums, Action Items, and so on, you can either add the corresponding index to this index group or create a new index group and add all the needed indexes to it.

When your search index is defined build the index and execute a search to test it. You will use the results of this search to verify your SES search configuration.

Testing Your PS-SES Configuration

For unauthenticated mode, use this URL:

```
http://<MachineName:Port>/PSIGW/HttpListeningConnector?authenticate=n&To=PSFT_PA
&Portal=EMPLOYEE&Node=EMPL&Operation=EPPSR_SES_SRCH.v1&indexgroup=PAPP_PORTAL_⇒
SEARCH
&SearchText=dictionary
```

For authenticated mode, use this URL:

```
http://<MachineName:Port>/PSIGW/HttpListeningConnector?authenticate=n&From=SES
&To=PSFT_PA&Portal=EMPLOYEE&Node=EMPL&Operation=EPPSR_SES_SRCH.v1
&indexgroup=PAPP_PORTAL_SEARCH&debug=y&SearchText=dictionary
```

SES URL Query String

To initiate a search SES sends a URL Query String to PS-SES.

The URL is in this format:

```
http://<MachineName:Port>/PSIGW/HttpListeningConnector/?authenticate=<Y|N>
&To=PSFT_PA&Portal=<Portalname>[From=<FromPortalName>]&Node=<Nodename>
&Operation=EPPSR_SES_SRCH.v1&indexgroup=<IndexGroupName>
[&debug=<Y|N>]&SearchText=<SearchText>
```

URL Query String Parameters

The following parameters are passed through the URL query string as part of the HTTP request. All parameter values are case insensitive. The order of the parameters does not matter.

Authenticate

If Authenticate is set to *Y* then PS_TOKEN is validated and used to switch user. If set to any value other than *Y* the search is performed using the default user ID associated with the default local node.

See Chapter 29, "Integrating PeopleSoft Secure Enterprise Search With Oracle Secure Enterprise Search," Authenticated Mode, page 280.

From

This parameter sets the From node in Integration Broker. The Integration Broker handler is run in the userid context of the From node's default user ID. For example, if the default user ID of the From node is set to *GUEST* then any search performed will return results corresponding to GUEST. If this parameter is not included in the HTTP Request then Anonymous node becomes the default From node and search is performed using the user ID context of the default Anonymous node.

See Chapter 29, "Integrating PeopleSoft Secure Enterprise Search With Oracle Secure Enterprise Search," Authenticated Mode, page 280.

This parameter is optional. If it is not included then Anonymous node is taken as the From node.

To

Specify the name of the node that will receive the message.

This parameter must be set to the default local node, which is *PSFT_PA* for PeopleSoft Enterprise Portal. The default user ID of this node does not influence the search results.

This parameter is optional if you specified a default target node using the default application server Jolt connect string properties in the integrationGateway.properties file.

Portal

Specify the portal name into which the search is to be performed. If this parameter is empty or invalid an error message is returned.

Node

Specify the node that hosts the content. If this parameter is empty or invalid an error message is returned.

Operation

Specify the service operation name, which for PS-SES is set to *EPPSR_SES_SRCH*.

If this parameter is empty an Integration Broker Gateway error is thrown.

IndexGroup   Specify the search index group. If this parameter is empty or invalid an error message is returned. SES Search is enabled for the following Search Index Groups.

One of these Index group names must be passed as a value for the IndexGroup parameter:

- *EPPAI_SEARCH* — Action Items Search

- *EPPBL_SEARCH* — Blog Search

- *EPPCA_SEARCH* — Calendar Events

- *EPPCM_SEARCH* — Content Management Hierarchy Search

- *EPPCW_RF_SEARCH* — Collaborative Workspaces Resource Finder Search

- *EPPCW_SEARCH* — Collaborative Workspaces Search

- *EPPDF_SEARCH* — Discussion Forum Posts Search

- *EPPLINKS_SEARCH* — Links Plugin Search

- *EPPTG_SEARCH* — Tagging - All Namespace Search

- *PAPP_PORTAL_SEARCH* — Enterprise Portal Search

Debug   Set Debug to Y to obtain detailed error information.

This parameter is optional. By default detailed error information is disabled.

SearchText   The search string is case insensitive. While searching this is converted into uppercase. If this parameter is empty then the search is not performed.

Examples

URL example with a From node and the Debug flag

```
http://PTDMO-099.us.oracle.com:8980/PSIGW/HttpListeningConnector/?authenticate=n
&From=SES&To=PSFT_PA&Portal=EMPLOYEE&Node=EMPL&Operation=EPPSR_SES_SRCH.v1
&indexgroup=PAPP_PORTAL_SEARCH&debug=y&SearchText=dictionary
```

URL example with a From node and the Debug flag

```
http://PTDMO-099.us.oracle.com:8980/PSIGW/HttpListeningConnector/
?authenticate=n&To=PSFT_PA&Portal=EMPLOYEE&Node=EMPL&Operation=EPPSR_SES_SRCH.v1
&indexgroup=PAPP_PORTAL_SEARCH &SearchText=dictionary
```

Appendix A

PeopleSoft-Delivered Security Data

This appendix summarizes the PeopleSoft-delivered security data and discusses:

- Permission lists and roles cloned when creating sites.

- Permission lists with special uses in PeopleSoft Enterprise Portal.

- Roles.

- User IDs.

- Delivered PeopleTools roles.

- Adding the portal user roles to all user IDs.

Summary of Delivered Security Data

The following list provides an overview of important security information:

- Every component, PeopleCode Web library, interface, registry item, and so on, specific to PeopleSoft Enterprise Portal is assigned to two permission lists. These permission lists are:

  - A system administer permission list in the form xxxx9000.

  - One of the feature-specific permission lists in the form xxxxNNNN.

- Pagelet permission lists include the pagelet, the personalization, and usually the enhancement pages that are accessible from the pagelet.

- PeopleSoft Enterprise Portal security for each feature is divided into three groups:

  Administrator   Feature implementation and set up. Highest security level.

  Manager   Feature maintenance, distribution, and usage. Medium security level.

  User   Feature access, viewing, and usage. Low security level.

- All logged on user IDs (except for the Guest user) must contain the roles PeopleSoft User and PAPP_USER, or a cloned version of the roles.

- The GUEST user ID must contain the roles PeopleSoft Guest and PAPP_GUEST, or a cloned version of the roles.

- The required roles (PAPP_USER, PAPP_GUEST, PeopleSoft User, and PeopleSoft Guest) contain specific permission lists that are necessary to access the base portal features.

    You can adjust cloned roles to as needed, but you must keep the following permission lists on the specified role:

    - PTPT1000 is necessary to access the PeopleTools portal base features (included in the role PeopleSoft User).

    - PAPP0000 is necessary to access the PeopleSoft Enterprise Portal base features (included in the roles PAPP_USER and PAPP_GUEST).

    - PAPP0001 is necessary for the Guest tab (included in the role PAPP_GUEST).

    - PAPP0002 is necessary for the homepage Personalization (included in the role PAPP_USER).

Note. When enabling role grant security, you must include the roles PeopleSoft User and PAPP_USER. These roles are required for access to base portal functionality.

Permission Lists and Roles Cloned When Creating Sites

When you create sites, the system clones and uses special permission lists and roles on the site. This section describes:

- Permission lists cloned when creating sites.

- Roles cloned when creating sites.

Permission Lists Cloned When Creating Sites

When you create a site, the system clones and uses the following permission lists on the site content and folder definitions. The Installation Options page lists which permission lists to clone during site creation. These are delivered as PAPP5000, PAPP5060, PAPP5070. The generated permission lists are listed in the following table, where XXX represents the site name.

Permission List	Description
SITE_XXX_ADM	Gives site-specific access for the site administrator to set navigation defaults, set security access to the site, and review and override Branding elements for the site. It is generated by cloning PAPP5000 during site creation.
SITE_XXX_PUB	Gives site-specific access for publishing menu items in the navigation of the site. It is generated by cloning PAPP5060 during site creation.

Permission List	Description
SITE_XXX_VWR	Gives site-specific access to view the site. It is generated by cloning PAPP5070 during site creation.

Roles Cloned When Creating Sites

When you create a site, the following roles are generated and assigned site-specific permission lists. These roles are attached to the appropriate user who is assigned security access to the site.

Role	Description
SITE_XXX_ADM	Gives site-specific access for the site administrator to set navigation defaults, set security access to the site, and review and override Branding elements for the site. It contains the matching permission list SITE_XXX_ADM which is generated during site creation.
SITE_XXX_PUB	Gives site-specific access for publishing menu items in the navigation of the site. It contains the matching permission list SITE_XXX_PUB which is generated during site creation.
SITE_XXX_VWR	Gives site-specific access to view the site. It contains the matching permission list SITE_XXX_VWR which is generated during site creation.

Permission Lists

This section describes:

• Permission lists that have special meaning and usage in PeopleSoft Enterprise Portal.

• All permissions delivered with PeopleSoft Enterprise Portal.

Permission Lists with Special Uses

The following table describes permission lists that have special meaning and usage in PeopleSoft Enterprise Portal.

Permission List	*Description*
PAPP9000	Includes every delivered PeopleSoft Enterprise Portal object (excluding Pagelet Wizard and Resource Finder objects). This permission list is included in the role PAPP_SYSTEM_ADMIN.
PAPX9000	Includes every delivered Resource Repository object. This permission list is included in the role PAPP_SYSTEM_ADMIN.
PAPP0000	Required to access the PeopleSoft Enterprise Portal base features. This permission list is included in the roles PAPP_USER and PAPP_GUEST.
PAPX0000	Required to access the Resource Repository base features. This permission list is included in the roles PAPP_USER and PAPP_GUEST.
PAPP0001	Required for the Guest tab. This permission list is included in the role PAPP_GUEST.
PAPP0002	Required for Personalize Content and Layout links on the homepage and the My Links feature in the portal header. This permission list is included in the role PAPP_USER.
PAPQnnnn	Required for access to Internal Controls Enforcer Portal items in the left navigation and for access to Internal Controls Enforcer pagelets.
PAPJnnnn	Required for access to EnterpriseOne applications from the Enterprise Portal.
PTPT1000	Required to access the PeopleTools base portal features. This permission list is included in the PeopleTools role PeopleSoft User. If you use a cloned version of this permission list, make sure to retain the needed iScripts and component interfaces security required to access the portal and end-user base access items, such as changing a password.
PTPT1400	Required to access the PeopleTools base portal features for a guest user. This permission list is included in the PeopleTools role PeopleSoft Guest.

Delivered Permission Lists

The following table lists all permission lists delivered with PeopleSoft Enterprise Portal.

Permission List	Description	Usage
PAPP0000	Base PeopleSoft Enterprise Portal objects.	Base access to the navigation and template iScripts (Web Libraries), portal search results page, Take a Survey page, Workspace error access page, Site Manager error access page, template pagelets (Content Ratings, Related Information, Related Contacts), menu item file attachment viewer pages, and the Language Selection pagelet. Note: This permission list is required for all users, including GUEST.
PAPP0001	Base Guest objects.	Access the homepage tab Guest Page and the Sign On pagelet. **Note.** This permission list is required for the GUEST user.
PAPP0002	Logged in user access.	Access the homepage Personalize Content and Layout pages, and My Links pages, the user profile pages, and the Related Discussion Template pagelet. Required access for all users, except Guest.
PAPP0010	PeopleTools Notification.	Access the email notification pages from the PeopleTools Notify button.
PAPP1000	External News pagelets.	Access the integrated External News feed and RSS News pagelets.
PAPP1100	Company News pagelets.	Access the News Publication pagelets, pagelet personalization, and pagelet enhancement pages for viewing sections and published articles.
PAPP1110	Company Promotions pagelet.	Access the Company Promotions pagelet and pagelet personalization.

Permission List	Description	Usage
PAPP1120	Web Magazine pagelet.	Access the Web Magazine pagelet and Web Magazine viewing.
PAPP1130	Promotions by Role pagelet.	Access the Promotions by Role pagelet. To access the results page, roles with this permission list must also include permission list PAPP2030 (Manage Company Promotions).
PAPP1140	My Managed Content Pagelet	Access the My Managed Content pagelet and pagelet personalization. **Note.** To access the links on this pagelet, roles with this permission list must also include permission list PAPP2010 (Access Content Management).
PAPP1150	My News Content Pagelet	Access the My News Content pagelet. **Note.** To access the links on this pagelet, roles with this permission list must also permission list PAPP2010 (Access Content Management). To access the Review for Publishing link, roles with this permission link must also include permission list PAPP2020 (Publish News Articles).
PAPP1160	Submitted Promotions pagelet.	Access the Submitted Promotions pagelet. To access the links on this pagelet, roles with this permission list must also include permission list PAPP4110 (Submit Promotion Items).

Permission List	Description	Usage
PAPP1170	Poll Pagelet	Access published Poll pagelets to respond to the current poll question. **Note.** Users must be included in the Poll definition's respondent roles to respond or view any given poll. Users do not need member privileges or access to the Poll definition in order to respond to a poll question.
PAPP1200	Tasks pagelet.	Access the Integrated Task List pagelet, pagelet personalization, pagelet enhancement pages, and to the PeopleTools Worklist and Worklist Details pages. **Note.** To access links for action items, roles with this permission list must also include permission list PAPP5600 (Access Action Items).
PAPP1210	View Community Calendars	View Community Calendars in display-only mode. Access the Community Calendar search results page. Calendar access is restricted by member privileges on the Calendar definition. **Note.** This permission list is required to view the links on the Pagelet Wizard generated Community Calendar pagelets.
PAPP1300	Email/Calendar pagelets.	Access the Email and Calendar pagelets and pagelet personalization pages.
PAPP1500	Internet Information pagelets.	Access the Internet HTML pagelets and associated component interfaces and web libraries.
PAPP1600	Saved Searches pagelets.	Access the Saved Searches pagelets, pagelet personalization, and pagelet enhancement Search Results pages.

Permission List	*Description*	*Usage*
PAPP2000	Access Published Content	Access the Content Management published content viewer pages, hierarchy viewer pages, and Browse by Category viewer pages. Content and folder access is restricted by member privileges on the Folder definition, or content viewer roles on the Content definition, or folder viewer roles on the Folder definition. **Note.** This permission list is needed for all users when Content Management folders and content items are published as menu items in the left navigation or published as pagelets or available from the portal search.
PAPP2010	Access content management.	Access the hierarchy management pages, hierarchy search pages, content definition pages, folder definition pages, the My Content Status pages, and the content web services. Content Management access and actions are restricted by member privileges on the Folder definition, or to users listed as Top Administrators for the Content Management feature.
PAPP2020	Publish News Articles	Access the News Publications Publish Articles page, the Unpublish Articles page, and the Choose Top Stories page. **Note.** To access the pages for viewing and editing content, roles with this permission list must also include permission list PAPP2010 (Access Content Management)

Permission List	Description	Usage
PAPP2025	Administer News content.	Administer News Publication articles and images. These pages allow the user to delete, add, and update news articles and images, ignoring the privilege set or status of the content. This permission list should only be granted to high-level content administrators. To access the pages for viewing and editing news content, roles with this permission list must also include permission list PAPP2010 (Access Content Management).
PAPP2030	Manage Company Promotions.	Manage Company Promotions by publishing submitted promotions, and inquiring on viewer roles assigned to Company Promotion items.
PAPP2035	Administer Company Promotions.	Administer Company Promotions by creating and updating promotion targets and categories.
PAPP2045	Run Categorization Spider.	Run the Categorization Spider process to pull categories and content into the Categorized Content feature. **Note.** Users with this permission list should also be listed as a Top Administrator for the Categorized Content feature.
PAPP2050	Administer Content Management.	Administer Managed Content by assigning top category administrators, creating privilege sets, assigning viewer roles, and defining attachment locations. This permission list should only be granted to high-level content administrators.

Permission List	Description	Usage
PAPP2070	Review Content Access/Location.	Review Content stored in the Content Management system. The inquiry lists where the content can be accessed, who can access the content, and a preview of the content for users who are viewing members for this content. Access the Render Content URL page to generate the content's rendering URL for use in third-party applications.
PAPP2080	Query Content Management	Access the Content Management tables and views on the Enterprise Portal query tree. **Note.** This permission list should only be granted to high level content administrators to limit access to all content.
PAPP2300	Administer External News.	Administer External News by creating and updating External News publication pagelets, providers, groups, categories, articles, and news feed batch process.
PAPP2310	Manage External News.	Manage External News by changing the publish and expire dates of news feed articles to remove offensive articles.
PAPP2700	Administer Web Magazine.	Administer Web Magazine by creating and updating Web Magazine publications, issues, sections, categories, images, and articles.
PAPP2800	Administer Integrated Tasks.	Administer the Integrated Task pagelet by access to the PeopleTools Worklist, Worklist Details, and Worklist administration pages.
PAPP3100	Administer Weather pagelet.	Administer Weather pagelet by getting a customer ID or running the Update City List process.

Permission List	Description	Usage
PAPP3200	Administer HTML pagelets.	Administer HTML pagelets by creating and registering HTML pagelets.
PAPP3300	Administer Email/Calendar pagelet.	Administer the Email and Calendar pagelets by defining the email and calendar system and user values.
PAPP3550	Administer integration content.	Access the SOAP to component interface iScripts (WEBLIB) web services.
PAPP3560	Administer integration workspaces.	Access the Collaborative Workspace component interface web services.
PAPP4000	Query Portal Registry	Access PeopleSoft Query and the Portal Registry navigation and homepage tables on the Enterprise Portal query tree.
PAPP4001	Run portal registry processes.	Access the run control pages and processes for Registry Load, Menu Import, Portal Security Sync, and Sync Navigation Collections.
PAPP4002	Administer Homepage Tabs.	Administer the Homepage Tab Layout and Content definition. **Note.** The user must have the Portal Administrator role or have the site-specific administrator role to modify the tab definition from the Configure Homepage menu item.
PAPP4003	Administer Portal Settings	Administer the Portal General Settings page to set the site and node templates, the folder navigation options, and the portal search options.
PAPP4004	Run Processes.	Access to Process Monitor and the delivered process groups. Use as the process profile permission list on the User Profile definition page.

Permission List	Description	Usage
PAPP4005	Publish Pagelets to Sites.	Access the component to copy pagelet content references from one site to another.
PAPP4006	Run Base User Processes	Access the delivered base user process group for alert and subscribed notifications. **Note.** Use this permission list as the process profile permission list on the User Profile definition page for end-users.
PAPP4010	Administer Pagelet Personalization.	Administer Pagelet Personalization by setting any user's preferences for the following pagelets: Weather, External News, RSS News, Stock Quotes, Community Calendars, Managed Content, Discussion Forums, and Pagelet Wizard pagelets.
PAPP4020	Manage Menu Item Requests.	Manage menu item requests by approving or rejecting requests, and defining the users notified by email for submitted requests.
PAPP4025	Administer Menu Item Requests.	Administer menu item requests by approving or rejecting requests, registering approved requests, and defining the users notified by email for submitted requests.
PAPP4040	Administer Privilege Sets.	Administer the Privilege Set definitions for Collaborative Workspaces, Community Calendars, Action Items, Polls, and Discussion Forums. **Note.** Use permission list PAPP2050 (Administer Content Management) to administer the Content Management Privilege Sets

Permission List	Description	Usage
PAPP4050	Administer Portal Search.	Administer Search by defining search indexes, search groups, search run controls and search notification. **Note.** Search groups determine which search collections are associated with a specific search results page.
PAPP4060	Administer Viewer Roles	Administer Viewer Roles by listing the roles available to secure News Publication articles and Company Promotion items. **Note.** This permission list should only be granted to high level content administrators.
PAPP4080	Query Navigation.	Access the Portal Registry navigation tables on the Enterprise Portal query tree.
PAPP4100	Submit Menu Item requests	Submit Menu Item Requests to request items to be added to the portal navigation.
PAPP4110	Submit promotion items	Submit company promotion items.
PAPP4120	Submit news articles	Submit News Articles for publication. **Note.** This permission list is needed to enable the Submit Article link on News Publication pagelets that allow submits from the pagelet.
PAPP4130	Take a survey	Take a survey. Access is limited to the survey definition's distribution group.
PAPP4200	Logon Statistics pagelet	Access the Logon Statistics pagelet.

Permission List	Description	Usage
PAPP4300	Manage Content Ratings	Manage Content Ratings by creating content rating questions, assigning menu items to the content rating definition, and viewing the respondent results of the content rating questions.
PAPP4310	Access Poll definitions.	Access Poll Definitions. Poll Definition access and actions are restricted by member privileges on the Poll Definition.
PAPP4350	Administer Content Ratings.	Administer Content Ratings by assigning Result Viewers, setting non registered URL's, and inquiring on the invisible iTracker results.
PAPP4355	Administer Poll definition.	Administer Poll Definitions by assigning member privileges or deleting a poll. These Poll Definition actions are not restricted by member privileges.
PAPP4360	Create Poll Definitions	Create Poll Definitions and assign member privileges to the created poll.
PAPP4400	Access Account Signon Utility.	Access the Account Signon Utility by updating the stored user ID and password.
PAPP4450	Administer Account Signon Utility.	Administer the Account Signon Utility by creating the Sign On forms and URLs to access external secured sites.
PAPP4500	Administer portal options.	Define installation, system, and registry options.
PAPP4600	Administer context assignment.	Administer Context Manager by assigning the default template pagelets as well as the individual template pagelets to a specified Menu Item.

Permission List	Description	Usage
PAPP4680	Query Context Manager	Access the Context Manager tables and views on the Enterprise Portal query tree.
PAPP4700	Manage Related Content.	Manage Related Content by adding Related Content online to Menu Items that are assigned a Related Content template pagelet. This permission list is for general page access. Access to add content to a Menu Item/Related Content publication combination is restricted via assigned Topic Experts as well as access to the Menu Item in the navigation.
PAPP4710	Review Related Content	Access the Related Content Inquiry Pages listing content according to the assigned Topic Expert or the Menu Item.
PAPP4750	Administer Related Content	Administer Related Content by creating or updating Related Content Publications and assigning the Topic Experts to add the content.
PAPP4800	Discussion Forums pagelet	Access the Discussion Forums pagelet and pagelet personalization. The displayed forums are limited by member privileges on the Forum definition.
PAPP4810	Access Discussion Forums	Access Discussion Forums. Discussion Forum access and actions are restricted by member privileges on the Forum definition.
PAPP4820	Access Guest Discussion Forums	View Discussion Forums in display-only mode. Access is restricted by member privileges on the Forum definition.

Permission List	Description	Usage
PAPP4850	Administer Discussion Forums	Administer Discussion Forums by assigning member privileges, editing metadata or deleting a Forum. These Discussion Forum actions are not restricted by member privileges.
PAPP4855	Manage Related Discussions	Administer Related Discussions template pagelet by assigning moderators. Contributor and viewer privileges are automatically granted to all users who can access the Menu Item that contains the related discussion.
PAPP4860	Create Discussion Forums	Create Discussion Forums and assign member privileges to the created Forum.
PAPP4910	Define pagelets with the Wizard.	Create, delete, and clone Pagelet Wizard pagelets definitions. Pagelet Wizard access and actions are restricted by the security on the Pagelet Wizard definition.
PAPP4920	Define Pagelet Wizard data.	Create and update Pagelet Wizard footers, headers, and categories and review existing pagelet definitions.
PAPP4950	Administer Pagelet Wizard	Create and update Pagelet Wizard data types, display formats, transform types, and pagelet XSL. Create Data Mover scripts to export and import pagelet definitions.
PAPP5000	Administer Site - Template.	This permission list is the Site Manager template permission list for site administrators. This permission list is cloned for each created site. It grants site-specific access to the following: define site navigation defaults, define site security, define visible site features, configure homepage display, override allowed branding elements, view Branding queries, and publish pagelets to multiple sites

Permission List	Description	Usage
PAPP5050	Create sites / Allow overrides.	Create portal sites and assign allowed Branding overrides using the Site Wizard.
PAPP5060	Publish in Sites - Template.	This permission list is the Site Manager template permission list for site publishers. This permission list is cloned for each created site. It grants site-specific access to the following: manage a site's navigation by publishing men items to the site, update the content IDs used in existing Pagelet Wizard Content Management pagelets, create Action Item Lists, create Community Calendars, create and access Poll Definitions, create and access Content Management, and create Discussion Forums. **Note.** Users with this permission list should also have the following permission lists (delivered on the base user role PAPP_USER): PAPP4810 (Access Discussion Forums), PAPP5600 (Access Action Items), PAPP1210 (View Community Calendars) and PAPP5500 (Access Community Calendars).
PAPP5070	View Sites - Template.	This permission list is the Site Manager template permission list for site viewers. This permission list is cloned for each created site. It is a placeholder permission list for the site-specific home link to access the created site.
PAPP5100	Maintain Branding roles.	Assign security roles to Branding themes.
PAPP5150	Maintain Branding data.	Create and maintain Branding themes, headers, and footers.
PAPP5160	Maintain Branding layouts.	Create and maintain Branding layouts.

Permission List	Description	Usage
PAPP5180	Query Branding	Access the Branding tables and views on the Enterprise Portal query tree. Access the Branding Query menu items.
PAPP5200	Manage Navigation Collections.	Manage Navigation Collections by creating and updating Navigation Collection definitions. **Note.** This permission list does not grant access to delete Navigation Collections.
PAPP5250	Administer Navigation Collections.	Administer Navigation Collections by creating, updating and deleting Navigation Collections definitions.
PAPP5300	Access Workspaces.	Access Collaborative Workspaces. Access is granted to: links, members, documents, polls, search and browsing. Workspace access and actions are restricted by member privileges on the workspace definition. Note: Users with this permission list should also have the following permission lists (delivered on the base user role PAPP_USER): PAPP4810 (Access Discussion Forums), PAPP5600 (Access Action Items), PAPP1210 (View Community Calendars) and PAPP5500 (Access Community Calendars).
PAPP5350	Administer Workspaces.	Create and administer Collaborative Workspaces and Templates. Administer Workspace categories, and batch import Workspaces. Administer existing Workspaces by activating, deactivating, or deleting a workspace. These Workspace actions are not restricted by member privileges on the Workspace definition. Workspace access is restricted by member privileges on the Workspace definition.

Permission List	Description	Usage
PAPP5360	Manage Workspaces.	Create and manage Collaborative Workspaces. Manage existing Workspaces by activating, deactivating, or deleting a workspace. Workspace access and actions are restricted by member privileges on the Workspace definition.
PAPP5400	Access My Alerts.	Access to the user-defined alerts.
PAPP5450	Administer Alerts.	Administer Alerts Notifications including the Notification batch process, and defining features, email options, and alert subscriptions.
PAPP5500	Access Community Calendars.	Access Community Calendars. Calendar access and actions are restricted by member privileges on the Calendar definition.
PAPP5550	Administer Community Calendars.	Administer Community Calendars by assigning member privileges or deleting a Calendar. These actions are not restricted by member privileges.
PAPP5560	Create Community Calendars.	Create Community Calendars and assign member privileges to calendars.
PAPP5600	Access Action Items	Access Action Items. Action Item access and actions are restricted by member privileges on the List definition or the assigned user.
PAPP5650	Review Action Items	Review Action Items. Action Item access and actions are restricted by member privileges on the List definition or the assigned user.
PAPP5655	Administer Action Items.	Administer Action Item Lists by assigning member privileges or deleting a List. These actions are not restricted by member privileges.

Permission List	Description	Usage
PAPP5660	Create Action Item list.	Create Action Item lists and assign member privileges.
PAPP9000	All Enterprise Portal objects.	Access all Enterprise Portal-owned objects excluding Resource Finder
PAPP9900	System setup data.	Access to the pages displaying system data that should not be changed or customized.
PAPP9999	Demo examples and testing.	Access to delivered demo, testing, and SDK material.
PAPX0000	Base Repository objects.	Base access to Resource Finder profile display and the Related Resources template pagelets. Required access for all users, including Guest.
PAPX1000	Resource Finder pagelet.	Access the Resource Finder pagelet and pagelet enhancement Search Results pages.
PAPX2050	Manage Resource profiles.	Manage Resource profiles by updating or creating a profile definition (create an Employee profile type).
PAPX2060	Administer Repository.	Administer Resource Finder Repository by creating profile attributes or entering a profile not obtained from a feed.
PAPX2070	Administer Repository Search.	Administer Resource Finder Repository Search Collections.
PAPX9000	All Repository objects.	Access to all Resource Finder Repository objects.
PAPX9999	Demo examples and testing.	Testing Resource Finder application classes.

Roles

This section describes:

• Roles that have special usage in PeopleSoft Enterprise Portal.

• Roles associated with major PeopleSoft Enterprise Portal areas.

• Viewer roles.

• All delivered roles.

Roles with Special Uses

The following table lists roles that have special meaning and usage in PeopleSoft Enterprise Portal.

Note. In Enterprise Portal 9, the base object permission lists have been streamlined to include only those components that all users need and are cannot access directly from the left navigation. Additional permission lists have been created for some components and added to the PAPP_USER role. The components My Discussion Forums, My Alerts, and Browse by Category were removed from the PAPP000n permission list. This enables you to disable a given feature by removing the feature's base permission list from the PAPP_USER role.

Role	*Description/Usage*
PAPP_USER	Must be assigned to every user ID, except the default signon user ID GUEST.
PeopleSoft User	Must be assigned to every user ID, except the default signon user ID GUEST.
PAPP_GUEST	Must be assigned to the default signon user ID GUEST.
PeopleSoft Guest	Must be assigned to the default signon user ID GUEST.
PAPP_SYSTEM_ADMIN	Used only during installation and implementation and is assigned to VP1 and PS.
PeopleSoft Administrator	Used only during installation and implementation and is assigned to VP1 and PS. It gives access into all the pages regardless of the user's assigned permission lists.

Role	Description/Usage
Portal Administrator	Used in the production system. It gives access to the portal registry structure (content references and folder references), but not the actual component/pages and pagelets. Be aware that users who have this role will see all pagelets and all menu items (all content references), but they may not be able to access the actual pages. If a user with this role attempts to access a pagelet or a page where they do not have that pagelet or pages's security, a "You are not authorized" error message displays.

Roles Associated with Major PeopleSoft Enterprise Portal Areas

The major areas within PeopleSoft Enterprise Portal are associated with roles. These areas and roles contain overlap. The major areas and roles are shown in the following table.

Area	Role	Description
Content	PAPP_CONTENT_ADMIN	Administer internally-created and external content, including External News, Internal News, Context Manager and Content Management.
Navigation	PAPP_NAVIGATION_ADMIN	Administer how users navigate the portal sites, including Menu Items requests, manage navigation, Portal Registry Load, and Navigation Collections. Users who have this role should also have the role of Portal Administrator.
Portal sites	PAPP_PORTAL_ADMIN	Administer the portal and portal sites, including install options, site creation, Logon Statistics, Search, Menu Items requests, manage navigation, Portal Registry Load, Navigation Collections, Collaborative Workspaces, Branding, Account Signon Utility, pagelet Personalization, and Context Manager. Users who have this role should also have the role of Portal Administrator.

Area	Role	Description
Presentation	PAPP_DISPLAY_ADMIN	Administer the presentation of portal sites, including Branding, Pagelet Wizard headers/footers, default templates, and homepage tab layouts.
Resource Finder	PAPX_REPOSITORY_ADMIN	Administer the Resource Finder Repository feature.
Security	PAPP_SECURITY_ADMIN	Administer portal row-level security, including Manage Content privilege sets, Viewer roles, Related Context topic experts, Discussion moderators, pagelet Personalization, and Menu Item Inquiry. Users who have this role may also have the role of Security Administrator.
Integration	PAPP_INTEGRATION_ADMIN	Administer integration content in the enterprise portal, including external content, Internet content, email, account signon utility, and Pagelet Wizard.

Viewer Roles

The following roles are delivered as viewer roles, and are used by Content Management to secure individual content items for viewing. To change which roles are designated as viewer roles, select Portal Administration, Content, Viewer Roles.

Role	Usage / Long Description
PAPP_CUSTOMER	Access to applicable customer homepage pagelets and assigned content viewing.
PAPP_EMPLOYEE	Access to applicable employee homepage pagelets, assigned content viewing, submit pages (promotions, articles, menu items), and edit account signon information.
PAPP_GUEST	Access to applicable Guest homepage pagelets, assigned content viewing, Guest homepage tab, and base PeopleSoft Enterprise Portal access.

Role	Usage / Long Description
PAPP_SUPPLIER	Access to applicable supplier homepage pagelets and assigned content viewing.

Delivered Roles

The following table lists the roles delivered with PeopleSoft Enterprise Portal.

Role	Description	Usage/Long Description
PAPP_ACCOUNT_SIGNON_ADMIN	Account signon administrator.	Administer the User Account Signon Utility.
PAPP_AUTHOR	Content author.	Access the submit pages for News, Promotions, and Menu Items. Access Content Management common pages, where the privilege sets limit the access.
PAPP_BRANDING_ADMIN	Branding administrator.	Administer the Branding feature.
PAPP_COMPANY_PROMOTIONS_ADMIN	Company Promotions administrator.	Administer the Company Promotions feature.
PAPP_CONTCATG_ADMIN	Content Categorization administration.	Administer the Content Categorization feature manually.
PAPP_CONTENT_ADMIN	Content administrator.	Administer internally created and external content, including External News, Internal News, Context Manager and Content Management.
PAPP_CONTENT_MANAGER	Content Manager.	Manage internally created and external content, including External News, Internal News, Context Manager and Content Management.
PAPP_CONTENT_RATINGS_ADMIN	Content Ratings administrator.	Administer the Content Ratings related context feature.

Role	Description	Usage/Long Description
PAPP_CONTENT_USER	Content Management user.	Access Content Management common pages, where assigned privilege sets limit the access. Access the Managed Content pagelet, the News Article In-Box pagelet, and the Submit News Article page. Use this role as a general access role, then create additional roles to assign to the privilege sets within each created category.
PAPP_CONTEXT_ADMIN	Related Context administrator.	Administer the Context Manager feature including the contextual content.
PAPP_CONTEXT_MANAGER	Related Context Manager.	Manage the contextual content used with the Context Manager feature.
PAPP_CUSTOMER	Portal Customer.	Access to applicable Customer homepage pagelets and assigned content viewing.
PAPP_DEMO_ADMIN	Demo/Test Items administrator.	Sample. Administer the sample features, including the Demo Item pagelet and Context Manager Item tester.
PAPP_DISCUSSIONS_ADMIN	Discussions administrator.	Administer Related Discussions and the Discussions Forum feature.
PAPP_DISPLAY_ADMIN	Presentation administrator.	Administer the presentation of the portal sites, including Branding, Pagelet Wizard headers/footers, default templates, and homepage tabs layout.
PAPP_EMAIL_CALENDAR_ADMIN	Email / Calendar administrator.	Administer the Email and Calendar pagelets.
PAPP_EMPLOYEE	Portal employee.	Access to applicable employee homepage pagelets, assigned content viewing, submit pages (Promotions, Articles, Menu Items), find a resource, and edit account signon information.
PAPP_EXTERNAL_NEWS_ADMIN	External News administrator.	Administer the External News pagelet.

Role	Description	Usage/Long Description
PAPP_GUEST	Guest user access.	Access to applicable Guest homepage pagelets, assigned content viewing, Guest homepage tab, and base PeopleSoft Enterprise Portal access.
PAPP_GUEST_ADMIN	Guest user administrator.	Administer pagelet Personalization for a Guest user, or any user, and access the Guest homepage tab.
PAPP_INSTALL_OPTIONS_AD MIN	Install options administrator.	Administer the Install Options for the PeopleSoft Enterprise Portal features.
PAPP_INTEGRATED_TASKS_A DMIN	Integrated tasks administrator.	Administer the Tasks pagelet.
PAPP_INTEGRATION_ADMIN	Integration administrator.	Administer integration content in the PeopleSoft Enterprise Portal, including External Content, Internet Content, Email, Account Signon Utility, and Pagelet Wizard.
PAPP_INTERNET_PAGELETS_A DMIN	Internet pagelets administrator.	Administer Internet pagelets.
PAPP_LDAP	LDAP default access.	Contains the required permission lists needed to access the Enterprise Portal database. Use as the default role for LDAP access.
PAPP_LOGON_STATISTICS_AD MIN	Logon statistics administrator.	Review user logon statistics through the User Logon Statistics pagelet.
PAPP_NAVIGATION_ADMIN	Navigation administrator.	Administer how users navigate the portal, including, Menu Items requests, Portal Registry Load, and Navigation Collections. Users who have this role should also have the Portal Administrator role.
PAPP_NAVIGATION_MANAGE R	Navigation manager.	Manage submitted menu items and Navigation Collections.
PAPP_NEWS_PUBLICATIONS_ ADMIN	News Publication administrator.	Administer the Content Management News Publication feature.

Role	Description	Usage/Long Description
PAPP_PAGELET_ADMIN	Pagelet administrator.	Administer the creation of pagelets using pagelet wizard. Administer Navigation Collections. Administer Integration pagelets. Assign user pagelet personalization. Users who have this role should also have the Portal Administrator role and the Pagelet User role.
PAPP_PAGELET_USER	Pagelet access user.	Access the homepage pagelets. To configure the layout of a homepage tab, the user must be either assigned the Portal Administrator role, or the user must have access to PAPP4002 as well as all of the homepage pagelet permission lists on the homepage tab.
PAPP_PORTAL_ADMIN	Portal administrator.	Administer the portal and portal sites, including install options, site creation, Logon Statistics, Search, Menu Items requests, navigation collections, Portal Registry Load, Branding, Account Signon Utility, pagelet Personalization, alerts and Context Manager. Users who have this role should also have the Portal Administrator role.
PAPP_PUBLISHER	Content publisher.	Manage, review, and publish content to a viewing audience in the New Publications and Company Promotions features.
PAPP_RELATED_CONTENT_ADMIN	Related Content administrator.	Administer features of Context Manager.
PAPP_SEARCH_ADMIN	Search administrator.	Administer the portal Search feature.
PAPP_SECURITY_ADMIN	Security administrator.	Administer portal row-level security, including Managed Content privilege sets, viewer roles, related context topic experts, Discussion moderators, pagelet Personalization, and Menu Item inquiry. Users who have this role may also have the Security Administrator role.

Role	Description	Usage/Long Description
PAPP_SITE_MGMT_ADMIN	Site Management administrator.	Administer the Site Management feature, including creating sites and site Branding. Users who have this role should also have the Portal Administrator role.
PAPP_SUPPLIER	Portal supplier.	Access to applicable supplier homepage pagelets and assigned content viewing.
PAPP_SYSTEM_ADMIN	PeopleSoft Enterprise Portal system administrator.	Access to all PeopleSoft Enterprise Portal objects.
PAPP_USER	PeopleSoft Enterprise Portal user.	Access the base objects in the PeopleSoft Enterprise Portal. Every user in the system, other than Guest, must be assigned this role along with the PeopleSoft User role.
PAPP_WEB_MAGAZINE_ADMIN	Web Magazine administrator.	Administer the Web Magazine pagelet and content.
PAPP_WORKSPACE_ADMIN	Workspace Administrator.	Administer and create collaborative workspaces.
PAPP_WORKSPACE_MANAGER	Workspace Manager.	Manage collaborative workspaces.
PAPP_WORKSPACE_USER	Workspace User.	Access the Collaborative workspace components. Individual workspaces are also secured by members to that workspace.
PAPX_PROFILE_MANAGER	Resource profile manager.	Manage the Resource Finder profiles.
PAPX_REPOSITORY_ADMIN	Repository administrator.	Administer the PeopleSoft Enterprise Resource Finder feature.
PAPX_SEARCH_ADMIN	Profile Search administrator.	Administer the Resource Profile Search.

Delivered Roles and Associated Permission Lists

You can obtain this information online, including any security fixes, by using the delivered PeopleSoft Query PAPP_SECURITY_ROLE_PERM.

User IDs

This section discusses:

- User IDs with special uses in PeopleSoft Enterprise Portal.

- User IDs delivered with PeopleSoft Enterprise Portal.

User IDs with Special Uses

The following table lists user IDs with special uses in PeopleSoft Enterprise Portal.

User ID	Description
GUEST	The default signon user.
PS	The system administrator to access all of the PeopleSoft Enterprise Portal database and the HRMS database.
VP1	The system administrator to access all of the PeopleSoft Enterprise Portal database and the FSCM, EPM, and CRM databases.

Delivered PeopleTools Roles

The following table shows the delivered PeopleTools roles and their associated permission lists.

PeopleTools Role	PeopleTools Permission List	Permission List Description
PeopleSoft User	PTPT1000	PeopleSoft-User.
PeopleSoft Guest	PTPT1400	PeopleSoft-Guest.
Security Administrator	PTPT1100	Maintain Security.
PeopleTools	PTPT1200	PeopleTools.
PeopleSoft Administrator	**special**	Behind-the-scenes coding.

PeopleTools Role	PeopleTools Permission List	Permission List Description
Portal Administrator	PTPT1300	Behind-the-scenes to PeopleSoft Enterprise Portal.
Portal Manager	PTPT1600	Pagelet Wizard, Navigation Collections.

Adding the Portal User Roles to All User IDs

To navigate and use common features and pages, every user ID (except for the Guest user IDs) must include the delivered roles PAPP_USER and PeopleSoft User. During a PeopleTools upgrade, the role PeopleSoft User is added to all existing roles. You can update the existing user IDs to include the PAPP_USER role with the delivered PeopleSoft Data Mover script PORTAL_ADD_ROLE.DMS.

Note. Every newly created user ID should include both roles PeopleSoft User and PAPP_USER. Guest user IDs should not include these roles. After running the script, manually update the Guest user ID by replacing the PeopleSoft User role and the PAPP_USER role with the PeopleSoft Guest role and the PAPP_GUEST role.

Use PeopleSoft Data Mover to update the existing user IDs in PeopleSoft Enterprise Portal to include the necessary PAPP_USER role.

There are two ways to start PeopleSoft Data Mover:

• Using the Data Mover shortcut in your PeopleSoft program group, as in Start, Programs, <PeopleSoft Group>, Data Mover.

This access method only applies to the Windows Development Environment.

• Using the command line interface.

This executes PeopleSoft Data Mover in a console for Windows and a Telnet session for UNIX.

To update the user IDs:

1. Start PeopleSoft Data Mover and sign on to the PeopleSoft Enterprise Portal database.

2. Open the script PORTAL_ADD_ROLE.DMS in the <PS_HOME>\scripts directory.

3. Run the script against the PeopleSoft Enterprise Portal database.

4. Close PeopleSoft Data Mover.

Appendix B

Understanding Web Services for Remote Portlets (WSRP)

This appendix discusses:

- Producing WSRP-compliant portlets for PeopleSoft Enterprise Portal

- Configuring WSRP-Enabled Pagelets

Understanding Producing WSRP-Compliant Portlets for the PeopleSoft Enterprise Portal

PeopleSoft Enterprise provides support for consuming and producing portlets using WSRP technology. Most Enterprise Portal pagelets can be produced as WSRP-compliant portlets. Also, a set of end-user oriented pages is supported for production as WSRP-compliant portlets.

Pagelets and pages that are supported for WSRP are marked as producible in the portal registry. Additional pages can be marked as producible, but you should first determine if they are WSRP-compliant or not by using the WSRP validation testl in Application Designer as well as doing general testing in a WSRP host environment.

In order to see all the pagelets and pages that have been marked as WSRP-producible, navigate to PeopleTools, Portal, WSRP Production. This page shows all the items that have been marked as WSRP-producible. If you set any additional pages as producible (beyond the set that is delivered with the product), they are displayed on this page, as well.

See *PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Understanding Web Services for Remote Portlets (WSRP)"

See *PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using WSRP to Consume and Produce Remote Portlets," Validating WSRP-Compliance

Understanding How to Configure WSRP-Enabled Pagelets

PeopleTools provides an infrastructure that enables WSRP functionality to be configured in various ways. For example, the pages that a WSRP-enabled Enterprise Portal pagelet are linked to can be rendered within the host environment or within the Enterprise Portal environment.

The Enterprise Portal has been configured so that links from the Enterprise Portal pagelet take the user to pages that are rendered in the Enterprise Portal. This enables you to achieve a consistent functional experience across the full range of Enterprise Portal pagelets. In this way, users get the benefit of a consolidated and consistent homepage and dashboard. At the same time, it provides users of the Enterprise Portal a familiar environment in which to interact with the Enterprise Portal applications as they extend from the homepage environment.

While this general approach may be appropriate in many situations, it may be that your implementation requires a different approach. The PeopleTools infrastructure allows for customizing of the behavior for Enterprise Portal pagelets when they are rendered in a host environment.

See *PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Understanding Web Services for Remote Portlets (WSRP)"

Example of a PeopleSoft Enterprise Portal Pagelet in the Oracle Application Server Portal

In this example, a WSRP provider is created in the Oracle Application Server Portal. The WSRP provider definition references web services that are available in the PeopleSoft Enterprise Portal. When a page is assembled in the Oracle Application Sever Portal, services can be deployed that allow for the rendering of PeopleSoft Enterprise Portal pagelets on the Oracle Application Server Portal page.

In this example, the My Approval Status portlet is an application provided along with the Oracle Application Server Portal. The My Workspaces, My News Content, Tag Cloud, Company News, and Tasks portlets originate from the PeopleSoft Enterprise Portal.

PeopleSoft Enterprise Portal pagelest in the Oracle Application Server Portal

Clicking on the first item in the Tasks portlet allows the user to view additional information about the task. The details are displayed on the TaskDetails page that is rendered within the Oracle PeopleSoft Enterprise Portal.

Task Details page in the Oracle PeopleSoft Enterprise Portal

The user can update the action item as necessary and then return to their home page by clicking the Home link that is found in the header area located in the upper area of the screen. The user arrives back at their Home page in the Oracle Application Server Portal.

Note. If the user navigates to other areas of the PeopleSoft Enterprise Portal system from this page and then clicks the Home link, they will be taken to the PeopleSoft Enterprise Portal header as opposed to being taken back to the host Oracle Application Server portal.

Appendix C

Using Common Functions That Reference a Password Data Store

This chapter provides overviews of the common functions that reference a password data store and the interactive flow for a sign on password data store. This chapter also provides details of the common functions.

Note. This chapter is intended for use by programmers.

Understanding Common Functions that Reference a Password Data Store

The common functions discussed in this chapter can be combined to reference a password database store. These functions can help achieve a sign on point between the portal and other target system software.

For each target system (email, web-based, and so forth), the user ID and password are stored and usually encrypted. When attempting to access information through PeopleSoft Enterprise Portal features that need to retrieve information from these target systems, such as the Email pagelet, the PeopleSoft Enterprise Portal performs the connection to the system using the user credentials stored in the password data store.

Note. This is a one-way integration. No data is written to the target system, such as Microsoft Exchange. A login is performed and data is retrieved, but user credentials or data is never updated in the target system.

The PeopleSoft Enterprise Portal uses these functions for third-party email and calendar integration:

- InsertUpdateUsrNamePsswd.

  Used for inserting and updating.

- GetUsrNamePsswd.

  Returns the user name and password that are associated with a Uniform Resource Locator (URL) identifier and a portal user ID.

- DeleteUsrNamePsswd.

  Used for deleting.

For example, when accessing the Email pagelet, the Get function is called. It retrieves the user credentials from the data store, which can then be passed to the target system. The Insert/Update is used when the user sets up the pagelet for the first time, or subsequently updates his user ID or password. The Delete is used when the user deletes these stored credentials from the password data store.

Understanding the Interactive Flow for a Sign On Password Data Store

The following diagram illustrates a way in which the InsertUpdateUsrNamePsswd, GetUsrNamePsswd, and DeleteUsrNamePsswd common functions could be used.
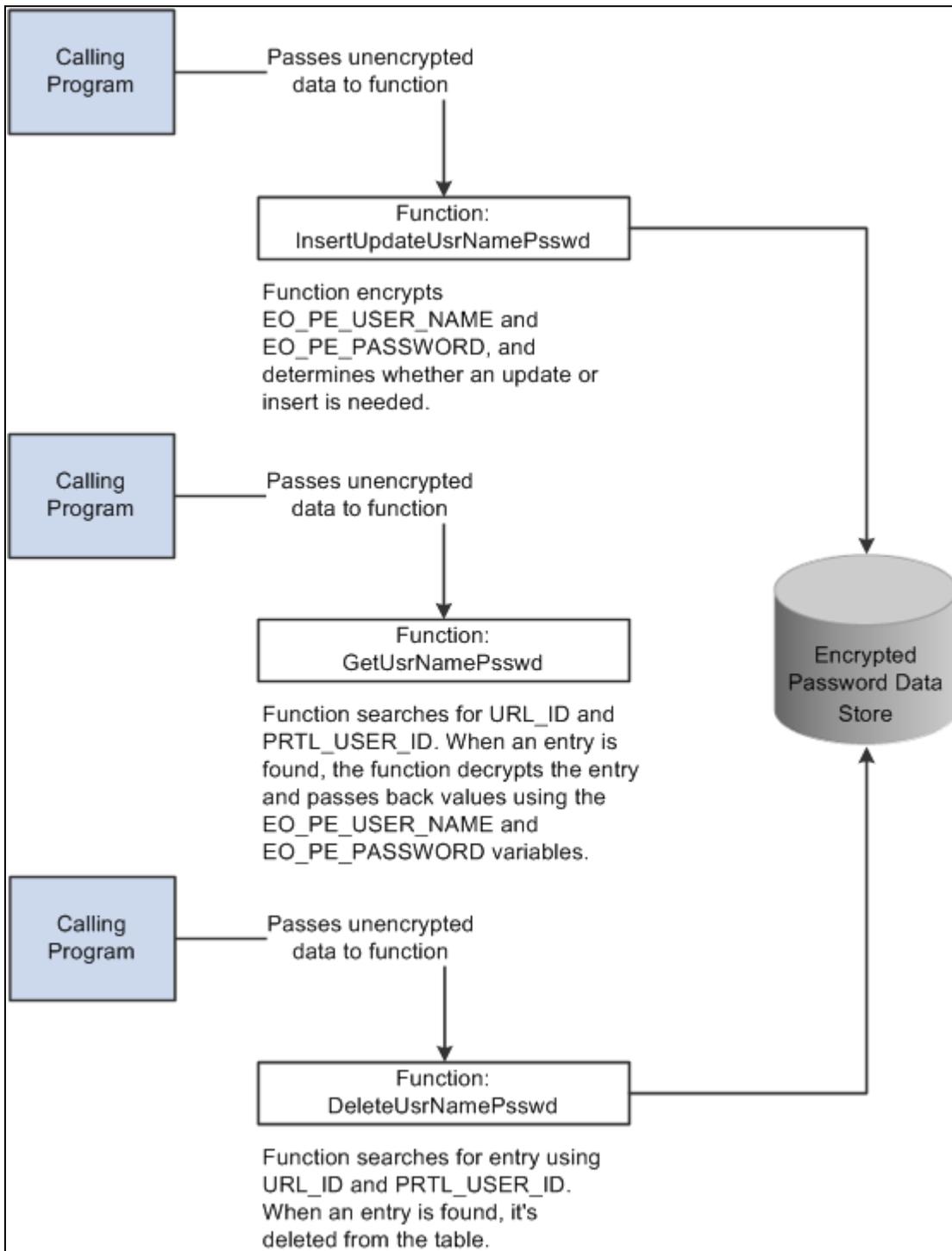
Interactive flow for a sign on password data store

Common Functions

This section discusses the common functions used to reference a password data store.

InsertUpdateUsrNamePsswd

Syntax

```
InsertUpdateUsrNamePsswd(URL_ID, EO_PE_USER_NAME, EO_PE_PASSWORD)
```

Description

InsertUpdateUsrNamePsswd takes the URL identifier (URL_ID) and the portal user ID (PRTL_USER_ID) and searches the table for an entry that already exists. If an entry exists, an update is performed; if no entry exists, a new entry is inserted.

The values for the user ID (EO_PE_USER_NAME) and password (EO_PE_PASSWORD) that are associated with the URL_ID and PRTL_USER_ID are encrypted when placed in the table.

The following is the technical design in PeopleCode:

```
Function InsertUpdateUsrNamePsswd(&URL_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD)

    &found = "";

    &PRTL_USER_ID = %UserId;

    &EO_PE_USER_NAME = Encrypt("", &EO_PE_USER_NAME);
       &EO_PE_PASSWORD = Encrypt("", &EO_PE_PASSWORD);

    SQLExec("select EO_PE_USER_NAME from PS_EO_PE_SS_LOGIN
    where URL_ID = :1 and PRTL_USER_ID = :2", &URL_ID, &PRTL_USER_ID,
    &found);


    If &found = "" Then
    SQLExec("INSERT INTO PS_EO_PE_SS_LOGIN( URL_ID, PRTL_USER_ID,
    EO_PE_USER_NAME, EO_PE_PASSWORD) values(:1, :2, :3, :4)",
    &URL_ID, &PRTL_USER_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD);
    Else
    SQLExec("UPDATE PS_EO_PE_SS_LOGIN SET EO_PE_USER_NAME = :1,
    EO_PE_PASSWORD = :2 WHERE URL_ID = :3 AND PRTL_USER_ID = :4",
    &EO_PE_USER_NAME, &EO_PE_PASSWORD, &URL_ID, &PRTL_USER_ID);
    End-If;

End-Function;
```

Parameters

Parameter	Description
URL_ID	URL identifier.
EO_PE_USER_NAME	User name that is needed to access the account that is referenced by the URL_ID.
EO_PE_PASSWORD	Password that is associated with the EO_PE_USER_NAME.

Returns

The function returns no value.

Example

In this example, the function is used with hardcoded values. In most cases, variables are used as parameters.

InsertUpdateUsrNamePsswd("Yahoo_Mail_Account", "Name", "Password");

Name and password are encrypted and placed in the table. The table appears as follows:

URL_ID	PRTL_USER_ID	EO_PE_USER_NAME	EO_PE_PASSWORD
Yahoo_Mail_Account	Portal Login Name	ASDFG#$%MDSF	ASKDKFJ@W#$RFGMS

GetUsrNamePsswd

Syntax

```
GetUsrNamePsswd(URL_ID, EO_PE_USER_NAME, EO_PE_PASSWORD);
```

Description

GetUsrNamePsswd takes the URL_ID and PRTL_USER_ID and searches the table for the associated EO_PE_USER_ID and EO_PE_PASSWORD. GetUsrNamePsswd decrypts EO_PE_USER_ID and EO_PE_PASSWORD. The decrypted user ID and password are passed back.

The following is the technical design in PeopleCode:

```
Function GetUsrNamePsswd(&URL_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD)

    &PRTL_USER_ID = %UserId;

    SQLExec("select EO_PE_USER_NAME, EO_PE_PASSWORD from
    PS_EO_PE_SS_LOGIN where URL_ID = :1, and PRTL_USER_ID = :2",
    &URL_ID, &PRTL_USER_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD);

    &EO_PE_USER_NAME = Decrypt("", &EO_PE_USER_NAME);
    &EO_PE_PASSWORD = Decrypt("", &EO_PE_PASSWORD);

End-Function;
```

Parameters

Parameter	Description
URL_ID	URL identifier.
EO_PE_USER_NAME	Empty variable that is used to store the value for the user name that is associated with the URL_ID. The decrypted value can be retrieved from the function without using a return.
EO_PE_PASSWORD	Empty variable that is used to store the value for the password that is associated with the URL_ID. The decrypted value can be retrieved from the function without using a return.

Returns

The function returns no value.

Example

The value for URL_ID is hardcoded. Usually, this parameter is a variable.

&UserName = "";

&Password = "";

GetUsrNamePsswd("Yahoo_Mail_Account", UserName, Password);

DeleteUsrNamePsswd

Syntax

```
DeleteUsrNamePsswd(&URL_ID);
```

Description

DeleteUsrNamePsswd deletes entries in the table by searching with the URL_ID and the PRTL_USER_ID and removing those items when it finds a match.

The following is the technical design in PeopleCode:

```
Function DeleteUsrNamePsswd(&URL_ID)

    &PRTL_USER_ID = %UserId;


    SQLExec("Delete from PS_EO_PE_SS_LOGIN Where URL_ID = :1 and
    PRTL_USER_ID = :2", &URL_ID, &PRTL_USER_ID);

End-Function;
```

Parameters

Parameter	Description
URL_ID	URL identifier.

Returns

The function returns no value.

Example

In this example, the value for URL_ID is hardcoded. Usually, this parameter is a variable.

DeleteUsrNamePsswd("Yahoo_Mail_Account");

Index

A

B

C

Q

R