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PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features

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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

See "PeopleSoft Enterprise Portal Preface," PeopleSoft Enterprise Portal Feature Overview, page xxi.

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.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "PeopleSoft Community Portal."

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.

See "PeopleSoft Enterprise Portal Preface," Related Content Services, page xxiii.

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

Chapters in this PeopleBook are grouped into the following parts. See the associated references for more information about the chapters and general content included in each part.

- Part 1: Introduction.

  This part provides an overview of getting started with PeopleSoft Enterprise Portal and an introduction to PeopleSoft Community Portal.

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Introduction."

- Part 2: Navigation

  This part provides an overview of how to get around in PeopleSoft Enterprise Portal and describes navigation features such as My Links.

  See Navigation.

- Part 3: Collaborative Features

  This part describes the collaborative features of PeopleSoft Enterprise Portal such as action items, blogs, calendars, discussion forums, feeds and alerts, and tagging.

  See Collaborative Features.

- Part 4: Other Portal Features

  This part describes other portal features such as polls, surveys, integration with third-party email and calendar systems, and menu item requests.

  See Other Portal Features.

- Part 5: Performing Searches

  This part describes how to perform searches and how to save and reuse searches.

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Using Portal Features*, "Performing Searches."

- Part 6: Context Manager

  This part describes how to set up and use Context Manager and iTracker.

  See Context Manager.

- Part 7: Related Content Services

  This part describes the setup and use of three delivered related content services: Related Discussion service, Related Links service, Related Tags service.

  See Related Content Services.

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*

  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*

  The PeopleBook you are reading, 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

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.

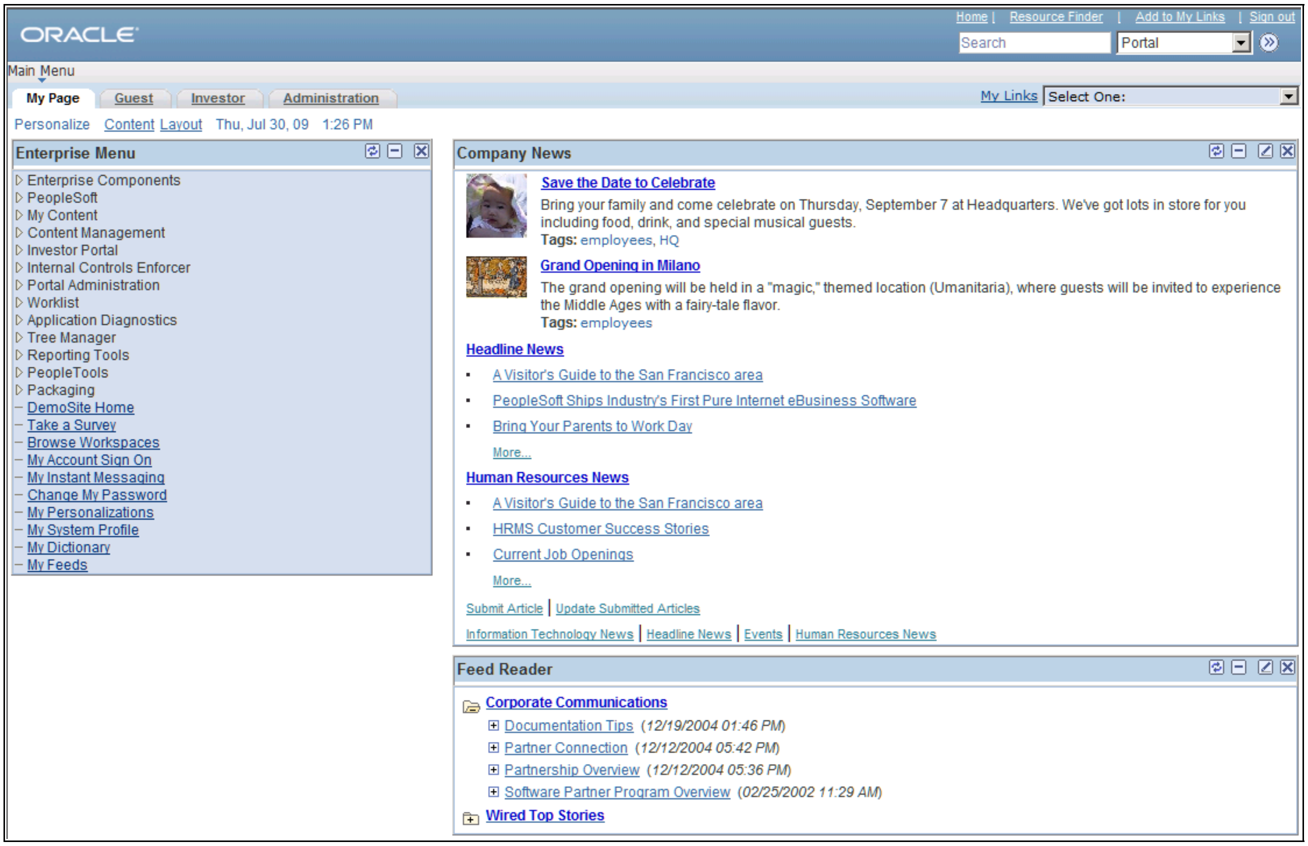
Note. This PeopleBook documents only the functionality of the PeopleSoft Enterprise Portal. Detailed documentation for PeopleTools portal technology and the application portal packs is delivered separately with respective products.

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 Chapter 17, "Submitting Searches in the Portal," page 333.

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 Chapter 6, "Using My Links," Adding the Current Page to My Links, page 54.

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 *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Managing Guest User Accounts."

Investor

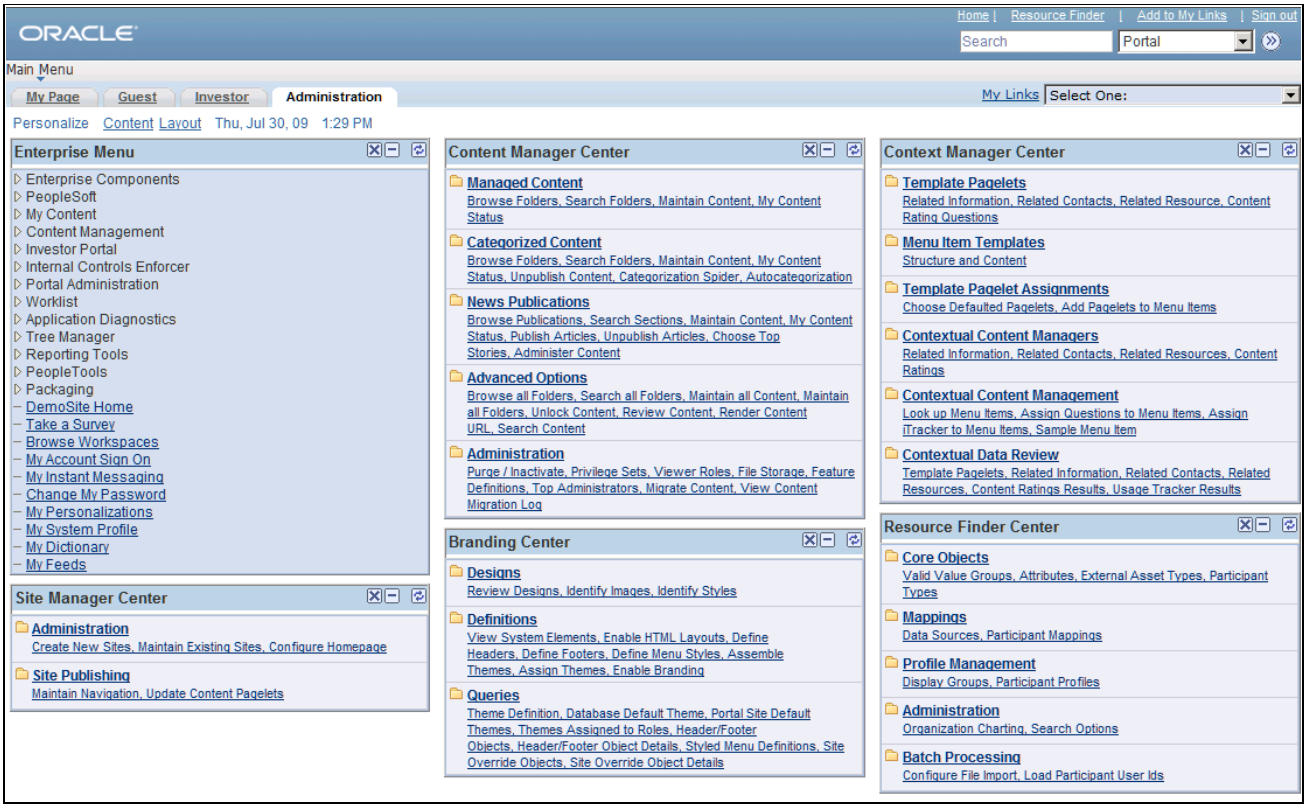
Select to access the Investor Portal homepage tab.

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 *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Navigating in PeopleSoft Enterprise Portal Site Management."

- 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 Chapter 19, "Working With Context Manager in PeopleSoft Enterprise Portal," Working With the Context Manager Center Pagelet, page 373.

- 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.

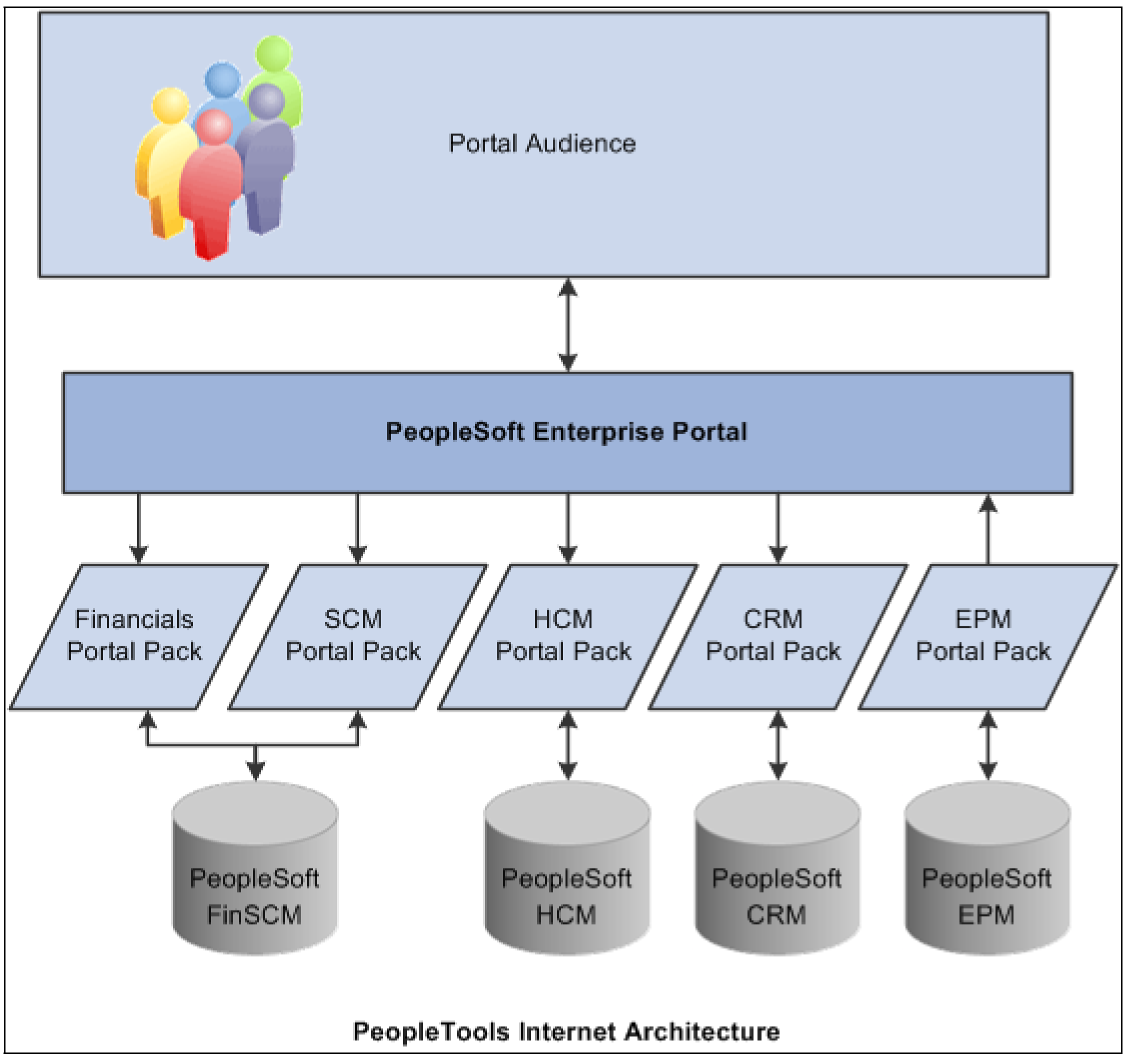
PeopleTools Portal Technology

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.

Part 2

Navigation

Chapter 3

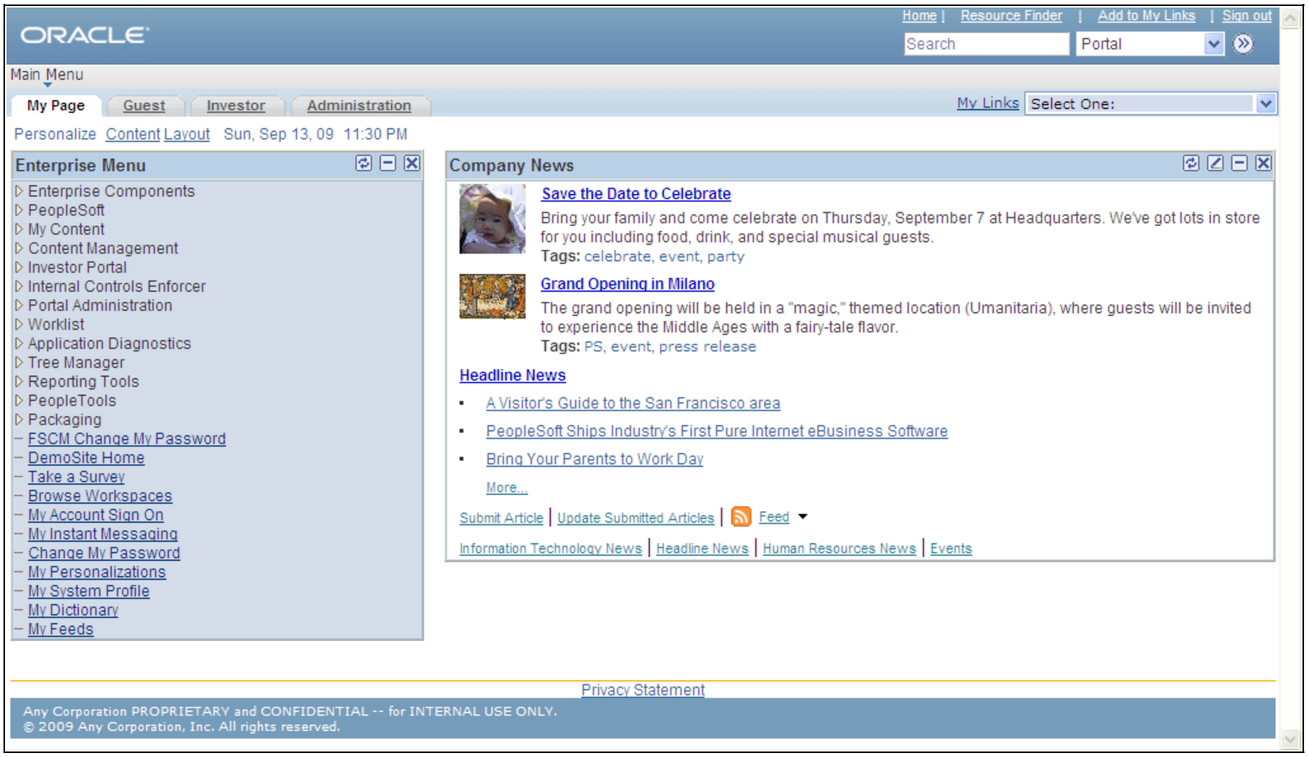
Using and Personalizing Your Portal Homepage

This chapter provides an overview of the portal homepage and discusses how to:

- Personalize your homepage content.
- Personalize your homepage layout.

Understanding Your Portal Homepage

Your portal homepage aggregates a variety of content gathered from sources across your organization. This content is organized by tabs, is presented in pagelets, and can be accessed through menu navigation and links.



PeopleSoft Enterprise Portal homepage

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

Search

Submit a portal search request and access the Search page.

See Chapter 17, "Submitting Searches in the Portal," page 333.

Home

Click to return to your PeopleSoft Enterprise Portal homepage (the My Page tab).

Worklist

Click to access your worklist.

See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*, "Using Workflow."

Resource Finder

Click to access the Resource Finder - Advanced Search page on which 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

Click to launch the MultiChannel console.

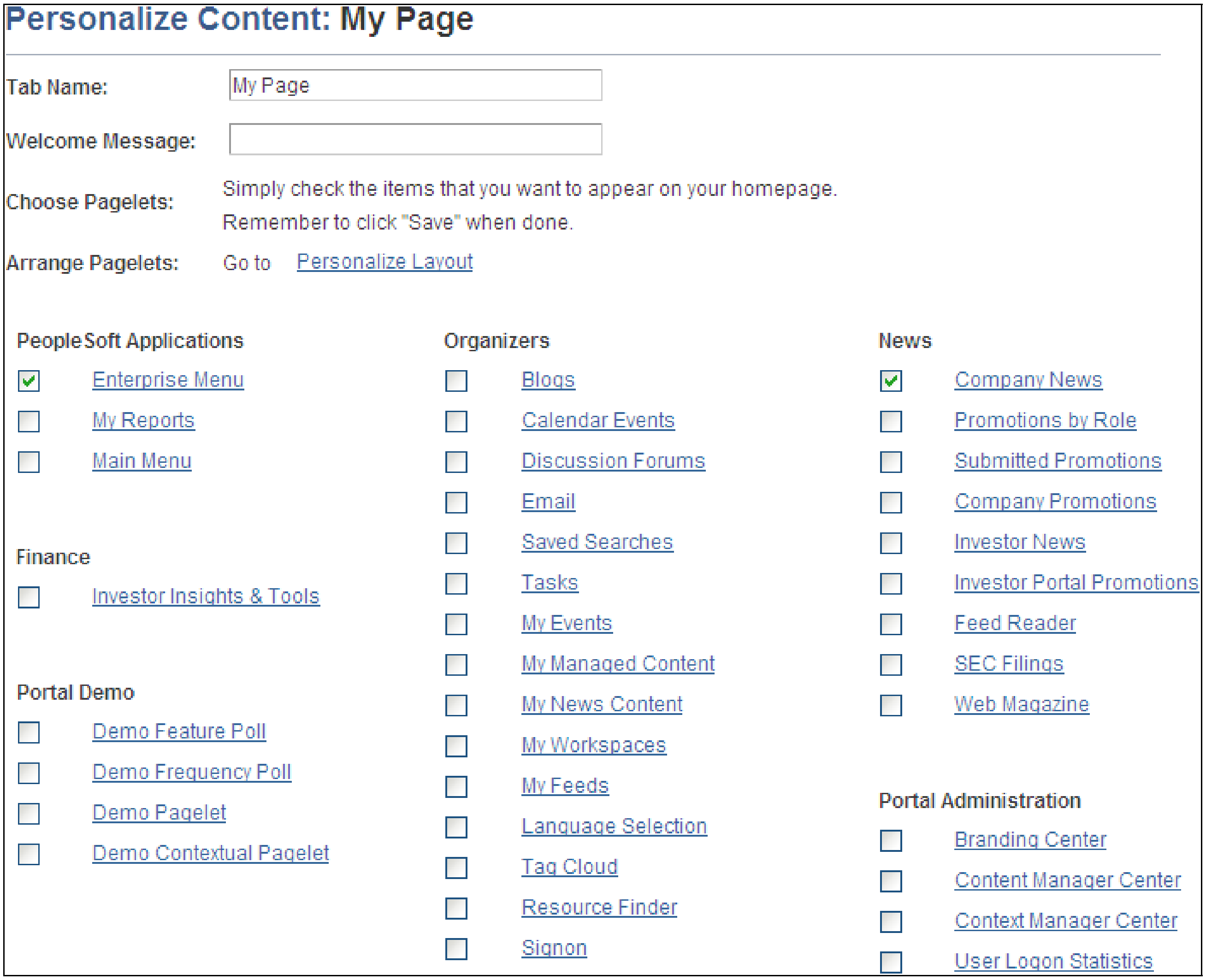
See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft MultiChannel Framework*, "Understanding PeopleSoft MultiChannel Framework."

Add to My Links	Click to access the Add to My Links modal window on which you can add a link to the current page. See Chapter 6, "Using My Links," Adding the Current Page to My Links, page 54.
Main Menu	Use the cascading Main Menu drop-down navigation to view menu folders and navigate to a menu item.
My Page, **Guest**, **Investor**, or **Adminstration**	Select a tab to view the pagelets configured for that homepage tab.
My Links	Click to access the View My Links page. See Chapter 6, "Using My Links," Viewing My Links, page 64.
Content	Click to access the Personalize Content: <Tab Name> page on which you can select pagelets to display on your portal homepage.
Layout	Click to access the Personalize Layout: <Tab Name> page on which you can select pagelets to display on your portal homepage.

Personalizing Your Homepage Content

You can configure your portal homepage to display a variety of pagelets in a layout that suits your needs. Numerous pagelets are delivered with the PeopleSoft Enterprise Portal product for your use.

Access the Personalize Content page (click the Content link on the homepage tab that you want to personalize).



Personalize Content page (My Page tab)

Use the Personalize Content page to designate the pagelets (types of content) you want to display on the homepage tab.

To select pagelets for your portal homepage:

1. Enter the name for the tab in the Tab Name field.

2. Enter an optional welcome message in the Welcome Message field.

3. Select the check box for each pagelet that you want to display on your homepage.

   Note. The pagelets are organized by the folders in which they are stored in the portal registry.

4. Do one of the following:

   - To return to the portal homepage with the pagelets arranged in their default columns and in a default order, click the Save button.

   - To specify the layout of the pagelets, click the Personalize Layout link.

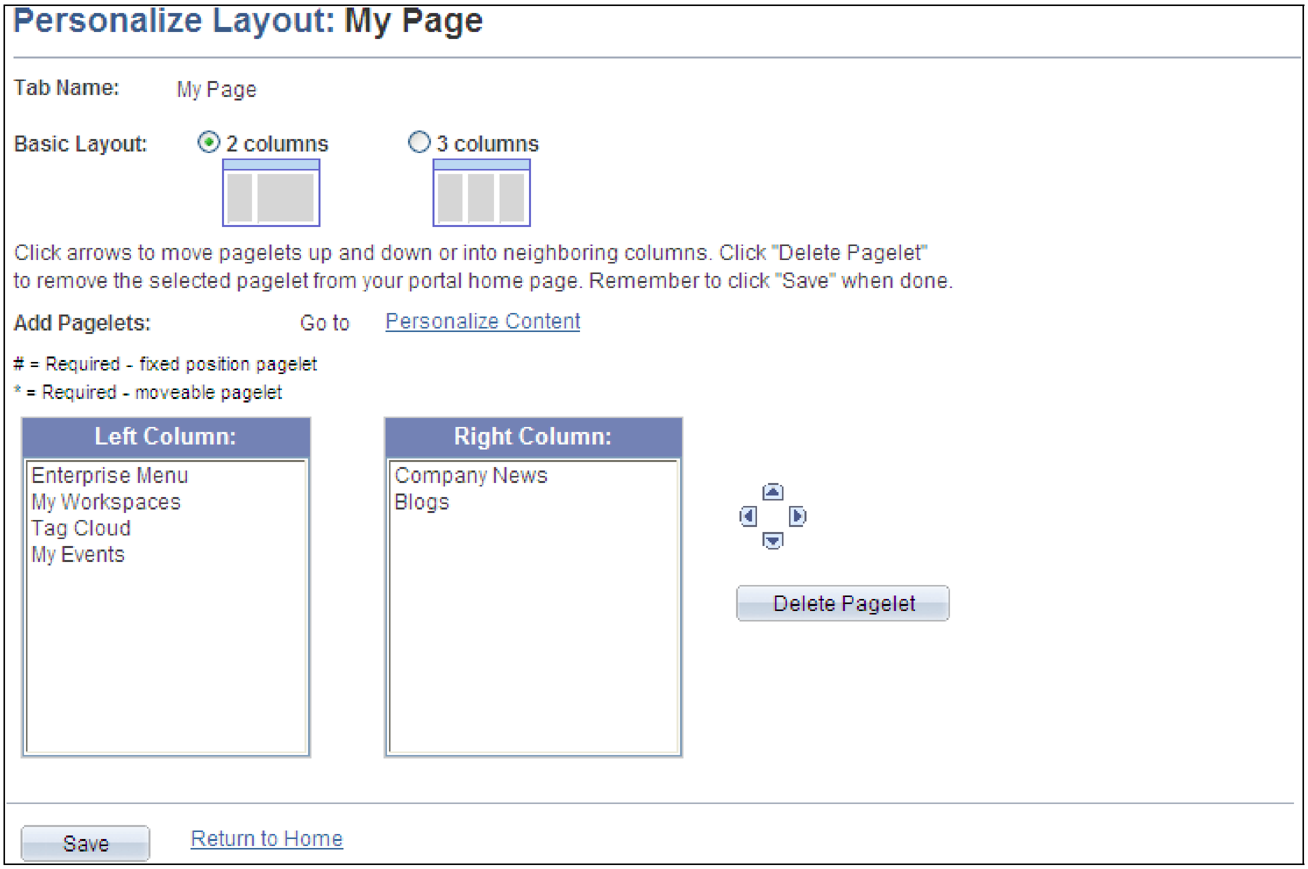
Personalizing Your Homepage Layout

Use either of these two methods to modify the layout of your portal homepage:

- Move pagelets on the Personalize Layout page.
- Drag and drop pagelets on the portal homepage.

Moving Pagelets on the Personalize Layout Page

Access the Personalize Layout page (click the Layout link on the homepage tab that you want to personalize).



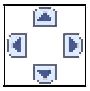
Personalize Layout page (My Page tab)

Use the Personalize Layout page to designate the layout of content on the homepage tab.

Tab Name Displays the name of this tab as specified on the Personalize Content page.

Basic Layout Select to display the pagelets in either two or three columns on the portal homepage.

Personalize Content Click to access the Personalize Content page to add or delete pagelets

Left Column, Center Column, and **Right Column**	Displays the pagelets selected on the Personalize Content page under the assigned column headings. If the basic layout is two columns, the pagelets are divided into left and right columns. If the basic layout is three columns, the pagelets are divided into left, center, and right columns.
	Use the Move Left, Move Up, Move Right, and Move Down buttons to position a pagelet. Select a pagelet, and then click the directional arrow buttons to move the selected pagelet up in the list, down in the list, to the next column to the right, or to the next column to the left.
Delete Pagelet	Select a pagelet and then click Delete Pagelet to delete the pagelet from the homepage tab.
Save	Click to save your changes and return to the portal homepage.

Dragging and Dropping Pagelets on the Portal Homepage

You can also rearrange pagelets on the portal homepage by dragging and dropping them between columns.

To drag a pagelet, hover over the pagelet title bar; the cursor changes shape to indicate that you can drag the pagelet. Click and drag the pagelet. When you are in the new location**—**signified by the color change**—** release the mouse.

Chapter 4

Understanding PeopleSoft Enterprise Portal-Delivered Pagelets

This chapter provides an overview of Oracle's PeopleSoft Enterprise Portal-delivered pagelets and discusses:

- Common elements used in PeopleSoft Enterprise Portal pagelets.
- Homepage pagelets.
- Workspace pagelets.
- Template Pagelets.

Understanding PeopleSoft Enterprise Portal-Delivered Pagelets

The PeopleSoft Enterprise Portal pagelets discussed in this chapter can be classified into one of the following pagelet types:

- Homepage pagelets

  Homepage pagelets are primarily selected and laid out by the user and appear on the user's homepage.

  Users can configure their portal homepages with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. When this documentation provides two object names for a pagelet, the first one refers to the narrow version.

- Workspace pagelets

  Workspace pagelets are determined by the workspace template and can be configured by a workspace administrator.

  Workspace administrators can configure workspace homepages with three narrow columns or one narrow and one wide column.

- Template pagelets

  Template pagelets are configured by a portal administrator and appear in the menu frame on the right side of a destination target page.

Oracle provides a table for each of these pagelet types that provides the following information about the pagelets:

- The pagelet name.

- A pagelet description.
- The functional role of the person who would typically use the pagelet.
- The pagelet's enabling feature.

Note. The enabling feature provides the data that appears on the pagelet. If you do not implement the enabling feature, the pagelet does not work as designed.

Common Elements Used in PeopleSoft Enterprise Portal Pagelets

	Click the Minimize button in the pagelet title bar to minimize the pagelet area.
	Click the Expand button in the pagelet title bar to expand the pagelet area.
	The Customize button displays in the pagelet title bar of a pagelet that supports personalization. Click the Customize button to access a personalization page for the pagelet. **Note.** The personalization option for default pagelets does not appear until you click the Content or Layout link on homepage to personalize the tab on which the pagelet resides.
	Click the Refresh button in the pagelet title bar to refresh the data displayed on the pagelet.
	Click the Remove button in the pagelet title bar to remove the pagelet from the homepage.
	Click the Help button in the pagelet title bar to view the PeopleBooks help associated with this pagelet.

Homepage Pagelets

The following table lists the homepage pagelets delivered with PeopleSoft Enterprise Portal:

Pagelet Name	***Description***	***Enabling Feature***	***Delivered Permission List***
Blogs	Displays user-selected blogs with most recent posts and comments. This pagelet can be personalized. See Chapter 8, "Working With Blogs," Working With the Blogs Pagelet, page 149.	See Chapter 8, "Working With Blogs," Working With the Blogs Pagelet, page 149.	
Branding Center	Provides a navigational guide to configure and use the Branding features. Created using Navigation Collections with its definition stored in Pagelet Wizard tables. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Navigating in PeopleSoft Enterprise Portal Branding."	Branding See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Branding*, "Understanding PeopleSoft Enterprise Portal Branding."	PAPP5000 PAPP5100 PAPP5150 PAPP5160 PAPP5180 PAPP9000
Calendar Events	Enables employees to access calendar information without leaving the portal. This pagelet can be personalized. See Chapter 15, "Using External Email, Calendar Data, and Instant Messaging," Working With the Calendar Events Pagelet, page 318.	Calendar integration See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Setting Up Integration with Third-Party Email and Calendar Systems."	PAPP1300 PAPP9000
Company Promotions	Enables you to promote transactions so that users can link to specific transactions or URLs in your system. This pagelet can be personalized. Appropriate for guests. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Managing Company Promotions," Working with the Company Promotions Pagelet.	Company Promotions See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Managing Company Promotions."	PAPP1110 PAPP9000

Pagelet Name	***Description***	***Enabling Feature***	***Delivered Permission List***
Content Manager Center	Provides a navigational guide to configure and use Content Management features. Created using Navigation Collections with its definition stored in Pagelet Wizard tables.	Content Management See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Understanding the Content Management System."	PAPP2010 PAPP2020 PAPP2025 PAPP2045 PAPP2050 PAPP2070 PAPP2080 PAPP9000
Context Manager Center	Provides a navigational guide to configure and use Context Manager features. Created using Navigation Collections with its definition stored in Pagelet Wizard tables. See Chapter 19, "Working With Context Manager in PeopleSoft Enterprise Portal," Working With the Context Manager Center Pagelet, page 373.	Context Manager See Context Manager.	PAPP4300 PAPP4350 PAPP4600 PAPP4680 PAPP4700 PAPP4710 PAPP4855 PAPP9000
Demo	Provides example code for creating a simple component-based pagelet.	Not applicable.	PAPP9999 PAPP9000
Discussion Forums	Displays user-selected discussion forums with most recent topics and replies. This pagelet can be personalized. See Chapter 10, "Working With Discussion Forums," Working With the Discussion Forums Pagelet, page 247.	Discussion Forums See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Using the Discussions Module.	PAPP4800 PAPP9000
Email	Enables employees to access email without leaving the portal. This pagelet can be personalized. See Chapter 15, "Using External Email, Calendar Data, and Instant Messaging," Working With the Email Pagelet, page 314.	Email integration See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Setting Up Integration with Third-Party Email and Calendar Systems."	PAPP1300 PAPP9000

Pagelet Name	***Description***	***Enabling Feature***	***Delivered Permission List***
Feed Reader	Provides access to feed headlines and articles directly from the PeopleSoft Enterprise Portal.	Web proxy server See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration*, "Using Listening Connectors and Target Connectors," Working With the HTTP Connectors, Running Integration Gateways Behind Proxy Servers.	PAPP1000 PAPP9000
Language Selection	Allows you to change the displayed language without having to access the language options on the sign-in page. This pagelet is useful for guest users, who may never see the sign-in page, as well as for users who are already logged into the database. Appropriate for guests. See Chapter 5, "Working With Homepage Pagelets," Working With the Language Selection Pagelet, page 39.	No special setup is required. All languages enabled for the application database are available for selection. The pagelet can be extended to support any languages as long as the translated data is available. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Managing Guest User Accounts," Extending the Language Selection Pagelet.	PAPP0000 PAPP9000
My Feeds	Allows you to view a list of feeds published within PeopleSoft Enterprise Portal to which you have access. See Chapter 11, "Working With Feeds and Alerts," Working With the My Feeds Pagelet, page 256.	Feed publishing must be enabled and feeds published within the system. See Chapter 11, "Working With Feeds and Alerts," Publishing PeopleSoft Enterprise Portal Content as a Feed, page 251.	PAPP0002 PAPP9000
My Managed Content	Provides one-click access to your favorite Managed Content folders, as well as content status summaries and counts of the number of items in each status. This pagelet can be personalized. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Working With Managed Content," Working With the My Managed Content Pagelet.	Managed Content See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Working With Managed Content."	PAPP1140 PAPP9000

Pagelet Name	***Description***	***Enabling Feature***	***Delivered Permission List***
My News Content	Serves as an inbox for news content users, managers, and publishers providing them visibility and quick access to articles requiring their attention. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Working With News Publications," Working with the My News Content Pagelet.	News Publications See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Working With News Publications."	PAPP1150 PAPP9000
My Workspaces	Provides access to the collaborative workspaces to which you belong. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces* , "Working in Collaborative Workspaces," Working With the My Workspaces Pagelet.	Collaborative Workspaces See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces."	PAPP5300
News publication (pagelet name is defined by the pagelet publisher) The Company News pagelet delivered with PeopleSoft Enterprise Portal is an example of a news publication pagelet.	You can set up multiple internal news publication pagelets targeted at different audiences. The pagelet presents links to articles and displays top story summaries and images. This pagelet can be personalized. Appropriate for guests. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Working With News Publications," Viewing a News Publication in a Pagelet.	News Publications See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Working With News Publications."	PAPP1100
Pagelet Wizard-generated pagelets	Pagelet Wizard allows you to create and register a pagelet integrating and transforming data from a wide variety of data sources, both internal and external to PeopleSoft applications. Pagelets created using Pagelet Wizard may be configured to include personalization options. May be appropriate for guests.	Pagelet Wizard See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard."	Pagelet Wizard enables you to create a pagelet with security definitions.

Pagelet Name	***Description***	***Enabling Feature***	***Delivered Permission List***
Promotions by Role	Enables promotion managers to quickly verify which promotions are currently appearing for a particular portal viewer role. There is no stored personalization for this pagelet, but it does allow an input parameter. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Managing Company Promotions," Working with the Promotions by Role Pagelet.	Company Promotions See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Managing Company Promotions."	PAPP1130 PAPP9000
Resource Finder	Provides immediate access to the basic search capabilities of Resource Finder, all from any portal homepage tab. Appropriate for guests. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Performing Resource Finder Searches," Using the Resource Finder Pagelet.	Resource Finder See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Performing Resource Finder Searches."	PAPX1000 PAPX9000
Resource Finder Center	Provides a navigational guide to configure and use Resource Finder features. Created using Navigation Collections with its definition stored in Pagelet Wizard tables.	Resource Finder See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Enterprise Portal Resource Finder Overview," Understanding PeopleSoft Portal Resource Finder.	PAPX2050 PAPX2060 PAPX1070 PAPX9000
Saved Searches	Allows you to define your frequently performed searches and rerun them quickly the next time by clicking a link on the pagelet. This pagelet can be personalized. See Chapter 18, "Using Saved Searches," Working With the Saved Searches Pagelet, page 342.	Search See Chapter 18, "Using Saved Searches," Creating a Saved Search, page 340.	PAPP1600 PAPP9000

Pagelet Name	***Description***	***Enabling Feature***	***Delivered Permission List***
Signon	Enables users to switch from a GUEST user account to their own user account. Appropriate for guests. See Chapter 5, "Working With Homepage Pagelets," Working With the Signon Pagelet, page 39.	Guest User Account See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Managing Guest User Accounts."	PAPP0001 PAPP9000
Site Manager Center	Provides a navigational guide to configure and use the Site Management features. Created using Navigation Collections with its definition stored in Pagelet Wizard tables. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Managing Sites."	Site Management See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Site Management Overview."	PAPP5000 PAPP5050 PAPP5060 PAPP5070
Submitted Promotions	Provides promotion managers visibility into the status of and quick access to their submitted promotions. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Managing Company Promotions," Working with the Submitted Promotions Pagelet.	Company Promotions See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Managing Company Promotions."	PAPP1160 PAPP9000
Tasks	Enables you to keep track of your workflow tasks and personal reminders across your business solutions. This pagelet can be personalized. See Chapter 7, "Working With Action Items," Working With the Tasks and Tasks Pagelet, page 84.	Integrated Task List See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Using the Integrated Task List."	PAPP1200 PAPP9000
User Logon Statistics	View monthly logon data, including logon dates, times, and user IDs. Appropriate for portal administrators. See Chapter 5, "Working With Homepage Pagelets," Working With the User Logon Statistics Pagelet, page 40.	Portal Logon Statistics See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Configuring Enterprise Portal," Enabling the Signon PeopleCode.	PAPP4200 PAPP9000

Pagelet Name	***Description***	***Enabling Feature***	***Delivered Permission List***
Web Magazine	Provides access to web magazine publication issues. Appropriate for guests. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Managing Web Magazines," Working With the Web Magazine Pagelet.	Web Magazines See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Managing Web Magazines."	PAPP1120 PAPP9000

Workspace Pagelets

The following table lists the pagelets delivered with PeopleSoft Enterprise Portal for display on a collaborative workspace homepage.

Pagelet Name	***Description***	***Enabling Feature***	***Privilege Set***
Blogs	Members can monitor recent blog postings and comments using the Blogs pagelet.	Blogs module See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Administering Workspace Modules.	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Blogs Module Privileges.
Calendar	Shows all of the events a user has access to across portals, sites, and workspaces. This pagelet can be personalized. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Working With the Calendar Pagelet.	Calendar module See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Administering Workspace Modules.	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Calendar Module Privileges.

Pagelet Name	***Description***	***Enabling Feature***	***Privilege Set***
Links	Displays a collection of useful links related to a collaborative workspace. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Working With the Links Pagelet.	Links module See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Administering Workspace Modules.	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Links Module Privileges.
Poll	Use the Poll pagelet to show a single question or poll in a pagelet and enable users to add comments and see other responses to the poll. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Working With the Poll Pagelet.	Polls module See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Administering Workspace Modules.	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Polls Module Privileges.
Recent Discussions	Members can monitor recent discussion topics and replies using the Recent Discussions pagelet. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Working With the Recent Discussions Pagelet.	Discussion module See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Administering Workspace Modules.	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Discussions Module Privileges.

Pagelet Name	***Description***	***Enabling Feature***	***Privilege Set***
Recent Documents	Members can monitor recently added or changed documents using the Recent Documents pagelet. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Working With the Recent Documents Pagelet.	Documents module See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Administering Workspace Modules.	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Documents Module Privileges.
Tags	Members can view and edit the workspace-level tags.	Workspace homepage See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Designating the Content and Layout of the Workspace Homepage.	Not applicable
Upcoming Action Items	Displays a list of all open action items for the workspace. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Working With the Open Action Items Pagelet.	Action Items module See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Administering Workspace Modules.	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Action Item Lists Module Privileges.
Upcoming Events	Displays a list upcoming events for the workspace. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Working With the Open Action Items Pagelet.	Calendar module See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Administering Workspace Modules.	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Calendar Module Privileges.

Pagelet Name	Description	Enabling Feature	Privilege Set
Welcome	Displays a welcome message from the workspace administrator. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Administering Workspace Properties.	Welcome module See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Administering Workspace Modules.	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Welcome Module Privilege.
Wiki Content	Displays the wiki content.	Wiki Content module See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Administering Workspace Modules.	See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Designating the Content and Layout of the Workspace Homepage.

Template Pagelets

The following table lists the template pagelets delivered with PeopleSoft Enterprise Portal. The pagelets are discussed in the final chapters of this book:

Note. Template pagelets cannot be personalized.

Pagelet Name	***Description***	***Enabling Feature***	***Delivered Permission List***
Content Ratings	Displays links to questions set up for an associated menu item target page. Authorized users can also view summarized rating responses. See Chapter 20, "Working With Context Manager Pagelets," Working With the Content Ratings Pagelet, page 399.	Content Ratings See Chapter 21, "Managing Content Ratings and iTracker," page 403.	PAPP0000 Controlled by the permission list on the related target CREF.
Related Contacts	Displays contacts that are relevant to the associated menu item. Provides email and instant messaging functionality that can be used to reach the related contacts. Appropriate for Guests, if guests are allowed access to the menu item. See Chapter 20, "Working With Context Manager Pagelets," Working With the Related Contacts Pagelet, page 378.	Context Manager See Chapter 19, "Working With Context Manager in PeopleSoft Enterprise Portal," page 347.	PAPP0000 Controlled by the permission list on the related target CREF
Related Information	Display links to content relevant to an associated menu item. Appropriate for Guests, if guests are allowed access to the menu item. See Chapter 20, "Working With Context Manager Pagelets," Working With the Related Information Pagelet, page 386.	Context Manager See Chapter 19, "Working With Context Manager in PeopleSoft Enterprise Portal," page 347. Content Management See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System,* "Understanding the Content Management System."	PAPP0000 Controlled by the permission list on the related target CREF.

Pagelet Name	***Description***	***Enabling Feature***	***Delivered Permission List***
Related Discussions	Display links to discussion forums relevant to an associated menu item. See Chapter 20, "Working With Context Manager Pagelets," Working With the Related Discussion Pagelet, page 383.	Context Manager See Chapter 19, "Working With Context Manager in PeopleSoft Enterprise Portal," page 347.	PAPP0000 Controlled by the permission list on the related target CREF.
Related Resources	Provides access to resources related to an associated menu item. These resources are configured and stored in the Resource Finder feature. Appropriate for guests. See Chapter 20, "Working With Context Manager Pagelets," Working With the Related Resources Pagelet, page 392.	Context Manager See Chapter 19, "Working With Context Manager in PeopleSoft Enterprise Portal," page 347. Resource Finder See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Enterprise Portal Resource Finder Overview."	PAPX0000 Controlled by the permission list on the related target CREF.
Related Workspaces	Enables immediate access to all workspaces that you have access to that are related to that transaction page. See Chapter 20, "Working With Context Manager Pagelets," Working With the Related Workspaces Pagelet, page 398.	Context Manager See Chapter 19, "Working With Context Manager in PeopleSoft Enterprise Portal," page 347.	

Chapter 5

Working With Homepage Pagelets

This chapter discusses how to:

- Work with the Feed Reader pagelet.
- Work with the Language Selection pagelet.
- Work with the Signon pagelet.
- Work with the User Logon Statistics pagelet.

Working With the Feed Reader Pagelet

This section provides an overview of the Feed Reader pagelet and discusses how to:

- Personalize the Feed Reader pagelet.
- Use the Feed Reader pagelet.

Understanding the Feed Reader Pagelet

A feed—also known as an RSS feed, an XML feed, syndicated content, or a web feed—is frequently updated content published by a website. Particularly suitable for listing news headlines and content, 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.
- Item (article) titles and optional summaries with links to the associated articles on the source website.
- Optional capability to search for content on the source website.

Note. The Feed Reader pagelet currently supports news feeds supplied in the RSS 0.9x, RSS 1.x, RSS 2.x, ATOM 0.3 and ATOM 1.x formats.

The news categories and headlines display as links. Each category displays the most recent news headlines. Select the news category link to access a page that lists all headlines in the category.

If the content source provides search capability in their content and you have configured your Feed Reader pagelet to display search functionality, you can use available search fields on the pagelet to enter keywords to execute searches in the source website. Search results display on the source website.

In addition to external feed sources, the Feed Reader pagelet can be configured to display PeopleSoft feeds such as feeds published from PeopleSoft Enterprise Portal content or PeopleTools content.

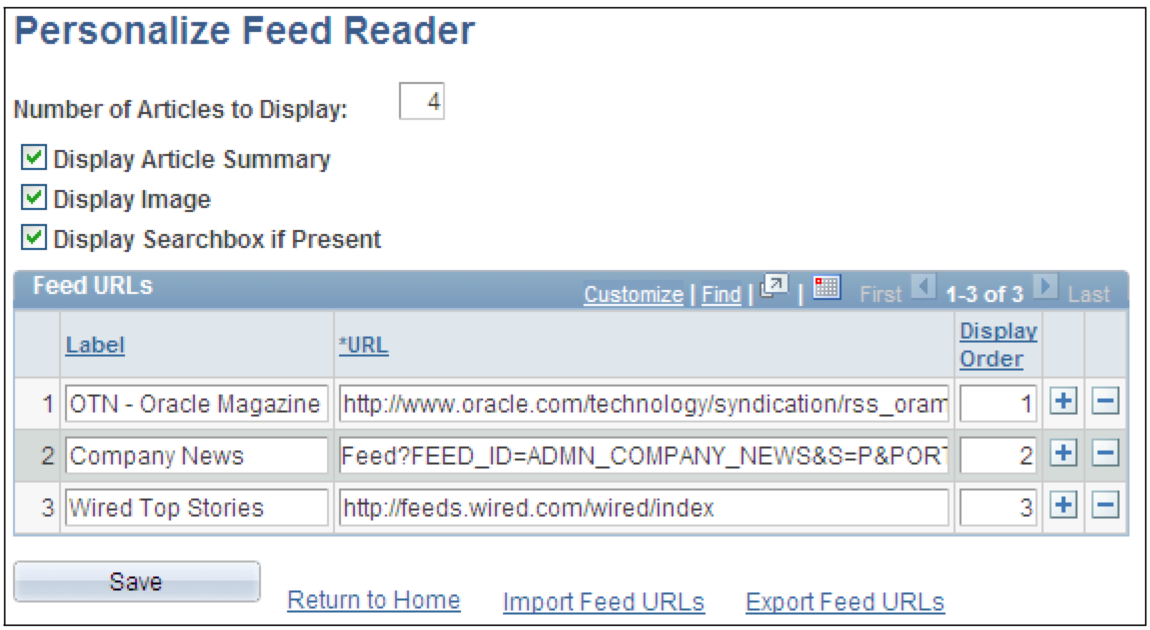
This homepage pagelet may also be placed on the homepage of a collaborative workspace.

Page Used to Personalize the Feed Reader Pagelet

Page Name	Definition Name	Navigation	Usage
Personalize Feed Reader	EO_PE_RSS_NEWS	Click the Customize icon on the Feed Reader pagelet.	Specify URLs to feed content that you want to display on the Feed Reader pagelet. Define display pagelet options.

Personalizing the Feed Reader Pagelet

Access the Personalize Feed Reader page (click the Customize button on the Feed Reader pagelet).



Personalize Feed Reader page

Number of Articles to Display: Indicate the number of articles (items) to display per feed.

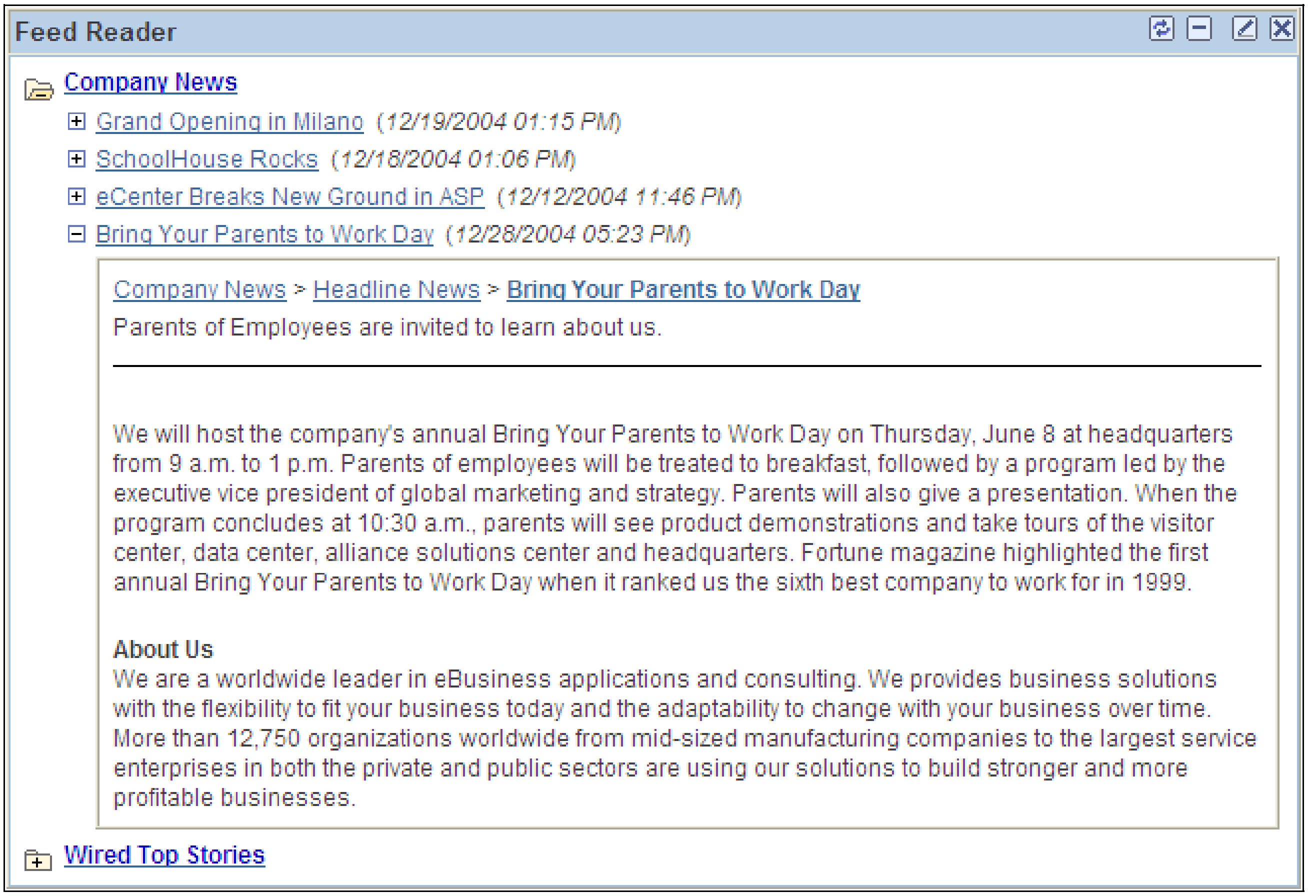
Display Article Summary: Indicate whether the article summaries are to be displayed by default.

Display Image: Indicate whether to display feed icons or logos if they are provided by the content publisher.

Display Searchbox if Present	Indicate whether to display a search box if the content publisher provides feed search capability.
Label	Enter text to be used to label the feed in the pagelet as well as in the exported feed subscription files. The Label field is optional and if left blank, will default to the feed title when the page is saved.
URL	Enter a valid feed URL. If the specified URL does not return a valid feed document, the following error message is displayed when the page is saved: `A feed URL is missing, or the system was unable to retrieve a valid feed document of supported format from the specified url.`
Display Order	Indicate the order to display feeds in the pagelet.
Import Feed URLs	Click to upload an Outline Processor Markup Language (OPML) file. OPML is an XML format for storing outlines including lists of feeds. The OPML format has become popular for users to exchange subscription lists among various feed readers and feed aggregators.
Export Feed URLs	Click export all feed URLs to a .opml file in the OPML 2.0 format.

Using the Feed Reader Pagelet

Access the Feed Reader pagelet on the portal homepage.



Feed Reader pagelet

Use the Feed Reader pagelet to access feeds and feed articles directly from the PeopleSoft Enterprise Portal. For each feed, a folder icon shows first, followed by the feed label and the feed description. For each feed item (article), an item icon shows first, followed by the item title and summary.

Click this folder button to show the content for the feed.

All feeds show initially in collapsed state, except the first feed, which shows in expanded state.

Click this folder button to hide the content for the feed.

Click this item button to show the summary for the article.

Note. If a dot icon appears, that means the article does not have a summary.

Click this item button to hide the summary for the article.

<Feed Title>

Click the link for a feed title to open the entire feed document within PeopleSoft Enterprise Portal.

<Item Title>

Click a link for an item title to display the feed item in the target frame of the PeopleSoft Enterprise Portal.

Note. The item appears wrapped in your PeopleSoft Enterprise Portal, unless the source website contains a frame buster.

If a valid feed document is no longer available at a specified URL, the Feed Reader pagelet displays an error message for that feed similar to the following:

`Unable to get a feed document of recognized formats from the url "`*`URL`*`"`

Working With the Language Selection Pagelet

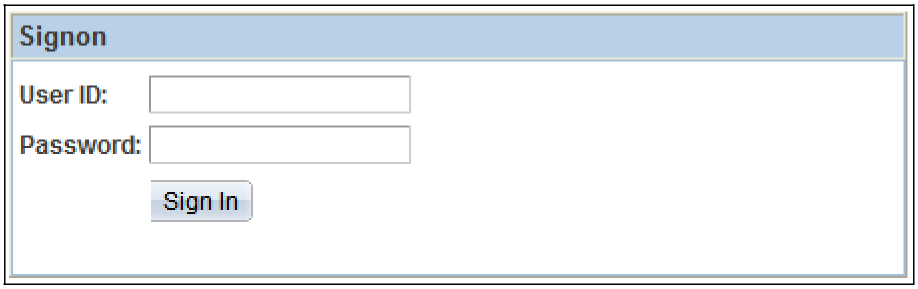
Access the Language Selection pagelet on the portal homepage.

Language Selection pagelet

The Language Selection pagelet displays links for each PeopleSoft-delivered translation that has been enabled for the application database. Click a link to change the displayed language without having to sign out and sign back in again. This functionality is especially useful for GUEST users who may not have access to the language selection options on the sign-in page.

Working With the Signon Pagelet

Access the Signon pagelet on the PeopleSoft Enterprise Portal Guest homepage.



Signon pagelet

The Guest homepage displays the Signon pagelet. This pagelet enables users to switch from guest user accounts to their own user accounts.

User ID	Enter a valid user ID.
Password	Enter the corresponding password.

Note. These fields are case sensitive.

Working With the User Logon Statistics Pagelet

This section provides an overview of the User Logon Statistics pagelet and discusses how to:

- Personalize the User Logon Statistics pagelet.
- Use the User Logon Statistics pagelet.
- View user logon statistics by date.
- View distinct users by month.
- View user logon statistics by hour.
- View distinct users by date.
- View distinct users by hour.

Understanding the User Logon Statistics Pagelet

Logon statistics gather information regarding the number of users who log on to the portal during each month and the number of distinct user logons.

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.

Portal administrators can add the User Logon Statistics pagelet to their homepages to gain convenitent access to logon statistics.

To view logon statistics, you must enable the Signon PeopleCode that is related to the User Logon Statistics pagelet.

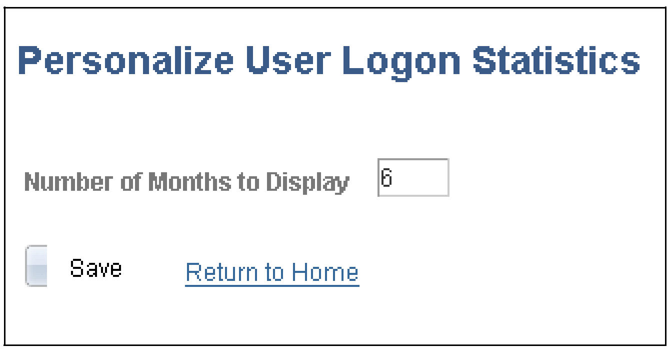
See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Configuring Enterprise Portal," Enabling the Signon PeopleCode.

Pages Used to View Additional User Logon Statistics

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize User Logon Statistics	EO_PE_STATSPREF	Click the Customize icon on the User Logon Statistics pagelet.	Specify the numbers of months for which you want the pagelet to display user logon statistics.
User Logon Statistics by Date	EO_PE_DYSTAT_VW	Click the link for the month on the User Logon Statistics pagelet.	Displays the total number of times that users signed in to the portal each day during a month, as well as the distinct number of sign-ins.
Distinct Users by Month	EO_PE_MTUSER_VW	Click the link for the total distinct users on the User Logon Statistics pagelet.	Displays a list of all users who signed in to the portal during a month, as well as the number of times each user signed in during that month.
User Logon Statistics by Hour	EO_PE_HRSTAT_VW	• Click the link for the month on the User Logon Statistics pagelet. • Click the link for the date on the User Logon Statistics by Date page.	Displays the total number of times that users signed in to the portal each hour on the specified day, as well as the number of distinct user sign-ins.
Distinct Users by Date	EO_PE_DYUSER_VW	• Click the link for the month on the User Logon Statistics pagelet. • Click the link for the total distinct users on the User Logon Statistics by Date page.	Displays a list of users who signed in to the portal on the specified day, as well as the number of times those users signed in during that day.

Page Name	*Definition Name*	*Navigation*	*Usage*
Distinct Users by Hour	EO_PE_HRUSER_VW	• Click the link for the month on the User Logon Statistics pagelet. • Click the link for the date on the User Logon Statistics by Date page. • Click the link for the total distinct users on the User Logon Statistics by Hour page.	Displays a list of all users who signed in to the portal during a specified hour, as well as the number of times those users signed in during that hour.

Personalizing the User Logon Statistics Pagelet

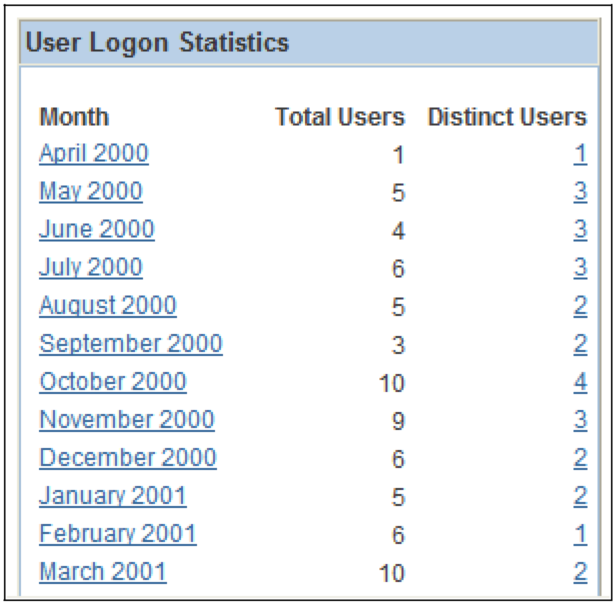


Personalize User Logon Statistics page

Number of Months to Display Enter the number of months for which you want the pagelet to display user logon statistics.

Using the User Logon Statistics Pagelet

Access the Personalize User Logon Statistics page on the portal homepage.



User Logon Statistics

Month	Total Users	Distinct Users
April 2000	1	1
May 2000	5	3
June 2000	4	3
July 2000	6	3
August 2000	5	2
September 2000	3	2
October 2000	10	4
November 2000	9	3
December 2000	6	2
January 2001	5	2
February 2001	6	1
March 2001	10	2

User Logon Statistics pagelet

The Logon Statistics pagelet displays the number of users who sign in to the portal during each month and the number of distinct user sign-ins.

Month Click the desired month to access the User Logon Statistics by Date page.

Total Users Displays the total number of times that users signed in to the portal during the corresponding month.

Distinct Users Displays the total number of users that signed in to the portal during the corresponding month.

Click the desired total to access the Distinct Users by Month page.

Show All Click to display statistics for all available months.

Viewing User Logon Statistics by Date

Access the User Logon Statistics by Date page (click the link for the month on the User Logon Statistics pagelet).

User Logon Statistics by Date

Year: 2003

Date	Total Users	Distinct Users
06 January	2	2
07 January	2	1
08 January	3	2
15 January	7	3
16 January	7	2
17 January	3	2
18 January	4	1
22 January	48	6
23 January	46	4
24 January	49	3
26 January	4	1
27 January	19	1

User Logon Statistics by Date page

Date

Displays each day on which the portal was accessed in the selected month.

Click the link for the desired date to access the User Logon Statistics by Hour page.

Total Users

Displays the total number of times users signed in to the portal on the corresponding date.

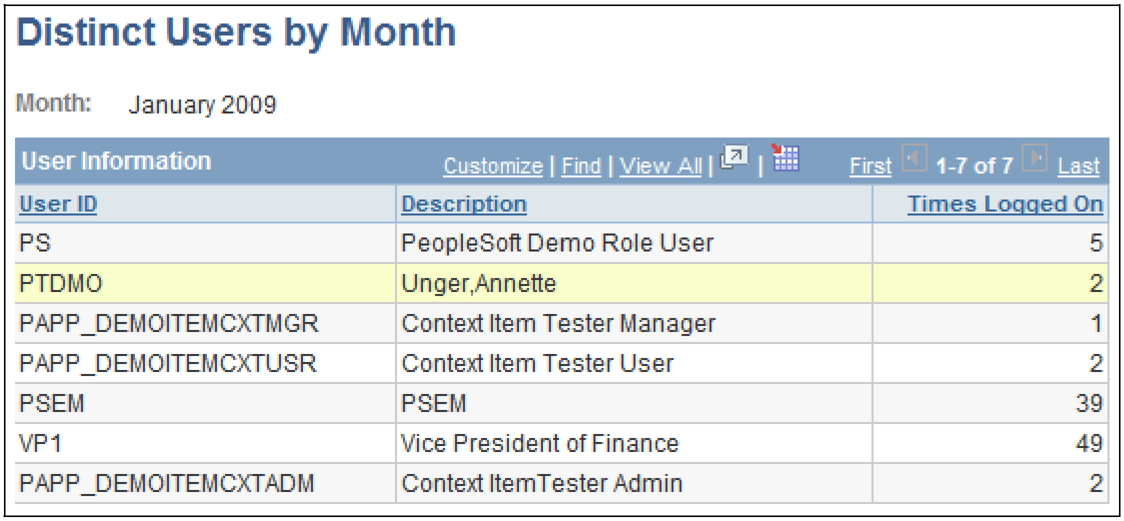
Distinct Users

Displays the total number of users who signed in to the portal on the corresponding date.

Click the link for the desired total users to access the Distinct Users by Date page.

Viewing Distinct Users by Month

Access the Distinct Users by Month page (click the link for the total distinct users on the User Logon Statistics pagelet).



Distinct Users by Month

Month: January 2009

User Information Customize | Find | View All | First 1-7 of 7 Last

User ID	Description	Times Logged On
PS	PeopleSoft Demo Role User	5
PTDMO	Unger,Annette	2
PAPP_DEMOITEMCXTMGR	Context Item Tester Manager	1
PAPP_DEMOITEMCXTUSR	Context Item Tester User	2
PSEM	PSEM	39
VP1	Vice President of Finance	49
PAPP_DEMOITEMCXTADM	Context ItemTester Admin	2

Distinct Users by Month page

Month Displays the month and year that you selected on the User Logon Statistics pagelet.

User ID and **Description** Displays the user ID and a description of each user that signed in to the portal during the selected month.

Times Logged On Displays the total number of times that the associated user signed in to the portal during the selected month.

Viewing User Logon Statistics by Hour

Access the User Logon Statistics by Hour page (click the link for the month on the User Logon Statistics pagelet, and then click the link for the date on the User Logon Statistics by Date page).

User Logon Statistics by Hour

Date: 22 January 2003

Hour	Total Users	Distinct Users
09:00	3	1
10:00	3	1
12:00	3	2
13:00	11	3
14:00	6	1
15:00	4	1
16:00	4	1
18:00	1	1
19:00	6	2
20:00	5	2
23:00	2	1

User Logon Statistics by Hour page

Date

Displays the date that you selected on the User Logon Statistics by Date page.

Hour

Displays each hour on the selected date during which users signed in to the portal.

Total Users

Displays the total number of times that users signed on to the portal during the corresponding hour .

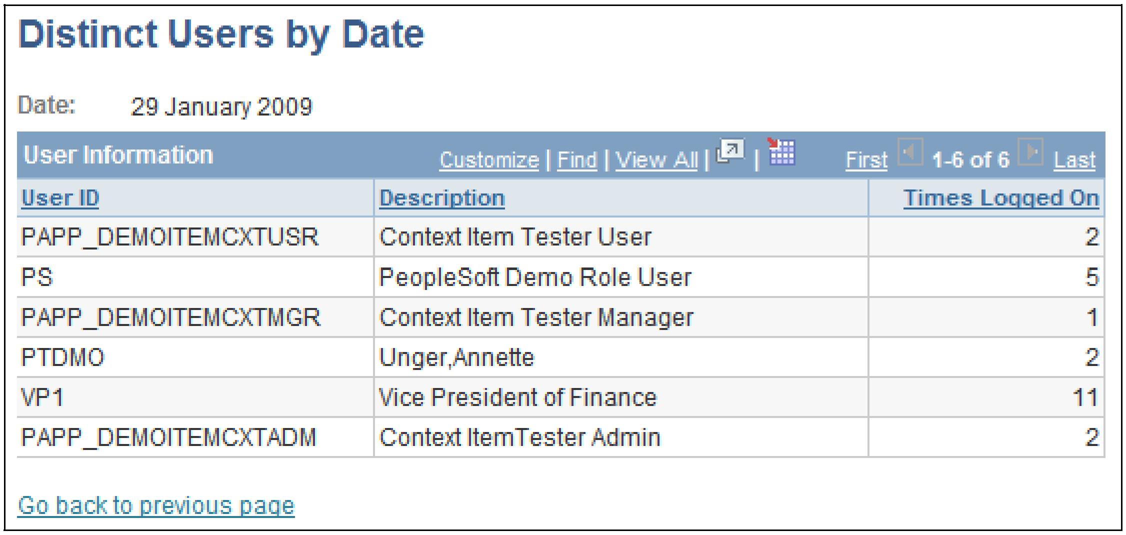
Distinct Users

Displays the total number of distinct users that signed in to the portal during the corresponding hour

Click the link for the total distinct users to access the Distinct Users by Hour page.

Viewing Distinct Users by Date

Access the Distinct Users by Date page (click the link for the month on the User Logon Statistics pagelet, and then click the link for the total distinct users on the User Logon Statistics by Date page).



Distinct Users by Date

Date: 29 January 2009

User Information Customize | Find | View All | | First 1-6 of 6 Last

User ID	Description	Times Logged On
PAPP_DEMOITEMCXTUSR	Context Item Tester User	2
PS	PeopleSoft Demo Role User	5
PAPP_DEMOITEMCXTMGR	Context Item Tester Manager	1
PTDMO	Unger,Annette	2
VP1	Vice President of Finance	11
PAPP_DEMOITEMCXTADM	Context ItemTester Admin	2

Go back to previous page

Distinct Users by Date page

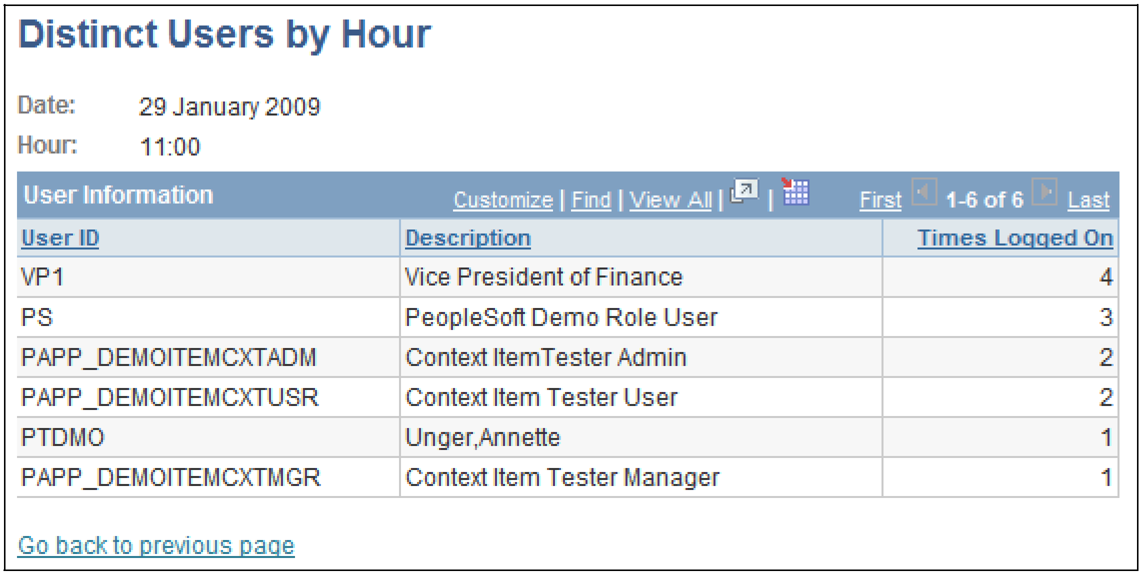
Date	Displays the date that you selected on the User Logon Statistics by Date page.
User ID and **Description**	Displays the user ID and a description of each user that signed in to the portal on the selected date.
Times Logged On	Displays the number of times that the corresponding user signed in to the portal on the selected date.

Viewing Distinct Users by Hour

To access the Distinct Users by Hour page:

1. Click the link for the month on the User Logon Statistics pagelet.
2. Click the link for the date on the User Logon Statistics by Date page.
3. Click the link for the distinct user on the User Logon Statistics by Hour page.

This is an example of the Distinct Users by Hour page:



Distinct Users by Hour

Date: 29 January 2009

Hour: 11:00

User Information Customize | Find | View All | First 1-6 of 6 Last

User ID	Description	Times Logged On
VP1	Vice President of Finance	4
PS	PeopleSoft Demo Role User	3
PAPP_DEMOITEMCXTADM	Context ItemTester Admin	2
PAPP_DEMOITEMCXTUSR	Context Item Tester User	2
PTDMO	Unger,Annette	1
PAPP_DEMOITEMCXTMGR	Context Item Tester Manager	1

Go back to previous page

Distinct Users by Hour page

Date and Hourand **Hour**	Displays the date and hour that you selected on the User Logon Statistics by Date page or the User Logon Statistics by Hour pages.
User ID and Description and **Description**	Displays the user ID and a description of each user that signed in to the portal during the selected date and hour.
Times Logged On	Displays the number of times that the corresponding user signed in to the portal during the selected date and hour.

Chapter 6

Using My Links

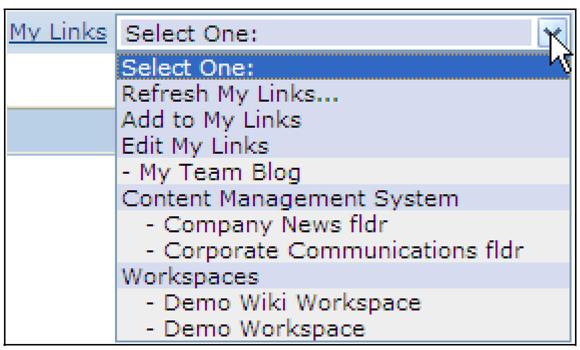
This chapter provides an overview of My Links functionality and discusses how to:

- Enable My Links.
- Maintain My Links.
- Access My Links.

Understanding My Links

Using My Links functionality in Oracle's PeopleSoft Enterprise Portal provides you an easy way for you 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.

The following example shows the My Links drop-down list box with My Links functions (refresh, add, edit), a link at the root of the My Links collection, and other links organized by folders:



My Links drop-down list box

My Links are defined and accessible according to the user ID with which you log in to PeopleSoft Enterprise Portal. Therefore, unlike browser bookmarks, you can access your My Links collection from any workstation that can connect to your PeopleSoft Enterprise Portal site.

The content types supported by My Links include:

- External URLs.
- Navigation collections.
- Components with user-defined query string parameters.

- Pages directly accessible from the Enterprise Menu.
- PeopleSoft queries.

Enabling My Links

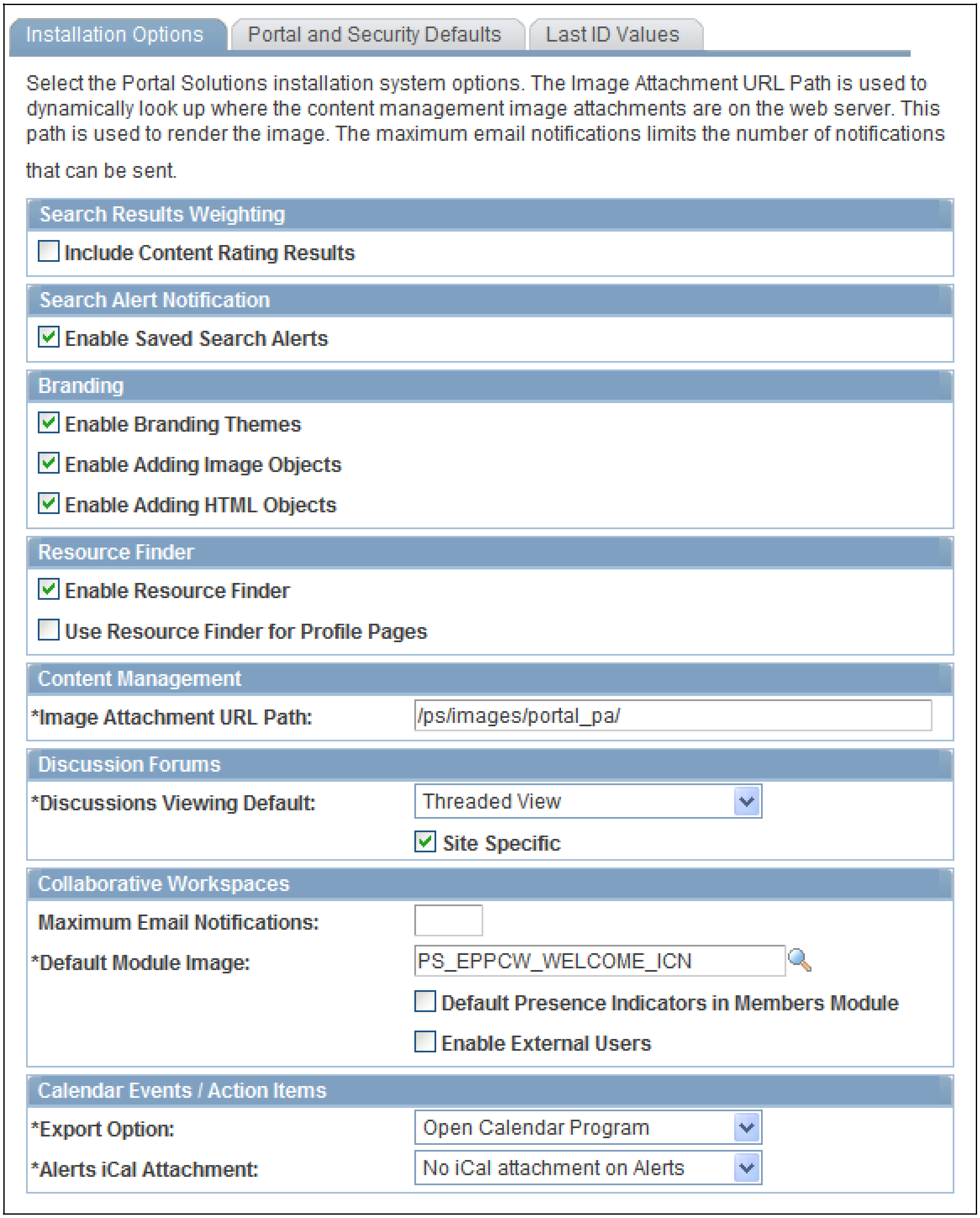
This section discusses how to enable My Links functionality.

Page Used to Enable My Links

Page Name	***Definition Name***	***Navigation***	***Usage***
Installation Options	EO_PE_OPTIONS1	Portal Administration, System Data, Installation Options	Set installation options for your portal solutions, including enabling Branding Themes, which makes it possible for you to provide the My Links functionality to your users.

Enabling My Links Functionality

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



Installation Options page

Enable Branding Themes

By activating the configurable branding feature in your PeopleSoft Enterprise Portal implementation, it becomes possible to provide the My Links functionality to your users. You would configure branding special bar elements to display the My Links drop-down list box the portal header. You can also configure header bar items to display the Add to My Links link.

Maintaining My Links

This section discusses how to:

- Add the current page to My Links.
- Maintain your My Links collection.
- Add a link to My Links.
- Select a menu item or menu folder as a link.
- Edit a link.
- Add or edit My Links folders.
- Add menu folders or navigation collections to My Links.
- Select a navigation collection as a link.

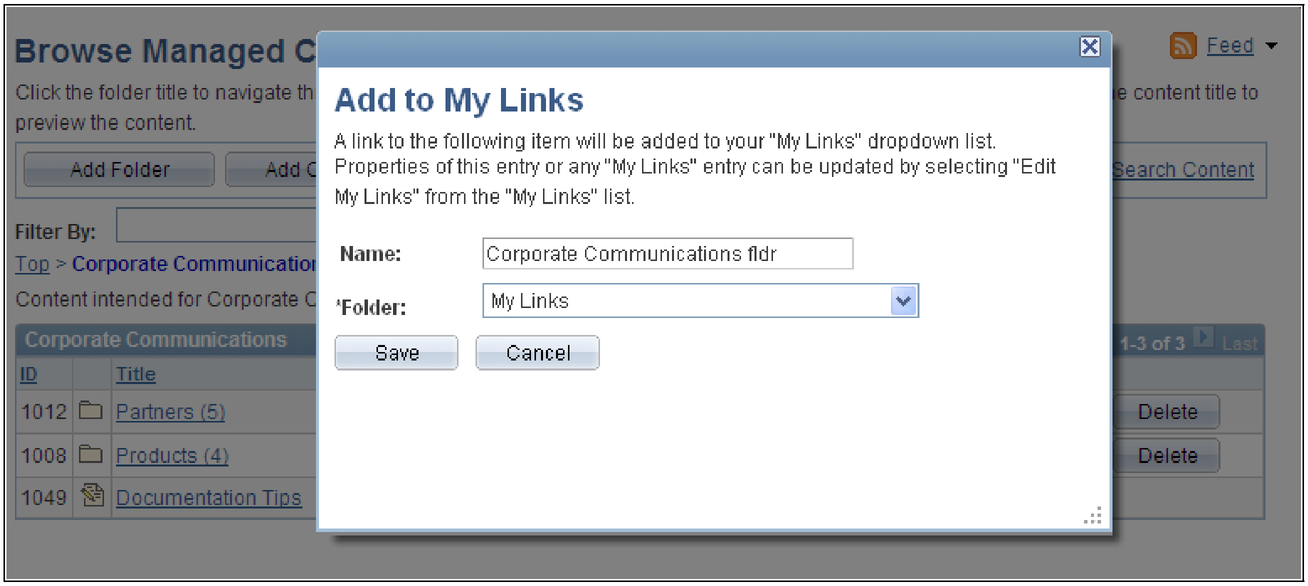
Pages Used to Maintain My Links

Page Name	***Definition Name***	***Navigation***	***Usage***
Add to My Links	EPPSC_ADD_MYSHRTCT	• Click the Add to My Links link in the portal header. • Click the Add to My Links link in the My Links drop-down list box the portal header.	Add a link to the current page to your My Links collection.
Edit My Links	EPPSC_EDIT_MYSC	• Click the Edit My Links link in the My Links drop-down list box in the portal header. • Click the Edit My Links button on the View My Links page.	Maintain your My Links collection. Access pages that enable you to add, edit, and delete links and folders.
Add Link	EPPSC_AE_MYSHRTCT	Click the Add Link button on the Edit My Links page.	Add a link to your My Links collection.

Page Name	***Definition Name***	***Navigation***	***Usage***
Select Menu Item	EPPSC_BROWSEREG_MS	• Select the Menu Item lookup button on the Add Link page. • Select the Menu Item lookup button on the Edit Link page. • Select the Menu Folder lookup button on the Add Other page. • Select the Menu Folder lookup button on the Edit Folder page.	Browse through a hierarchical display of the Enterprise Menu and select the menu folder or menu item for which you want to create a My Links.
Edit Link	EPPSC_AE_MYSHRTCT	Click the Edit Link button on the Edit My Links page.	Edit a link in your My Links collection.
Add Folder	EPPSC_AE_MYFOLDER	Click the Add Folder button on the Edit My Links page.	Add a folder to organize your links in your My Links collection.
Edit Folder	EPPSC_AE_MYFOLDER	Click the Edit Folder button on the Edit My Links page.	Edit a folder in your My Links collection.
My Links - Delete Confirmation	EO_PE_DEL_CONFIRM	• Click the Delete Link button on the Edit My Links page. • Click the Delete Folder button on the Edit My Links page.	Confirm or cancel the deletion.
Add Other	EPPSC_AE_MYFLD_OTH	Click the Add Other button on the Edit My Links page.	Add an item that references either a menu folder or a navigation collection to your My Links collection.
Browse Navigation Collections	EPPSC_SRCH_MS	• Click the Navigation Collection lookup button on the Add Other page. • Click the Navigation Collection lookup button on the Edit Folder page.	Search for and select the navigation collection for which you want to create a link in your My Links collection.

Adding the Current Page to My Links

Access the Add to My Links page (select the Add to My Links item in the My Links drop-down list box, or click the Add to My Links link in the portal header).

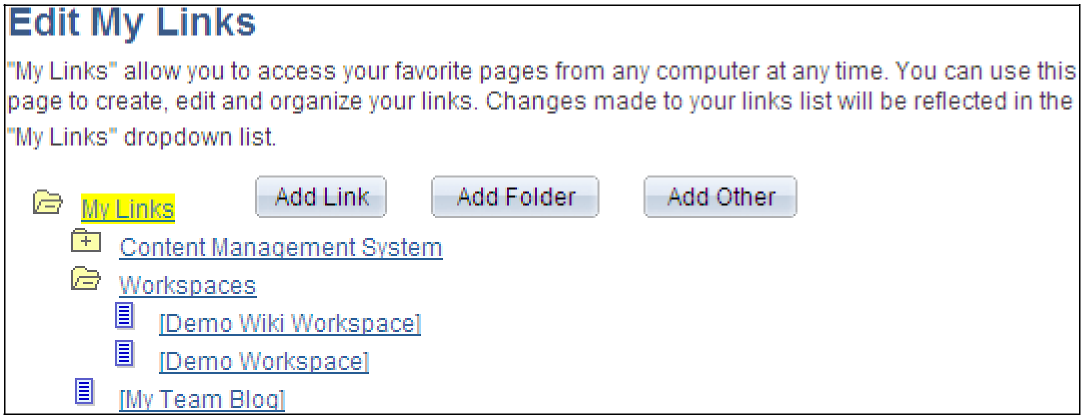


Add to My Links modal window

Name	The menu item link text defined for the currently accessed menu item automatically defaults as the link name. You can override this default text as shown in the example.
Save	Click to save the current page to My Links.

Maintaining Your My Links Collection

Access the Edit My Links page (click the Edit My Links link in the My Links drop-down list box in the portal header).



Edit My Links page

Use the Edit My Links page to maintain your My Links collection.

My Links

This is the root folder that holds your My Links collection.

Add Link

Click to access the Add to My Links page. This option is available when you select the My Links top-level folder or a folder added using the Add Folder page.

Add Folder

Click to access the Add Folder page. This option is available when you select the My Links top-level folder.

Add Other

Click to access the Add Other page. This option is available when you select the My Links top-level folder.

Edit Link

Click to access the Edit Link page.

This option is available when you select a link in the My Links hierarchy.

Delete Link

Click to access the My Links - Delete Confirmation page, where you are prompted to confirm or cancel your deletion.

This option is available when you select a link in the My Links hierarchy.

Edit Folder

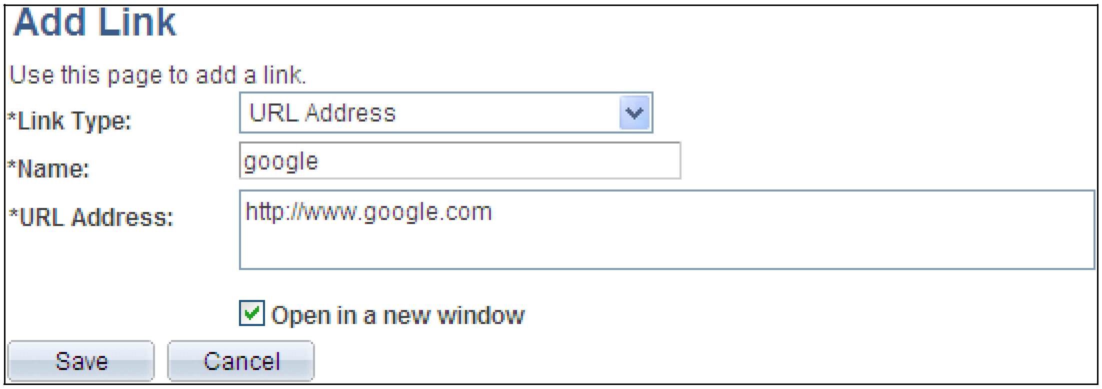
Click to access the Edit Folder page. This option is available when you select a folder in the My Links hierarchy.

Delete Folder

Click to access the My Links - Delete Confirmation page, where you are prompted to confirm or cancel your deletion. This option is available when you select a folder in the My Links hierarchy.

Adding a Link to My Links

Access the Add Link page (click the Add Link button on the Edit My Links page).



Add Link page

Use the Add Link page to add a link to your My Links collection.

Link Type

Select from the following:

- *Menu Item.* Select to add a link to a menu item. This establishes a link to the menu item's content reference in the portal registry. If selected, the Menu Item link displays.
- *Query.* Select to establish a link to a PeopleSoft query within any PeopleSoft content provider. If selected, the Content Provider and Query Name fields display.
- *URL Address.* Select to establish a link to a URL. This option can be used to establish a link to an external website. If selected, the URL Address field displays.

Name

Enter a name for the item.

When the Link Type field value is set to *Menu Item,* the link text defined for the menu item you select automatically defaults as the link name. You can override this default text.

Open in a new window

Select to indicate that, when accessed, you want the item to display in a new window.

If this option is not selected, when accessed, the item is displayed within your PeopleSoft Enterprise Portal target frame.

Menu Item

Displays when the Link Type field value is set to *Menu Item.*

Select to access the Select Menu Item page, where you can browse through the enterprise menu for the menu item for which you want to create a link.

Once you have selected a menu item, displays the menu-based navigation path to the item.

Query Name

Displays when the Link Type field value is set to *Query.* Select from available public queries. You may manually enter a non-public query.

URL Address

Displays when the Link Type field value is set to *URL Address.*

Advanced Properties

The Advanced Properties group box displays when the Link Type field value is set to *Menu Item* or *Query*.

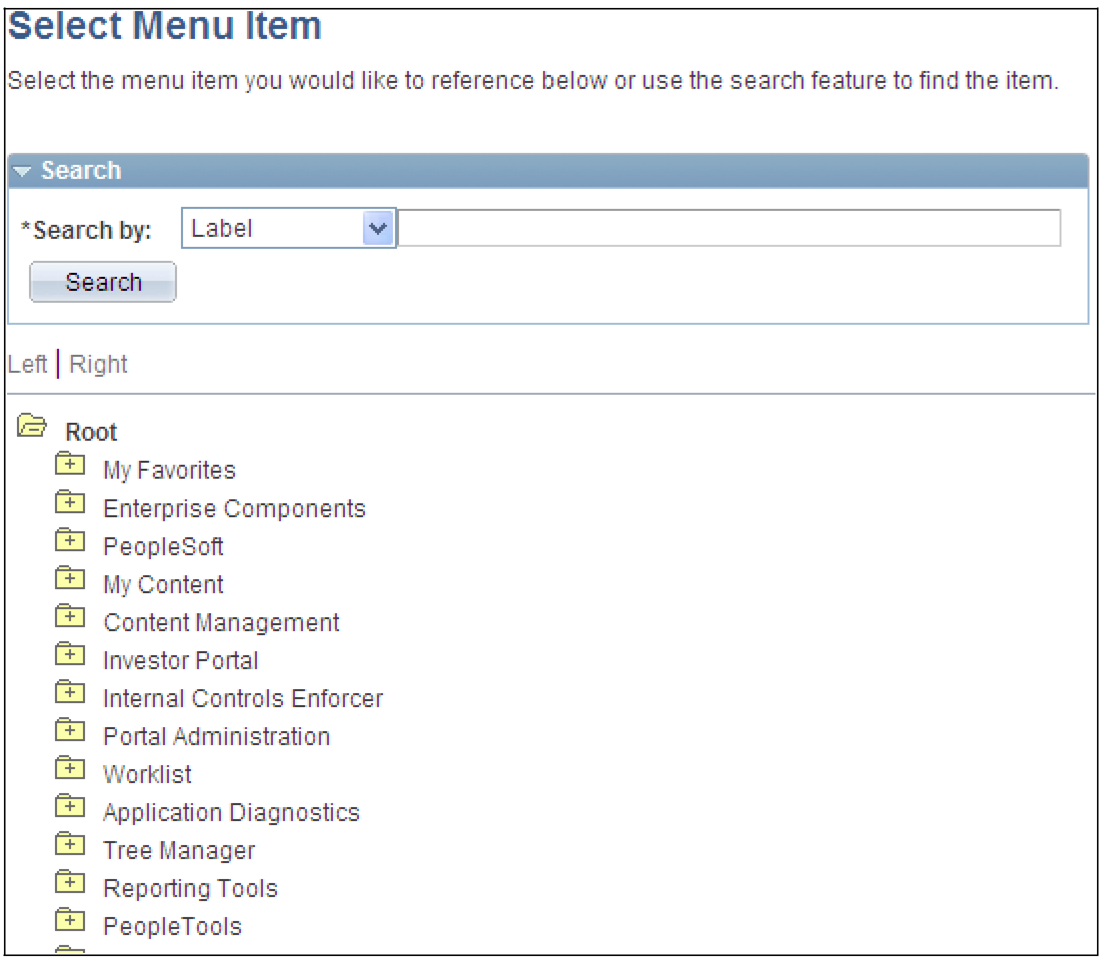
Additional Parameters Enter additional query string parameters to PeopleSoft components. For example, you can use these additional parameters to point a link to a specific query or row of data on an application business transaction page.

When the Link Type field value is set to *Query*, you can use this field to enter additional query parameters.

When the Link Type field value is set to *Menu Item*, you can use this field to enter additional parameters.

Selecting a Menu Item or a Menu Folder as a Link

Access the Select Menu Item page (click the Menu Item lookup button on the Add Link page, or click the Menu Folder lookup button on the Add Other page).



Select Menu Item page

Use the Select Menu Item page to select a menu item or a menu folder to be a link in your My Links collection.

Search

Search by

Description. Select to conduct your search based on menu item or folder description text.

Label. Select to conduct your search based on menu item or folder label text.

The search is not case sensitive.

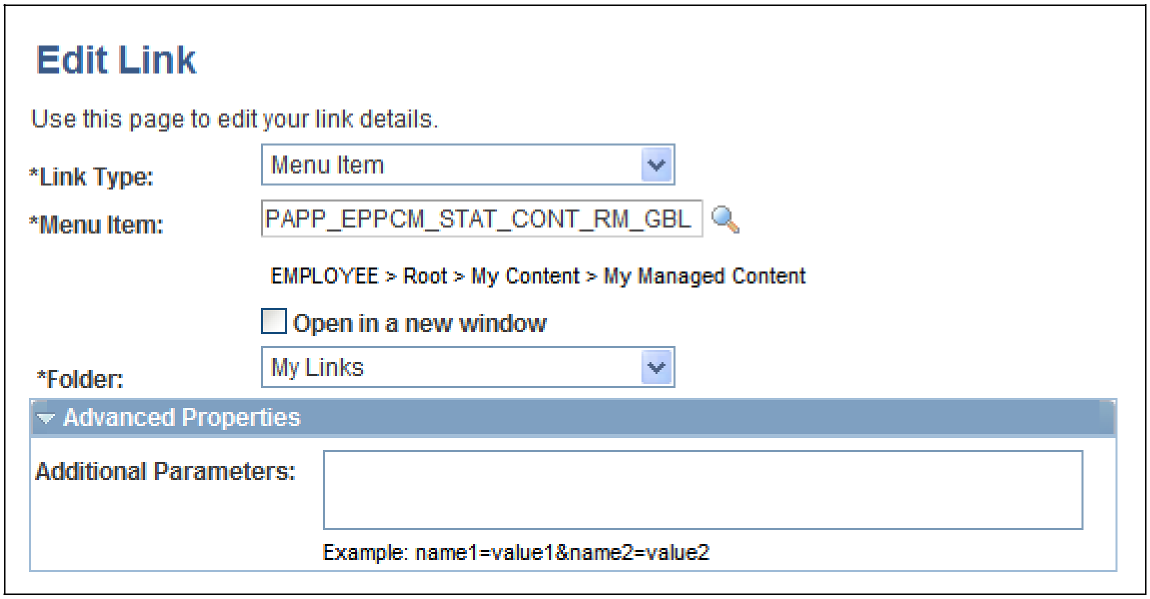
Search Results

Label

Select the linked label text to locate and select the item or folder in the enterprise menu hierarchy displayed at the bottom of the page.

Editing a Link

Access the Edit Link page (select a link and click the Edit Link button on the Edit My Links page).



Edit Link page

Use the Edit Link page to edit a link in your My Links collection.

Link Type	Select from the following: • *Menu Item.* Select to add a link to a menu item. This establishes a link to the menu item's content reference in the portal registry. If selected, the Menu Item link displays. • *Query.* Select to establish a link to a PeopleSoft query within any PeopleSoft content provider. If selected, the Content Provider and Query Name fields display. • *URL Address.* Select to establish a link to a URL. This option can be used to establish a link to an external website. If selected, the URL Address field displays.
Name	Enter a name for the item. When the Link Type field value is set to *Menu Item,* the link text defined for the menu item you select automatically defaults as the link name. You can override this default text.
Open in a new window	Select to indicate that, when accessed, you want the item to display in a new window. If this option is not selected, when accessed, the item is displayed within your PeopleSoft Enterprise Portal target frame.
Menu Item	Displays when the Link Type field value is set to *Menu Item.* Select to access the Select Menu Item page, where you can browse through the enterprise menu for the menu item for which you want to create a link. Once you have selected a menu item, displays the menu-based navigation path to the item.
Query Name	Displays when the Link Type field value is set to *Query.* Select from available public queries. You may manually enter a non-public query.
URL Address	Displays when the Link Type field value is set to *URL Address.*
Folder	Displays the folder in which the item is stored. You can move the link to another My Links folder by selecting an available folder from the drop-down list box.

Advanced Properties

The Advanced Properties group box displays when the Link Type field value is set to *Menu Item* or *Query.*

Additional Parameters Enter additional query string parameters to PeopleSoft components. For example, you can use these additional parameters to point a link to a specific query or row of data on an application business transaction page.

When the Link Type field value is set to *Query*, you can use this field to enter additional query parameters.

When the Link Type field value is set to *Menu Item*, you can use this field to enter additional parameters.

Adding or Editing My Links Folders

Access the Add Folder page (click the Add Folder button on the Edit My Links page).

Access the Add Folder page (select a folder and click the Edit Folder button on the Edit My Links page).

Add Folder page

Use the Add Folder page and the Edit Folder page to maintain the name of the folder.

Name Enter the name for the folder.

Adding Menu Folders or Navigation Collections to My Links

Access the Add Other page (click the Add Other button on the Edit My Links page).

Add Other page

Use the Add Other page to add a menu folder or navigation collection as a link in your My Links collection. In the My Link drop-down list box, the contents of the menu folder or navigation collection are expanded to allow you to navigate to any link in the folder or collection.

Note. On the Edit My Links page and the View My Links page, these items remain collapsed and you cannot view, navigate to, or edit the individual links within the folder or navigation collection.

Name

When the Folder Reference value is set to *Menu Folder,* the menu folder label text automatically defaults as the folder name. You can override this default text.

When the Folder Reference value is set to *Navigation Collection,* the navigation collection name automatically defaults as the folder name. You can override this default text.

Folder Reference

Menu Folder. Select to establish a link that accesses a folder in the enterprise menu. If selected, the Menu Folder link displays.

Navigation Collection. Select to establish a link that accesses a folder that contains a navigation collection. To be eligible for My Links functionality, the navigation collection must have been published with the Option for My Links option selected on the Publish Collection page. If selected, the Navigation Collection link displays.

Menu Folder

Displays when the Folder Reference value is set to *Menu Folder*.

Select to access the Select Menu Item page, where you can browse through the enterprise menu for the menu folder for which you want to create a link.

See Chapter 6, "Using My Links," Selecting a Menu Item or a Menu Folder as a Link, page 57.

Once you have selected a menu folder, displays the menu-based navigation path to the folder.

Navigation Collection

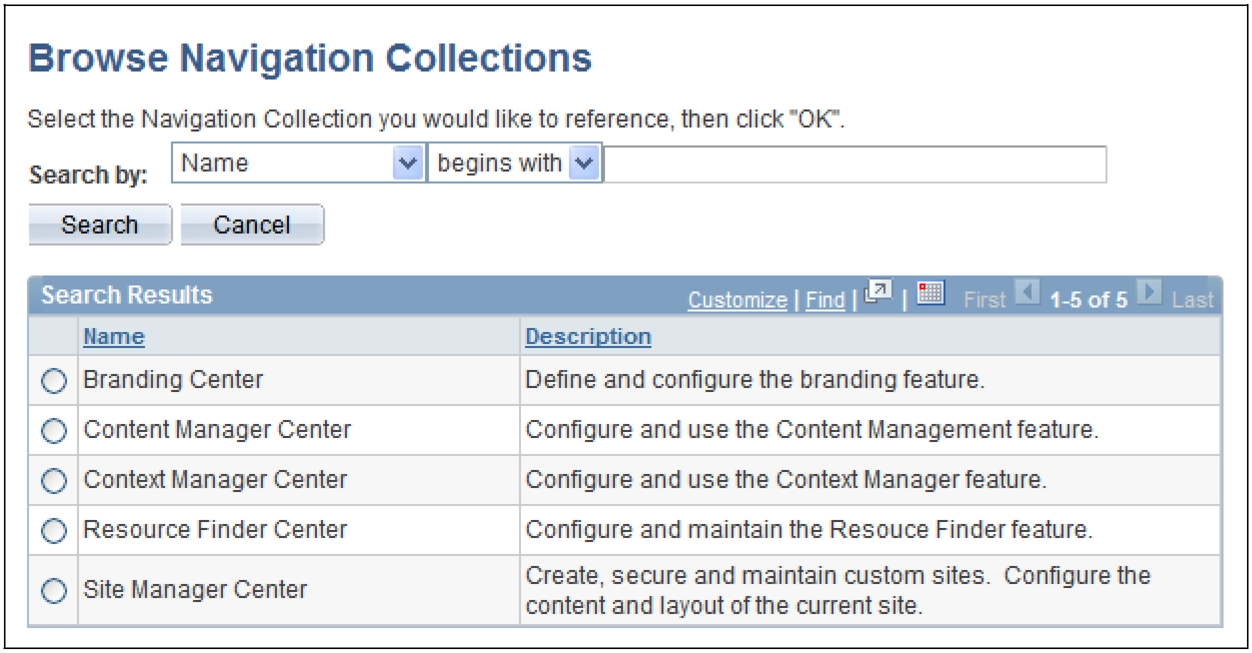
Displays when the Folder Reference value is set to *Navigation Collection.*

Select to access the Browse Navigation Collections page, where you can browse through navigation collections for which you want to create a link.

To be accessible on this page, the navigation collection must have been published with the Option for My Links option selected on the Publish Collection page.

Selecting a Navigation Collection as a Link

Access the Browse Navigation Collections page (click the Navigation Collection lookup button on the Add Other page).



Browse Navigation Collections page

Use the Browse Navigation Collections page to select a navigation collection to be a link in your My Links collection.

Search by

Description. Select to conduct your search based on navigation collection descriptions.

Name. Select to conduct your search based on navigation collection names.

This search is not case sensitive.

Search Results

Navigation collections available for selection in the Search Results scroll area meet your search criteria and have been published with the Option for My Links option selected on the Publish Collection page.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Working With Navigation Pages," Publishing Navigation Collections.

Accessing My Links

This section discusses how to:

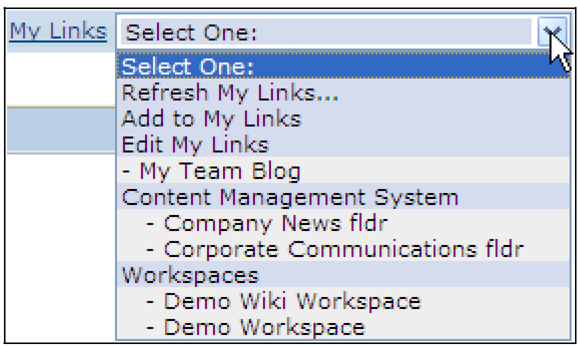
- Access My Links in the portal header.
- View My Links.

Page Used to Access My Links

Page Name	***Definition Name***	***Navigation***	***Usage***
View My Links	EPPSC_VIEW_MYSC	• Click the My Links link in the portal header. • In the My Links drop-down list box, select a folder, a menu folder, or a navigation collection folder.	Access your My Links collection to navigate to a specific link.

Accessing My Links in the Portal Header

My Links are accessible from the My Links drop-down list box in the portal header.



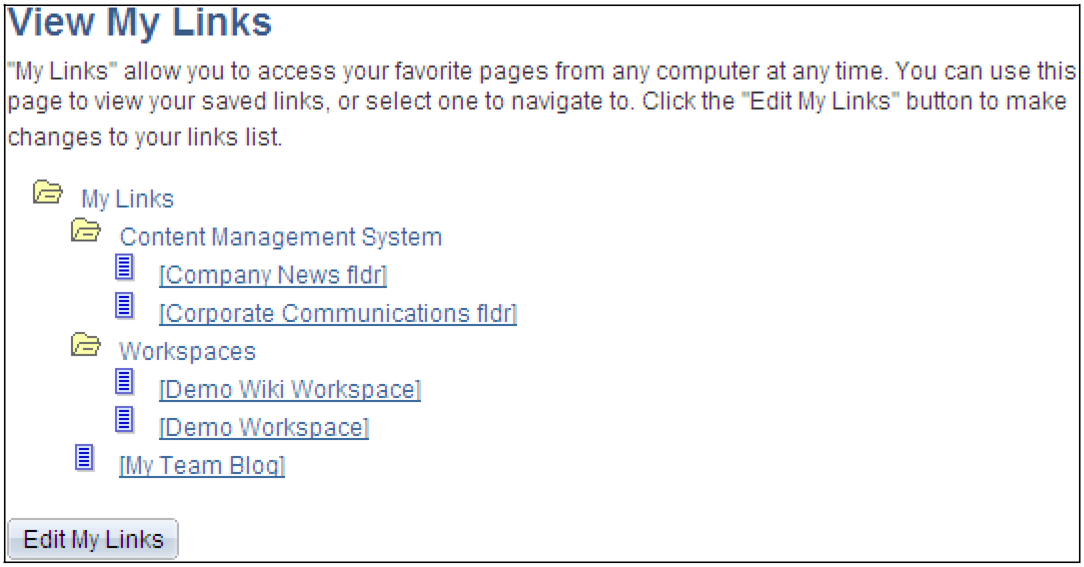
My Links drop-down list box

Use the My Links drop-down list box to navigate to links you have defined or to perform selected My Links functions.

My Links	Click to access the View My Links page.
Refresh My Links...	Select to force a refresh of the My Links data displayed in the drop-down list box.
Add to My Links	Select to access the Add to My Links page.
Edit My Links	Select to access the Edit My Links page.
<link name>	Click to navigate to the link content.
<folder name> or **<menu folder name>** or **<navigation collection name>**	Click to access the View My Links page.

Viewing My Links

Access the View My Links page (click My Links in the portal header).



View My Links page

Use the View My Links page to access your My Links collection to navigate to a specific link.

<link name>	Click to navigate to the link content.
Edit My Links	Click to access the Edit My Links page.

Part 3

Collaborative Features

Chapter 7

Working With Action Items

This chapter provides an overview of action items and discusses how to:

- Manage action item lists.
- Create and manage action items.
- Review action items.
- Work with tasks and the Tasks pagelet.
- Administer action item lists.
- Publish an action item list as a pagelet.

Action Items Overview

In Oracle's PeopleSoft Enterprise Portal, the action item feature allows you to collaborate with other users to create and track action items. *Action items* are assignments or tasks that are assigned to people across groups and require some sort of activity, monitoring, or event to take place before they can be considered complete. Items can be tracked through summary homepage pagelets, through inquiry pages, as well as through email notification and calendar entries.

These items are organized into groups called *action item lists.* An action item list is a set of action items. Action items appear in the list as a flat view with no nested hierarchy. Security privileges for users and for roles are defined based on the list membership.

Action item lists can be accessed from portals, sites, and workspaces. Action item lists exist in a *standalone* form in portals and sites. Standalone action item lists are accessible in portals and sites through the My Action Item Lists page under the My Content menu. In workspaces, action item lists are available in the Action Item Lists module that is part of the workspace.

Understanding the Tasks Pagelet

The Tasks pagelet is a delivered pagelet that displays a consolidated list of all of your action items and tasks based on the preferences that you specify for the pagelet. The Tasks pagelet and related pages provide you with access to personal tasks, worklist items, and action items that are assigned to you. Personal tasks are those you add to your task list using the Task Details page. Worklist items are those tasks that have been routed to you by way of PeopleSoft Workflow. Action items are those assignments or actionable items that are related to an action item list.

See Chapter 7, "Working With Action Items," Working With the Tasks and Tasks Pagelet, page 84.

Understanding the Action Item Lists Module in Collaborative Workspaces

Use the Action Item Lists module to maintain action item lists and action items defining responsibilities for individual workspace members. Members can also monitor current action items using the Open Action Items pagelet that displays on the workspace homepage.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Using the Action Item Lists Module.

Managing Action Item Lists

This section discusses managing action item lists and how to:

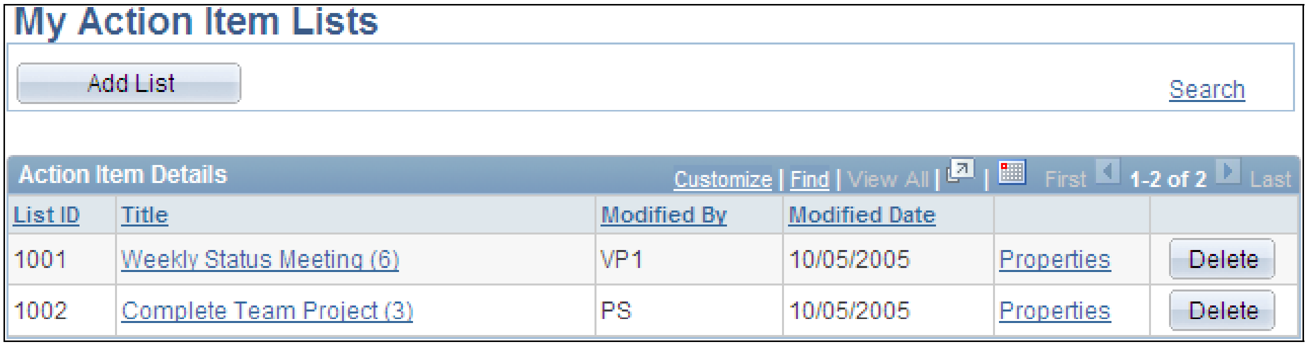
- Access action item lists.
- Create an action item list.
- Assign action item list participants and privileges.

Pages Used to Manage Action Item Lists

Page Name	***Definition Name***	***Navigation***	***Usage***
My Action Item Lists	EPPAI_BROWSE	My Content, My Action Item Lists	View and manage action item lists.
List Properties	EPPAI_LIST_INFO	• Click the Properties link on the My Action Item Lists page. • Click the Add List button on the My Action Item Lists page.	View or define the Action Item List and notification properties.
List Security	EPPAI_LIST_PRIV	• Select List Security on the List Properties page. • Click a Privileges link on the Administer Action Item Lists page.	Assign privilege sets to members of the list.

Accessing Action Item Lists

Access the My Action Item Lists page (My Content, My Action Item Lists).



My Action Item Lists page

Use the My Action Item Lists page to access the action item lists of which you are a member.

If you have permission to create an action item list, the Add List button appears on the page. If you are the administrator of a list, the Properties link is available and you can edit the list properties and security. The Delete button is available only to administrators as well.

Add List

Click to create a new action item list.

Note. This button appears only for those users who have create list privileges.

Display Active Lists or **Display Inactive Lists**

If you have created lists that have been set to a status of *inactive,* the system displays a drop-down list box on the page the enables you to display either active lists or all inactive lists that you have created.

Search

Click to access the Search Action Items page where you can retrieve action items based on the search criteria that you enter.

Title

Click the list title to view the individual action items that are associated with the list.

Properties

Click to view the List Properties page on which you can define properties for the list.

Note. This button appears only for those users who have edit list privileges.

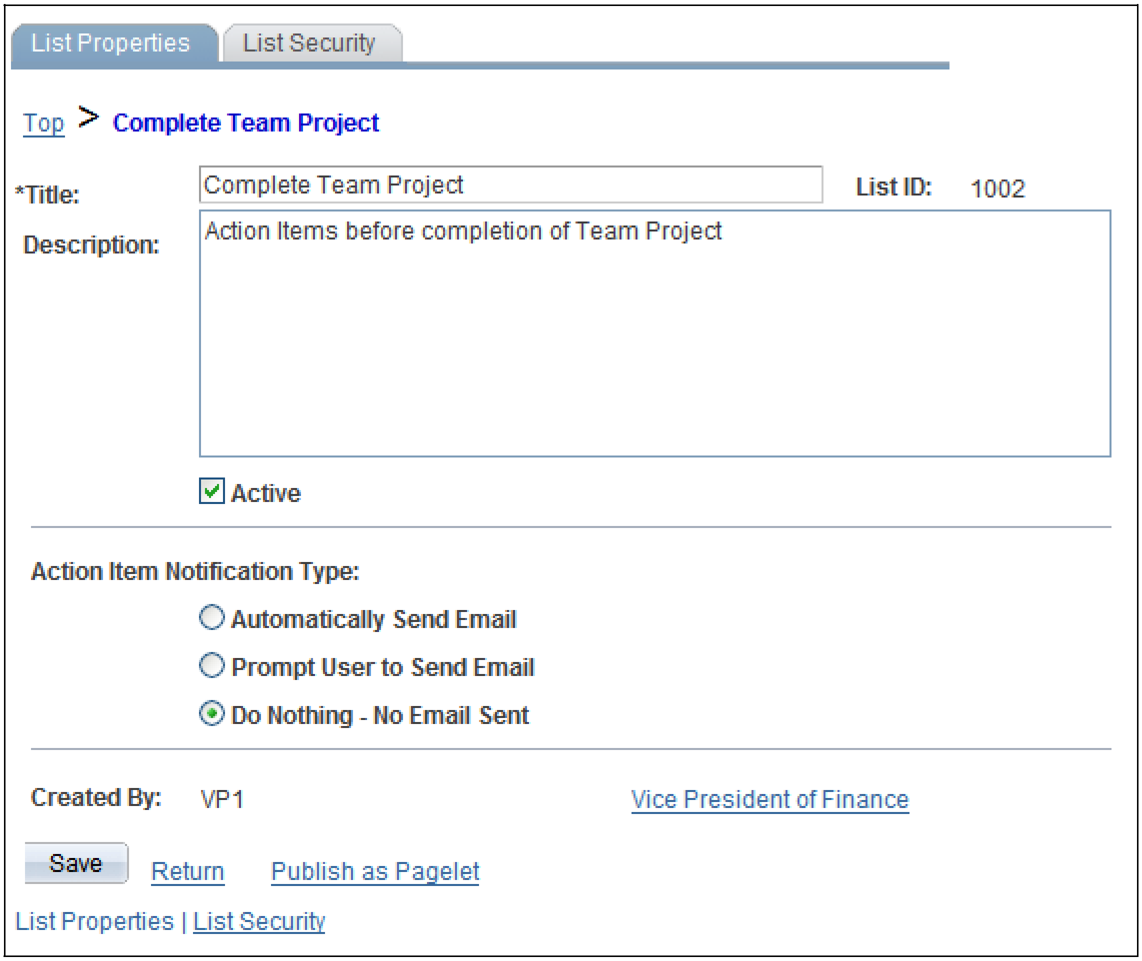
Delete

Click to delete the list.

Note. This button appears only for those users who have delete list privileges.

Creating an Action Item List

Access the List Properties page (click the Add List button on the My Action Item Lists page).



List Properties page

Use the List Properties page to define properties for the action item list.

Title

The name of the list.

List ID

After the list is saved, the system generates and displays a unique number to identify the list.

Description

A description for the list.

Created By

The system displays the user ID and a link to the profile of the list creator.

Click the link to display the member's profile page. If Resource Finder is enabled, the system displays the Resource Finder profile.

Active

Select this option to make the list active and have the list appear in the portal or site. If this option is cleared, the list is not be available to users.

Action Item Notification Type

Specify how email notifications should be sent to members of the list any time an action item associated with the list is changed or created and saved. The text of the email describes any changes made to the action item and contains a link to the Action Item Details page.

The available options are:

- *Automatically Send Email* sends an email notification to all members each time an action item in the list is added or changed.
- *Prompt User to Send Email* gives the user who adds or changes an action item the option of sending an email to a selected list of list members.
- *Do Nothing - No Email Sent* no email messages are sent and users are not prompted to send an email.

Return

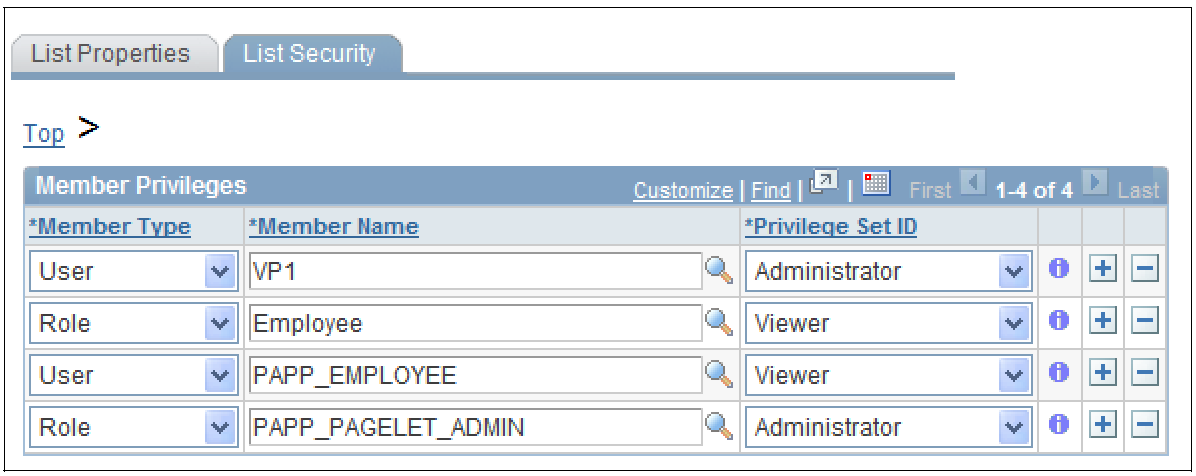
Displays the My Action Item Lists page.

Publish as Pagelet

Displays the List Properties - Publish Pagelet Wizard Definition page on whichyou can publish the pagelet to the homepage.

Assigning Action Item List Participants and Privileges

Access the List Security page (select List Security on the List Properties page).



List Security page

Use the List Security page to assign privilege sets for list members. Members and privilege sets are assigned at the action item list level. Privilege sets maintain security for accessing and managing action item lists as well as viewing, editing, and deleting action items.

Note. If a user who does not have security access to the list is assigned an action item from that list, she or he is able to view the Action Item Details page, but she or he does not have access to the list.

Member Type

Select the type of participant you want to add to the action item list. Available values include:

- *Role* — Select to be able to select a role in the Member Name field. Available group names are derived from PeopleSoft roles defined in the Roles component.

  See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*, "Setting Up Roles"

- *User* — Select to be able to select a user in the Member Name field. Available users are derived from PeopleSoft users defined in the User Profiles component.

  See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*, "Administering User Profiles"

Member Name

Specify the user ID or role name for the list member.

Privilege Set ID

Select a privilege level you want to assign to the member. Delivered values are:

- *Administrator* — Administrators can add, edit, or delete any action items in the list. In addition, they can add and delete list members.
- *Contributor* — Contributors can add or edit action items. They can delete their own action items, but not those belonging to others.
- *Viewer* — Viewers have read-only access to the action items.

Click to view additional information about the actions that the privilege set enables the member to use.

Creating and Managing Action Items

This section discusses:

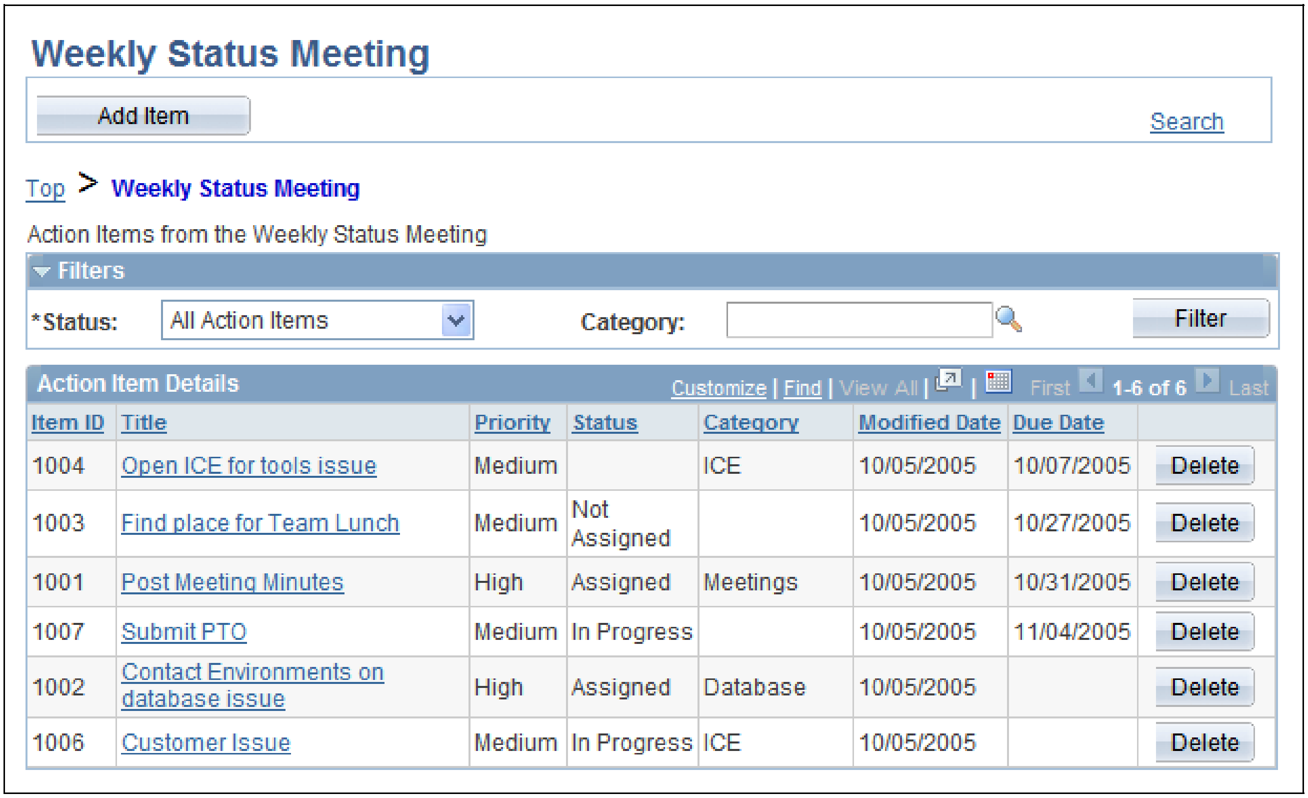
- View an action item list.
- Create an action item.
- Send notifications for an action item.
- Start a discussion for an action item.
- Add action items to your calendar.
- View the action items change log.
- Search within action items.

Pages Used to Create and Manage Action Items

Page Name	***Definition Name***	***Navigation***	***Usage***
<Action Item List> homepage	EPPAI_BROWSE	My Content, My Action Item Lists Click the link for an action item list.	View the action items in the list.
Action Items Detail	EPPAI_ITEM_INFO	• Click the Add Item button on the action item list homepage. • Click the link for an action item on the action item list homepage.	Define details for the action item.
Action Item Notification	EPPAI_ITEM_NOTIFY	Click the Notify link on the Action Item Details page.	Send notifications to list members.
Start Discussion Confirmation	EO_PE_YESNOCONFIRM	Click the Start Discussion link on the Action Item Details page.	Confirm the start of a discussion for this action item.
Post Details	EPPDF_VIEW_TOPIC	• Click the Start Discussion link on the Action Item Details page. Click Yes. • Click the View Discussions link on the Action Item Details page.	Post and view discussion topics for an action item.
Action Items Change Log	EPPAI_CHANGE_LOG	Click the Change Log link on the Action Item Details page.	View the change log for the action item.
Search Action Items	EPPAI_SEARCH	• Click the Search link on the action item list homepage. • Click the Search link on the My Action Item Lists page.	Search for action items.

Viewing an Action Item List

Access the action item list homepage (click the link for a list on the My Action Item Lists page).



<Action Item List> homepage

Add Item Click to access the Action Item Details page on which you can create a new action item.

Search Click to access the Search Action Items page on which you can search for action items.

Status Select the state or condition of the action items you want to select as your filter criteria.

Category Select an action item category to use as filter criteria.

Filter Click the Filter button to filter the list based on the selected criteria.

Item ID The identifier that the system assigned to the action item.

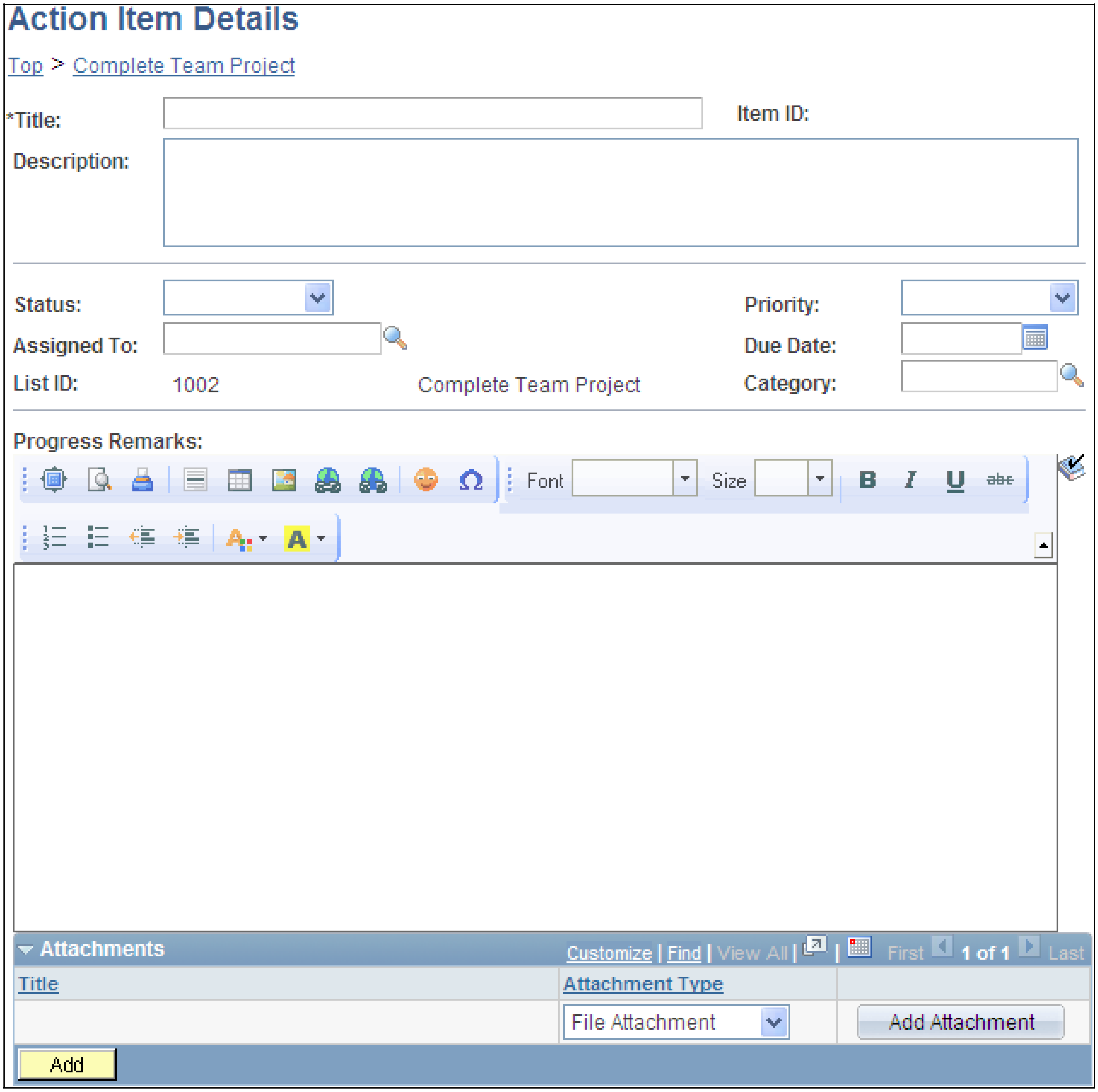
Title Click the item title to display the Action Item Details page and view the details of the action item.

Priority The priority assigned to the action item

Status	The state or condition of the action item.
Modified Date	The date that the action item was last modified.
Due Date	The date that the action item is scheduled to be completed.
Delete	Click to delete the action item. **Note.** This button appears only if you have delete privileges.

Creating an Action Item

Access the Action Item Details page (click the Add Item button on the action item list homepage).



Action Items Details page

Use the Action Items Details page to define the action item.

Top and **<List Title>** — Click Top to access the My Action Item Lists page. Click list title link to access the action item list homepage.

Title — Enter the title for the action item.

Item ID — When the action item is saved, the system generates and displays a unique item ID.

Description — Enter a description of the task or activity.

Status

Select a value for the status of the action item.

Note. Completed action items do not appear in a pagelet for this action item list if one is published. Completed and cancelled action items can be filtered out of the action item list homepage, the Review Action Items page, and the Tasks pagelet when the filter is set to display *active* or *open* items only.

Priority

Select a priority for the action item: *High, Low,* or *Medium.*

Assigned To

Select an assignee from the list of all users in the system.

Initially, the lookup modal window displays all users with list members appearing at the top of the list. To find members of the list only, select *User Type* in the Search By drop-down and then select *Member Users* in the second drop-down list box.

Note. You must have edit privileges to be able to assign an action item to a user.

After you select an assignee, their profile name appears next to the Assigned To field. You can click the profile name to view the profile page for the user.

Due Date

Select a date from the calendar. By default, action items are displayed in order of their due dates.

Note. Action items must have an assigned due date to appear in the Upcoming Action Items pagelet in Workspaces.

List ID

The identification number of the current list appears in this field. If you have edit privileges, you can move the action item to another list by selecting another ID from the action item lists that you have access to.

Note. An action item can be associated with one list only.

Category

Select a category in the lookup modal window or enter a new one. When you save the action item, the new category is saved to the list of categories and is available across sites and lists.

Progress Remarks

Use the rich text editor to enter comments and updates regarding the action item.

Completed By

Select the ID of the person who completed the action item.

The system automatically defaults to the user ID and profile of the person who changes the Status field to *Completed.*

Complete Date

Select the date that the action item is completed.

The system automatically defaults to the date that the Status field is changed to *Complete.*

Attachments

Use this section of the page to add attachments to the action item. Attachment types include file attachments and managed content.

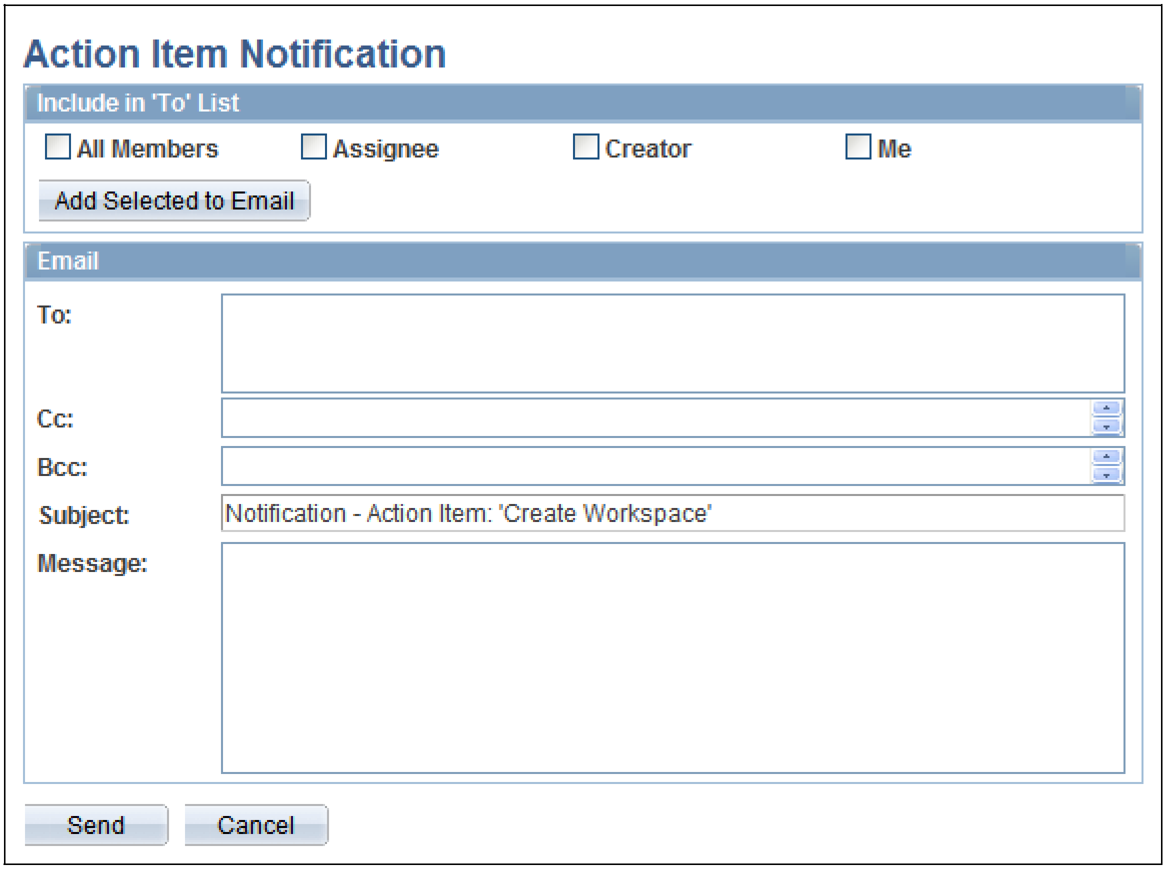
Attachment Type	Select the type of attachment you want to include with the action item. Available values include: *File Attachment.* Select to upload a local file. *Managed Content.* Select to attach a piece of managed content from the content management system.
Add Attachment	If you have selected the *File Attachment* attachment type, click to access a modal window that enables you to browse directories for the file you want to attach.
Select Content	If you have selected the *Managed Content* attachment type, click to access the Look Up Managed Content page on which you can select the piece of managed content you want to attach.

Other Action Item Functions

Save	Click to save changes to the action item.
Return	Click to return to the action item list.
Change Log	Click to view the log of changes made to this action item.
Notify	Click to send a notification to selected recipients.
Start Discussion or**View Discussion**	Click to start or view a discussion related to the action item.
Add to Personal Calendar	Click to add the action item to your personal calendar.

Sending Notifications for an Action Item

Access the Action Item Notification page (click the Notify link on the Action Item Details page).



Action Item Notification page

Use the Action Item Notification page to send messages to users associated with the action item. Notifications can originate because notifications have been enabled for the list on the List Properties page or they can originate as ad hoc notifications after the user has selected the Notify link.

Include in 'To' List

Select the people you want to receive the notification. Selecting any of these options populates the *To* field with the corresponding users from the list. Additionally, you can manually enter email addresses in the *To:* field.

Note. Addresses for the Cc: and Bcc: fields must be manually entered or copied and pasted from the To: field.

All Members	Sends the notification to all members of the list.
Assignee	Sends the notification to the person to whom the action item has been assigned.
Creator	Sends the notification to the person who created the action item.
Me	Sends the notification to you.

Add Selected to Email Populates the *To* field with email addresses of those people you have selected to receive the notification.

Email

Use this section of the page to enter additional address information as well as the text of the notification. The system displays the title of the action item as the subject of the notification.

To, **Cc**, or **Bcc** Manually enter additional email addresses in these fields.

Subject Enter a subject for the email. A default subject is generated by the system.

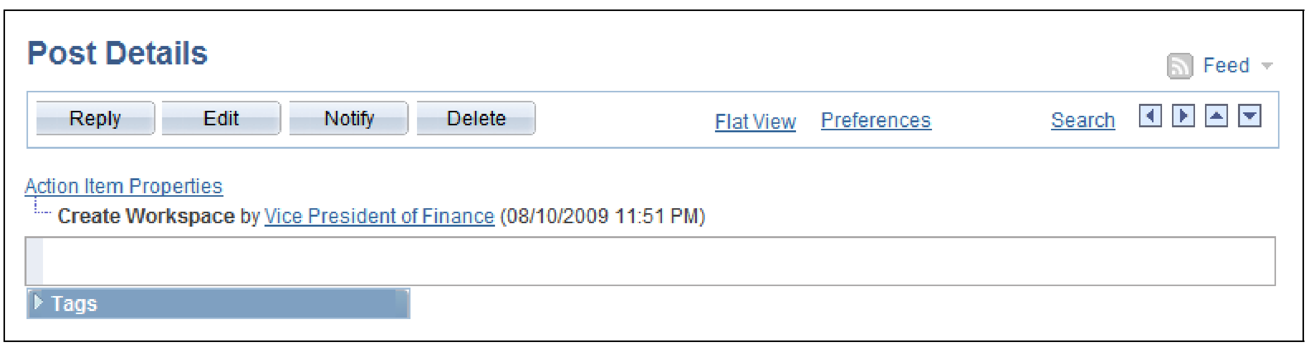
Message When sending an ad hoc notification, type the text of the message in this text box. The text appears in the email message along with a URL to the Action Item Detail page.

When the notification is created because notifications have been enabled on the List Properties page, the system populates the message text box with information stating who modified the item and what they changed. You can add any additional information by typing it after the system-generated text.

Send Click to send the email notification.

Starting a Discussion for an Action Item

Access the Post Details page (click the Start Discussion link or the View Discussions link on the Action Item Details page and click Yes).



Post Details page for an action item

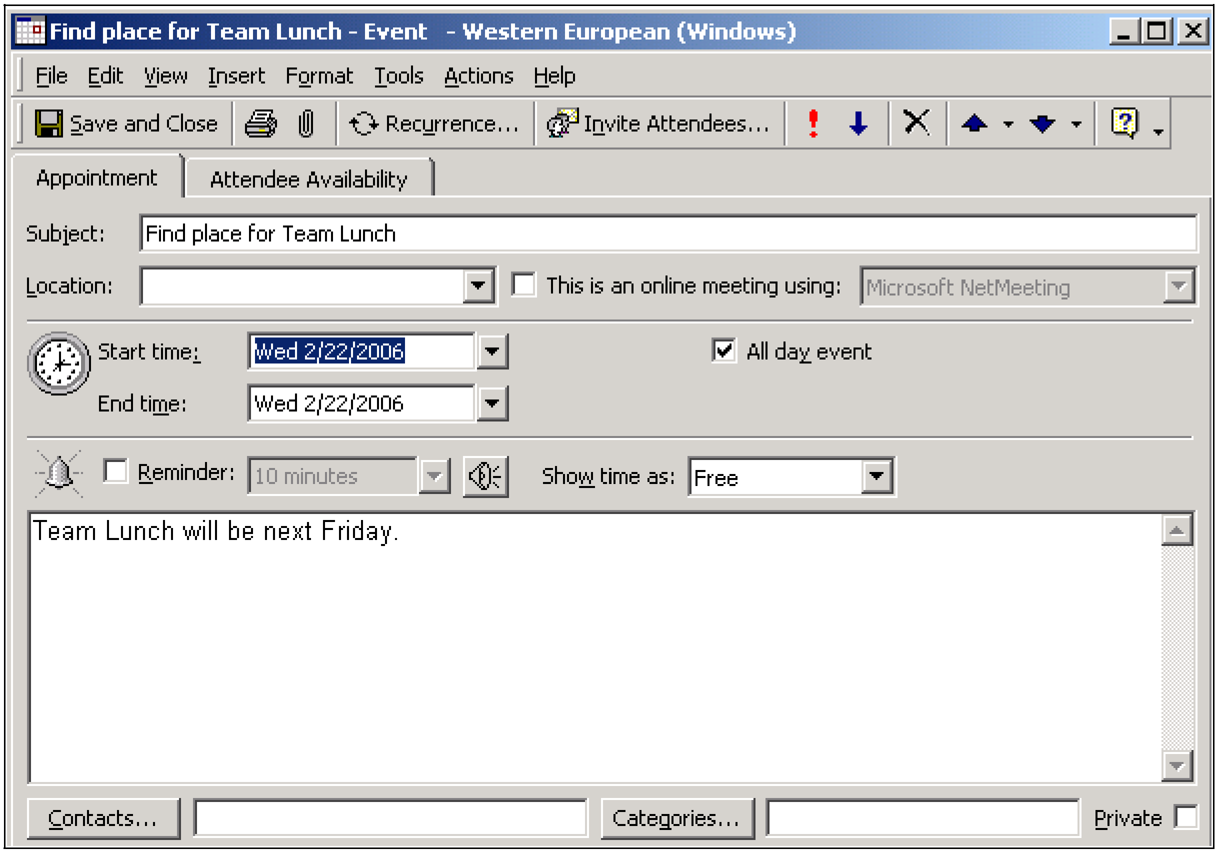
The Post Details page starts a single-topic discussion forum for this action item. List members can edit the topic and post replies. If there is already a forum started for this item, the link on the Action Item Details page will display as View Discussion.

Note. Discussions started for an action item will not appear in the Discussion Forums pagelet.

Adding Action Items to Your Calendar

Click the Add to Personal Calendar link on the Action Item Details page.

Depending on the options defined in the Installation Options page, the system can either create a calendar event that you can save to your default calendar application or it can send you an email that you can add to your calendar. The remarks appear in the body of the calendar event and the title field is the subject of the calendar event.



Calendar entry generated for an action item

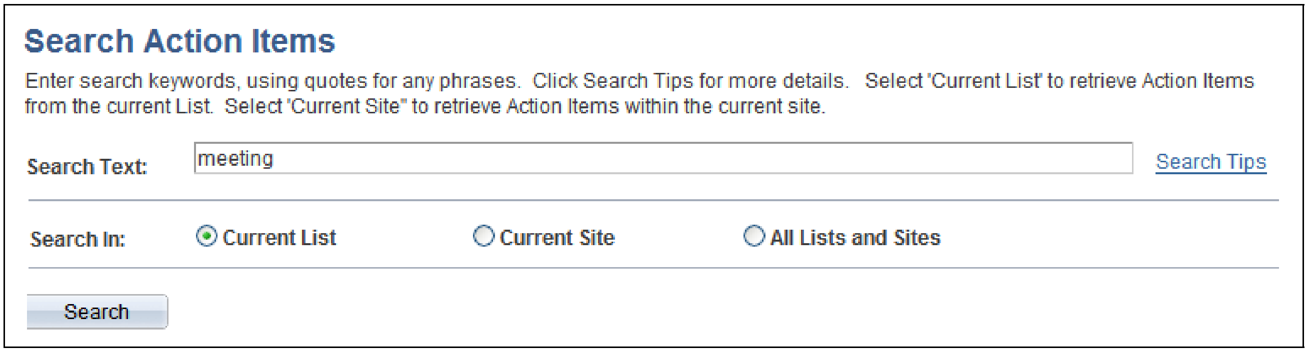
Viewing the Action Items Change Log

Access the Action Items Change Log page (click the Change Log link on the Action Item Details page).

Use the Action Items Change Log page to review and audit all changes associated with the action item, including who made the change and when they made it.

Searching Within Action Item Lists

Access the Search Action Items page (click the Search link on the action item list homepage, or click the Search link on the My Action Item Lists page).



Search Action Items page

Use the Search Action Items page to search for action items to which you have access.

Search Text Enter the text query in the Search Text field.

Search Tips Click Search Tips to get more information about searching action items.

Search In Select a scope to search for action items. Available options are:

- *Current List* searches in the list you are currently in.
- *Current Site* searches all lists that you have access to in the site you are currently in.
- *All Lists and Sites* searches all the lists in all of the sites that you have access to.

Reviewing Action Items

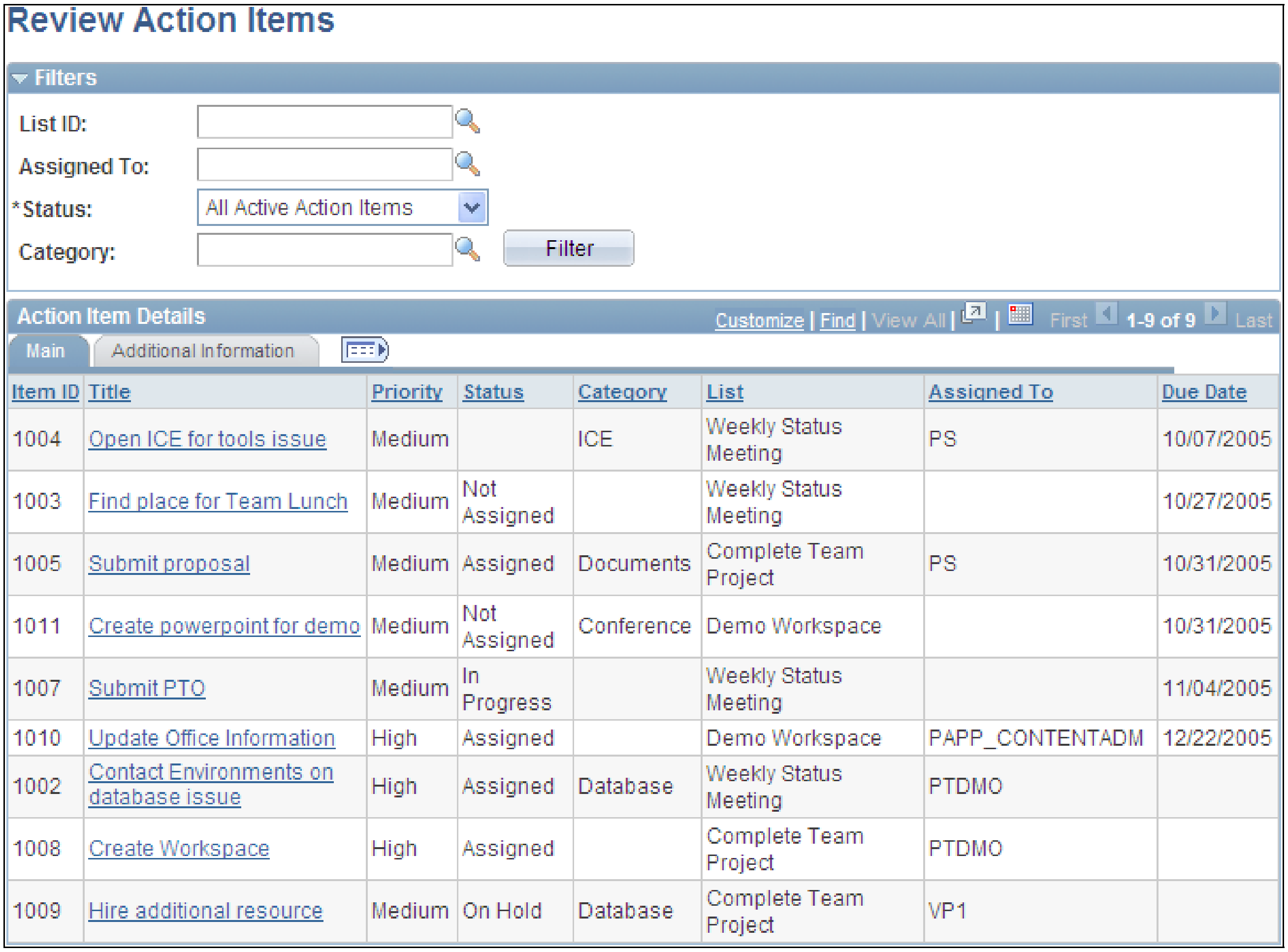
This section discusses how to filter and review action items across all action item lists.

Page Used to Review Action Items

Page Name	***Definition Name***	***Navigation***	***Usage***
Review Action Items	EPPAI_INQUIRY	My Content, Review Action Items	Review action items from all lists of which you are a member

Filtering and Reviewing Action Items

Access the Review Action Items page (My Content, Review Action Items).



Item ID	Title	Priority	Status	Category	List	Assigned To	Due Date
1004	Open ICE for tools issue	Medium		ICE	Weekly Status Meeting	PS	10/07/2005
1003	Find place for Team Lunch	Medium	Not Assigned		Weekly Status Meeting		10/27/2005
1005	Submit proposal	Medium	Assigned	Documents	Complete Team Project	PS	10/31/2005
1011	Create powerpoint for demo	Medium	Not Assigned	Conference	Demo Workspace		10/31/2005
1007	Submit PTO	Medium	In Progress		Weekly Status Meeting		11/04/2005
1010	Update Office Information	High	Assigned		Demo Workspace	PAPP_CONTENTADM	12/22/2005
1002	Contact Environments on database issue	High	Assigned	Database	Weekly Status Meeting	PTDMO	
1008	Create Workspace	High	Assigned		Complete Team Project	PTDMO	
1009	Hire additional resource	Medium	On Hold	Database	Complete Team Project	VP1	

Review Action Items page - Main tab

Use the Review Action Items page to filter and review all action items to which you have access. The results include action items from all portals, sites, and workspaces.

Filters

Select any combination of the available filters to narrow the list of action items. Available values are List ID, Assigned To,Status, and Category.

Click the Refresh button to execute the search.

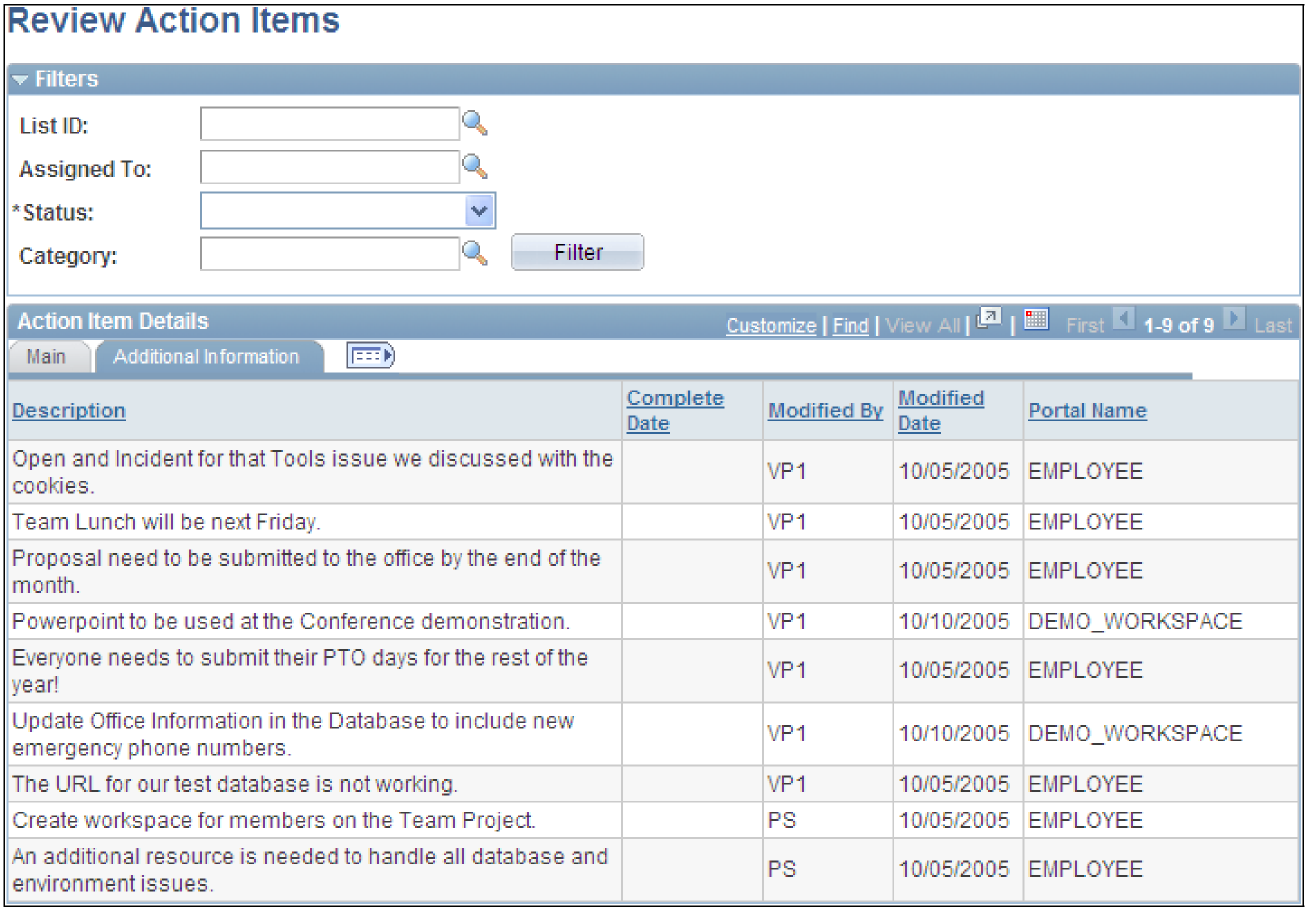
Note. Action items with a status of completed or cancelled are considered inactive, and do not display when the filter is set for active action items.

Main Tab

The Main tab displays the basic information about each action item. Click the title of the action item to view the Action Items Detail page.

Additional Information Tab

Access the Additional Information tab (select Additional Information on the Main tab).



Description	Complete Date	Modified By	Modified Date	Portal Name
Open and Incident for that Tools issue we discussed with the cookies.		VP1	10/05/2005	EMPLOYEE
Team Lunch will be next Friday.		VP1	10/05/2005	EMPLOYEE
Proposal need to be submitted to the office by the end of the month.		VP1	10/05/2005	EMPLOYEE
Powerpoint to be used at the Conference demonstration.		VP1	10/10/2005	DEMO_WORKSPACE
Everyone needs to submit their PTO days for the rest of the year!		VP1	10/05/2005	EMPLOYEE
Update Office Information in the Database to include new emergency phone numbers.		VP1	10/10/2005	DEMO_WORKSPACE
The URL for our test database is not working.		VP1	10/05/2005	EMPLOYEE
Create workspace for members on the Team Project.		PS	10/05/2005	EMPLOYEE
An additional resource is needed to handle all database and environment issues.		PS	10/05/2005	EMPLOYEE

Review Action Items page - Additional Information tab

The Additional Information tab shows the description of the items including the portal name as well as the targeted completion date and the user ID and timestamp of the most recent modification to the item.

Working With the Tasks and Tasks Pagelet

This section provides an overview of tasks and the Tasks pagelet and discusses how to:

- Personalize the Tasks pagelet.
- Use the Tasks pagelet.
- Add and maintain personal tasks.
- Manage your tasks.

Understanding Tasks and the Tasks Pagelet

The Tasks pagelet is a delivered pagelet that displays a consolidated list of all of your action items and tasks based on the preferences that you specify for the pagelet. The Tasks pagelet and related pages provide you with access to personal tasks, worklist items, and action items that are assigned to you. *Personal tasks* are those tasks you add to your task list using the Task Details page. *Worklist items* are those tasks that have been routed to you by way of PeopleSoft Workflow. *Action items* are those assignments that are related to a PeopleSoft Enterprise Portal action item list.

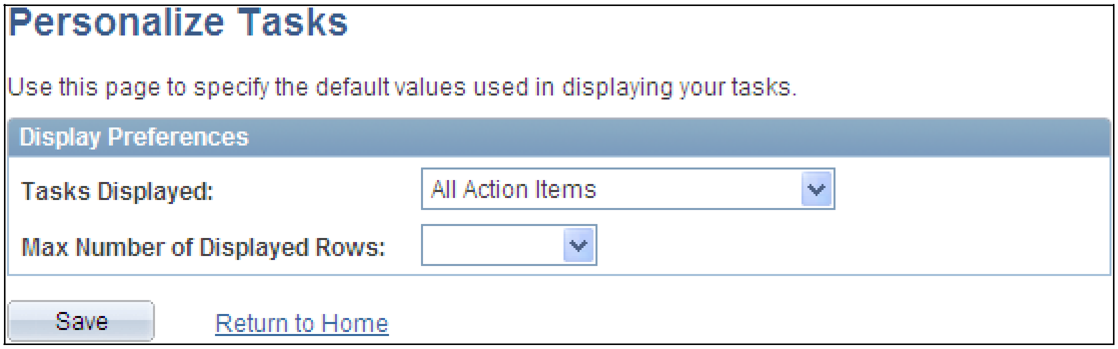
Note. The Tasks pagelet displays only items associated with the current user signed in to the system.

Pages Used to Work With Tasks and the Tasks Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize Tasks	EO_PE_TASK_PREF	Click the Customize Tasks button on the Tasks pagelet.	Set display preferences for your Tasks pagelet.
Task Details	EO_PE_TASK_DTL	• Click the Add a Task button on the Tasks pagelet. • Click a task link on the Tasks page.	Add personal tasks to your Tasks pagelet. View and edit personal task details.
Tasks	EO_PE_TASK_LIST	• Click the Show All/Enhanced... link or the More... link in the Tasks pagelet. • Click the Return to Tasks link on the Task Details page.	Manage your personal tasks in a real-time view. Relevant worklist task updates display on this page after the Worklist Replicate process is run.

Personalizing the Tasks Pagelet

Access the Personalize Tasks page (click the Customize Tasks button on the Tasks pagelet).



Personalize Tasks page

Tasks Displayed

Specify the type of tasks that display on your Tasks pagelet.

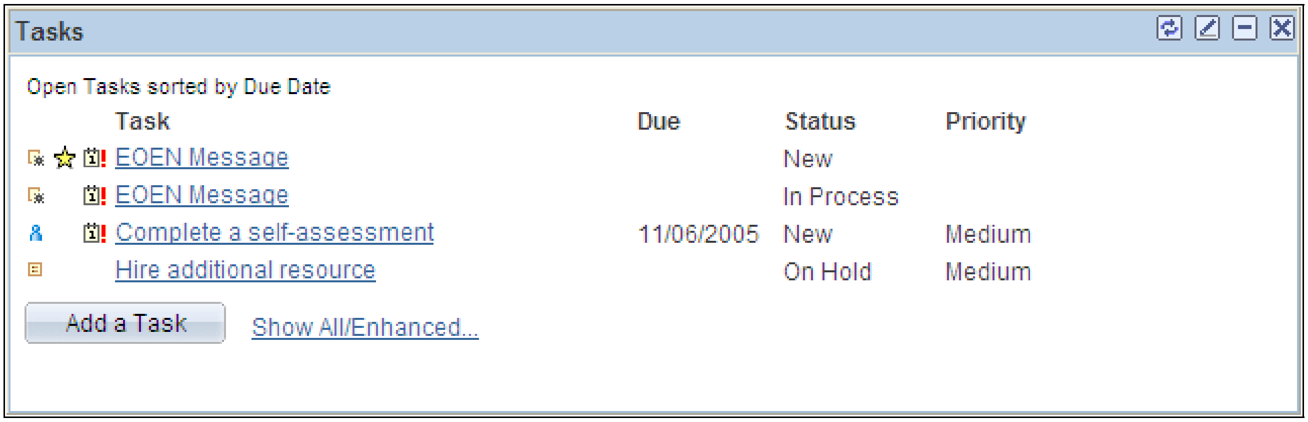
- *All Action Items* — Select to display all action items assigned to you.
- *All Personal Tasks* — Select to display all your personal tasks.
- *All Tasks* — Select to display all tasks, worklist items, and action items assigned to you.
- *All Worklist Items* — Select to display all worklist items assigned to you.
- *Open Action Items* — Select to display all action items that are open or active. Tasks with a status of complete or cancelled are not considered open, and therefore do not display.
- *Open Personal Tasks* — Select to display all personal tasks that are not complete.
- *Open Tasks* — display all tasks, worklist items, and action items that are open.
- *Open Worklist Items* — Select to display all worklist items that are not complete.

Max Number of Displayed Rows (maximum number of displayed rows)

Specify the maximum number of tasks you want to display on your Tasks pagelet. If you do not select a value, all matching tasks display.

Using the Tasks Pagelet

Access the Tasks pagelet on the portal homepage.



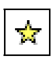
Tasks pagelet

Use the Tasks pagelet to review your personal tasks, worklist items, and action items assigned to you.

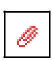
 Indicates a worklist item.

 Indicates an action item.

 Indicates a personal task.

 Appears for a worklist task that you have not yet accessed.

 Appears for a personal task or worklist item that is overdue.

 Appears for a task when it has an associated file attachment.

Task Displays the name of the task:

- Click a personal task to access the Task Details page on which you can view and enter detailed task information.
- Click a worklist task to access the associated transaction page.
- Click an action item to access the Action Item Details page

Due Displays the due date defined for the task. Tasks in the Task pagelet are sorted by due date.

Status Displays the status of the task.

Note. The Status column does not display if your Tasks pagelet is in a narrow page column. If this column does not display, you may view it by accessing the Tasks page, which displays all available task description columns.

Priority

Displays the priority of the task.

Note. The Priority column does not display if your Tasks pagelet is in a narrow page column. If this column does not display, you may view it by accessing the Tasks page, which displays all available task description columns.

Add a Task

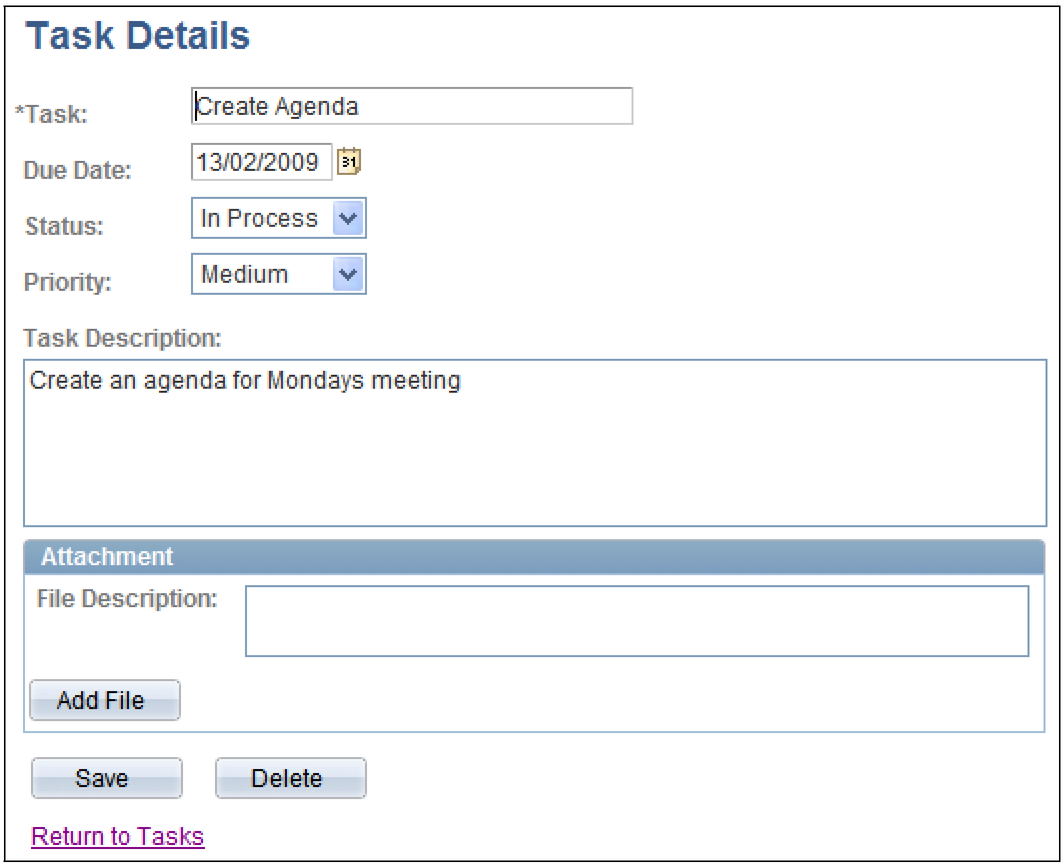
Click to access the Task Details page on which you can add a personal tasks to your task list.

Show All/Enhanced... or **More...**

Click to access the Tasks page on which you can view and access details about your personal tasks, worklist items, and action items.

Adding and Maintaining Personal Tasks

Access the Task Details page (click the Add a Task button on the Tasks pagelet).



Task Details page

Task

Enter the task name.

Due Date

Enter the due date of the task.

Status

Select a task status.

- *Complete* — Select for a task that has been completed. Selecting this value makes the task inactive. Inactive tasks do not display in *open* status views on the Tasks pagelet and Tasks page.
- *In Process* — Select for a personal task that has been started, but not completed.
- *New* — Select for a new personal task.
- *On Hold* — Select to place a task on hold.

Priority

Select a priority for the task: *High*,*Low*, or *Medium.*

Task Description

Enter a description of the task.

File Name

When an attachment is present, select the file name link to open the file.

Delete

If an attachment is present, click this Delete button to delete the attachment.

File Description

Enter a description of the attachment.

Add File

Click to add an attachment.

Note. Unlike action items, you can add one attachment only to tasks.

Save

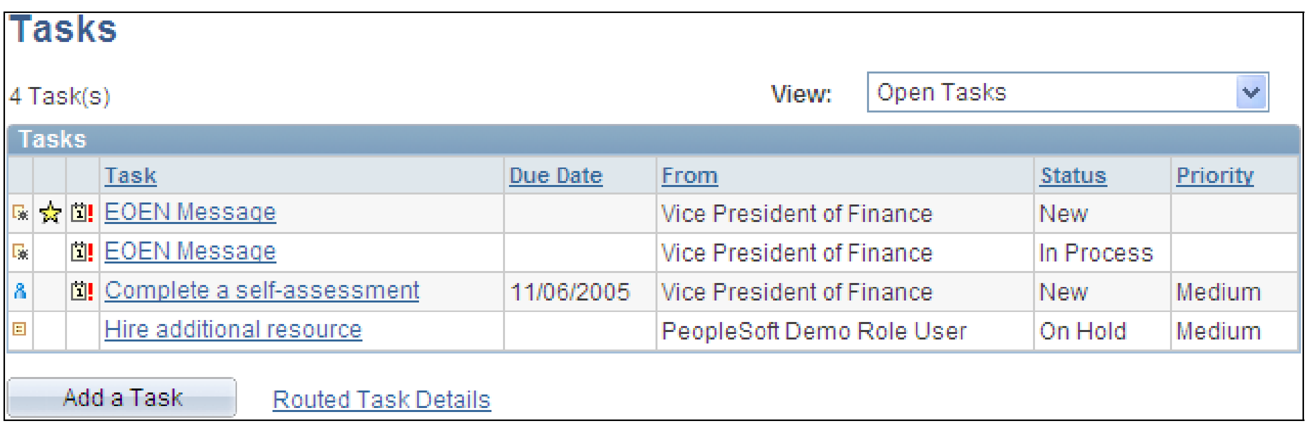
Click to save the current task.

Delete

Click to delete the current task. You will are prompted to confirm the deletion.

Managing Your Tasks

Access the Tasks page (click the Show All/Enhanced... link or More... link in the Tasks pagelet).



Tasks page

Use the Tasks page to manage your personal tasks, worklist items, and action items assigned to you. The Tasks page displays the same items available to you in the Tasks pagelet.

View

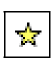
Specify the type of tasks that display on the Tasks page:

- *All Action Items* — Select to display all action items assigned to you.
- *All Personal Tasks* — Select to display all your personal tasks.
- *All Tasks* — Select to display all tasks, worklist items, and action items assigned to you.
- *All Worklist Items* — Select to display all worklist items assigned to you.
- *Open Action Items* — Select to display all action items that are open or active. Tasks with a status of complete or cancelled are not considered open, and therefore do not display.
- *Open Personal Tasks* — Select to display all personal tasks that are not complete.
- *Open Tasks* — display all tasks, worklist items, and action items that are open.
- *Open Worklist Items* — Select to display all worklist items that are not complete.

Indicates a worklist item.

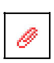
Indicates an action item.

Indicates a personal task.



Appears for a worklist task that you have not yet accessed.

Appears for a personal task or worklist item that is overdue.



Appears for a task when it has an associated file attachment.

Task

Displays the name of the task:

- Click a personal task to access the Task Details page on which you can view and enter detailed task information.
- Click a worklist task to access the associated transaction page.
- Click an action item to access the Action Item Details page

Due Date

Displays the due date defined for the item.

From

Displays the user who created the item.

Status Displays the status of the item.

Priority Displays the priority of the item.

Add a Task Click to access the Task Details page on which you can add a personal tasks to your task list.

Routed Task Details Click to access the Worklist page showing the details of your worklist items.

See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications,* "Using Workflow," Sending and Receiving Notifications, Working with Received Notifications.

Administering Action Item Lists

This section discusses how to:

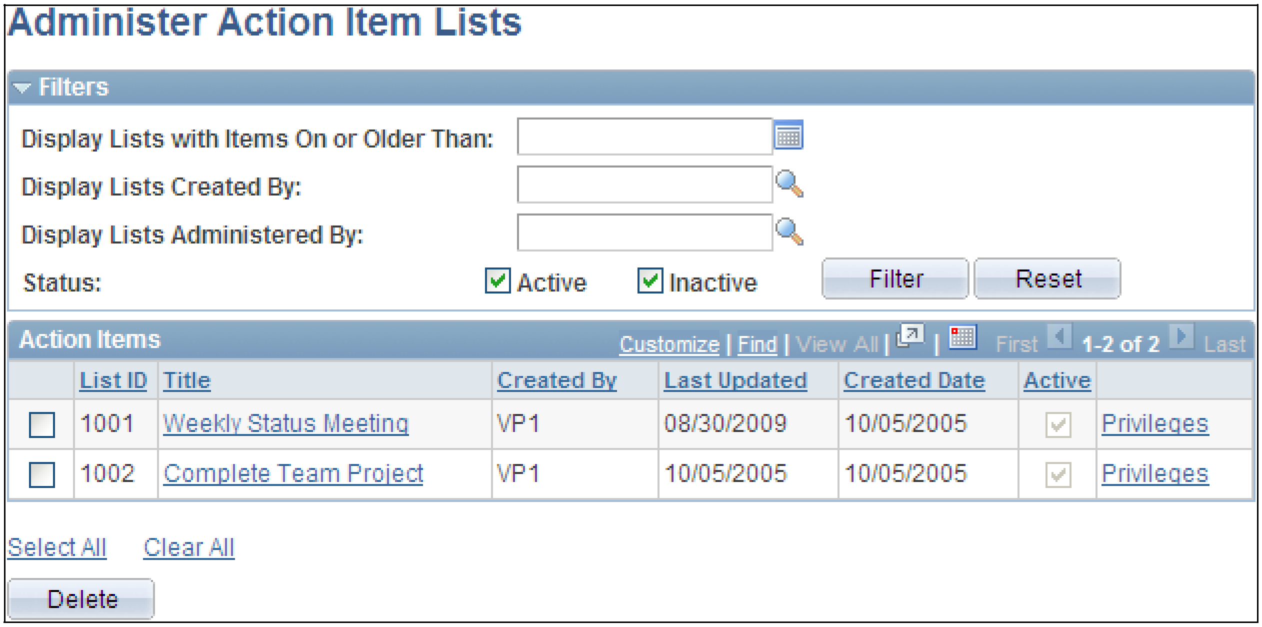
- Administer action item lists.
- Modify privileges for action item lists.

Pages Used to Administer Action Item Lists

Page Name	***Definition Name***	***Navigation***	***Usage***
Administer Action Item Lists	EPPAI_ADMIN	Portal Administration, Administer Action Items	Manage action item lists and member privileges.
Administer Action Item Lists - Edit Privileges	EPPAI_LIST_PRIV	Click the Privilegeslink on the Administer Action Item Lists page.	Manage privileges for members of an action item list.

Administering Action Item Lists

Access the Administer Action Item Lists page (Portal Administration, Administer Action Items).



Administer Action Item Lists page

Use the Administer Action Item Lists page to manage action item lists and member privileges.

Display Lists with Items On or Older Than Select a date to find lists with items that were created on or before the date you specify.

Display Lists Created By Select a user ID to return all lists that the user has created.

Display Lists Administered By Select a user ID to return all lists where the specified user is an administrator.

Status Select to search for active or inactive lists, or both.

Filter Click to filter the list of action item lists.

Reset Click to clear the filter criteria.

List ID The system displays the ID of the action item list.

Title Click the title of the list to access the action item list homepage.

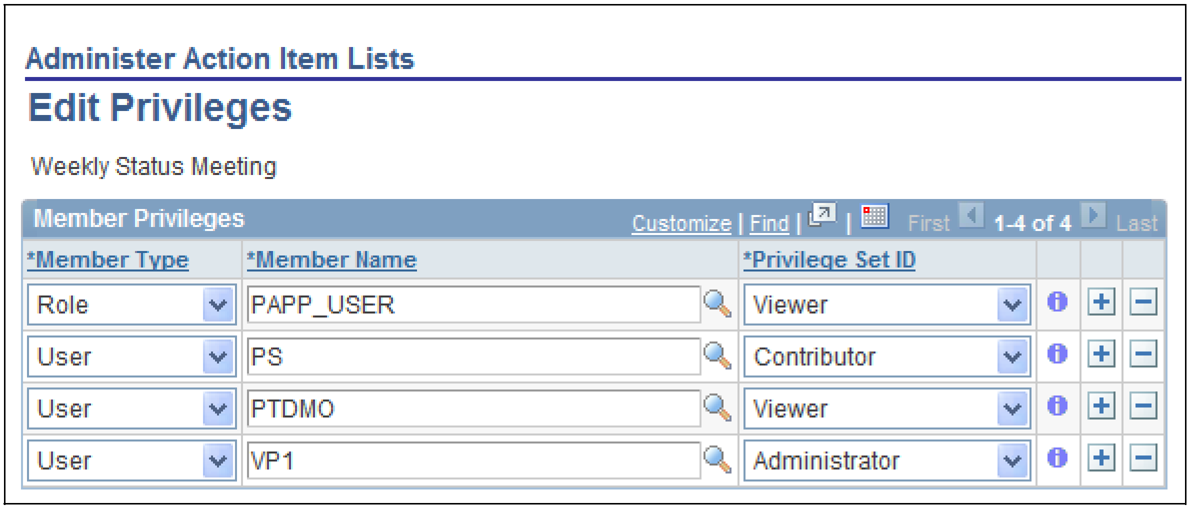
Privileges Click the Privileges link to access the Edit Privileges page.

Select All or **Clear All** Click a link to select or clear the selection of all action item lists.

Delete Click to delete the selected action item list or lists.

Modifying Privileges for Action Item Lists

Access the Administer Action Item Lists - Edit Privileges page (click a Privileges link on the Administer Action Item Lists page).



Administer Action Item Lists - Edit Privileges page

Use the Administer Action Item Lists - Edit Privileges page to assign list members and privileges similar to the List Privileges page.

See Chapter 7, "Working With Action Items," Assigning Action Item List Participants and Privileges, page 71.

Publishing an Action Item List as a Pagelet

This section discusses how to:

- Publish a pagelet from an action item list.
- Publish an action item list from Pagelet Wizard.
- Edit a published pagelet.
- Publish a pagelet to multiple portals.

Pages Used to Publish Action Item Lists as Pagelets

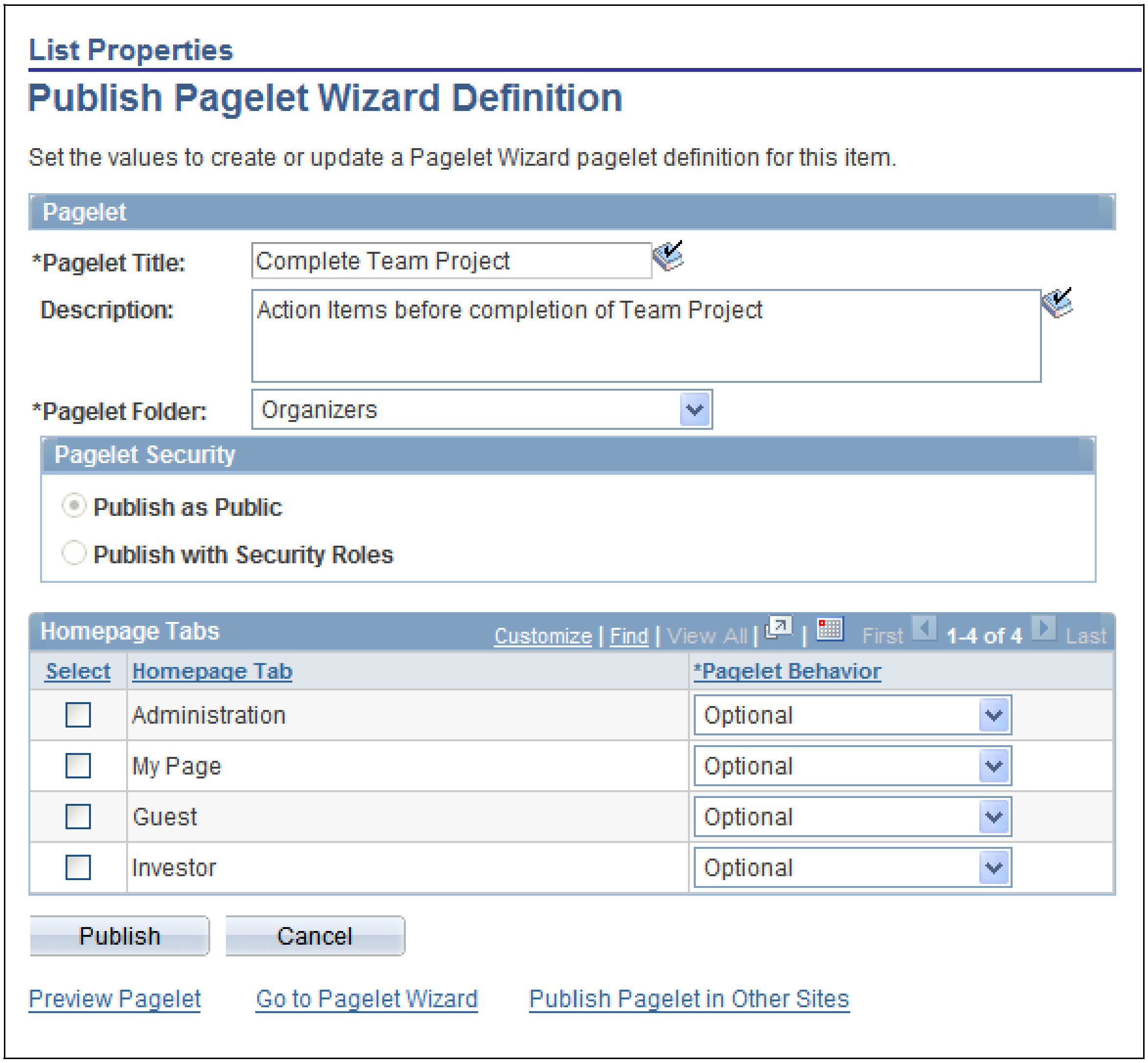
Page Name	***Definition Name***	***Navigation***	***Usage***
List Properties - Publish Pagelet Wizard Definition	EPPPB_PGLT_PUB	• My Content, My Action Item Lists Click the Properties link for the action item list. Click the Publish as Pagelet link on the List Properties page. • Click the Add Pagelet button or the Edit button on the List Properties - Publish as Pagelet page.	Create a pagelet definition for an action item list.
Pagelet Wizard - Specify Pagelet Information	PTPPB_WIZ_INFO	• Click the Go to Pagelet Wizard link on the List Properties - Publish Pagelet Wizard Definition page. • Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard • PeopleTools, Portal, Pagelet Wizard, Pagelet Wizard • 1 Click the Pagelet Information button from any page in the wizard.	Provide information to identify and categorize a pagelet.
Pagelet Wizard - Select Data Source	PTPPB_WIZ_DATASRC	• Click the Next button on the Pagelet Wizard - Specify Pagelet Information page. • 2 Click the Data Type button from any page in the wizard.	Select the type of data source for the pagelet.

Page Name	***Definition Name***	***Navigation***	***Usage***
Pagelet Wizard - Specify Data Source Parameters	PTPPB_WIZ_DATAPRMS	• Click the Next button on the Pagelet Wizard - Select Data Source page. • Click the Data Source Parameters button from any page in the wizard.	Configure the data source parameters that are required for data to be displayed in the pagelet. **Note.** This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.
Pagelet Wizard - Specify Data Source Parameter Values	PTPPB_WIZ_PRMVALS	Click the Values link on the Pagelet Wizard - Specify Data Source Parameters page.	Specify prompt values for the end user to select from when personalizing the pagelet. **Note.** This page is accessible only for data source parameters for which you have selected the *User Specified* or *Admin Specified* usage types.
Pagelet Wizard - Select Display Format	PTPPB_WIZ_DISPFRMT	• Click the Next button on the Pagelet Wizard - Specify Data Source Parameters page. • Click the Display Format button from any page in the wizard.	Specify the data transformation method and display format for the pagelet.
Pagelet Wizard - Specify Display Options	PTPPB_WIZ_DISP_CUS	• Select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page. • Click the Transformation button from any page in the wizard.	Enter the custom formatting details for the pagelet as well as header and footer options. Preview the pagelet.
Pagelet Wizard - Specify Publishing Options	PTPPB_WIZ_PUBOPT	• Click the Next button on the Pagelet Wizard - Specify Display Options page. • Click the Register Pagelet icon from any page in the wizard.	Specify the manner in which the pagelet is published. Provide registration, caching, and security details, and register the pagelet.

Page Name	Definition Name	Navigation	Usage
Pagelet Wizard - Pagelet Creation Confirmed	PTPPB_WIZ_FINISH	Click the Finish button on the Pagelet Wizard - Specify Publishing Options page.	Confirm that the creation of the pagelet is complete.
List Properties - Publish as Pagelet	EPPPB_PGLT_LST	• Click the Publish button on the List Properties - Publish Pagelet Wizard Definition page. • If this action item list has already been published as a pagelet, click the Publish as Pagelet link on the List Properties page.	Administer pagelet definitions for an action item list.
Publish to Multiple Portals	PTPP_PMPUBPRTL	• Click the Publish Pagelet in Other Sites link on the List Properties - Publish Pagelet Wizard Definition page. • Portal Administration, Pagelets, Publish Pagelets • PeopleTools, Portal, Portal Utilities, Publish Pagelets	Publish the pagelet definition to additional portals and sites.
Publish Multiple Pagelets	PTPP_PMPUBPGLT	• On the Publish to Multiple Portals page, select Publish Multiple Pagelets. • Portal Administration, Pagelets, Publish Pagelets, Publish Multiple Pagelets • PeopleTools, Portal, Portal Utilities, Publish Pagelets, Publish Multiple Pagelets	Publish multiple pagelet definitions to another portal or site.

Publishing a Pagelet from an Action Item List

Access the List Properties - Publish Pagelet Wizard Definition page (click the Publish as Pagelet link on the List Properties page).



List Properties - Publish Pagelet Wizard Definition page

Use the List Properties - Publish Pagelet Wizard Definition page to create a pagelet definition for an action item list.

Pagelet

The pagelet title and description from the List Properties page appear in the Pagelet group box. You can edit these two fields, if necessary.

Pagelet Title Displays the title for the action item list, which can be edited as the title for the pagelet.

Description Displays the description for the action item list, which can be edited as the description for the pagelet.

Pagelet Folder Select a folder to publish to. Only folders from the current site are available to select.

Pagelet Security

Select the security options for viewing the pagelet. Available options are:

Publish as Public, which enables all users to view the pagelet.

Publish with Security Roles, which uses the roles defined on the List Security page when publishing the pagelet.

Note. If there are no roles defined on the List Security page, the system automatically selects to publish the pagelet as public.

Homepage Tabs

Use this group box to define the homepage tab labels and behavior for the pagelet.

Homepage Tab

Select the tabs that will display the pagelet.

Pagelet Behavior

Select the behavior options for the pagelet.

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.

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 homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

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.

Publish

Click the Publish button to publish this pagelet and display the List Properties - Publish as Pagelet page, on which you can review or edit the pagelet definition

Publishing an Action Item List from Pagelet Wizard

Pagelets for action item lists can be created and published using Pagelet Wizard and then managed from the List Properties page. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.
- Step 4: Selecting a Pagelet Display Format.

- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

Note. If you access Pagelet Wizard from the Go to Pagelet Wizard link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

Where appropriate, this section provides details specific to using Pagelet Wizard to publish an action item list as a pagelet. The PeopleTools 8.50 PeopleBooks provide detailed information on using Pagelet Wizard.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard."

Step 1: Entering Pagelet Identifying Information

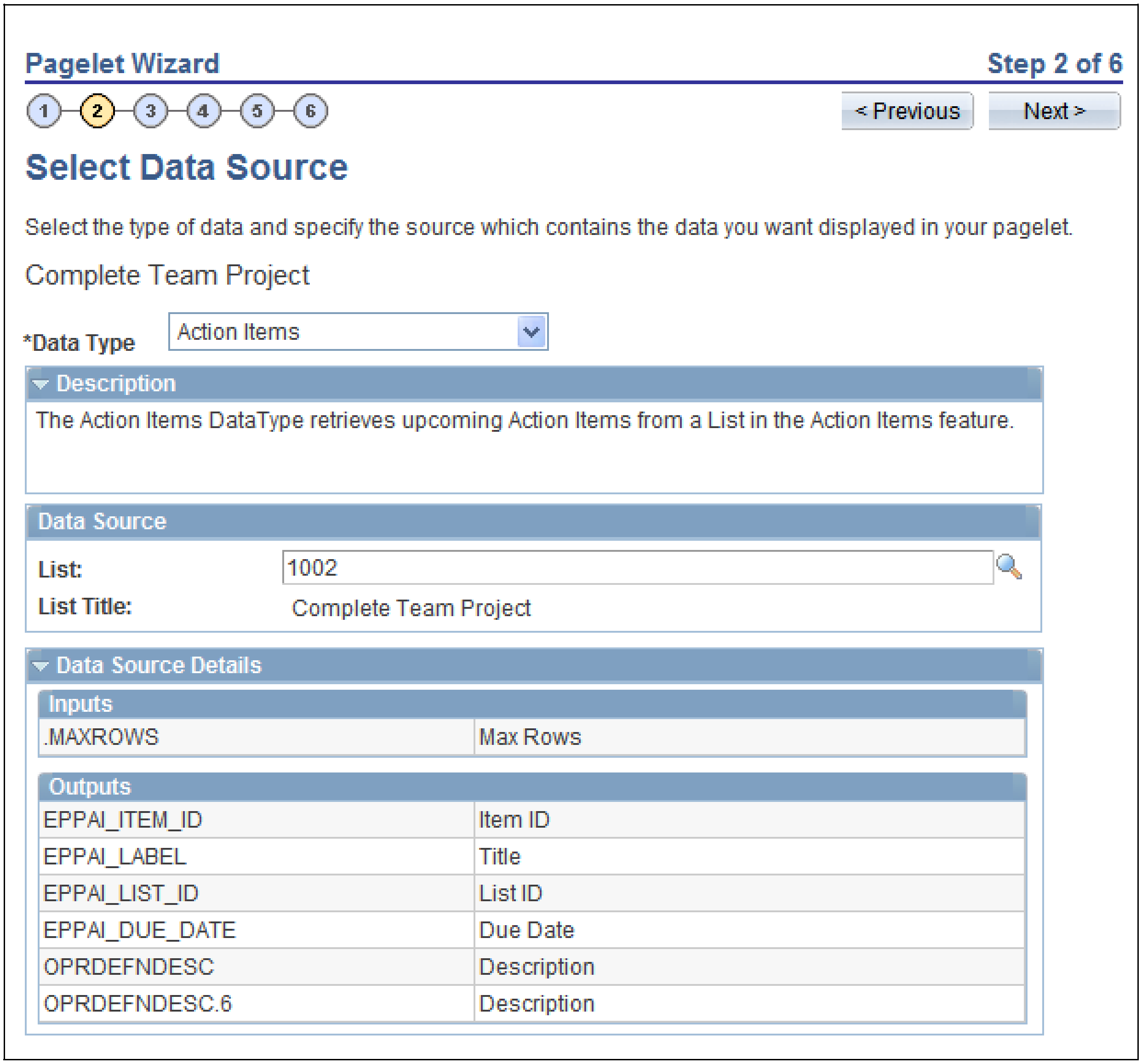
Access the Pagelet Wizard - Specify Pagelet Information page (click the Go to Pagelet Wizard link on the List Properties - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard).

Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 1: Entering Pagelet Identifying Information.

Step 2: Selecting a Pagelet Data Source

Access the Pagelet Wizard - Select Data Source page (click the Next button on the Pagelet Wizard - Specify Pagelet Information page).



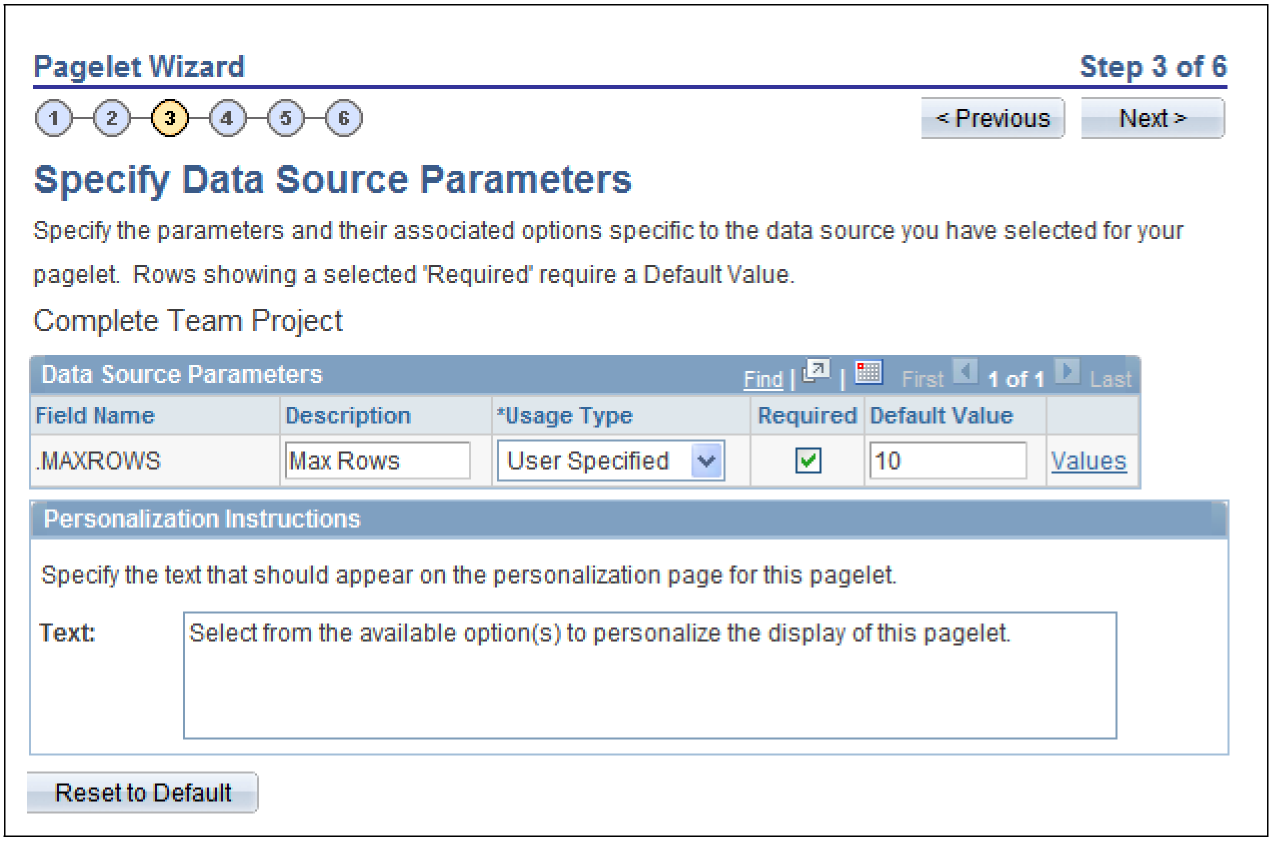
Pagelet Wizard - Select Data Source page (action items data type)

Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

Data Type	For action item lists, select *Action Items.*
List	Select the action item list to display in the pagelet.
Inputs	Displays the data source parameters that are used to retrieve data for the pagelet.
Outputs	Displays the data source parameter fields that are displayed as output in the pagelet.

Step 3: Specifying Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameters page (select *Action Items* as the data type on the Pagelet Wizard - Select Data Source page, then click the Next button).



Pagelet Wizard - Specify Data Source Parameters page (action items data source)

Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

Note. This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

Field Name

Displays the name of the data source parameter.

For action item lists, the following data source parameters can be defined:

MAXROWS — Limits the number of entries displayed in the pagelet

Description

Displays a description of the data source parameter.

Usage Type

Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are:

- *Admin Specified:* Select to enable those users with administrative privileges to specify variables for this field, as well as access the Configure link on the published pagelet and select from those parameters for users.
- *Context Sensitive:* Select to enable Context Manager to specify a data source parameter value for this field.
- *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify.
- *System Variable:* Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter.

  For example, suppose that you specify *%UserId* as the system variable for a parameter name User. When the pagelet appears on a user's homepage, the User field is populated by the *%UserId* system variable, which is the user ID used to access the pagelet.
- *User Specified:* Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the Customize button appears on the pagelet title bar.

  End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Uers can select a value from a prompt, or they can manually enter their own value if no prompt values are available.

  See Chapter 7, "Working With Action Items," Specifying Prompt Values for Data Source Parameters, page 103.

  If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.

Required

This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters.

Default Value

You can enter a value that includes the % and * wildcards at the beginning or end of a value in the Default Value field.

Note the following about default values:

- If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value.

  If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field.

  If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date.*

- If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the Look up Value button to access a list of valid system variables.

  See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters.

- If you select *Fixed* as the usage type, you must enter the fixed value.

Values

If you select *User Specified* or *Admin Specified* as the usage type, click Values to access the Pagelet Wizard - Specify Data Source Parameter Values page.

See Chapter 7, "Working With Action Items," Specifying Prompt Values for Data Source Parameters, page 103.

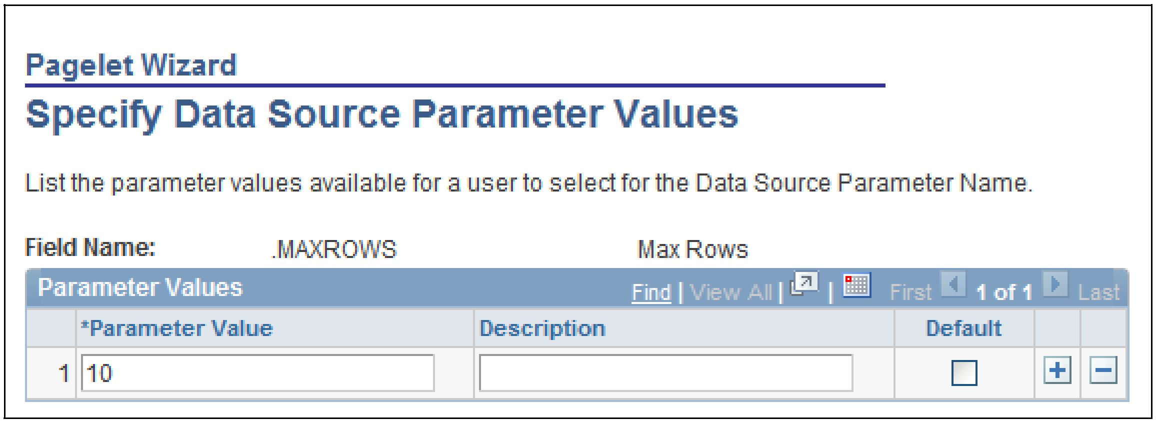
Text

Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet.

Note. Personalization instructions must be translatable.

Specifying Prompt Values for Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameter Values page (click the Values link on the Pagelet Wizard - Specify Data Source Parameters page).



Pagelet Wizard - Specify Data Source Parameter Values page (action items data source)

Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

Parameter Value Specify the parameter value.

Description Provide an optional description of the parameter value.

Default Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional.

Step 4: Selecting a Pagelet Display Format

Access the Pagelet Wizard - Select Display Format page (click the Next button on the Pagelet Wizard - Specify Data Source Parameters page).

Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 4: Selecting a Pagelet Display Format.

Step 5: Specifying Pagelet Display Options

Access the Pagelet Wizard - Specify Display Options page (select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page}.

Use the Pagelet Wizard - Specify Display Options page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet.

Note. If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 5: Specifying Pagelet Display Options.

Step 6: Specifying Pagelet Publication Options

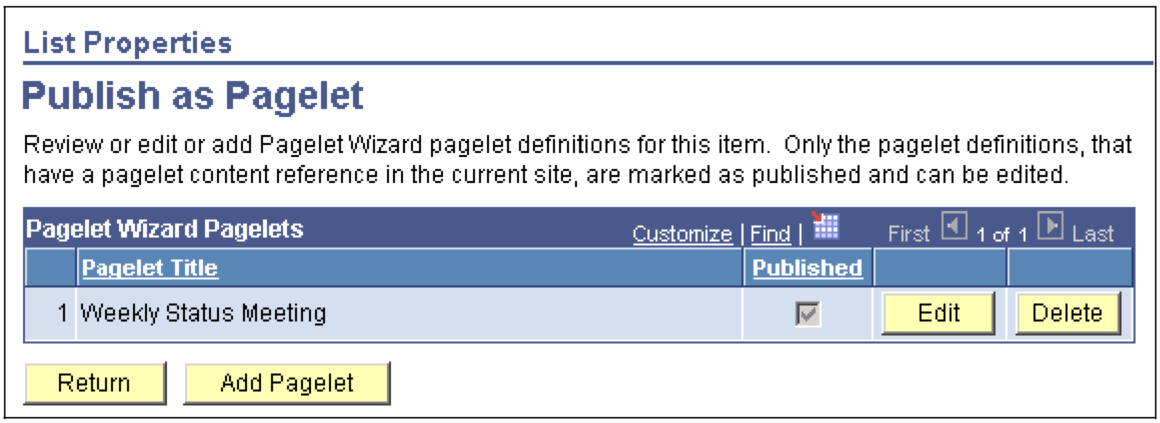
Access the Pagelet Wizard - Specify Publishing Options page (click the Next button on the Pagelet Wizard - Specify Display Options page).

Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 6: Specifying Pagelet Publication Options.

Editing a Published Pagelet

Access the List Properties - Publish as Pagelet page (click the Publish button on the List Properties - Publish Pagelet Wizard Definition page; or if this action item list has already been published as a pagelet, click the Publish as Pagelet link on the List Properties page).



List Properties - Publish as Pagelet page

Use the List Properties - Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this action item list. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

Note. Pagelets for this action item list published directly from Pagelet Wizard also appear in this list.

Edit	Displays the List Properties - Publish Pagelet Wizard Definition page on which you can make changes to the pagelet definition.
Delete	Deletes this pagelet definition and the published pagelet content references in all sites.
Add Pagelet	Adds a new pagelet definition based on the current action item list.

Publishing a Pagelet to Multiple Portals

Access the Publish to Multiple Portals page (click the Publish Pagelet in Other Sites link on the List Properties - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Publish Pagelets).

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.
- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Working With Navigation Pages," Publishing Pagelets.

Chapter 8

Working With Blogs

This chapter provides an overview of blogs and discusses how to:

- Create a blog.
- Participate in a blog.
- Manage a blog.
- Publish a blog as a pagelet.
- Use blog notifications˙.
- Manage tags for a blog.
- Search within blogs.
- Work with the Blogs pagelet.

Understanding Blogs

Blogs in Oracle's PeopleSoft Enterprise Portal enable individual authors or teams to maintain blogs (or "web logs"). In PeopleSoft Enterprise Portal, blogs provide these features:

- Rich text editing and image support.
- Multi-threaded comments that can be moderated or unmoderated.
- Tagging.
- Feeds.
- Ability to search blog content.
- Multi-language support.
- Public or PeopleSoft role-based security.

A blog is a site, maintained by an individual or group, with regular posts of commentary, descriptions of events, or other material. Individuals post articles on their blogs to let a community of interested parties read about and comment on items and ideas expressed.

Many blogs provide commentary or news on a particular subject, and this is most common in an enterprise blog. A typical blog combines text, images, and links to other blogs, web pages, and other media related to its topic. The ability for readers to leave comments in an interactive format is an important part of the blog.

Corporate or enterprise blogs can be used either internally, to enhance communication and culture in a corporation, or externally, for marketing or public relations. External blogs can also be used to disseminate information to customers and user groups, suppliers, partners, and so on.

In PeopleSoft Enterprise Portal, blogs can be created as "standalone" in portals and sites, or as an integrated module of a collaborative workspace. Standalone blogs can be accessed through the My Blogs page and the Blogs homepage pagelet.

When portal system administrators create a standalone blog, they can then assign an administrator to manage each blog. The blog administrator determines the membership and privileges for the blog, and has the option to manage the blog as moderated or unmoderated. Blog moderation is applied to all comments or replies. If moderation is set, the administrator has to approve each comment or reply before it can be viewed by the blog participants. The approval or rejection of a post causes an email notification to be sent to the participant who posted to the blog.

Note. Comments and replies posted by an author to his or her own post are not moderated.

This section also provides an overview of:

- Blog privileges.
- Blogs module in collaborative workspaces.

Understanding Blog Privileges

The following table summarizes blog privileges granted by portal role or privilege set ID. Privilege set IDs are defined on the Define Privilege Sets page. Privileges are assigned to blog participants on the Blog Security page.

Role ID or Privilege Set ID	***Description***	***Privileges***
PAPP_SYSTEM_ADMIN	Enterprise Portal System Admin role.	A portal administrator can: • Create new blogs. • Assign administrators to manage blogs. • Manage blogs. • Delete blogs. • Approve or reject blog comments or replies (when moderation of the blog is enabled). In addition, as a participant of blog a portal administrator can: • View blog posts and replies. • Add posts to blogs. • Add replies to blogs.
EPPBL_ADMINISTRATOR	Administrator privilege set.	• Manage the blog. • Approve or reject blog comments or replies (when moderation of the blog is enabled). • Add posts. • Edit any post or reply. • Delete any post or reply. • Edit own posts or replies. • Delete own posts or replies. • View blog posts and replies.
EPPBL_AUTHOR	Author privilege set.	• Add posts. • Edit own posts or replies. • Delete own posts or replies (if no replies have been posted to that post or reply). • View blog posts and replies.

Role ID or Privilege Set ID	Description	Privileges
EPPBL_READER	Reader privilege set.	View blog posts and replies.

Understanding the Blogs Module in Collaborative Workspaces

The Blogs module provides a platform that workspace members can use to discuss posts of interest. The blog can be configured as moderated or unmoderated, and members can post blog posts and replies. The pages used to participate in blogs in the Blogs module are the same pages used for standalone blogs.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Using the Blogs Module.

Creating Blogs

This section discusses how to:

- Create a blog.
- Add blog members.
- Assign member privileges.
- Create a blog policy statement.

Note. Portal system administrators can create standalone blogs and then assign an administrator to manage each blog.

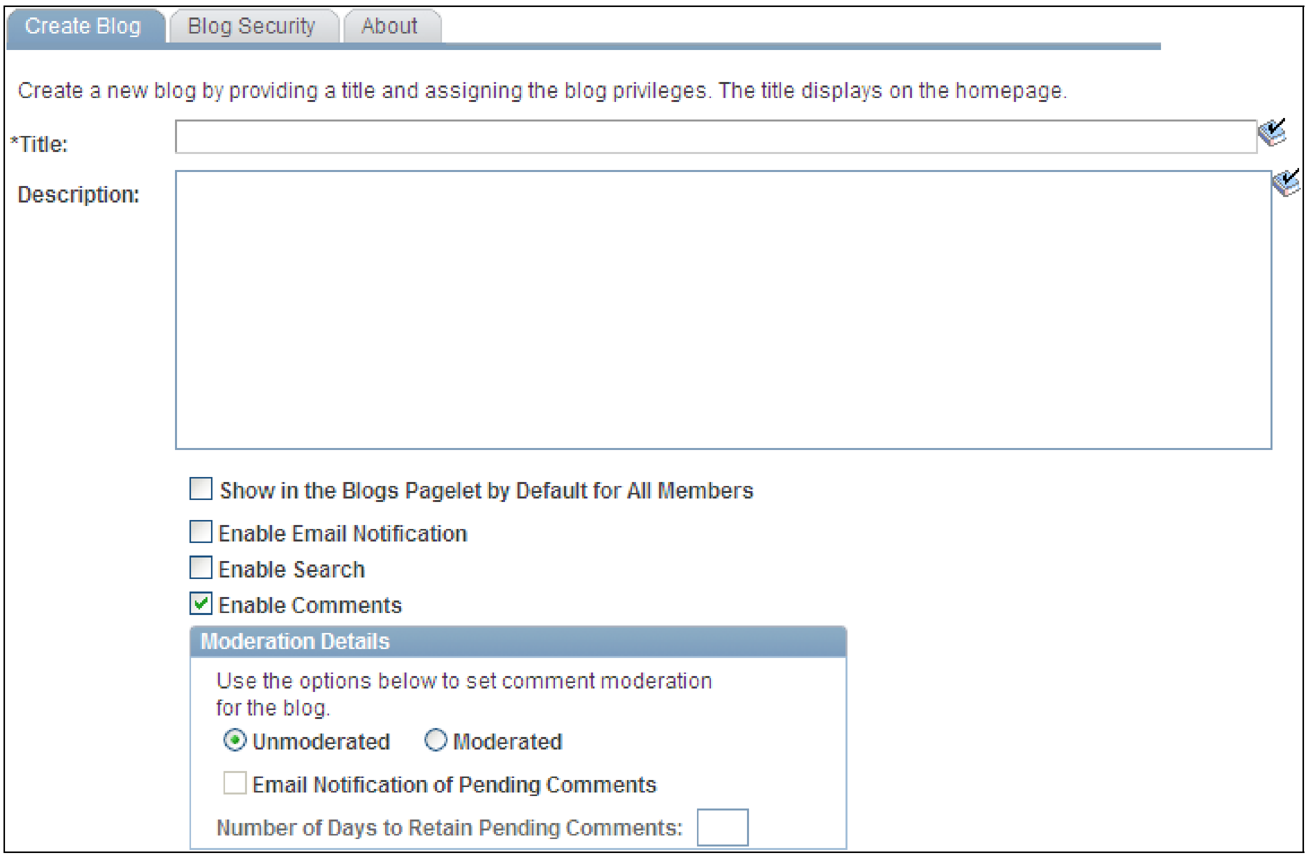
Pages Used to Create Blogs

Page Name	Definition Name	Navigation	Usage
Create Blog	EPPBL_BLOG_NEW	• My Content, My Blogs Click the Create Blog button. • Click the Create Blog link on the Blogs pagelet.	Set the properties for a new blog.
Blog Security	EPPBL_BLOG_MEM	Select the Blog Security page from the Create Blog page.	Maintain blog members.

Page Name	Definition Name	Navigation	Usage
Set Members Privileges	EPPBL_BLOG_PRIV	• Click the Add Member button on the Blog Security page. • Click the Edit button on the Blog Security page.	Assign blog participants by user or role. Assign privileges to the participants.
About	EPPBL_BLOG_POLICY	Select the Blog Security page from the Create Blog page.	Create a policy statement for the blog.

Creating a Blog

Access the Create Blog page (My Content, My Blogs; click the Create Blog button).



Create Blog page

Use the Create Blog page to set the properties for a new blog.

Title Enter a title for the blog. This text appears on the Blogs pagelet as the link to access the blog.

Description

Enter a description of the goal of the blog. This text appears on the Blogs pagelet as hover text for the link used to access the blog.

Show in the Blogs Pagelet by Default for All Members

Select to display this blog in the Blogs pagelet by default for all users who are included in the users and roles assigned on the Blog Security page.

Enable Email Notification

Select to allow members to send email notifications.

Enable Search

Select to allow members to search within the blog.

Enable Comments

Note. Blog moderation applies to comments and replies. Comments and replies posted by an author to his or her own post are not moderated.

Select the moderation option for this blog:

- *Unmoderated* — Comments and replies to this blog are not moderated.
- *Moderated* — All comments and replies to this blog are moderated.

  The blog administrator must review and approve or reject each comment and reply to this blog.

Email Notification For Pending Comments

Select this option to send an email notification to the blog administrator for each comment or reply that requires approval.

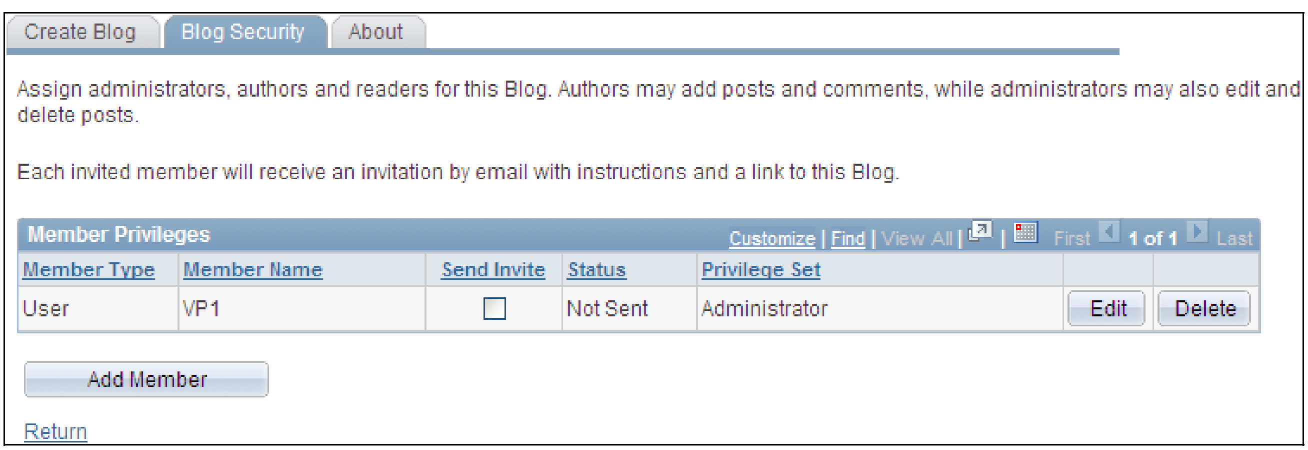
Number of Days to Retain Pending Comments

Set the number of days to retain a pending comment or reply.

After the set number of days has passed, a pending comment or reply is rejected. Set this field to *0* to retain pending comments and replies indefinitely.

Adding Blog Members

Access the Blog Security page (select the Blog Security page from the Create Blog page).



Blog Security page

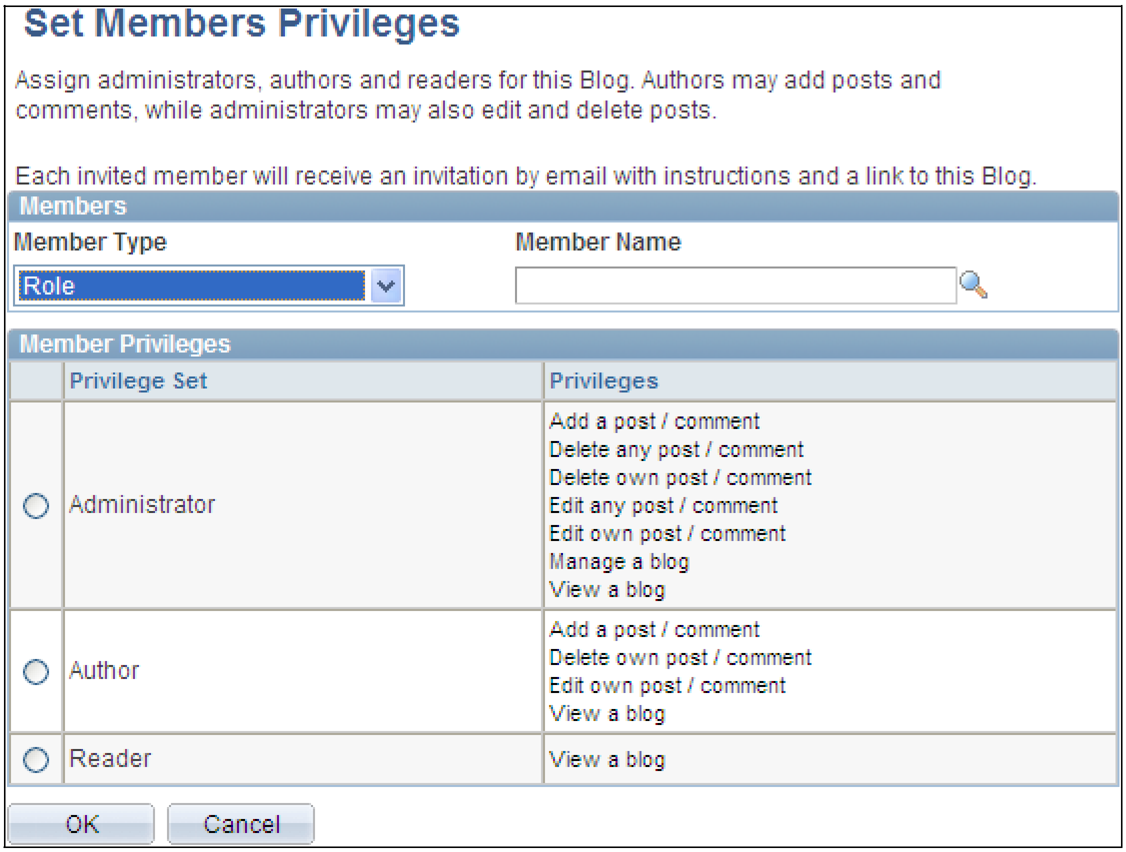
Edit Click the Edit button to access the Set Members Privileges page to modify the privileges for this member.

Delete Click the Delete button to delete this member.

Add Member Click the Add Member button to access the Set Members Privileges page to add a new member to the blog.

Assigning Member Privileges

Access the Set Members Privileges page (click the Add Member button or Edit button on the Blog Security page).



Set Members Privileges page

Member Type

Select the type of participant you want to add to the blog:

1. *Role* — Select to add blog participants by role.

   See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*, "Setting Up Roles."

2. *User* — Select to add blog participants by user ID.

   See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*, "Administering User Profiles."

Member Name

Select the role or user ID.

Privilege Set

Select the privilege level you want to assign to the member:

Administrator

Author

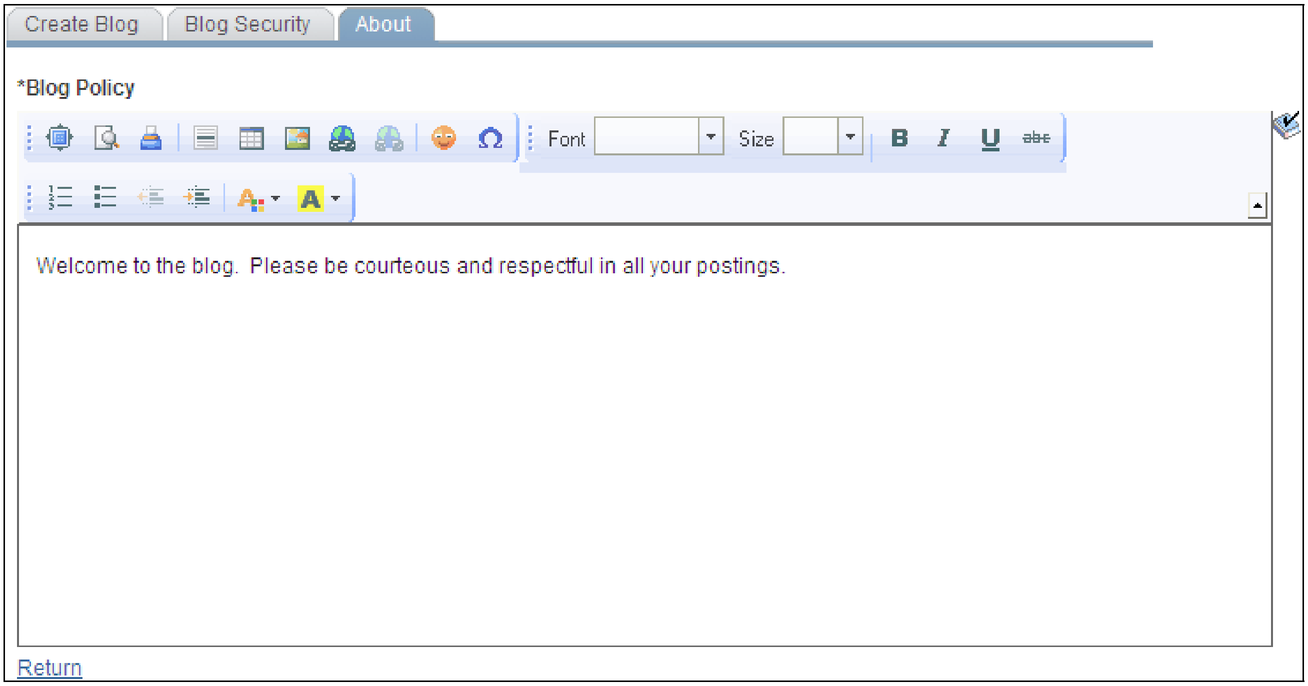
Reader

Note. At a minimum, every blog requires an administrator.

See Chapter 8, "Working With Blogs," Understanding Blog Privileges, page 108.

Creating a Blog Policy Statement

Access the About page (select the About page from the Create Blog page).



About page

Use the rich text editor to enter any policies that apply to the blog.

Participating in Blogs

This section discusses participating in blogs and how to:

- Access blogs.
- Add or edit a blog post.
- View post details.
- View pending or rejected comments (or replies).
- Delete a post.
- View blog feeds.
- Use tags in a blog.

Pages Used to Participate in Blogs

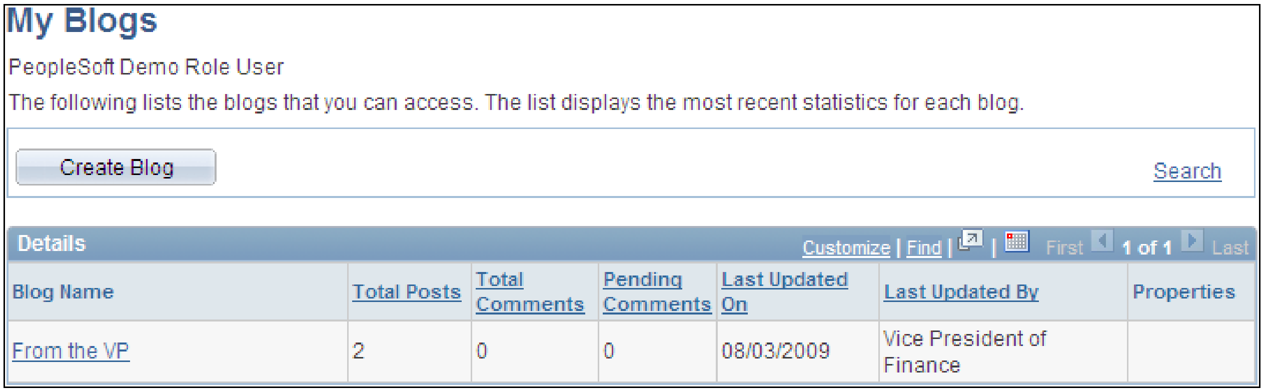
Page Name	***Definition Name***	***Navigation***	***Usage***
My Blogs	EPPDF_MYFORUMS	• My Content, My Blogs • Click the My Blogs link on the Blogs pagelet.	Provides access to all of the blogs of which you are a participant.
<Blog Title> homepage	EPPBL_VIEW_POSTS	• Click the link for a blog on the My Blogs page. • Click the link for a blog in the Blogs pagelet.	Serves as the homepage for a blog listing all blog posts and providing features to participate in the blog.
Create New Post	EPPDF_REPLY_TOPIC	• Click the Add New Post link on the blog homepage. •  Click the Add New Post button in the Blogs pagelet.	Add a post to a blog.
Post a comment	EPPDF_REPLY_TOPIC	Click the Comment link on the post details page.	Add a comment to a blog post. **Note.** The fields on this page are the same as those on the Create New Post page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Edit a Post	EPPDF_REPLY_TOPIC	Click the Edit link on the post details page.	Edit a blog post (post, comment, or reply). **Note.** The fields on this page are the same as those on the Create New Post page.
Add a Reply	EPPDF_REPLY_TOPIC	Click the Reply link on the post details page.	Add a reply to a blog comment. **Note.** The fields on this page are the same as those on the Create New Post page.
<Post Title> (post details)	EPPBL_VIEW_COMMENT	• Click the post title on the blog homepage. • Click the Comments link for a post on the blog homepage. • Click the link for a post or a comment in the Blogs pagelet.	View the details of a blog post.
View Pending Comments	EPPBL_MY_PEND_SEC	Click the View Pending Comments link on the post details page.	Review comments and replies that you submitted that have not been accepted yet by the blog administrator.
View Rejected Comments	EPPBL_MY_PEND_SEC	Click the View Rejected Comments link on the post details page.	Review comments and replies that you submitted that have been rejected by the blog administrator.

Accessing Blogs

To access a blog:

1. Select My Content, My Blogs to access the My Blogs page.



My Blogs page

Use the My Blogs page to access to all of the blogs of which you are a participant. The My Blogs page provides an overview of the activity in each of these blogs.

2. Click the link for a blog on the My Blogs page to access the homepage for a blog.

<Blog Title> homepage (administrator view)

Use the blog homepage to participate in the blog.

Note. Certain functions are available on this page only if you have been granted author or administrator privilege for this blog.

<Blog Title>	Click the blog title at the top of the page to return to the blog homepage displaying *all posts.*
Add New Post	Click to access the Create New Post page. **Note.** This link appears only for authors or administrators of the blog.
Manage Blog	Click to access the Manage Blog page. **Note.** This link appears only if you are an administrator of the blog.

Search	Click to access the Search Blogs page to search in the current blog or other blogs.
	Hover over any of these to view the list of feeds published for this blog. Click any list item to open that feed document. Click the Feed button or Feed link to open the first feed document in the list. Click the Open menu button to toggle the list of feeds between frozen open and closed. See Chapter 11, "Working With Feeds and Alerts," Viewing and Subscribing to Feeds, page 255.
<Post Title>	Click a post title link to view the post details page.
Comments *(#)*	Click a Comments*(#)* link to view the post details page.
Blog Policy	Displays the blog policy as defined by the blog administrator.
Archives	Click the number to the right of a month in the Archives section to display posts for that month only.
Authors	• Click the author's name to display that user's system profile in a new browser window. • Click the number to the right of an author's name to display posts for that author only.
Tags	Use the List tab to manage tags at the blog level; use the Cloud tab to view a tag cloud encompassing the blog and all posts.

Adding or Editing a Blog Post

Access the Create New Post page (click the Add New Post link on the blog homepage).

Access the Post a comment page (click the Comment link on the post details page).

Access the Edit a Post page (click the Edit link on the post details page).

Access the Add a Reply page (click the Reply link on the post details page).

Create New Post page

Use the Create New Post page to add a new post to a blog.

Use the Post a comment page to add a comment to a blog post.

Use the Edit a Post page to edit a blog post (post, comment, or reply).

Use the Add a Reply page to add a reply to a blog comment.

Title

Enter a title for your blog post.

<edit field>

Use the editor to enter the text of the post.

Save as Draft

Click to save your post in a draft state. The post, or modifications, are not visible until you publish it.

Note. The Save as Draft button appears on the Create New Post page and the Edit a Post page. If you edit an existing post and save it as a draft, the post (even the original content) is no longer visible in the blog until the draft is published.

Save

Click to save your comment or reply so that it can be viewed in the blog or reviewed by the blog administrator.

Note. The Save button appears on the Post a comment page and the Add a Reply page.

Cancel

Click to cancel any changes without saving or publishing and return to the post details page.

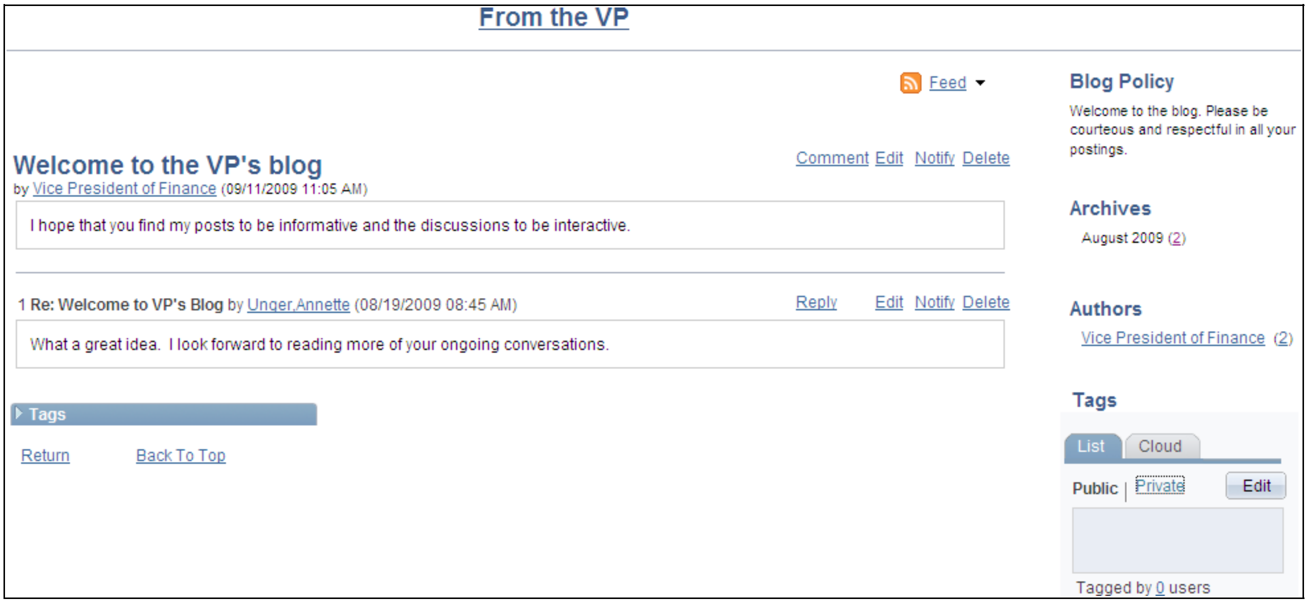
Publish

Click to publish your post so that it can be viewed in the blog.

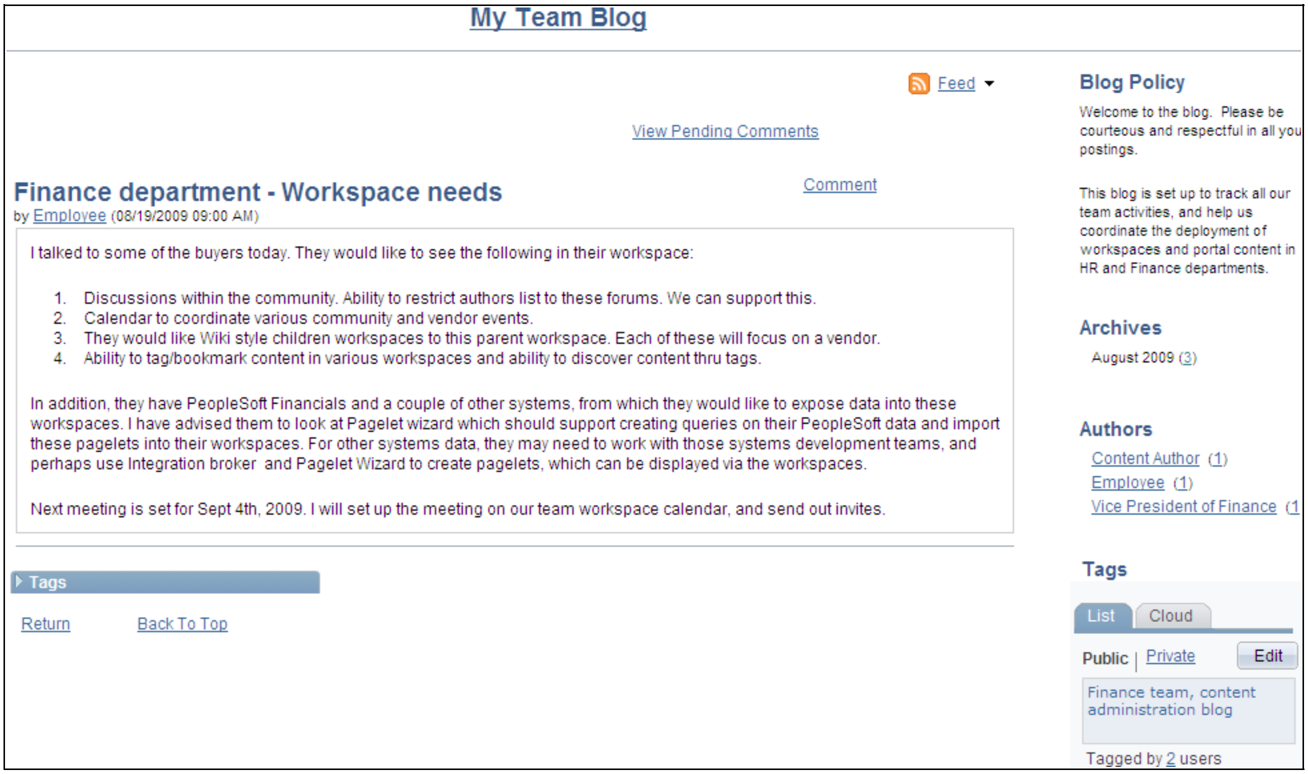
Note. The Save as Draft button appears on the Create New Post page and the Edit a Post page.

Viewing a Blog Post

Access the post details page (click the link for a post on the blog homepage).



Post details page (author view)



Post details page (reader view)

Use the post details page to view the details for a blog post.

<Blog Title> — Click the blog title at the top of the page to return to the blog homepage.

View Pending Comments — Click to access the View Pending Comments page to view which of your new blog comments and replies are pending acceptance by the blog administrator.

View Rejected Comments — Click to access the View Rejected Comments page to view which of your new blog comments and replies were rejected by the blog administrator.

Hover over any of these to view the list of feeds published for this blog. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

See Chapter 11, "Working With Feeds and Alerts," Viewing and Subscribing to Feeds, page 255.

Reply — Click to access the Add a Reply page to reply to a comment or reply.

Comment — Click to access the Post a comment page to comment on this post.

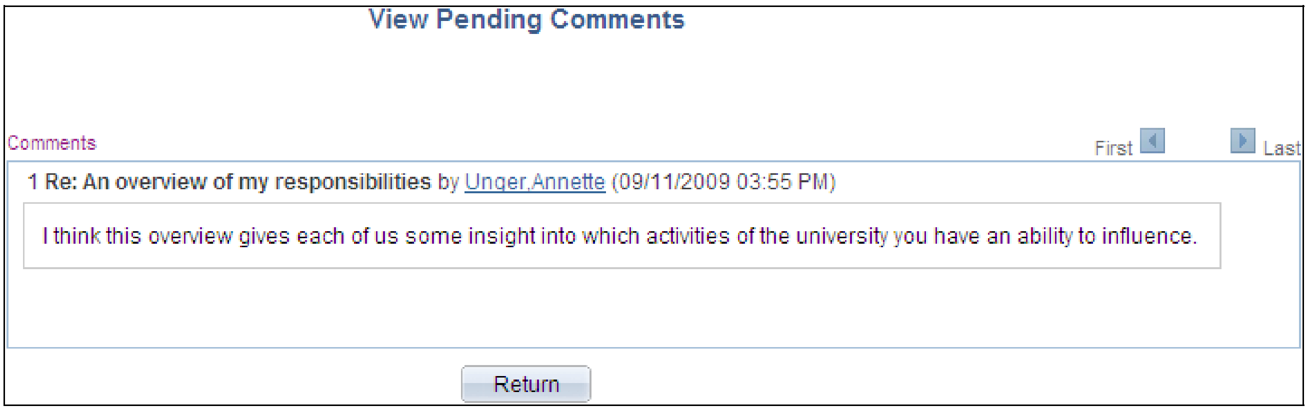
Edit — Click to access the Edit a Post page to edit this post.

Notify	Click to access the Notify Members page to send a notification to blog participants.
Delete	Click to delete this post. Any comments and replies to this post will also be deleted.
<Author>	Click to view the system profile for the author of the post, comment, or reply in a separate browser window.
or **Tags**	Click to view the expandable Tags section for the blog post.

Viewing Pending or Rejected Comments

Access the View Pending Comments page (click the View Pending Comments link on the blog homepage).

Access the View Rejected Comments page (click the View Rejected Comments link on the blog homepage).



View Pending Comments page

Use these pages to view your pending or rejected comments and replies for this blog. The links and buttons are the same for each page. In the preceding example, the View Pending Comments page is shown.

Find	Click to pop up a dialog box allowing you to search the page contents for a specific comment or reply.
Return	Click to return to the previous page.

Deleting a Post

To delete a post from a blog:

1. Go to the post details page for the post that you want to delete.

   Note. You are able to delete a post if you are the author of the post or the blog administrator.

   ---

2. Click the Delete button.

3. Click OK to confirm that you want to delete that post and any associated comments and replies.

Viewing Blog Feeds

Once a blog is published as a feed, the link to the blog's feed is available on the blog homepage, the post details page, the Blogs pagelet, and in other pages and pagelets in the PeopleSoft Enterprise Portal system.

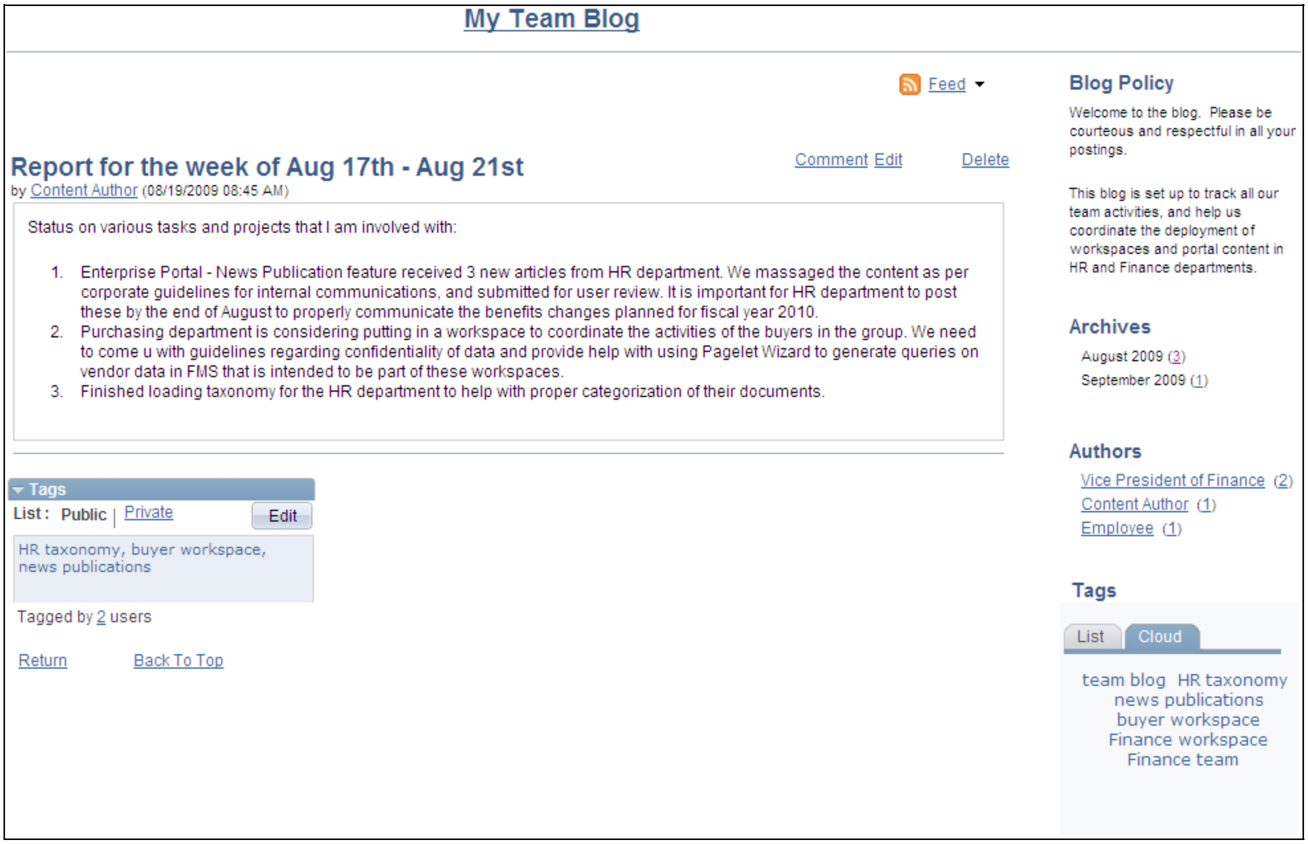
See Chapter 11, "Working With Feeds and Alerts," Viewing and Subscribing to Feeds, page 255.

Using Tags in a Blog

In a blog, tags can be added and managed in the Tags section at two levels:

- At the blog level on the blog homepage.
- At the post level on the post details page.

In addition, the Tags section on the blog homepage includes a tag cloud showing all tags (blog level and post level) added to this blog. The following example shows the Tags section from a blog homepage:



A blog post details page showing tags

In this example, *buyer workspace, HR taxonomy* and *news publications* are tags at the post level as shown in the expandable Tags section. The Tags Cloud tab shows all tags in use throughout this blog.

Creating, managing, and using tags is discussed in this PeopleBook.

See Chapter 12, "Working With Tags," page 263.

Managing Blogs

This section discusses how to:

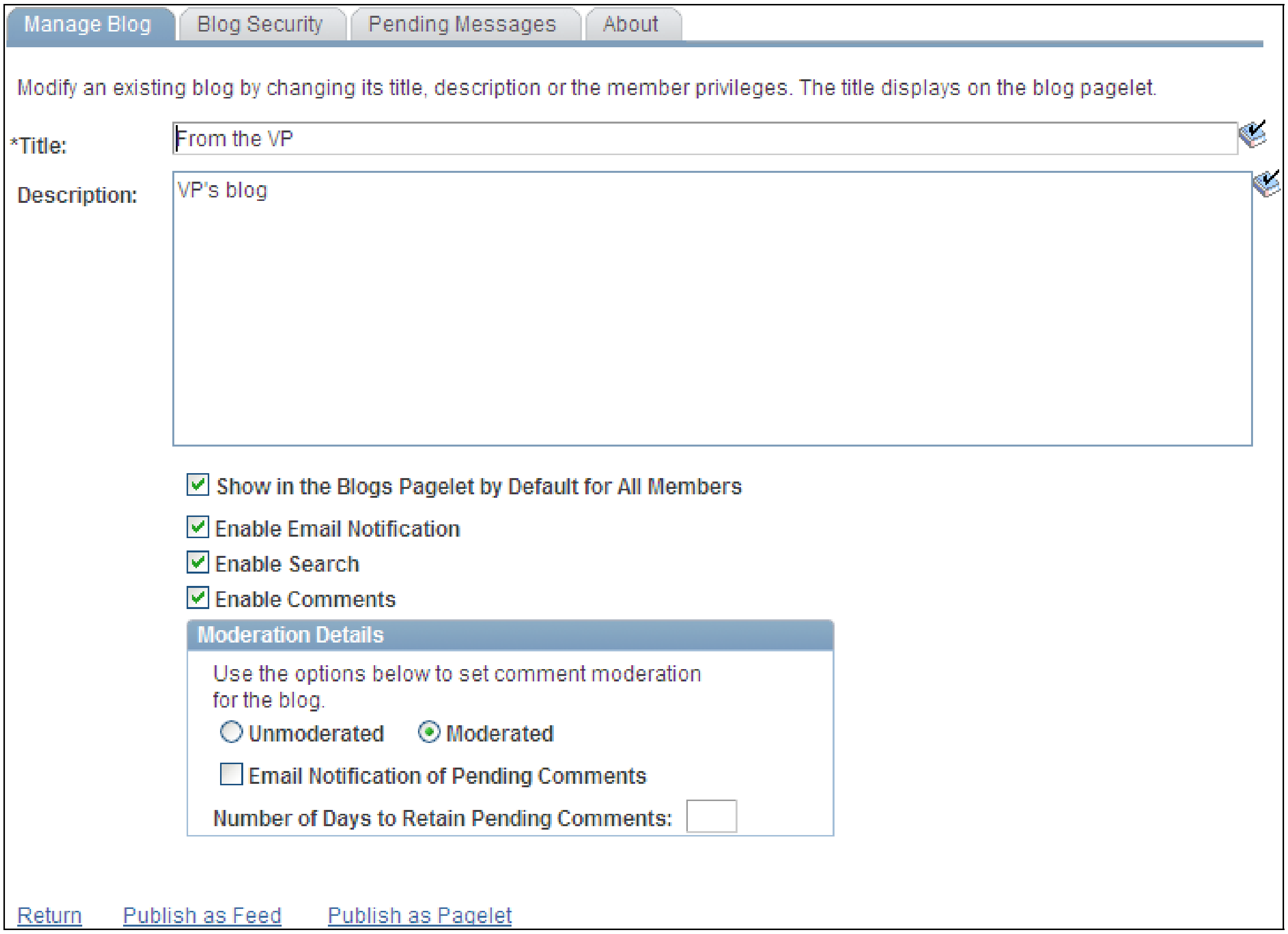
- Manage a blog.
- Approve or reject pending comments (or replies).
- Publish a blog as a feed.
- Administer a blog (delete).

Pages Used to Manage Blogs

Page Name	***Definition Name***	***Navigation***	***Usage***
Manage Blog	EPPBL_BLOG_MANAGE	• Click the Manage Blog button on the blog homepage. • Click the link for a blog on the Administer Blogs page.	Set the properties for a blog.
Blog Security	EPPBL_BLOG_MEM	Select the Blog Security page from the Create Blog page.	Maintain blog members.
Set Members Privileges	EPPBL_BLOG_PRIV	• Click the Add Member button on the Blog Security page. • Click the Edit button on the Blog Security page.	Assign blog participants by user or role. Assign privileges to the participants.
Set Invitation Message	EPPBL_ADMIN_INVITE	Click the Send Invitations button on the Blog Security page.	Set the invitation message and send invitations to blog members.
About	EPPBL_BLOG_POLICY	On the Manage Blog page, select the About page.	Enter a policy statement for the blog.
Pending Messages	EPPDF_PENDING_POST	On the Manage Blog page, select the Pending Messages page.	Approve or reject pending comments and replies to the blog.
View a Post	EPPDF_POST_SEC	Click the title for a comment or reply on the Pending Messages page.	Review the comment or reply text prior to approving or rejecting it.
Reject Expired Pending Forum Posts/Blog Comments	EPPDF_PSTRJT_RUN	Portal Administration, Blogs, Reject Expired Posts/Comments	Run the EPPDF_PSTRJT Application Engine program to reject pending comments and replies that have expired.
Administer Blogs	EPPDF_MYFORUMS	Portal Administration, Blogs, Administer Blogs	Delete blogs. Also, access the Manage Blog page for each blog.
Administer Blogs - Delete Confirmation	EO_PE_YESNOCONFIRM	On the Administer Blogs page, click the delete button for a blog.	Confirm deletion of the blog.

Managing a Blog

Access the Manage Blog page (click the Manage Blog link on the blog homepage).



Manage Blog page

Use the Manage Blog page to set the properties for a blog.

Title	Enter a title for the blog. This text appears on the Blogs pagelet as the link to access the blog.
Description	Enter a description of the goal of the blog. This text appears on the Blogs pagelet as hover text for the link used to access the blog.
Show in the Blogs Pagelet by Default for All Members	Select to display this blog in the Blogs pagelet by default for all users who are included in the users and roles assigned on the Blog Security page.
Enable Email Notification	Select to allow members to send email notifications.
Enable Search	Select to allow members to search within the blog.

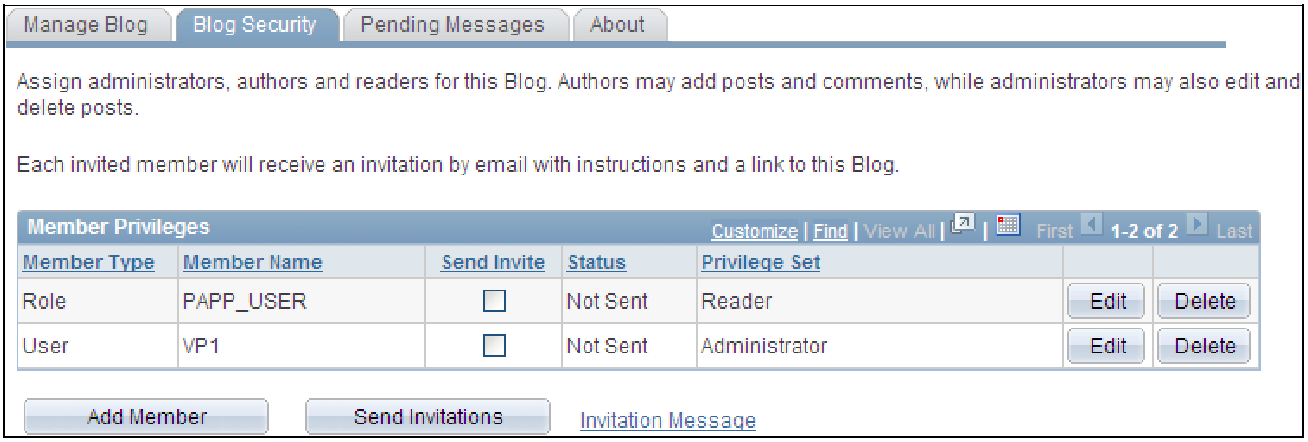
Enable Comments	**Note.** Blog moderation applies to comments and replies. Comments and replies posted by an author to his or her own post are not moderated. Select the moderation option for this blog: • *Unmoderated* **—** Comments and replies to this blog are not moderated. • *Moderated* **—** All comments and replies to this blog are moderated. The blog administrator must review and approve or reject each comment and reply to this blog.
Email Notification For Pending Comments	Select this option to send an email notification to the blog administrator for each comment or reply that requires approval.
Number of Days to Retain Pending Comments	Set the number of days to retain a pending comment or reply. After the set number of days has passed, a pending comment or reply is rejected. Set this field to *0* to retain pending comments and replies indefinitely.
Publish as Feed	Click to access the Manage Blog - Publish Feed Definition page to publish this blog as a feed.
Publish as Pagelet	Click to access the Manage Blog Publish Pagelet Wizard Definition page to publish this blog as a pagelet.
Return	Click to return to the previous page.

This section also discusses how to:

- Manage blog participants and privileges.
- Send invitations to the blog.
- Manage the blog policy statement.

Managing Blog Participants and Privileges

Access the Blog Security page (select Blog Security on the Manage Blog page). Use the Blog Security page to assign blog participants and privileges.



Blog Security page

See Chapter 8, "Working With Blogs," Adding Blog Members, page 112.

Sending Invitations to the Blog

Access the Set Invitation Message page (click the Send Invitations button on the Blog Security page).

Set Invitation Message page

Managing the Blog Policy Statement

Access the About page (select About on the Manage Blog page). Use the About page to edit the blog policy statement.

See Chapter 8, "Working With Blogs," Creating a Blog Policy Statement, page 114.

Approving or Rejecting Pending Comments

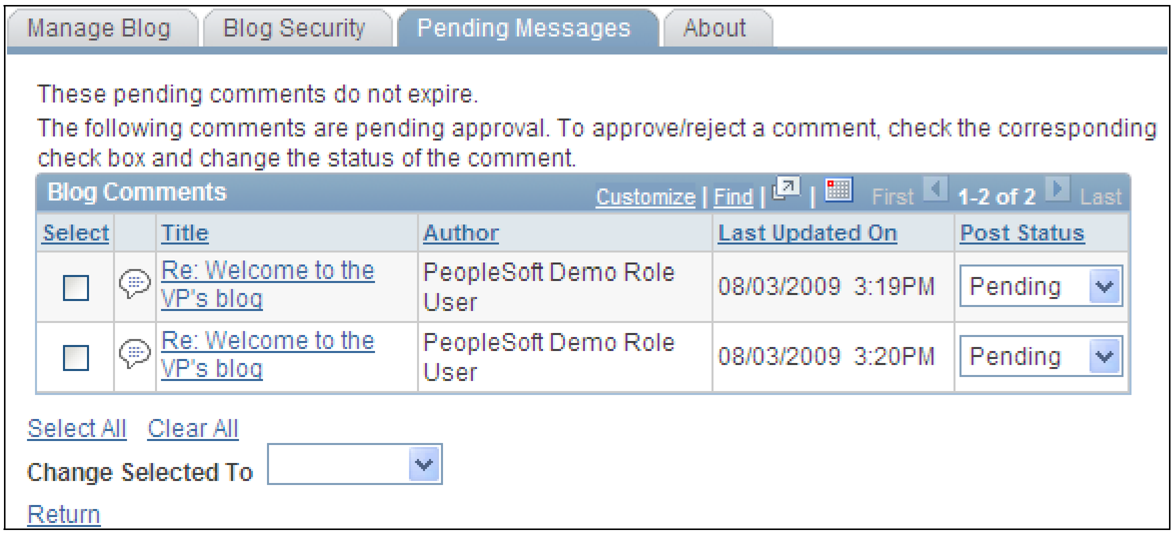
This section discusses how to:

- Approve or reject comments and replies manually.
- Review a comment or reply.
- Reject expired comments and replies automatically.

Note. The approval or rejection of a comment or reply causes an email notification to be sent to the participant who posted to the blog.

Approving or Rejecting Comments and Replies Manually

Access the Pending Messages page (select Pending Messages on the Manage Blog page).



Pending Messages page

Use the Pending Messages page to approve or reject comments and replies to the blog.

Select
Select one or more comments or replies to update in bulk.

Title
Click a comment title to access the View a Post page to review the posted text.

Post Status and **Change Selected To**
Select one of the following statuses:

- *Approved*
- *Pending*
- *Rejected*

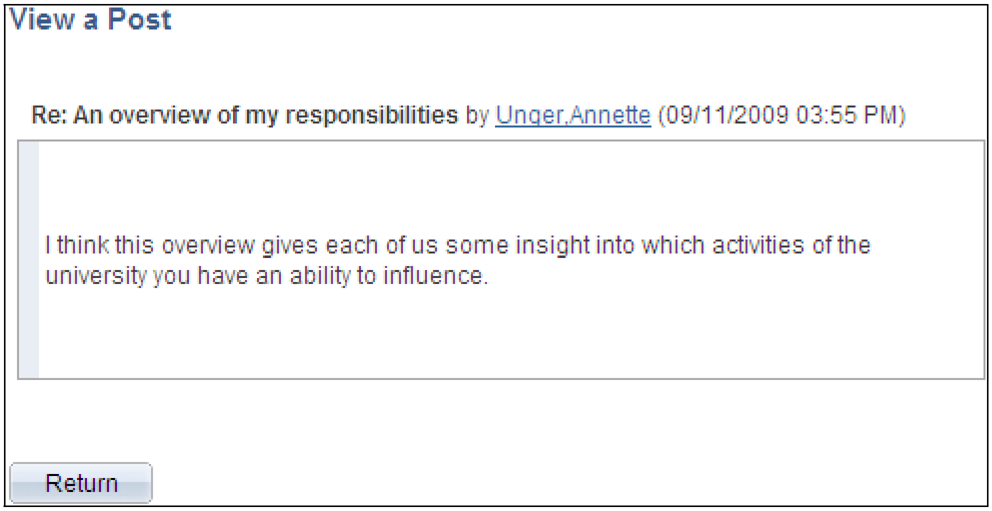
Select All
Click to select all listed comments and replies.

Clear All Click to clear the selection of all listed comments and replies.

Return Click to return to the previous page.

Reviewing a Comment or Reply

Access the View a Post page (click the link for a post on the Pending Messages page).



View a Post page

Use the View a Post page to review the comment or reply text prior to approving or rejecting it. Click Return to return to the Pending Messages page.

Rejecting Expired Comments and Replies Automatically

Access the Reject Expired Pending Forum Posts/Blog Comments page (select Portal Administration, Blogs, Reject Expired Posts/Comments).

Run the EPPDF_PSTRJT Application Engine program to reject pending comments and replies that have expired. This program searches for all pending comments and replies and checks the authored date for each. If the difference between the current date and the authored date is equal to or greater than the number of days set on the Manage Blog page for that blog, then the message status is set to rejected.

Set the process recurrence for the EPPDF_PSTRJT program to a frequency suitable for your system**—**for example, *M-F at 5pm.*

Publishing a Blog as a Feed

Blogs can be published as feeds. Once published, the link to a blog's feed is available on the blog homepage, the post details page, the Blogs pagelet, and in other pages and pagelets in the PeopleSoft Enterprise Portal system.

There are no special advanced options for blog feeds. Therefore, the standard feed publishing process can be followed.

See Chapter 11, "Working With Feeds and Alerts," Publishing PeopleSoft Enterprise Portal Content as a Feed, page 251.

Administering Blogs

Access the Administer Blogs page (select Portal Administration, Blogs, Administer Blogs).

Administer Blogs page

Use the Administer Blogs page to delete blogs and to access the Manage Blog page for each blog.

Blog Name Click the title for a blog to access its Manage Blog page.

Delete Click to delete the blog.

Publishing a Blog as a Pagelet

This section discusses how to:

- Publish a pagelet from a blog.
- Publish a blog from Pagelet Wizard.
- Edit a published pagelet.
- Publish a pagelet to multiple portals.

Pages Used to Publish a Blog as a Pagelet

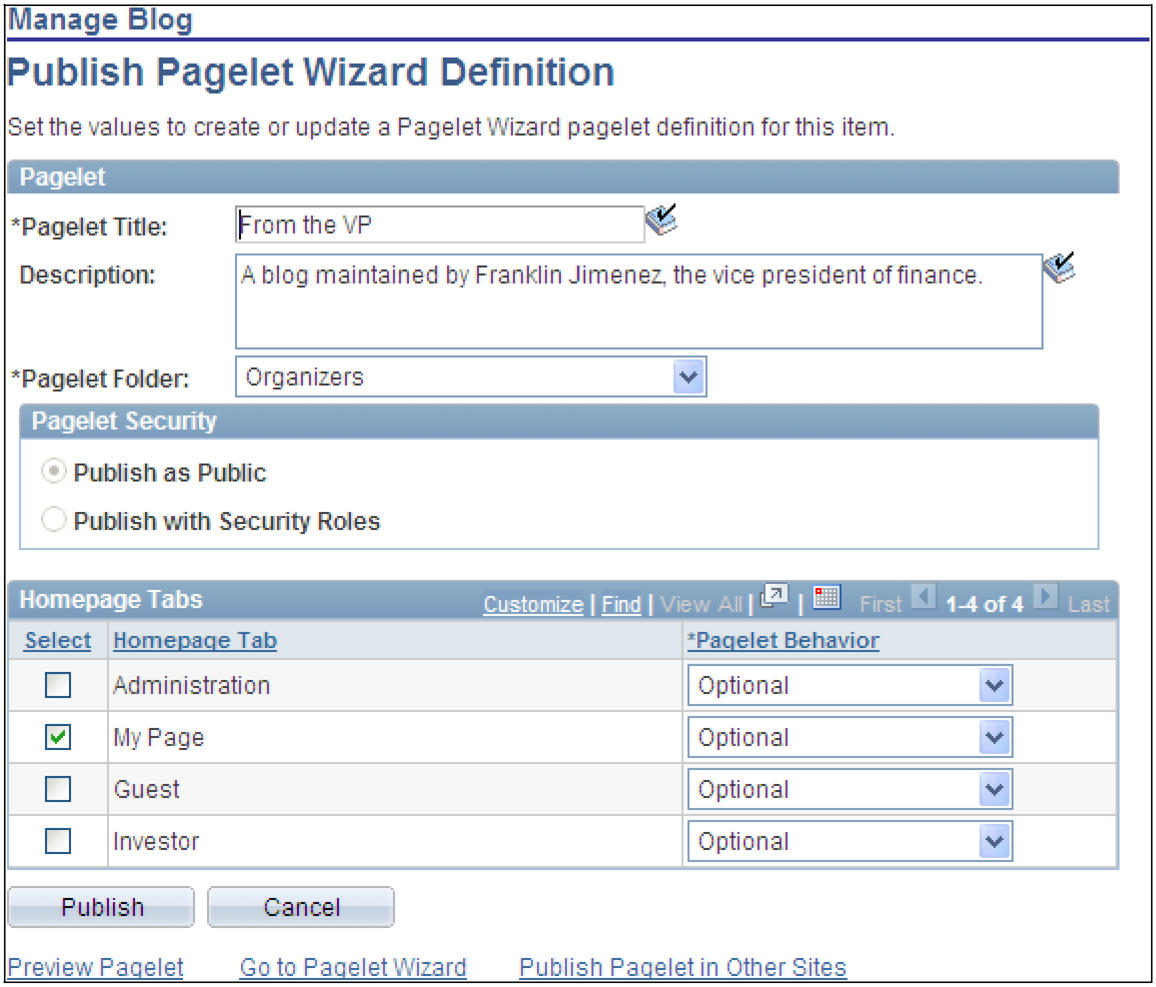
Page Name	***Definition Name***	***Navigation***	***Usage***
Manage Blog - Publish Pagelet Wizard Definition	EPPPB_PGLT_PUB	• My Content, My Blogs Click the link for the blog on the My Blogs page. Click the Manage Blog link on the blog homepage. Click the Publish as Pagelet link on the Manage Blog page. • Click the Add Pagelet button or the Edit button on the Manage Blog - Publish as Pagelet page.	Create a pagelet definition for a blog.
Pagelet Wizard - Specify Pagelet Information	PTPPB_WIZ_INFO	• Click the Go to Pagelet Wizard link on the Manage Blog - Publish Pagelet Wizard Definition page. • Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard • PeopleTools, Portal, Pagelet Wizard, Pagelet Wizard • Click the Pagelet Information button from any page in the wizard.	Provide information to identify and categorize a pagelet.
Pagelet Wizard - Select Data Source	PTPPB_WIZ_DATASRC	• Click the Next button on the Pagelet Wizard - Specify Pagelet Information page. •  Click the Data Type button from any page in the wizard.	Select the type of data source for the pagelet.

Page Name	***Definition Name***	***Navigation***	***Usage***
Pagelet Wizard - Specify Data Source Parameters	PTPPB_WIZ_DATAPRMS	• Click the Next button on the Pagelet Wizard - Select Data Source page. • Click the Data Source Parameters button from any page in the wizard.	Configure the data source parameters that are required for data to be displayed in the pagelet. **Note.** This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.
Pagelet Wizard - Specify Data Source Parameter Values	PTPPB_WIZ_PRMVALS	Click the Values link on the Pagelet Wizard - Specify Data Source Parameters page.	Specify prompt values for the end user to select from when personalizing the pagelet. **Note.** This page is accessible only for data source parameters for which you have selected the *User Specified* or *Admin Specified* usage types.
Pagelet Wizard - Select Display Format	PTPPB_WIZ_DISPFRMT	• Click the Next button on the Pagelet Wizard - Specify Data Source Parameters page. • Click the Display Format button from any page in the wizard.	Specify the data transformation method and display format for the pagelet.
Pagelet Wizard - Specify Display Options	PTPPB_WIZ_DISP_CUS	• Select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page. • Click the Transformation button from any page in the wizard.	Enter the custom formatting details for the pagelet as well as header and footer options. Preview the pagelet.
Pagelet Wizard - Specify Publishing Options	PTPPB_WIZ_PUBOPT	• Click the Next button on the Pagelet Wizard - Specify Display Options page. • Click the Register Pagelet icon from any page in the wizard.	Specify the manner in which the pagelet is published. Provide registration, caching, and security details, and register the pagelet.

Page Name	Definition Name	Navigation	Usage
Pagelet Wizard - Pagelet Creation Confirmed	PTPPB_WIZ_FINISH	Click the Finish button on the Pagelet Wizard - Specify Publishing Options page.	Confirm that the creation of the pagelet is complete.
Manage Blog - Publish as Pagelet	EPPPB_PGLT_LST	• Click the Publish button on the Manage Blog - Publish Pagelet Wizard Definition page. • If this blog has already been published as a pagelet, click the Publish as Pagelet link on the Manage Blog page.	Administer pagelet definitions for a blog.
Publish to Multiple Portals	PTPP_PMPUBPRTL	• Click the Publish Pagelet in Other Sites link on the Manage Blog - Publish Pagelet Wizard Definition page. • Portal Administration, Pagelets, Publish Pagelets • PeopleTools, Portal, Portal Utilities, Publish Pagelets	Publish the pagelet definition to additional portals and sites.
Publish Multiple Pagelets	PTPP_PMPUBPGLT	• On the Publish to Multiple Portals page, select Publish Multiple Pagelets. • Portal Administration, Pagelets, Publish Pagelets, Publish Multiple Pagelets • PeopleTools, Portal, Portal Utilities, Publish Pagelets, Publish Multiple Pagelets	Publish multiple pagelet definitions to another portal or site.

Publishing a Pagelet from a Blog

Access the Manage Blog - Publish Pagelet Wizard Definition page (click the Publish as Pagelet link on the Manage Blog page).



Manage Blog - Publish Pagelet Wizard Definition page

Use the Manage Blog - Publish Pagelet Wizard Definition page to create a pagelet definition for a blog.

Pagelet

The pagelet title and description from the Manage Blog page appear in the Pagelet group box. You can edit these two fields, if necessary.

Pagelet Title Displays the title for the blog, which can be edited as the title for the pagelet.

Description Displays the description for the blog, which can be edited as the description for the pagelet.

Pagelet Folder Select a folder to publish to. Only folders from the current site are available to select.

Pagelet Security Select the security options for viewing the pagelet. Available options are:

Publish as Public, which enables all users to view the pagelet.

Publish with Security Roles, which uses the roles defined on the Blog Security page when publishing the pagelet.

Note. If there are no roles defined on the Blog Security page, the system automatically selects to publish the pagelet as public.

Homepage Tabs

Use this group box to define the homepage tab labels and behavior for the pagelet.

Homepage Tab Select the tabs that will display the pagelet.

Pagelet Behavior Select the behavior options for the pagelet.

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.

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 homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

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.

Publish Click the Publish button to publish this pagelet and display the Manage Blog - Publish as Pagelet page, on which you can review or edit the pagelet definition

Publishing a Blog from Pagelet Wizard

A pagelet for a blog can be created and published using Pagelet Wizard and then managed from the Manage Blog page. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.

  Step 3 also includes "Specifying Prompt Values for Data Source Parameters."

- Step 4: Selecting a Pagelet Display Format.
- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

Note. If you access Pagelet Wizard from the Go to Pagelet Wizard link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

Where appropriate, this section provides details specific to using Pagelet Wizard to publish a blog as a pagelet. The PeopleTools 8.50 PeopleBooks provide detailed information on using Pagelet Wizard.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard."

Step 1: Entering Pagelet Identifying Information

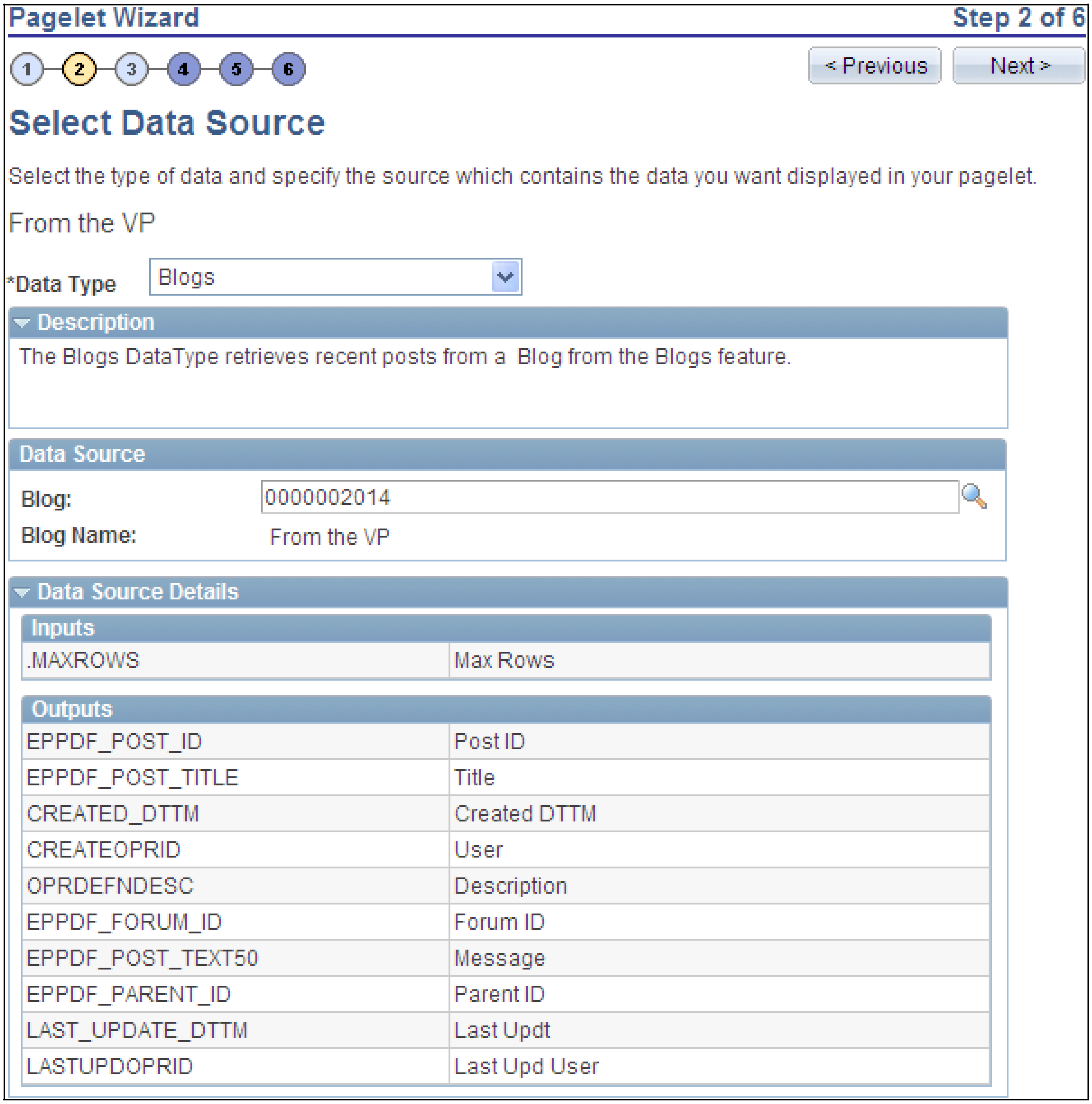
Access the Pagelet Wizard - Specify Pagelet Information page (click the Go to Pagelet Wizard link on the Manage Blog - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard).

Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 1: Entering Pagelet Identifying Information.

Step 2: Selecting a Pagelet Data Source

Access the Pagelet Wizard - Select Data Source page (click the Next button on the Pagelet Wizard - Specify Pagelet Information page).



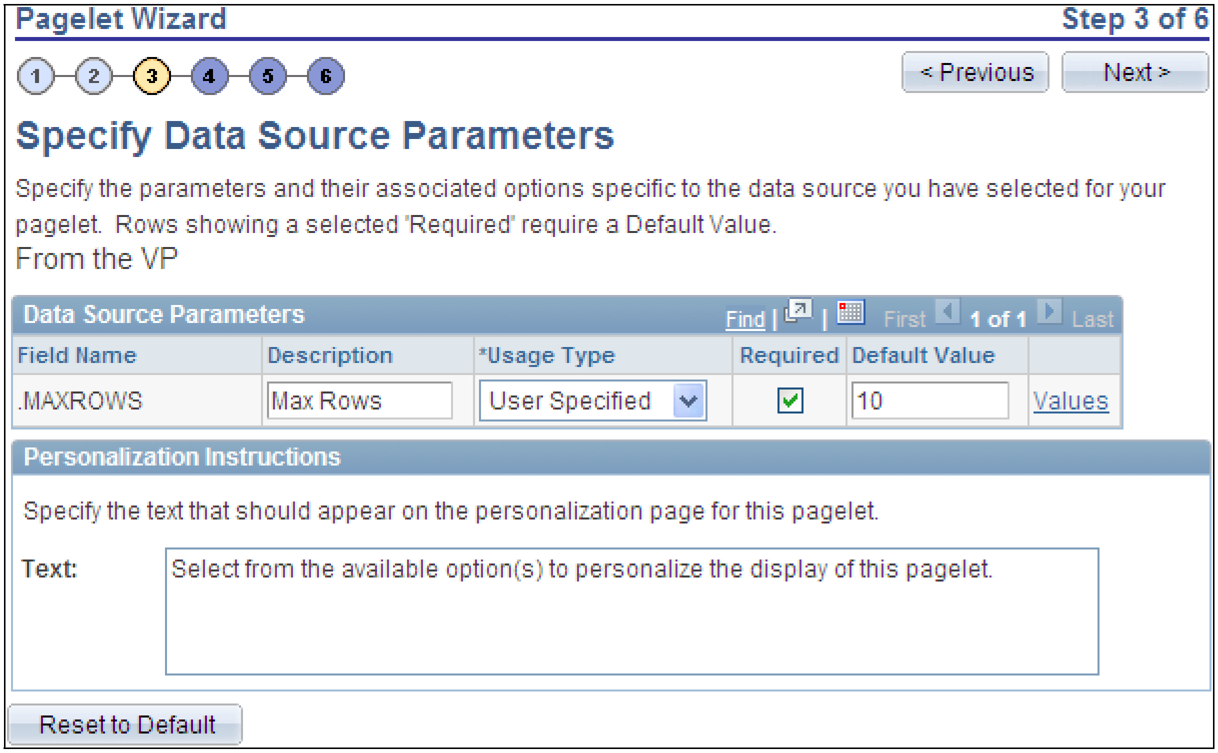
Pagelet Wizard - Select Data Source page (blogs data type)

Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

Data Type	For blogs, select *Blogs.*
Blog	Select the blog to display in the pagelet.
Inputs	Displays the data source parameters that are used to retrieve data for the pagelet.
Outputs	Displays the data source parameter fields that are displayed as output in the pagelet.

Step 3: Specifying Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameters page (select *Blogs* as the data type on the Pagelet Wizard - Select Data Source page, then click the Next button).



Pagelet Wizard - Specify Data Source Parameters page (blogs data source)

Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

Note. This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

Field Name

Displays the name of the data source parameter.

For blogs, the following data source parameters can be defined:

MAXROWS — Limits the number of entries displayed in the pagelet

Description

Displays a description of the data source parameter.

Usage Type

Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are:

- *Admin Specified:* Select to enable those users with administrative privileges to specify variables for this field, as well as access the Configure link on the published pagelet and select from those parameters for users.
- *Context Sensitive:* Select to enable Context Manager to specify a data source parameter value for this field.
- *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify.
- *System Variable:* Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter.

  For example, suppose that you specify *%UserId* as the system variable for a parameter name User. When the pagelet appears on a user's homepage, the User field is populated by the *%UserId* system variable, which is the user ID used to access the pagelet.
- *User Specified:* Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the Customize button appears on the pagelet title bar.

  End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Users can select a value from a prompt, or they can manually enter their own value if no prompt values are available.

  See Chapter 8, "Working With Blogs," Specifying Prompt Values for Data Source Parameters, page 142.

  If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.

Required

This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters.

Default Value

You can enter a value that includes the % and * wildcards at the beginning or end of a value in the Default Value field.

Note the following about default values:

- If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value.

  If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field.

  If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date.*

- If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the Look up Value button to access a list of valid system variables.

  See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters.

- If you select *Fixed* as the usage type, you must enter the fixed value.

Values

If you select *User Specified* or *Admin Specified* as the usage type, click Values to access the Pagelet Wizard - Specify Data Source Parameter Values page.

See Chapter 8, "Working With Blogs," Specifying Prompt Values for Data Source Parameters, page 142.

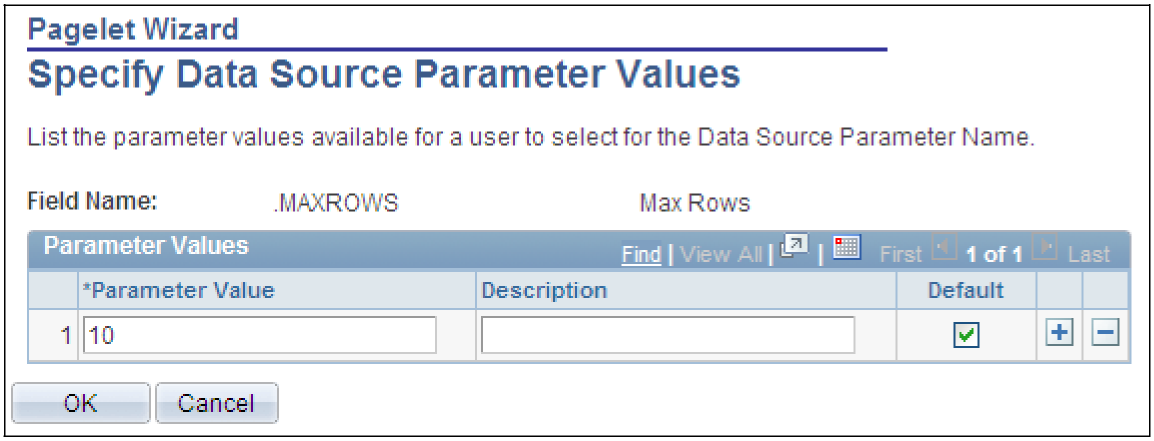
Text

Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet.

Note. Personalization instructions must be translatable.

Specifying Prompt Values for Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameter Values page (click the Values link on the Pagelet Wizard - Specify Data Source Parameters page).



Specify Data Source Parameter Values page (blogs data type)

Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

Parameter Value	Specify the parameter value.
Description	Provide an optional description of the parameter value.
Default	Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional.

Step 4: Selecting a Pagelet Display Format

Access the Pagelet Wizard - Select Display Format page (click the Next button on the Pagelet Wizard - Specify Data Source Parameters page).

Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 4: Selecting a Pagelet Display Format.

Step 5: Specifying Pagelet Display Options

Access the Pagelet Wizard - Specify Display Options page (select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page}.

Use the Pagelet Wizard - Specify Display Options page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet.

Note. If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 5: Specifying Pagelet Display Options.

Step 6: Specifying Pagelet Publication Options

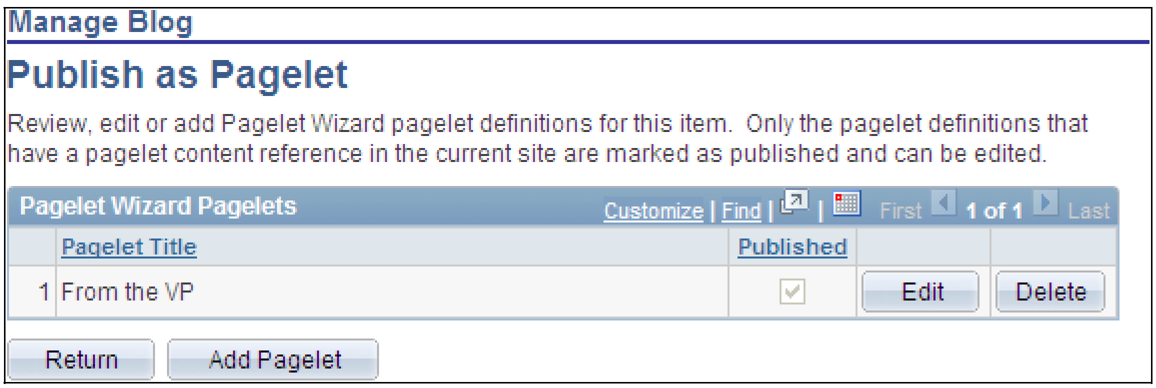
Access the Pagelet Wizard - Specify Publishing Options page (click the Next button on the Pagelet Wizard - Specify Display Options page).

Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 6: Specifying Pagelet Publication Options.

Editing a Published Pagelet

Access the Manage Blog - Publish as Pagelet page (click the Publish button on the Manage Blog - Publish Pagelet Wizard Definition page; or if this blog has already been published as a pagelet, click the Publish as Pagelet link on the Manage Blog page).



Manage Blog - Publish as Pagelet page

Use the Manage Blog - Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this blog. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

Note. Pagelets for this blog published directly from Pagelet Wizard also appear in this list.

Edit Displays the Manage Blog - Publish Pagelet Wizard Definition page on which you can make changes to the pagelet definition.

Delete Deletes this pagelet definition and the published pagelet content references in all sites.

Add Pagelet Adds a new pagelet definition based on the current blog.

Publishing a Pagelet to Multiple Portals

Access the Publish to Multiple Portals page (click the Publish Pagelet in Other Sites link on the Manage Blog - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Publish Pagelets).

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.
- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Working With Navigation Pages," Publishing Pagelets.

Using Blog Notifications

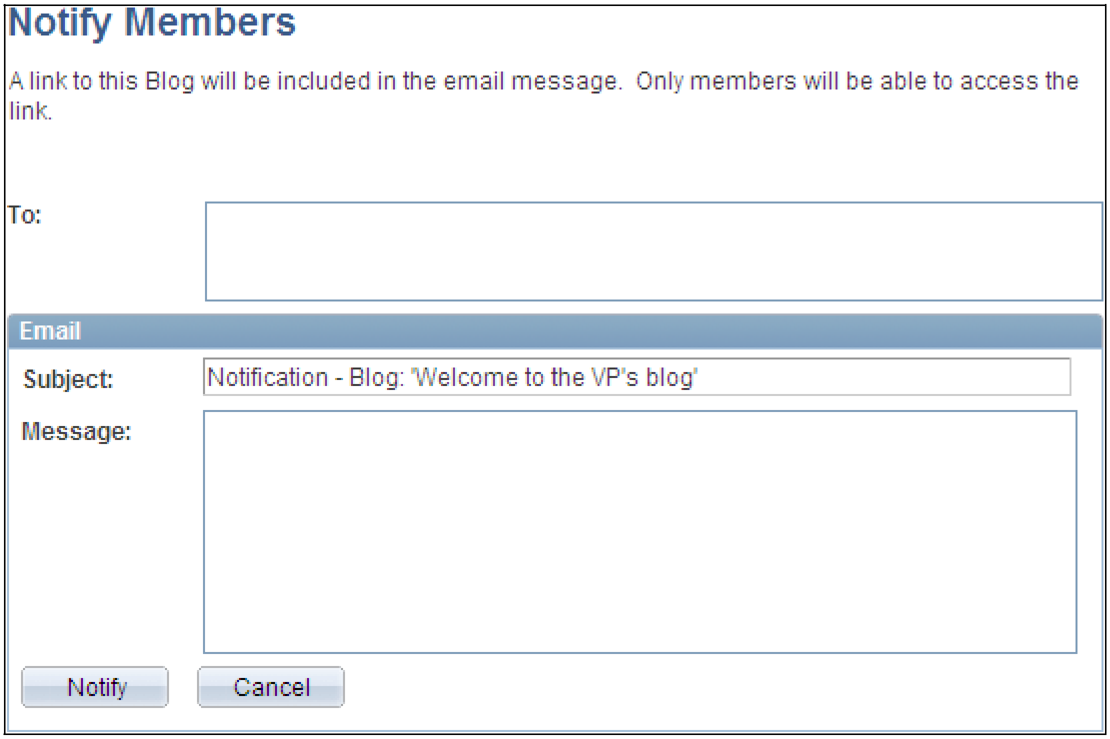
This section discusses how to send email notifications to blog participants.

Pages Used for Blog Notifications

Page Name	***Definition Name***	***Navigation***	***Usage***
Notify Members	EPPCW_MBNOTIFY	Click the Notify link on the post details page.	Compose and send an email message to the blog participants.

Sending Email Notifications to Blog Participants

Access the Notify Members page (click the Notify button on the post details page).



Notify Members page

Use the Notify Members page to compose and send an email message to blog participants. The To field is automatically populated with addresses for all members of the blog who have defined an email address in their system profile.

Note. The email will contain a link to the blog. Only members of the blog will be able to access the blog through the link.

To	Enter additional email addresses for blog participants separated by commas.
Subject	Enter a subject for the email.
Message	Enter the message text for your email.
Notify	Click to send the notification.

Performing Searches Within Blogs

This section provides an overview of searching within blog and describes how to search within blogs.

Understanding Searching Within Blogs

You can search for items within a blog in two ways:

- Using the Search link on pages within the blog.

  The Search Blogs page allows you to search within the current blog or across multiple blogs and sites.

- Using the Search field in the portal header.

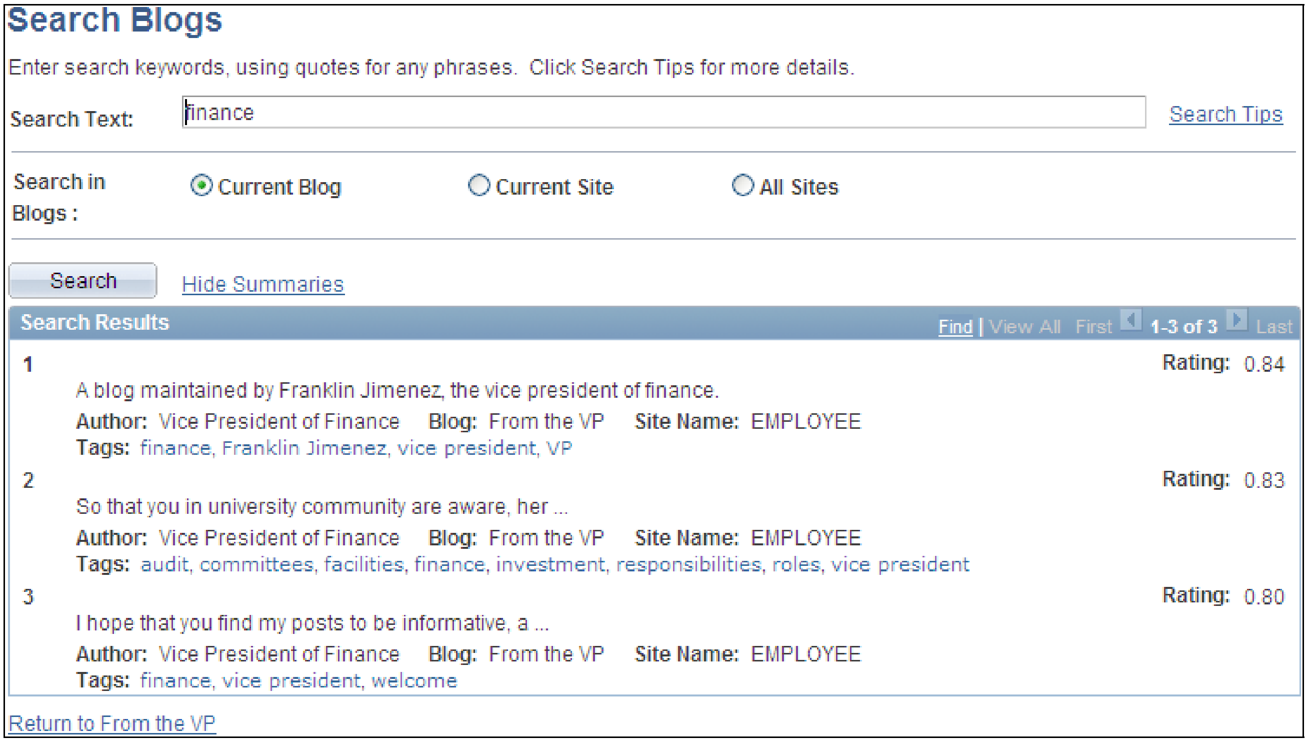
  The *Blogs* scope allows you to search across all blogs and sites.

Pages Used to Search Within Blogs

Page Name	***Definition Name***	***Navigation***	***Usage***
Search Blogs	EPPBL_SEARCH	• Click the Search link on the blog homepage. • Click the Search link on the post details page. • Click the Search Blogs link in the Blogs pagelet.	Perform a search within a blog or across selected blogs and sites.
Search	EO_PE_SRCH_RESULT	• In the portal header, select *Blogs* as the search scope, enter the search string in the Search field, and press ENTER. • In the portal header, select *Blogs* as the search scope, enter the search string in the Search field, and click the Search button. • On the Search page, select *Blogs* as the search scope, enter the search string in the Search For field, and click the Search button.	Perform a search across all blogs sites.
Search Tips	EO_PE_SRCH_TIPS	• Click the Search Tips link on the Search Blogs page. • Click the Search Tips link on the Search page.	Display search syntax and examples.

Searching Within Blogs

Access the Search Blogs page (click the Search link on the blog homepage).



Search Blogs page

Use the Search Blogs page to perform a search within a blog or across selected blogs and sites.

Search Text

Enter the search criteria.

Search Tips

Click to display search syntax and examples on the Search Tips page.

See Chapter 17, "Submitting Searches in the Portal," Search Considerations and Syntax, page 337.

Search In

Current Blog — Select to search within the current blog only.

Note. The Current Blog option is not displayed when the page is accessed from the Blogs pagelet.

Current Site — Select to search within all blogs of which you are a member in the current site.

All Sites — Select to search within all blogs of which you are a member across all sites.

Search

Click to perform the search.

Hide Summaries and **Show Summaries**

Click to hide or show the summaries in the search results.

Search Results

Click a link to view that item.

Return to <Blog Title>	If the search originated from a particular blog, click to return to that blog or post.

Working With the Blogs Pagelet

This section provides an overview of the Blogs pagelet and discusses how to:

- Personalize the Blogs pagelet.
- Use the Blogs pagelet.

Understanding the Blogs Pagelet

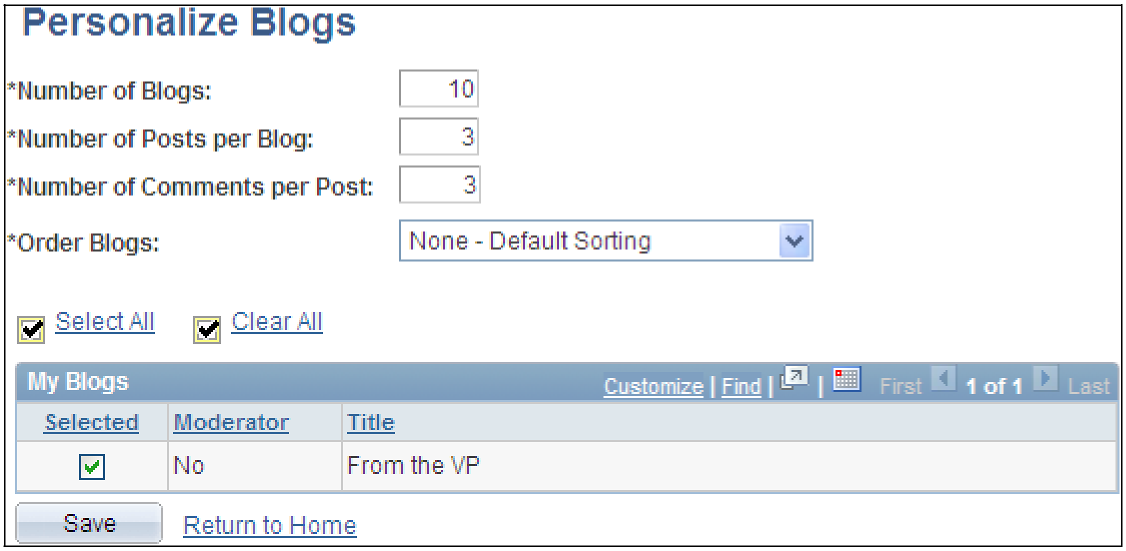
The Blogs pagelet lists blogs, posts, and replies. If you do not personalize the Blogs pagelet, the pagelet displays the first 10 blogs to which you have access, including those blogs created with the *Show in the Blogs Pagelet by Default for All Members* option selected, with three posts per blog and three replies per post. When it appears in the right (wide) column of a two-column layout, the pagelet also provides identification of the author of a post or reply, as well as the date of the post. In any other column, the pagelet does not provide this additional information.

Page Used to Personalize the Blogs Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize Blogs	EPPDF_USER_PREF	Click the Customize button in the Blogs pagelet.	Select the blogs and options for display in your Blogs pagelet.

Personalizing Your Blogs Pagelet

Access the Personalize Blogs page (click the Customize icon in the Blogs pagelet).



Personalize Blogs page

Use the Personalize Blogs page to select the blogs and options for display in your Blogs pagelet.

Number of Blogs Enter the maximum number of blogs you want to display in the pagelet. The default value is 10. The maximum number is 99.

Number of Posts per blog Enter the maximum number of posts that you want to display per blog in the pagelet. The default value is 3. The maximum number is 99.

Number of Comments per Post Enter the maximum number of comments you want to display per post in the pagelet. The default value is 3. The maximum number is 99,999.

Order Blogs Select one of the following:

- *Alphabetically - Ascending* — Select to sort by blog title in ascending order.
- *None - Default Sorting* — Select to have no sort order. This is the default.
- *Time Ascending* — Select to sort by date and time of creation in ascending order.
- *Time Descending* — Select to sort by date and time of creation in descending order.
- *User Defined* — Select to order explicitly by number. An Order of Appearance column appears in the My Blogs grid.

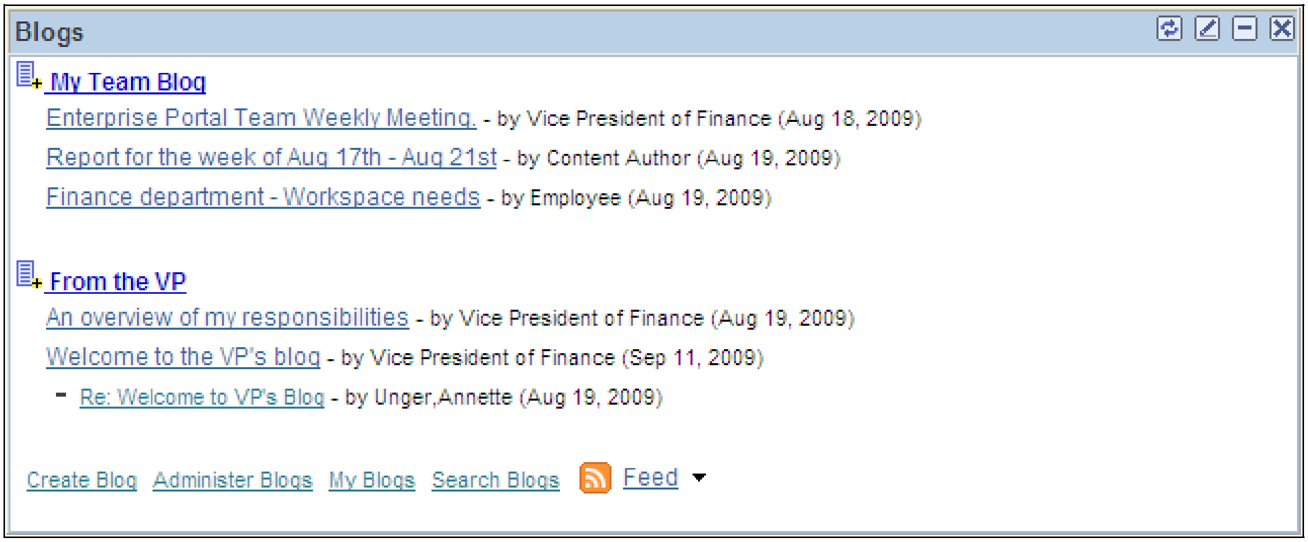
Select All Select to select all blogs.

Clear All Select to clear all selected blogs.

Selected Select the blogs you want to display on the pagelet.

Using the Blogs Pagelet

Access the Blogs pagelet on the portal homepage.



Blogs pagelet

Use the Blogs pagelet to access and manage blogs, posts, and comments.

	Click the Add New Post button to access the Create New Post page within the corresponding blog.
<Blog Title>	Click a blog link to access the blog's homepage on which you can view details about the blog. The hover text of the blog link displays the description of the blog.
<Post Title>	Click a post link to access the post details page on which you can view details about the post.
<Comment Title>	Click a comment link to access the post details page on which you can view details about the post and comment.
Create Blog	Click to access the Create Blog page from which you can create a new blog. This link displays for users with blog creation privileges.
Administer Blogs	Click to access to the Administer Blogs page for all blogs. This link displays for portal administrators only.
My Blogs	Click to access to the My Blogs page.
Search Blogs	Click to access the Search Blogs page on which you can perform a search of text in the blogs to which you belong.

Hover over any of these to view the list of feeds published for this blog. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

See Chapter 11, "Working With Feeds and Alerts," Viewing and Subscribing to Feeds, page 255.

Chapter 9

Working With Community Calendars

This chapter provides an overview of the community calendars feature and discusses how to:

- Create community calendars.
- Use community calendars.
- Create calendar events.
- Subscribe to calendar alerts.
- Work with the My Events pagelet.
- Administer community calendars.
- Publish a calendar as a pagelet.

Understanding Community Calendars

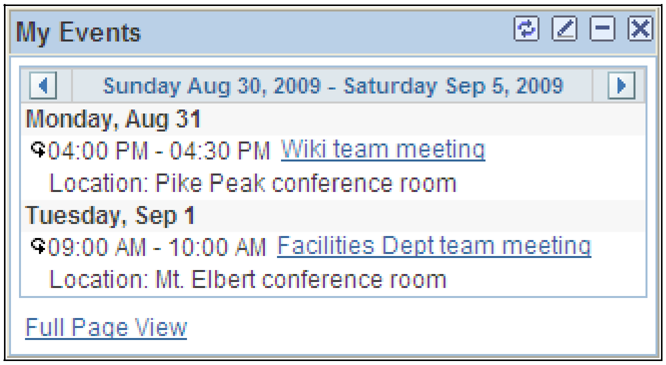
Community calendars provide a way for groups to share, organize, and communicate about events that pertain to their organization or group. Calendar membership can be assigned for users or roles and have different privileges including the ability to view, create, and edit the events for a calendar. Users can view calendars online in pagelets or in the full-page view accessible from the pagelet or the menu navigation.

Calendars can be accessed from portals, sites, and workspaces. Calendars exist in a *standalone* form in portals and sites. Standalone calendars are accessible in portals and sites through the My Community Calendars page under the My Content menu. In workspaces, a calendar is available in the Calendar module that is part of the workspace.

Understanding the My Events Pagelet

The My Events pagelet is a delivered homepage pagelet that shows all of the events a user has access to across portals, sites, and workspaces (if personalized to do so). Users can personalize the appearance of this pagelet to show a monthly, weekly, or daily view and to select one or more calendars from which to retrieve events.

The following example shows the My Events pagelet in a weekly view displaying events from two workspace calendars:



My Events pagelet (weekly view)

See Chapter 9, "Working With Community Calendars," Working With the My Events Pagelet, page 179.

Understanding the Calendar Module in Collaborative Workspaces

In a workspace, the Calendar module enables members to manage the workspace calendar to coordinate the activities of the workspace team. A workspace calendar provides a way to share, organize, and communicate about events that pertain to the workspace. Workspace members can also view workspace events in the Calendar pagelet and the Upcoming Events pagelet on the workspace homepage or in the full-page view in the Calendar module. Similar to the My Events pagelet, the Calendar pagelet can simultaneously display events from multiple calendars available from all portals, sites, and workspaces.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Using the Calendar Module.

Creating Community Calendars

This section discusses creating community calendars and how to:

- Access community calendars.
- Create a community calendar.
- Assign community calendar participants and privileges.

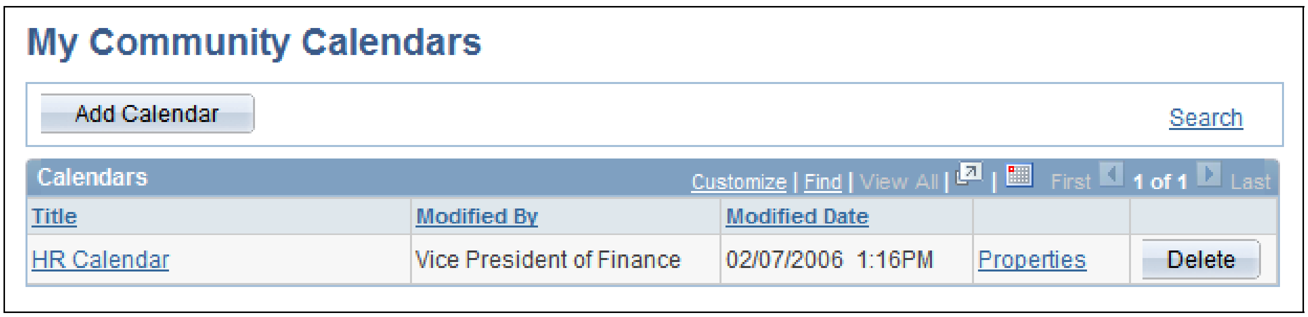
Pages Used to Create Community Calendars

Page Name	*Definition Name*	*Navigation*	*Usage*
My Community Calendars	EPPCA_BROWSE	My Content, My Community Calendars	View and manage community calendars.

Page Name	*Definition Name*	*Navigation*	*Usage*
Calendar Properties	EPPCA_CAL_DETAIL	• Click the Add Calendar button on the My Community Calendars page. • Click a Properties link on the My Community Calendars page.	Maintain the properties for the calendar.
Calendar Security	EPPCA_CAL_MEM	Select Calendar Security on the Calendar Properties page.	Manage calendar members and privileges.

Accessing Community Calendars

Access the My Community Calendars page (My Content, My Community Calendars).



My Community Calendars page

Use the My Community Calendars page to browse through the list of calendars in the current portal that you are a member of and have permission to view. If you have permission to create a calendar, the Add Calendar button appears on the page.

Add Calendar

Click to create a new calendar.

Note. The Add Calendar button only appears for those users who have permission to create a calendar.

Display Active Calendars or **Display Inactive Calendars**

If you have created calendars that have been set to a status of *inactive,* the system displays a drop-down list box on the page the enables you to display either active calendars or all inactive calendars that you have created.

Search

Click to access the Search Community Calendars page on which you can search for calendar events.

Title

Click the calendar title to access the calendar.

Properties

Click to view the Calendar Properties page on which you can modify calendar properties.

Note. The Properties link appears only for administrators of the calendar.

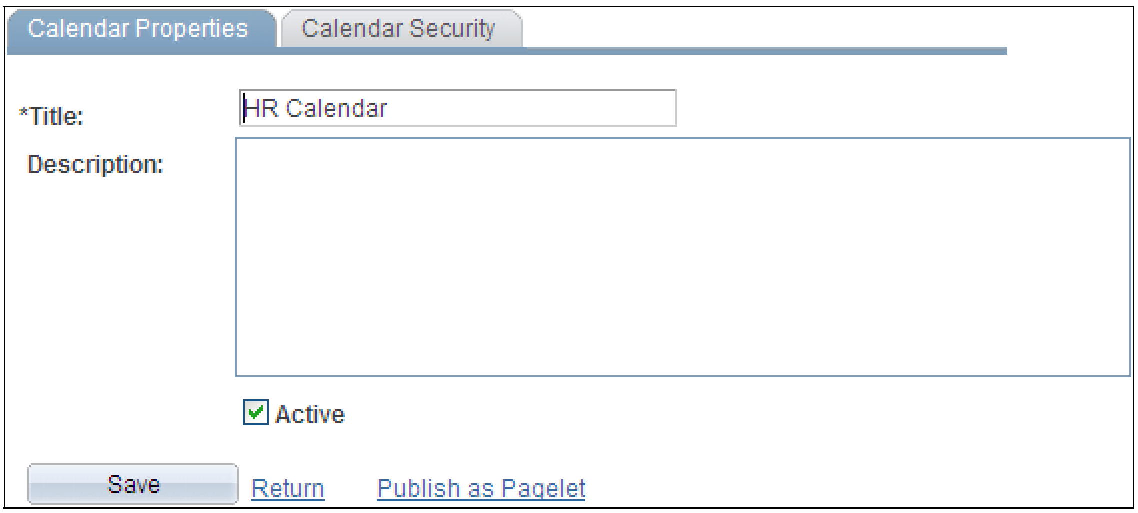
Delete

Click to delete the calendar.

Note. The Delete button appears only for administrators of the calendar.

Creating a Community Calendar

Access the Calendar Properties page (click the Add Calendar button on the My Community Calendars page).



Calendar Properties page

Enter a name for the calendar in the Title field as well as descriptive information about the calendar.

Title

Enter the name of the calendar. The text you enter in this field becomes the title of the calendar.

Description

Enter a description for the calendar.

Active

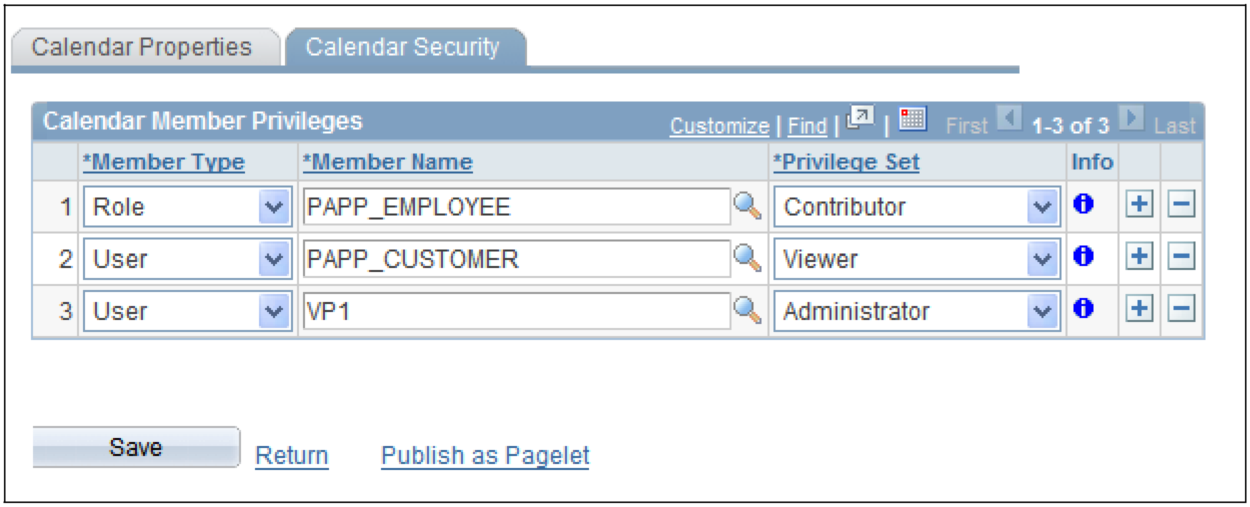
Select this option to make the calendar active and have the calendar appear in the portal or site. If this option is not selected, the calendar is not be available to users.

Publish as Pagelet

Displays the List Properties - Publish Pagelet Wizard Definition page on which you can publish the calendar pagelet to the homepage.

Assigning Community Calendar Participants and Privileges

Access the Calendar Security page (select Calendar Security on the Calendar Properties page).



Calendar Security page

Use the Calendar Security page to assign calendar members and privileges.

Member Type

Select the type of participant you want to add to the calendar:

- *Role* — Select to be able to select a role in the Member Name field. Available group names are derived from PeopleSoft roles defined in the Roles component.

  See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*, "Setting Up Roles"

- *User* — Select to be able to select a user in the Member Name field. Available users are derived from PeopleSoft users defined in the User Profiles component.

  See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*, "Administering User Profiles"

Member Name

Select the role or user ID.

Privilege Set ID

Select a privilege level you want to assign to the member:

Administrator. Administrators can add, edit, or delete calendar events. In addition, they can add and delete calendar members.

Contributor. Contributors can add or edit calendar events. They can delete their own calendar events, but not those belonging to others.

Viewer. Viewers have read-only access to the calendar and calendar events.

Click to view additional information about the actions that the privilege set enables the member to use.

Publish as Pagelet

Displays the List Properties - Publish Pagelet Wizard Definition page on which you can publish the calendar pagelet to the homepage.

Using Community Calendars

This section discusses common elements in working with community calendars and how to:

- Select calendar views.
- View an event.
- Search for an event.

Common Elements Used in This Section

Add Event

Click this button to add an event to the calendar. This button appears on all calendar views if you have contributor or administrator privileges for the calendar.

See Chapter 9, "Working With Community Calendars," Creating Calendar Events, page 171.

 **Alerts**

Click the Alerts link or this icon to access the Add Alert Subscription page on which you can subscribe to email alerts that keep you informed of updates to the selected calendar.

See Chapter 9, "Working With Community Calendars," Using Calendar Alerts and Notifications, page 175.

Search

Click to access the Search Community Calendars page on which you can search for events in calendars across all portals and sites.

Click the Previous button to scroll backward. For example, on the monthly view of the calendar homepage, click this button to display the previous month. In same view, in the left column, click the Previous button to display the list of months for the previous year.

Click the Next button to scroll forward. For example, on the weekly view of the calendar homepage, click this button to display the next week. In same view, in the left column, click the Next button to scroll the display of months forward by one month.

Indicates a recurring event.

Indicates an all-day event.

Go to My Calendars Click to access the My Community Calendars page that lists all available calendars within the current portal.

Pages Used with a Community Calendars

Page Name	***Definition Name***	***Navigation***	***Usage***
My Community Calendars	EPPCA_BROWSE	My Content, My Community Calendars	Use to select a calendar.
<Calendar> homepage (monthly view)	EPPCA_MONTHLY	• Click the link for the calendar title on the My Community Calendars page. • On the calendar homepage, select *Monthly View* from the drop-down list box.	View calendar events for the current month. **Note.** Monthly is the default view for calendars.
<Calendar> homepage (daily view)	EPPCA_DAILY	• On the calendar homepage, click the link for any date. • On the calendar homepage, select *Daily View* from the drop-down list box.	View calendar events for a specific day.
<Calendar> homepage (weekly view)	EPPCA_WEEKLY	On the calendar homepage, select *Weekly View* from the drop-down list box.	View calendar events for a specific week. **Note.** The start date for a week is specified on the Regional Settings page.
<Calendar> homepage (yearly view)	EPPCA_YEARLY	On the calendar homepage, select *Yearly View* from the drop-down list box.	View calendar events for an entire year.
Community Calendar	EPPCA_MONTHLY EPPCA_DAILY EPPCA_WEEKLY EPPCA_YEARLY	Click the Full Page View link in the My Events pagelet.	View events from all of your calendars or for a specific calendar. **Note.** The default view for this page is the same as the view specified for the My Events pagelet. The default scope is all calendars, regardless of which calendars were selected for the My Events pagelet.

Page Name	*Definition Name*	*Navigation*	*Usage*
<Calendar> - <Event Title>	EPPCA_EVENT_VIEW	• Click the link for an event on the calendar homepage. • Click the link for an event in the My Events pagelet. • Click the Preview link on the Event Details page.	View the information for an event. **Note.** This page is referred to as the event view page.
Search Community Calendars	EPPCA_SEARCH	• Click the Search link on the My Community Calendars page. • Click the Search link on the calendar homepage.	Search for events in calendars across all portals and sites.

Selecting Calendar Views

This section discusses how to:

- Personalize regional settings for calendars.
- View your community calendars.
- View a monthly calendar.
- View a daily calendar.
- View a weekly calendar.
- View a yearly calendar.
- View events from all calendars.

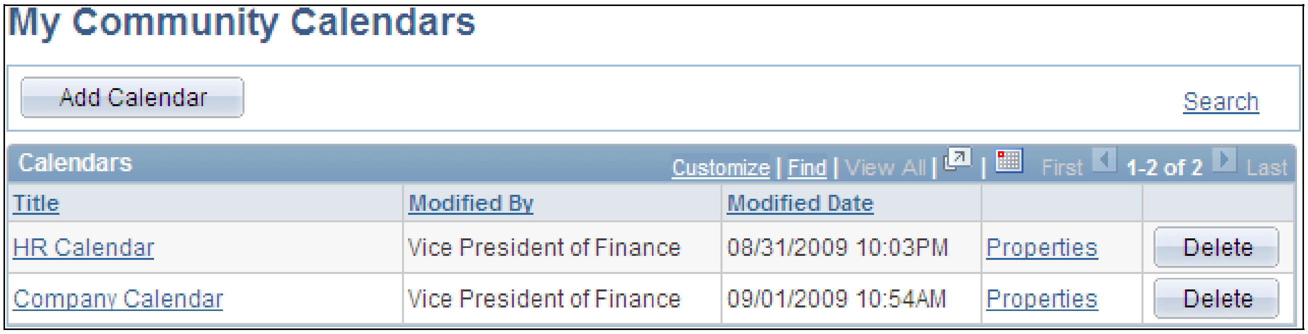
Personalizing Regional Settings for Calendars

Regional settings such as date and time formats for calendars are set on the Regional Settings page. On the portal homepage, select My Personalizations, Regional Settings to personalize your date, time, and number formats. Select settings for afternoon and morning designators (AM/PM or am/pm), date format (MMDDYY, DDMMYY, or YYMMDD), a local time zone, and so on.

See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications,* "Setting User Preferences," Defining Your User Personalizations.

Viewing Your Community Calendars

Access the My Community Calendars page (My Content, My Community Calendars).



My Community Calendars page

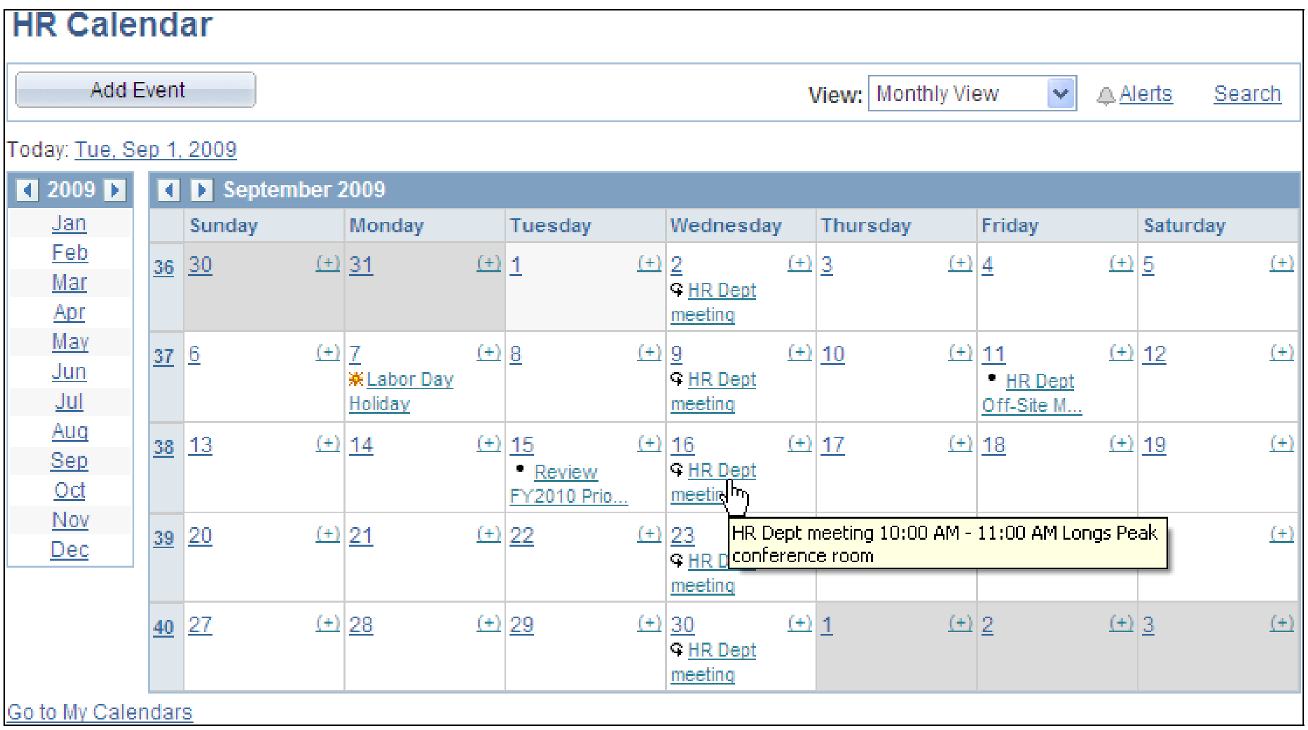
Use the My Community Calendars page to browse through the list of calendars in the current portal that you are a member of and have permission to view. On this page, you can access specific calendars, In addition, from this page, you can add a new calendar or manage calendar properties and membership if you have permission to do so.

See Chapter 9, "Working With Community Calendars," Accessing Community Calendars, page 155.

Viewing a Monthly Calendar

Access the monthly view of the calendar homepage (click the link for a calendar on the My Community Calendars page).

Note. The monthly view is the default view for a calendar.



Calendar homepage (monthly view)

Use the monthly view of the calendar homepage to view dates and events for an entire month.

Event titles appear on the days that have an event scheduled. Hover over an event title to display a tool tip with the event details. Click the event title to access the event view page showing additional event information.

To add an event to this calendar, you can either click the Add Event button or click the (+) link on a specific date in the calendar.

Note. You must have contributor or administrator privileges to add an event to the calendar.

To display a different view of this calendar:

- To display a different month, click the month link in the left column. Alternatively, click the Next or Previous arrows in the title bar of the monthly calendar view.
- To display a daily view for a specific date, click the link for that date in the calendar. For a daily view of today's date, click the Today field link to the left above the title bar for the calendar.

  Alternatively, to display a daily view, select *Daily View* above the title bar for the calendar.

  Note. The date defaults to the first of the month, or the last date viewed in that month.

- To display a weekly view for a specific week, click the week number at the left side of the calendar.

  Alternatively, to display a weekly view, select *Weekly View* above the title bar for the calendar.

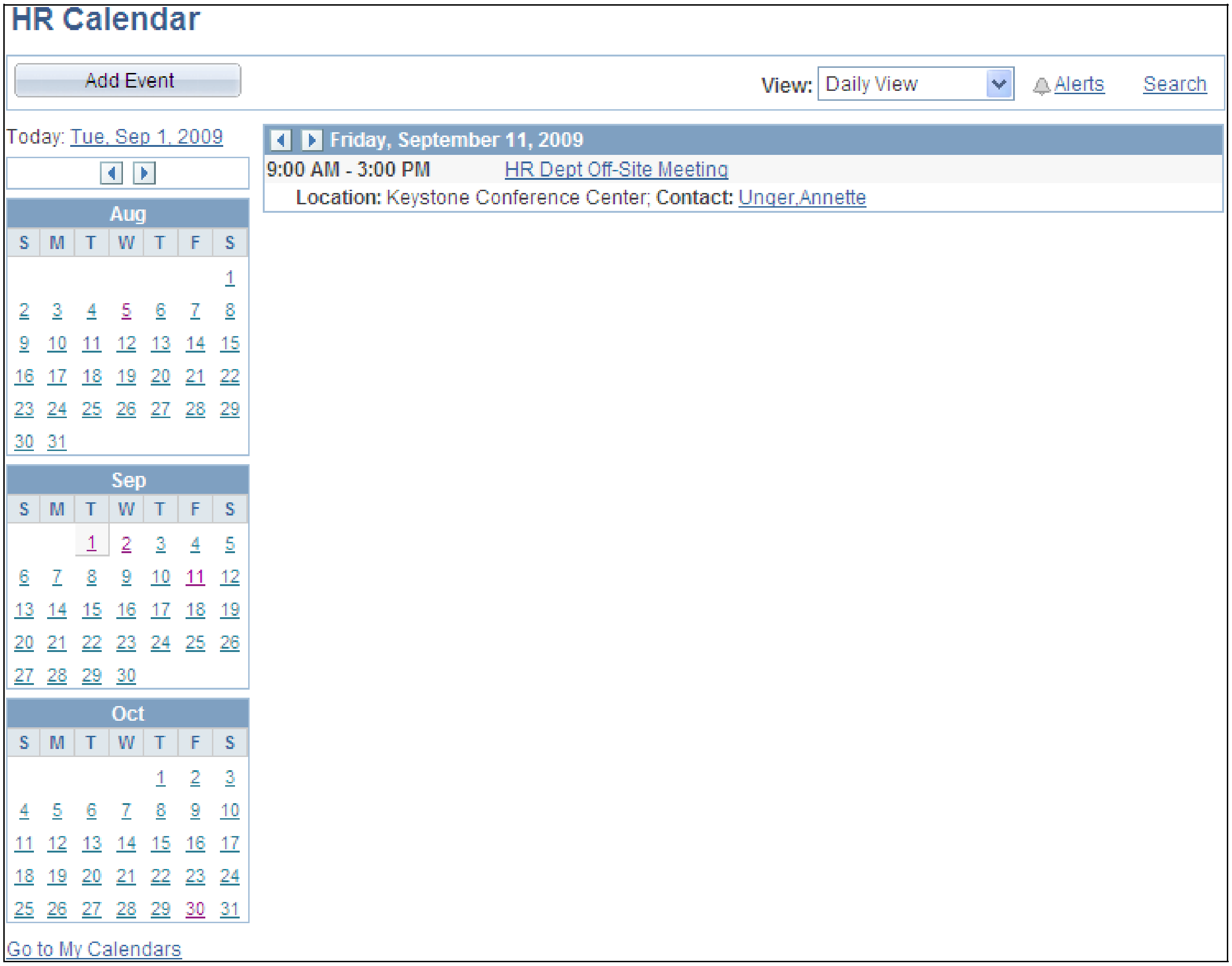
  Note. The week defaults to the first week of the month, or the week containing the last date viewed in that month.

- To display a yearly view, select *Yearly View* above the title bar for the calendar.

  Note. The year defaults to the year of the currently displayed month.

Viewing a Daily Calendar

Access the daily view of the calendar homepage (click the link for any date on the calendar homepage).



Calendar homepage (daily view)

Use the daily view of the calendar homepage to view all events for the specified date.

Click an event title to access the event view page showing additional event information. Click the link for an event contact to view the profile for that person in a separate window.

To add an event to this calendar, click the Add Event button.

Note. You must have contributor or administrator privileges to add an event to the calendar.

To display a different view of this calendar:

- To display a daily view for a different date, click the link for that date in one of the months in the left column. Alternatively, click the Next or Previous arrows in the title bar of the daily calendar view. For a daily view of today's date, click the Today field link to the left above the title bar for the calendar.
- To display a monthly view of the calendar, select *Monthly View* above the title bar for the calendar.

Note. The month defaults to the month of the currently displayed date.

- To display a weekly view of the calendar, select *Weekly View* above the title bar for the calendar.

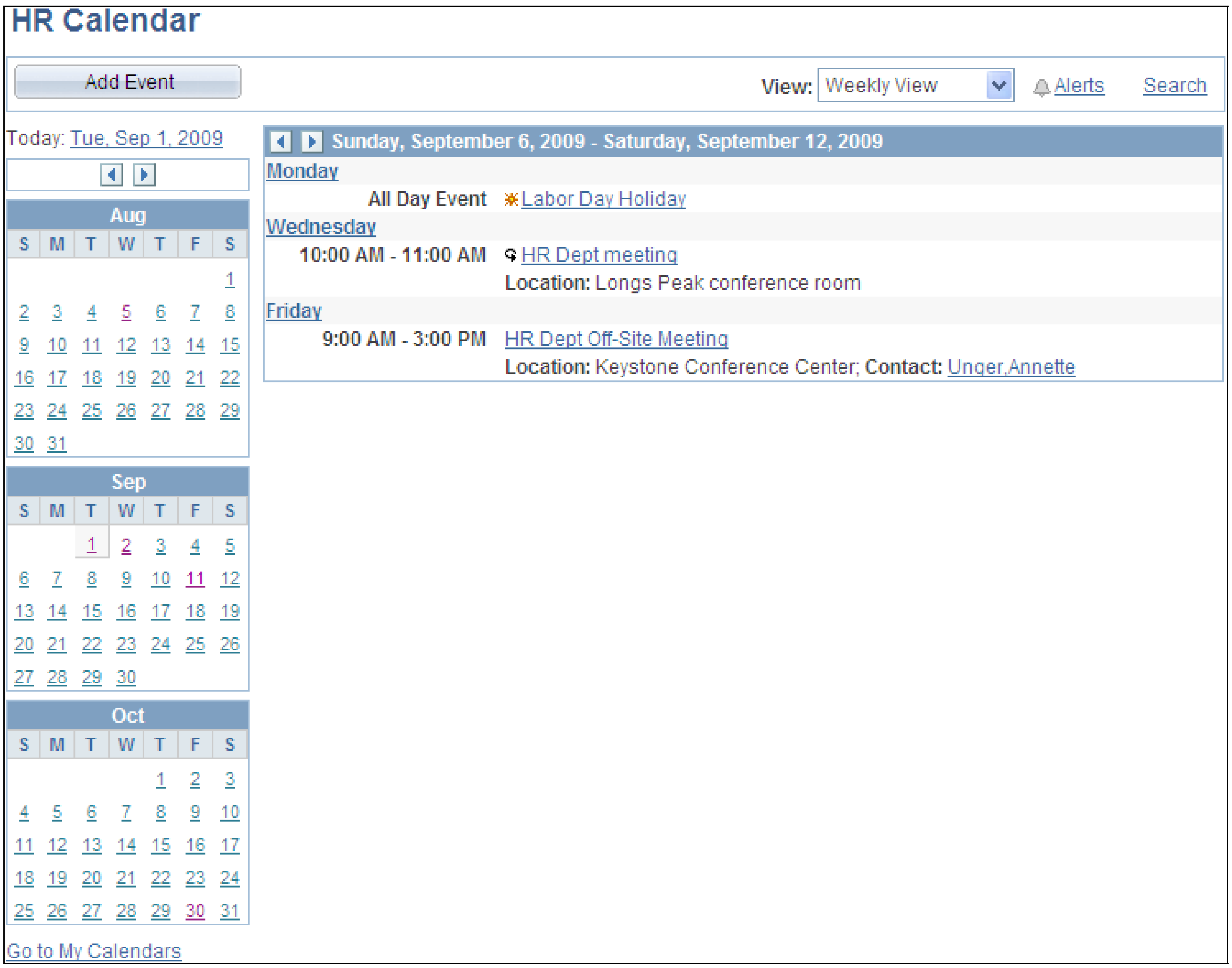
Note. The week defaults to the week of the currently displayed date.

- To display a yearly view of the calendar, select *Yearly View* above the title bar for the calendar.

Note. The year defaults to the year of the currently displayed date.

Viewing a Weekly Calendar

Access the weekly view of the calendar homepage (select *Weekly View* in the drop-down list box above the calendar title bar).



Calendar homepage (weekly view)

Use the weekly view of the calendar homepage to view all events for the specified week.

Click an event title to access the event view page showing additional event information. Click the link for an event contact to view the profile for that person in a separate window.

To add an event to this calendar, click the Add Event button.

Note. You must have contributor or administrator privileges to add an event to the calendar.

To display a different view of this calendar:

- To display a weekly view for a different week, click the Next or Previous arrows in the title bar of the weekly calendar view.
- To display a daily view of the calendar, click the link for that date in one of the months in the left column. For a daily view of today's date, click the Today field link to the left above the title bar for the calendar.

  Alternatively, to display a daily view, select *Daily View* above the title bar for the calendar.

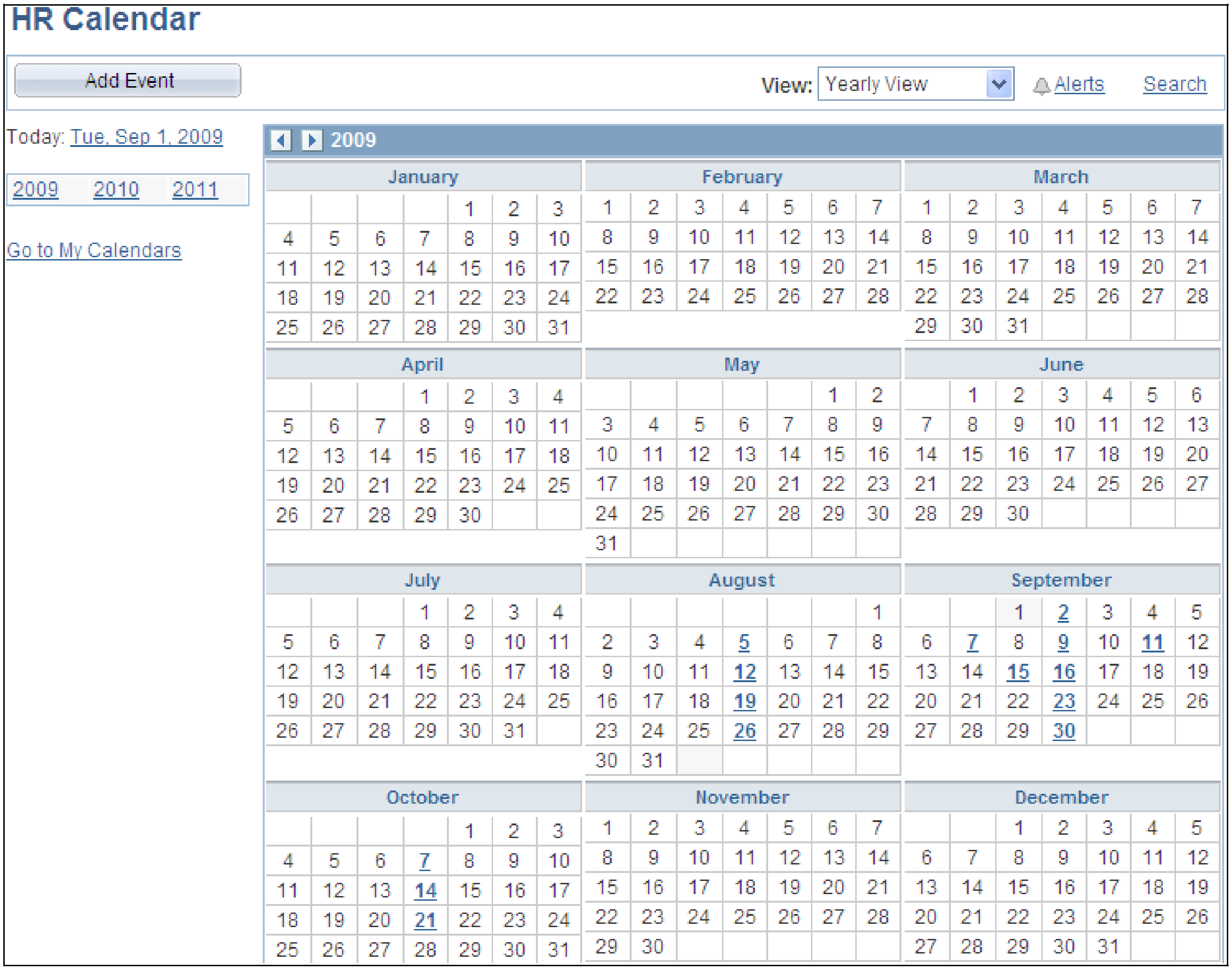
  Note. The date defaults to the first of the week, or the last date viewed in that week.
- To display a monthly view of the calendar, select *Monthly View* above the title bar for the calendar.

  Note. The month defaults to the month of the currently displayed week.
- To display a yearly view of the calendar, select *Yearly View* above the title bar for the calendar.

  Note. The year defaults to the year of the currently displayed week.

Viewing a Yearly Calendar

Access the yearly view of the calendar homepage (select *Yearly View* in the drop-down list box above the calendar title bar).



Calendar homepage (yearly view)

Use the yearly view of the calendar homepage to view all events for the specified year.

Note. Bold and underlined dates indicate that there is an event associated with that date. Click the date to display the daily view of the calendar for that date.

To add an event to this calendar, click the Add Event button.

Note. You must have contributor or administrator privileges to add an event to the calendar.

To display a different view of this calendar:

- To display a yearly view for a different year, click the Next or Previous arrows in the title bar of the yearly calendar view. Alternatively, click the link for that year in the left column.

- To display a daily view of the calendar for a specific date that contains an event, click a bold and underlined date.

  Alternatively, to display a daily view, select *Daily View* above the title bar for the calendar.

  Note. The date defaults to the last date viewed in the currently displayed year, or today's date in the currently displayed year.

- To display a weekly view of the calendar, select *Weekly View* above the title bar for the calendar.

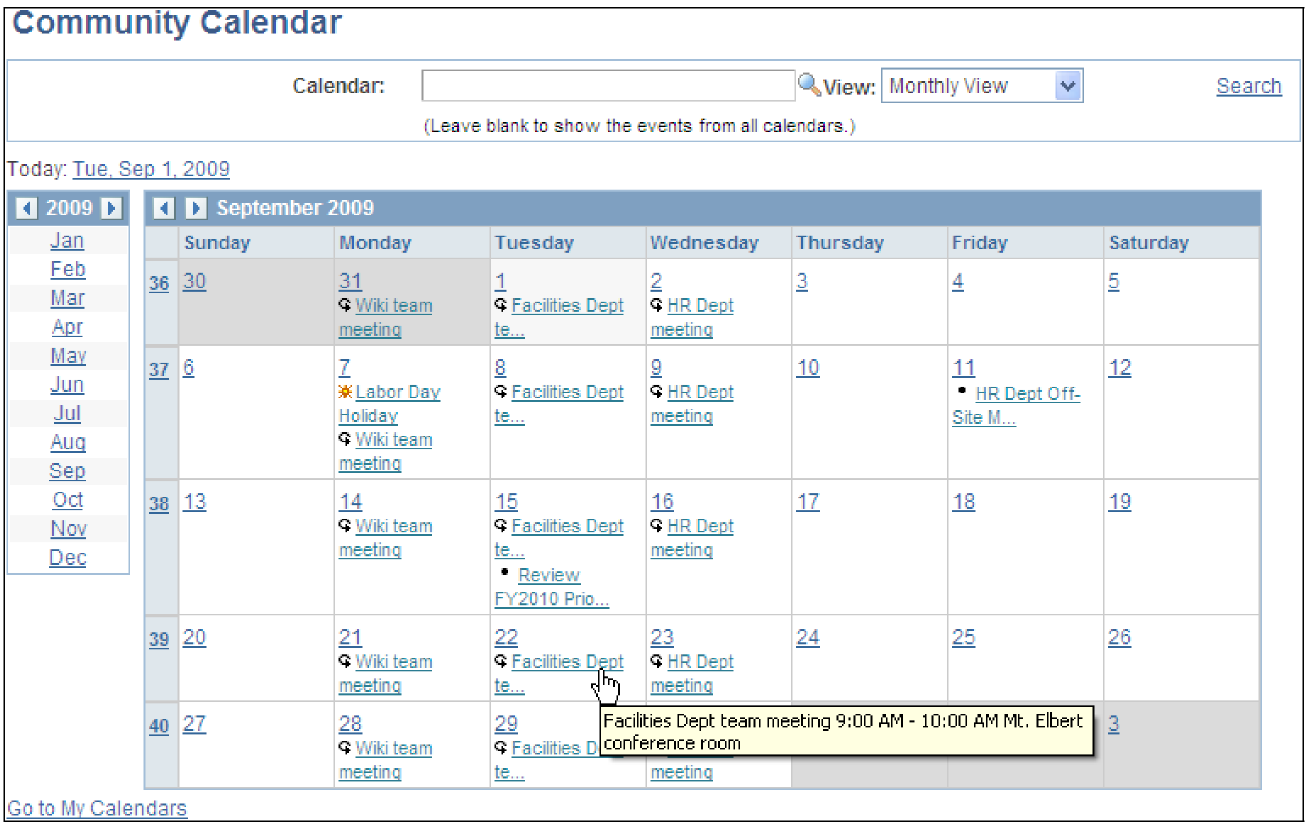
  Note. The week defaults to the week of the last date viewed in the currently displayed year, or the week of today's date in the currently displayed year.

- To display a monthly view of the calendar, select *Monthly View* above the title bar for the calendar.

  Note. The month defaults to the month of the last date viewed in the currently displayed year, or the month of today's date in the currently displayed year.

Viewing Events from All Calendars

Access the Community Calendar page (click the Full Page View link in the My Events pagelet.



Community Calendar page (displaying events from all calendars)

Use the Community Calendar page to display a combined view of all events from all calendars of which you are a member (which is also known as a *unified calendar*). You can also view events for a specific calendar on this page.

Note. The default view for this page is the same as the view specified for the My Events pagelet. The default period is the period that was being viewed in the pagelet when you clicked the Full Page View link. The default scope is *all calendars*, regardless of which calendars were selected for the My Events pagelet.

Leave the Calendar field blank to view events from all calendars. Otherwise, look up or enter the name of a specific calendar to view events for that calendar only.

Similar to a calendar homepage, you can change the period viewed by selecting from the View drop-down list box; by selecting a specific date, week, month, or year; or by navigating with the Next and Previous arrows in the calendar title bar.

See Chapter 9, "Working With Community Calendars," Viewing a Monthly Calendar, page 161.

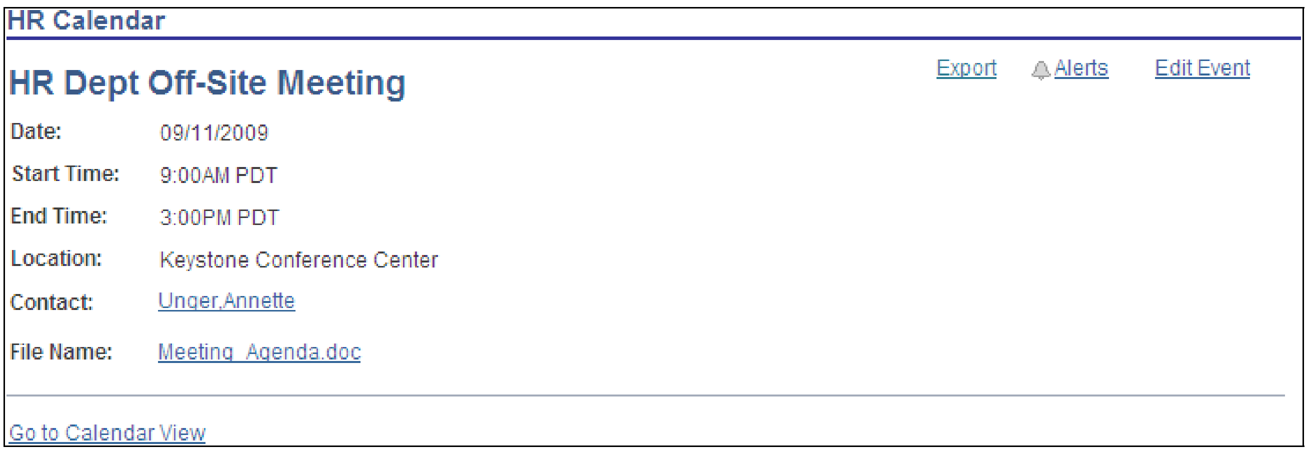
See Chapter 9, "Working With Community Calendars," Viewing a Daily Calendar, page 162.

See Chapter 9, "Working With Community Calendars," Viewing a Weekly Calendar, page 164.

See Chapter 9, "Working With Community Calendars," Viewing a Yearly Calendar, page 165.

Viewing an Event

Access the event view page (click the link for an event on the calendar homepage, or click the link for an event in the My Events pagelet).



Event view page

Export

Click to export event information to add the event to your personal calendar application.

Alerts

Click to subscribe to or update email alerts for the event.

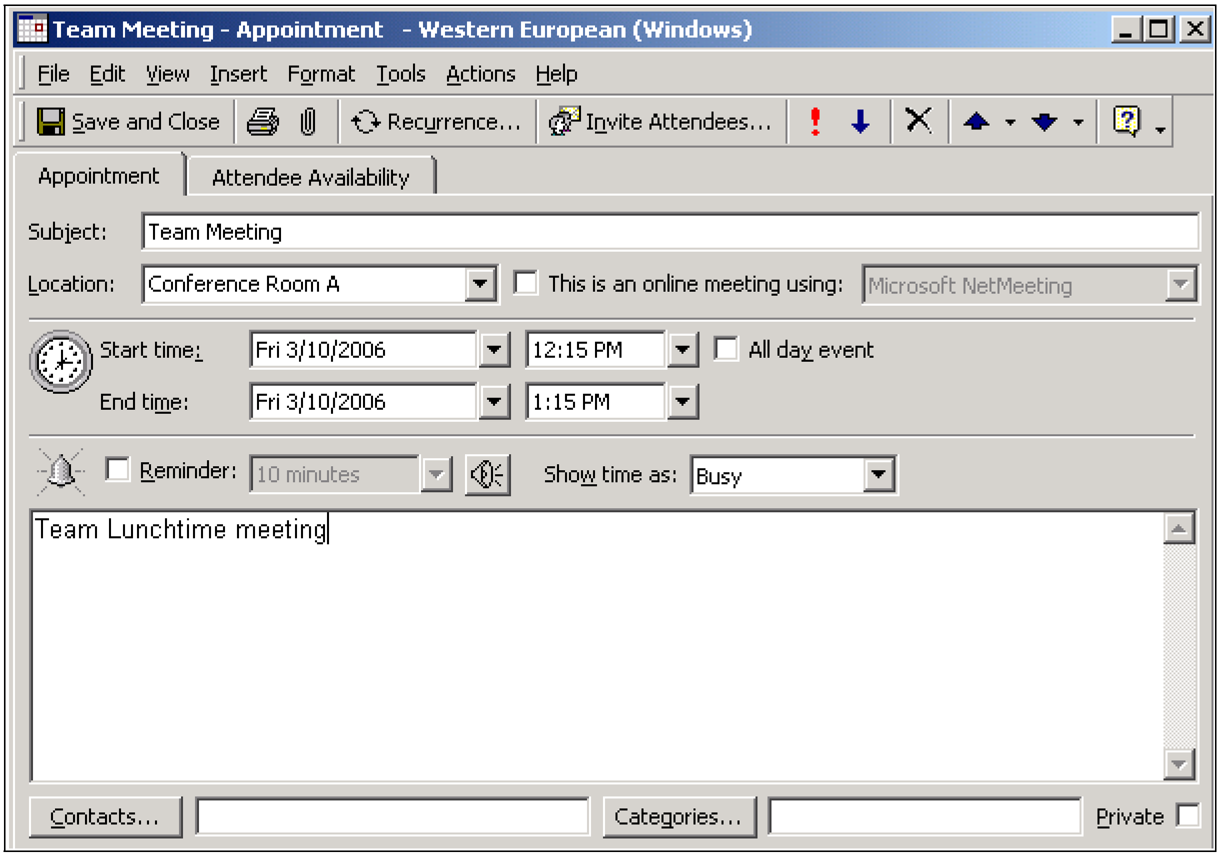
See Chapter 9, "Working With Community Calendars," Using Calendar Alerts and Notifications, page 175.

Edit Event	Click to access the Event Details page on which update the event information. **Note.** This link is displayed only if you are a contributor to the calendar and you created this event, or if you are an administrator of the calendar.

Exporting an Event to a Personal Calendar

Depending on the options defined in the Installation Options page, the system can either create a calendar event that you can save to your personal default calendar application or it can send you an email with an attachment that enables you to add the event to your calendar. The remarks appear in the body of the calendar event and the title field is the subject of the calendar event.

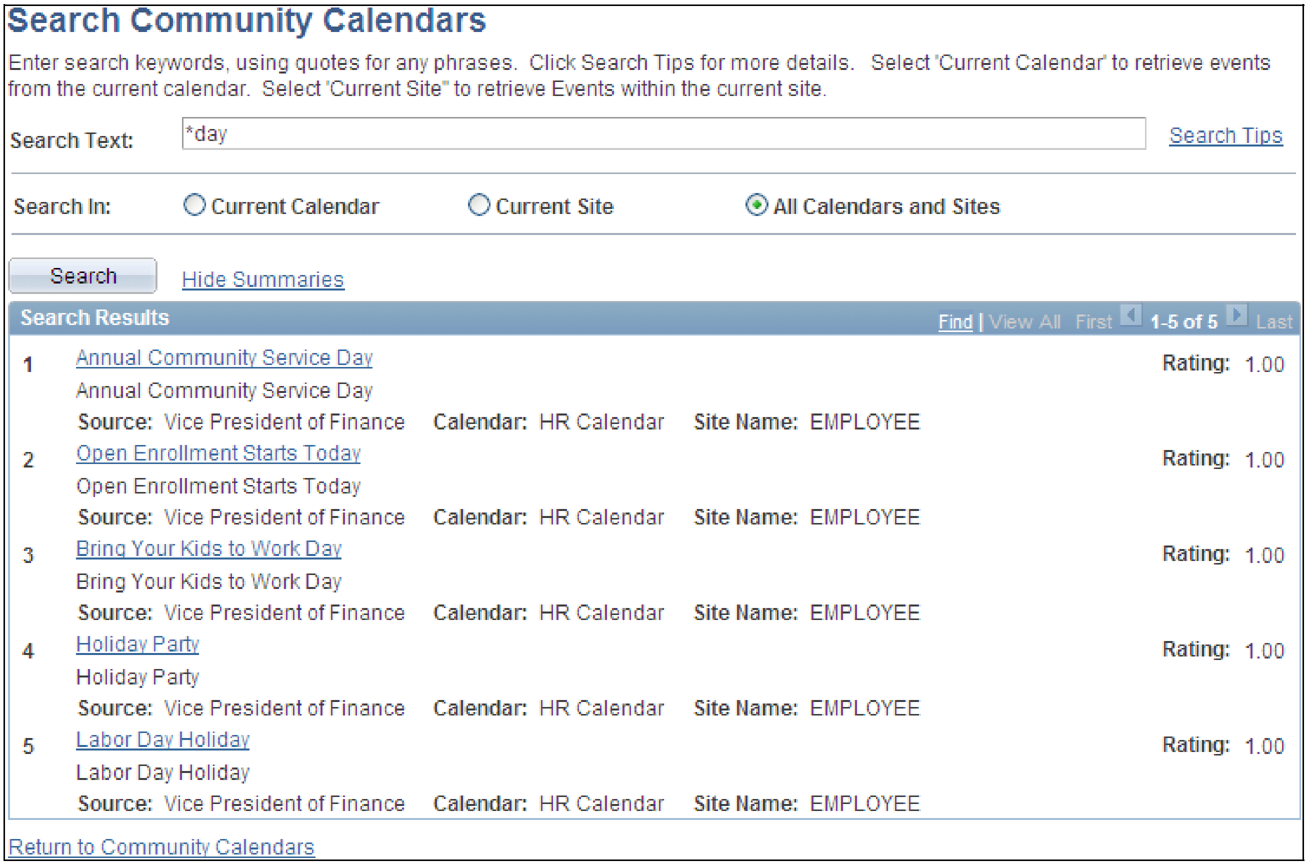
To export an event to your personal calendar, click the Export link on the event view page.



Personal calendar entry generated from a PeopleSoft Enterprise Portal calendar event

Searching for an Event

Access the Search Community Calendars page (click the Search link on a calendar homepage, the My Community Calendars page, or the Community Calendars page).



Search Community Calendars page

Use the Search Community Calendars page search your calendars for events to which you have access.

Search Text Enter the search criteria.

Search Tips Click to display search syntax and examples on the Search Tips page.

See Chapter 17, "Submitting Searches in the Portal," Search Considerations and Syntax, page 337.

Search In *Current Calendar* — Select to search within the current calendar only.

Current Site — Select to search within all calendars of which you are a member in the current site.

All Calendars and Sites — Select to search within all calendars of which you are a member across all sites.

Search Click to perform the search.

Hide Summaries and **Show Summaries** Click to hide or show the summaries in the search results.

Search Results Click a link to view that item.

Return to Community Calendars Click to return to the originating page: calendar homepage, My Community Calendars page, or Community Calendars page.

Creating Calendar Events

This section discusses how to:

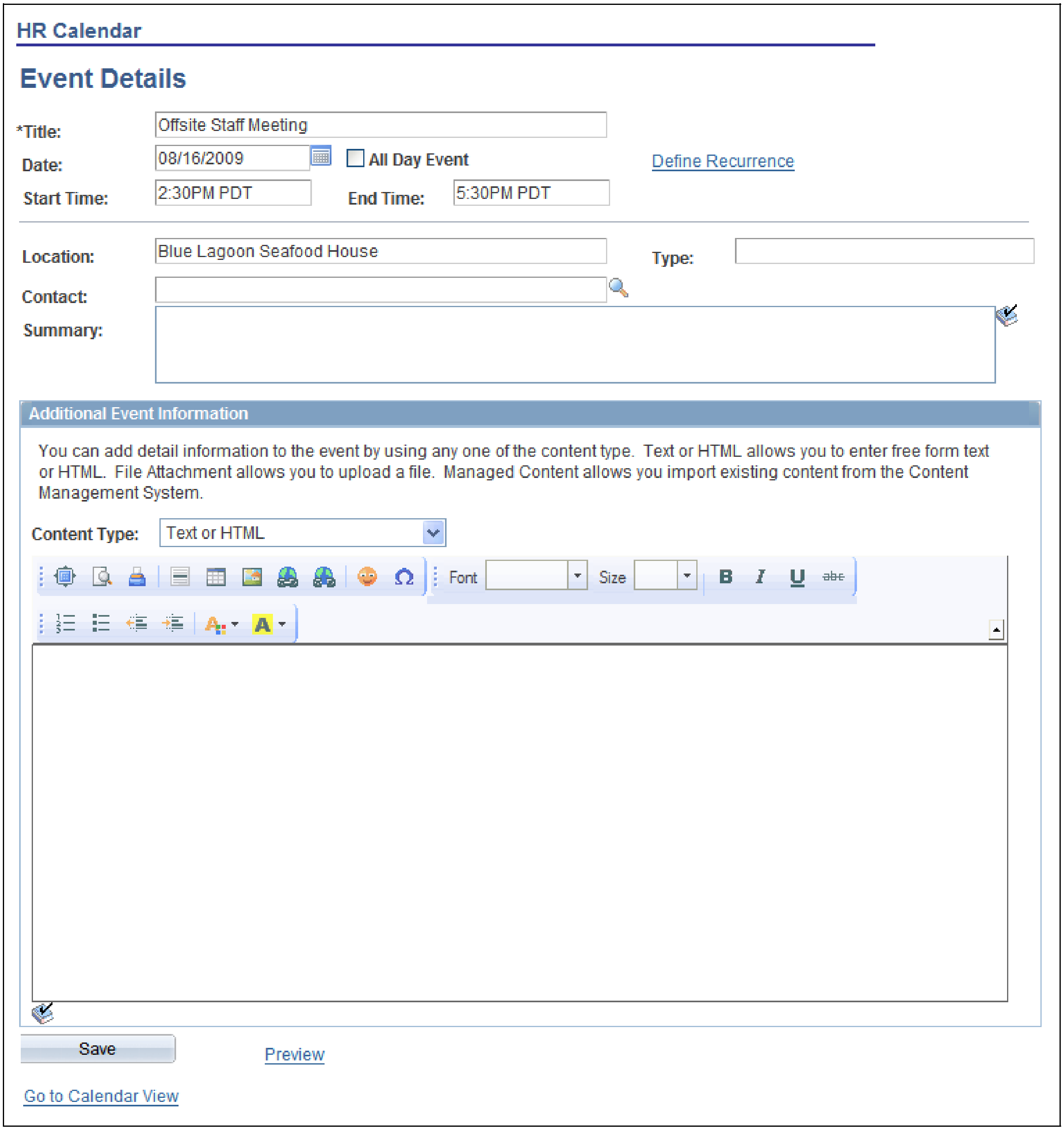
- Define calendar events.
- Define recurring events.

Pages Used to Create Calendar Events

Page Name	***Definition Name***	***Navigation***	***Usage***
Event Details	EPPCA_EVENT_EDIT	• Click the Add Event button on a calendar homepage. • Click the (+) link in the monthly view of a calendar homepage. • Click the Add Event link in the monthly view of the My Events pagelet. • Click the Edit Event link on the event view page.	Add an event to a calendar or modify the details for an existing event.
Define Recurrences	EPPCA_RECUR_SEC	Click Define Recurrence or View Recurrence link on the Event Details page.	Set the recurrence for an event.

Defining a Calendar Event

Access the Event Details page (click the Add Event button on a calendar homepage).



Event Details page

Use the Event Details page to define the details for a calendar event.

Title Enter the title for the event. This text appears on the calendar to identify the event.

Date Enter the date of the event.

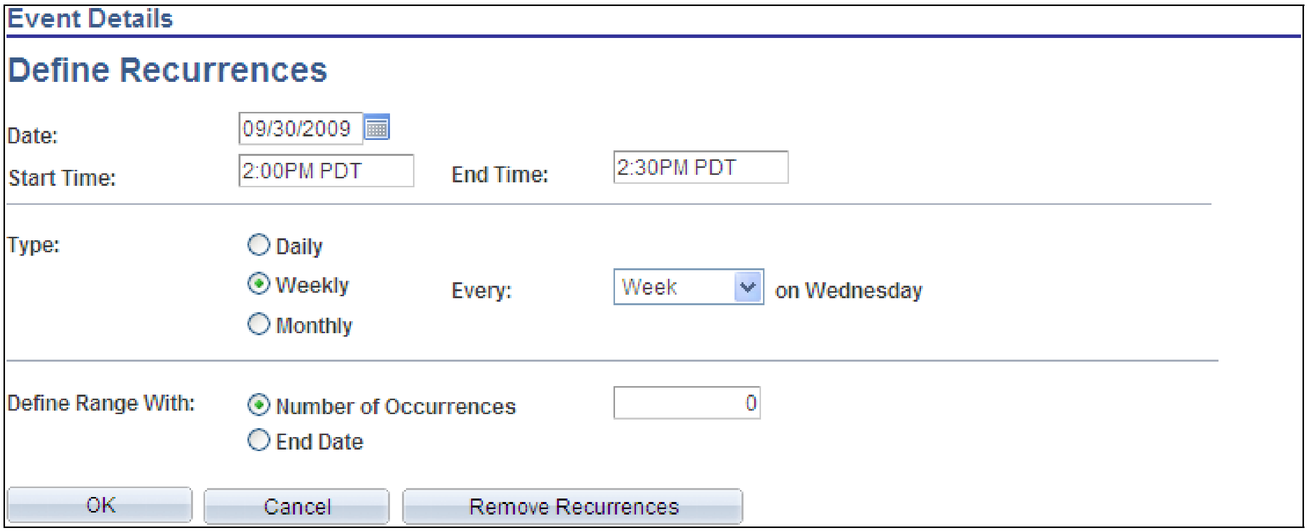
All Day Event Select this option to create an event that is identified as lasting the entire day.

Define Recurrence or **View Recurrence**	Select this link to access the Define Recurrences page that enables you to create repeating events.
Start Time and **End Time**	Set the start and end times for the event. **Note.** The start time defaults to the current time; the end time defaults to one hour after the start time.
Location	Enter information about where the event will take place. This information is displayed in the weekly and daily views of the calendar and appears as tool tip text in the monthly view.
Type	Enter free-form text describing what type of event you are creating.
Contact	Select a user name for the contact person. After you select the contact name, their profile name appears next to the fields. You can click the profile name to view the profile page.
Summary	Enter a summary of the event.
Content Type	You can add attachments or additional information to the event using the following options: • *File Attachment* **—** Allows you to attach a file to the event. Selecting this option enables the Upload File button. • *Managed Content* **—** Allows you to import a piece of managed content from any portal providing it has been approved for publishing and its parent folder allows for publishing. Selecting this option enables the Select Content button. **Note.** Attaching a piece of content to an event is considered to be a form of publishing the content. • *Text or HTML* enables you to use the text editor to enter plain text or HTML that appears on the Event Details page. Selecting this option enables the rich text editor. • *Web Site URL* enables you to add a URL that appears on the Event Details page. Selecting this option enables URL field. This additional content is accessible on the event view page.
Notify	Click to send a notification. **Note.** The Notify link is enabled after you save the event.

Preview Click to display a preview of the event before it is published to the calendar.

Defining Recurring Events

Access the Define Recurrences page (click the Define Recurrence link or the View Recurrence link on the Event Details page).



Define Recurrences page

Use the Define Recurrence page to define a series of repeating events over time.

Date Select the date of the first occurrence of the event.

Start Time and **End Time** Set the start and end times for the event.

Type Enter the type of recurrence:

- Select *Daily* to set daily recurrence for every: *Day,2 Days,3 Days,* or *4 Days.*
- Select *Weekly* to set weekly recurrence. The date for the first occurrence determines the day of the week for the recurrence, which is displayed by the system. Recurrence can be set to every: *Week,2 Weeks,3 Weeks,* or *4 Weeks.*
- Select *Monthly* to set monthly recurrence. Recurrence can be set to the *1st, 2nd,3rd, 4th,* or *5th* occurrence of a day of the week.

Define Range With Select a method to define when the event stops repeating:

- Select *Number of Occurrences* to specify a number of times the event repeats.
- Select *End Date* to specify a date for the event to stop repeating.

Remove Recurrences Click to remove the entire series of recurring events from the calendar.

Editing a Recurring Event

If you select to edit a recurring event, you are prompted to select either just one occurrence of the recurring event or all events in the series. If you select to edit just one occurrence in the series, the changes you make apply to this date only. You are able to view the Define Recurrence page, but not make any changes to the recurrences. Information attached to the event from the Additional Event Information group box can only be edited when updating the entire series of recurring events since the item is shared across the series of events.

If you choose to edit all events in the series, then all information related to the event is available for editing. The changes you make apply to the entire series of recurring events. To delete the recurring events, click View Recurrences and click Remove Recurrences on the Define Recurrences page.

Using Calendar Alerts and Notifications

This section provides an overview of calendar alerts and notifications and discusses how to:

- Subscribe to calendar alerts.
- Update calendar alerts.
- Send event notifications.

Understanding Calendar Alerts and Notifications

You can create personal alert subscriptions at the calendar level and at the event level. In addition, any calendar member can send notifications to selected calendar members from any calendar event.

Prior to creating any alerts, calendar alerts must be enabled on the Alerts Setup page. In addition, for alerts to be delivered to subscribers, alert notifications need to be scheduled by the portal administrator.

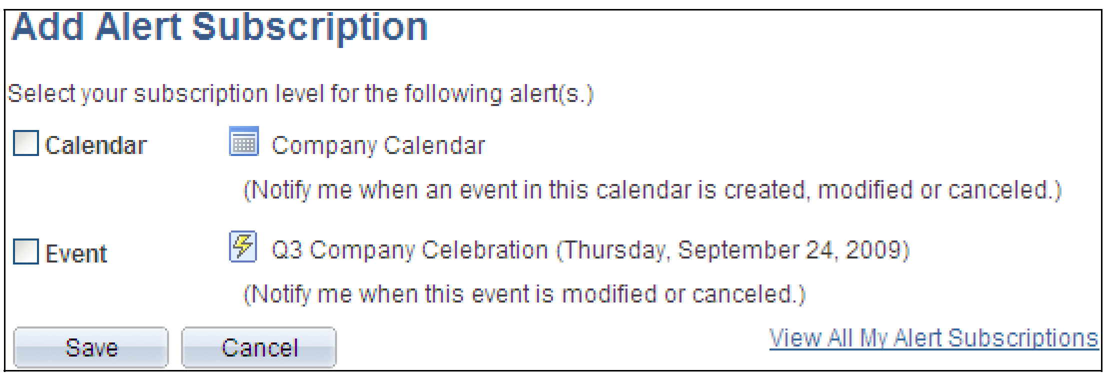
Pages Used with Calendar Alerts and Notifications

Page Name	***Definition Name***	***Navigation***	***Usage***
Add Alert Subscription	EPPAN_ALERTS	• Click the Alerts link on the calendar homepage. • Click the Alerts link on the event view page. • Click the Alerts link on the Community Calendar page when viewing a specific calendar.	Subscribe to an email alert for a calendar or an event.

Page Name	***Definition Name***	***Navigation***	***Usage***
Update Alerts Subscription	EPPAN_ALERTS	• Click the Alerts link on the calendar homepage. • Click the Alerts link on the event view page. • Click the Alerts link on the Community Calendar page when viewing a specific calendar.	Update an email alert for a calendar or an event.
Event Notification	EPPCA_EVENT_NOTIFY	Click the Notify link on the Event Details page.	Send email notifications to users associated with the calendar or the event.

Subscribing to Calendar Alerts

Access the Add Alert Subscription page (when an alert has not yet been defined for this calendar, click the Alerts link from a calendar homepage or from an event view page).



Add Alert Subscription page (event level view)

Use the Add Alert Subscription page to create subscriptions for email alerts for the calendar.

Calendar

Select this option to subscribe to an email alert at the calendar level.

When selected, you will receive an email update when the date, time, or location fields in any existing event in the calendar are modified or when an event is created or canceled.

Event

Select this option to subscribe to an email alert at the discussion topic level.

When selected, you will receive an email update when the specific event is modified or canceled. If the event is a recurring event, you can only subscribe to alerts for one date in the series using this page. To subscribe to more than one event in the series, you must open each event and subscribe to it individually.

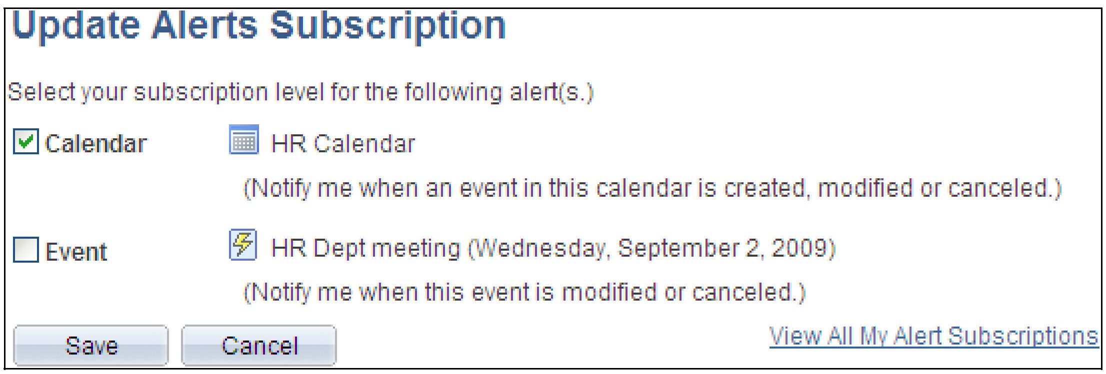
Note. This option is available only when accessing this page from the event view page.

View All My Alert Subscriptions

Click to view the My Alerts page.

Updating Calendar Alerts

Access the Update Alerts Subscription page (when an alert has already been defined for this calendar, click the Alerts link on the calendar homepage or on the event view page).



Update Alerts Subscription page (event level view)

Use the Update Alerts Subscription page to update subscriptions for email alerts for the calendar.

Calendar

Select this option to subscribe to an email alert at the calendar level.

Event

Select this option to subscribe to an email alert at the discussion topic level.

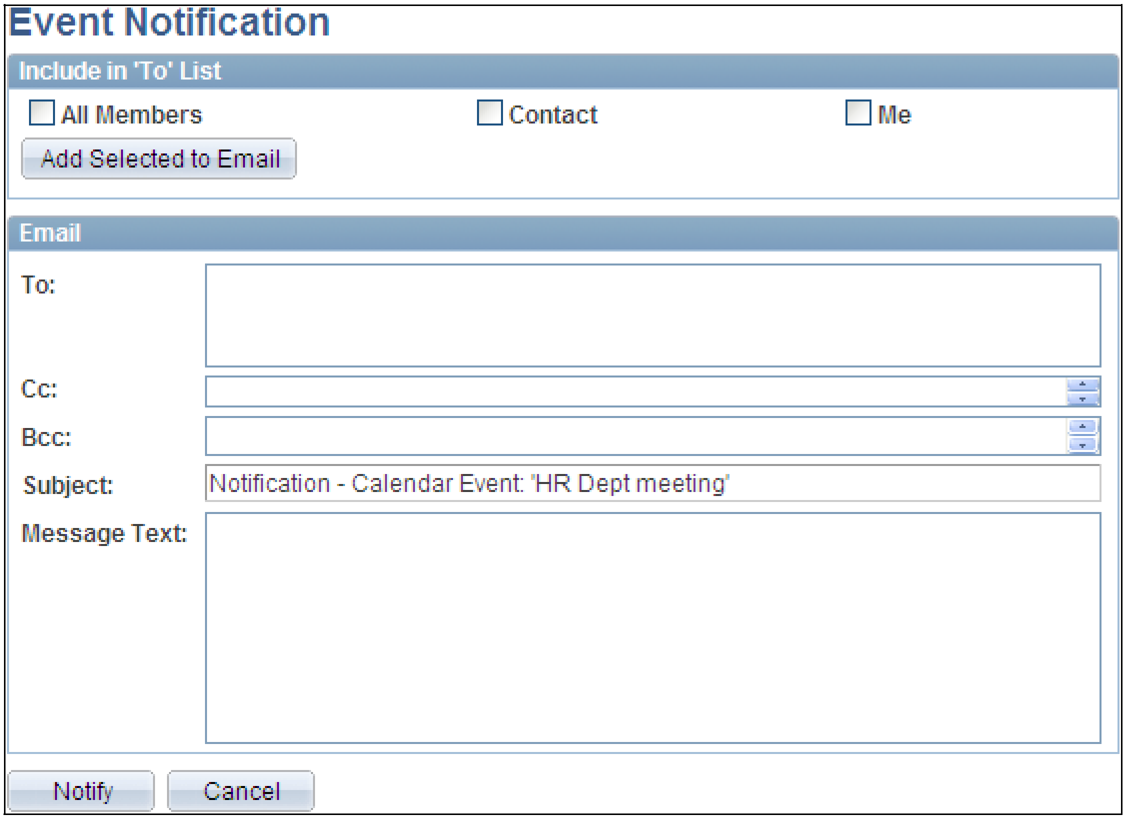
Note. This option is available only when accessing this page from the event view page.

View All My Alert Subscriptions

Click to view the My Alerts page.

Sending Event Notifications

Access the Event Notification page (click the Notify link on the Event Details page).



Event Notification page

Use the Event Notification page to send email notifications to users associated with the calendar or the event.

Include in 'To' List

Select the people you want to receive the notification. Selecting any of these options populates the *To* field with the corresponding users from the calendar. Additionally, you can manually enter email addresses in the *To:* field.

Note. Addresses for the Cc: and Bcc: fields must be manually entered or copied and pasted from the To: field.

All Members Sends the notification to all members of the calendar.

Contact Sends the notification to the contact for the event.

Me Sends the notification to you.

Add Selected to Email Populates the *To* field with email addresses of those people you have selected to receive the notification.

Email

Use this section of the page to enter additional address information as well as the text of the notification. The system displays the title of the event as the subject of the notification.

To, **Cc**, or **Bcc**	Manually enter additional email addresses in these fields.
Subject	Enter a subject for the email. A default subject is generated by the system.
Message	Enter the text of the message in this text box. The text appears in the email message along with a URL to the Event Detail page.
Send	Click to send the email notification.

Working With the My Events Pagelet

This section discusses how to:

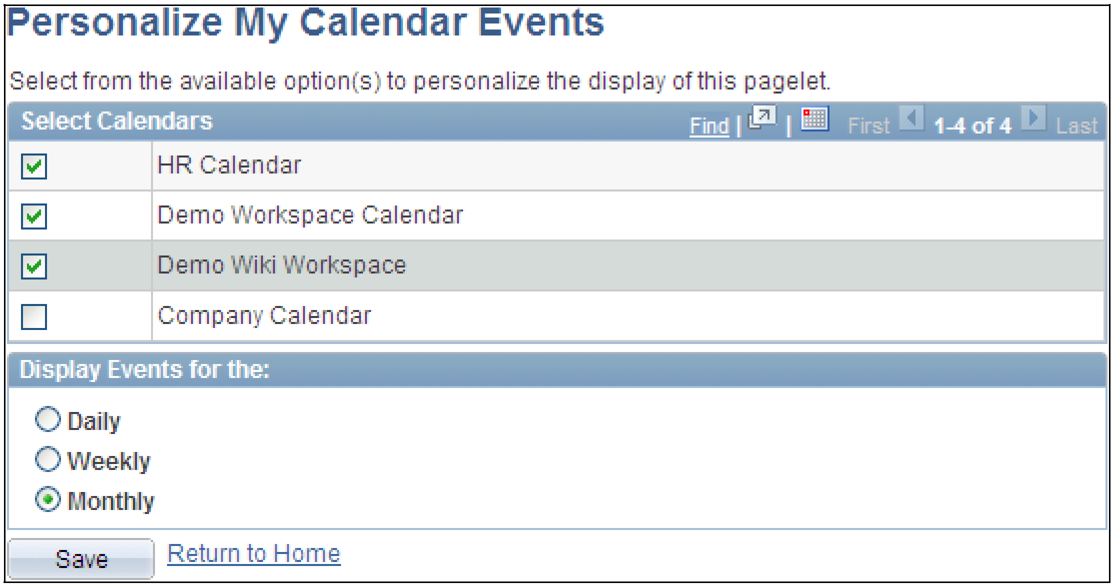
- Personalize the My Events pagelet.
- Use the My Events pagelet.

Page Used to Personalize the My Events Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize My Calendar Events	EPPCA_CALPGLT_PREF	Click the Customize My Events button in the My Events pagelet.	Select the calendar or calendars to be displayed in the pagelet and specify the view (daily, weekly, or monthly).

Personalizing the My Events Pagelet

Access the Personalize My Calendar Events page (click the Customize My Events button in the My Events pagelet).



Personalize My Calendar Events page

Use the Personalize My Calendar Events page to select the calendar or calendars to be displayed in the pagelet and specify the period (daily, weekly, or monthly).

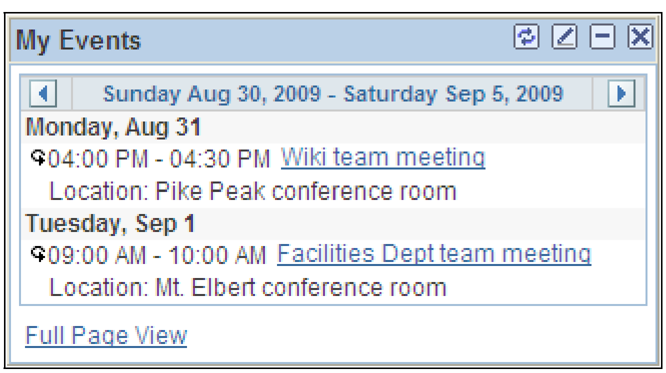
Select Calendars Select events from which calendar or calendars are displayed in the My Events pagelet.

Display Events for the Select the period to be displayed in the My Events pagelet.

Note. This period determines the default period to be used on the Community Calendars page.

Using the My Events Pagelet

Access the My Events pagelet on the portal homepage.



My Events pagelet (weekly view)

Use the My Events pagelet to display calendar events from one or more calendars of which you are a member. The My Events pagelet displays what is also known as a *unified calendar* because events can appear from calendars across all portals, sites, and workspaces.

Click the Previous button to scroll the calendar display backward one period.

Click the Next button to scroll the calendar display forward one period.

<#>

Click a bold date to view a pop-up list of events scheduled on that date. In this pop-up list, you can select to view detailed event information or to add an event to one of the calendars personalized to display in the pagelet.

Note. This feature is available from the monthly view only.

<Event Title>

Click an event title to access the event view page for that event.

Note. This feature is available directly from the daily and weekly views, and from the pop-up list of the monthly view.

Indicates a recurring event.

Indicates an all-day event.

Full Page View

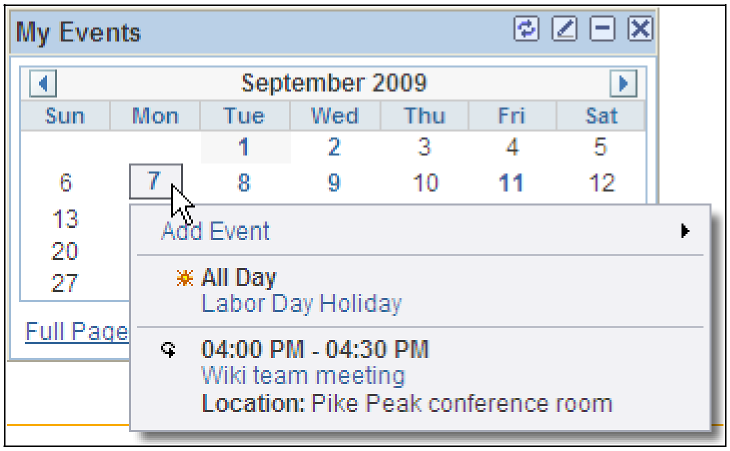
Click to access the Community Calendars page that enables you to view events from all of your calendars.

Note. This period displayed in the My Events pagelet determines the default period displayed on the Community Calendars page. The default scope is *all* calendars.

See Chapter 9, "Working With Community Calendars," Viewing Events from All Calendars, page 167.

Viewing the Event Pop-up List

To view the event pop-up list, click a bold date in the monthly view of the My Events pagelet as shown in this example:



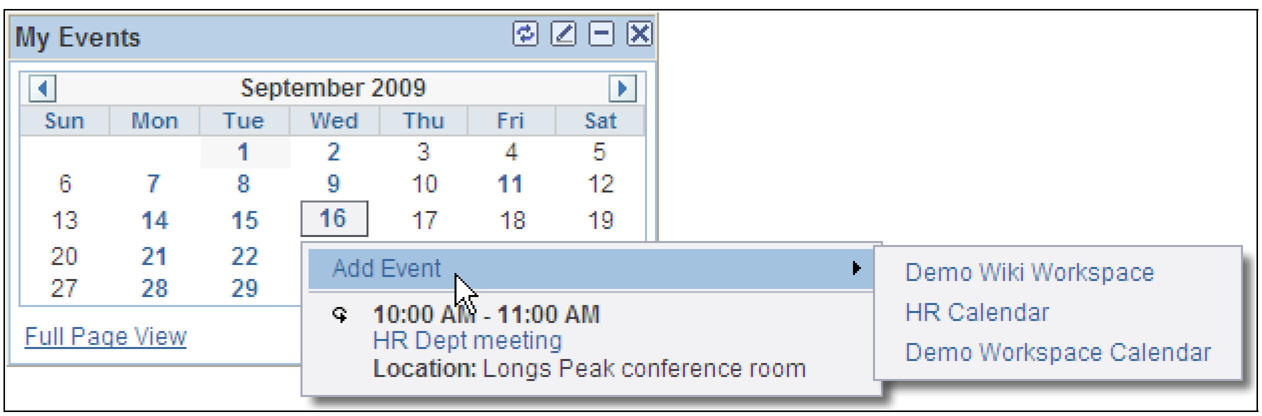
My Events pagelet event pop-up list

From the event pop-up list, you can access the event view page for a listed event or add an event to any of the calendars personalized to display in the pagelet.

Adding an Event from the Event Pop-up List

To add an event from the My Events pagelet:

1. Click a bold date in the monthly view of the My Events pagelet.
2. Click the Add Event link in the pop-up list as shown in this example:



Clicking the Add Event link in the event pop-up list

3. Select one of the calendars listed to add an event to that calendar.

Note. Only the calendars selected to display in the pagelet on the Personalize My Calendar Events page are listed.

See Chapter 9, "Working With Community Calendars," Creating Calendar Events, page 171.

Administering Community Calendars

This section discusses how to:

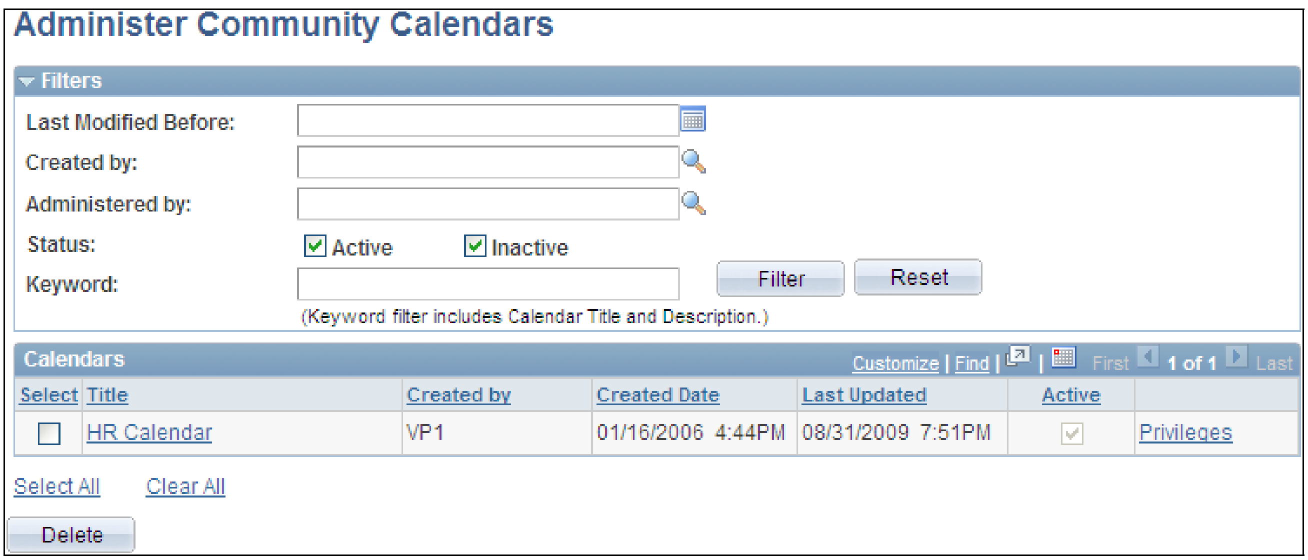
- Administer community calendars.
- Modify privileges for calendars.

Pages Used to Administer Community Calendars

Page Name	***Definition Name***	***Navigation***	***Usage***
Administer Community Calendars	EPPCA_INQUIRY	Portal Administration, Administer Calendars	Manage calendars.
Administer Community Calendars - Calendar Security	EPPCA_CAL_MEM	Click the Privileges link on the Administer Community Calendars page.	Assign members and privileges to calendars.

Administering Community Calendars

Access the Administer Community Calendars page (Portal Administration, Administer Calendars).



Administer Community Calendars page

Use the Administer Community Calendars page to manage calendars and member privileges.

Last Modified Before Select a date to find calendars that were modified before the date you specify.

Created By — Select a user ID to return all calendars that the user has created.

Administered By — Select a user ID to return all calendars for which the specified user is an administrator.

Status — Select to search for active or inactive calendars, or both.

Keyword — Enter keywords used in the title and description of the calendar.

Filter — Click to filter the list of calendars.

Reset — Click to clear the filter criteria.

Select — Select a specific calendar.

Title — Click the title of the calendar to access the calendar homepage.

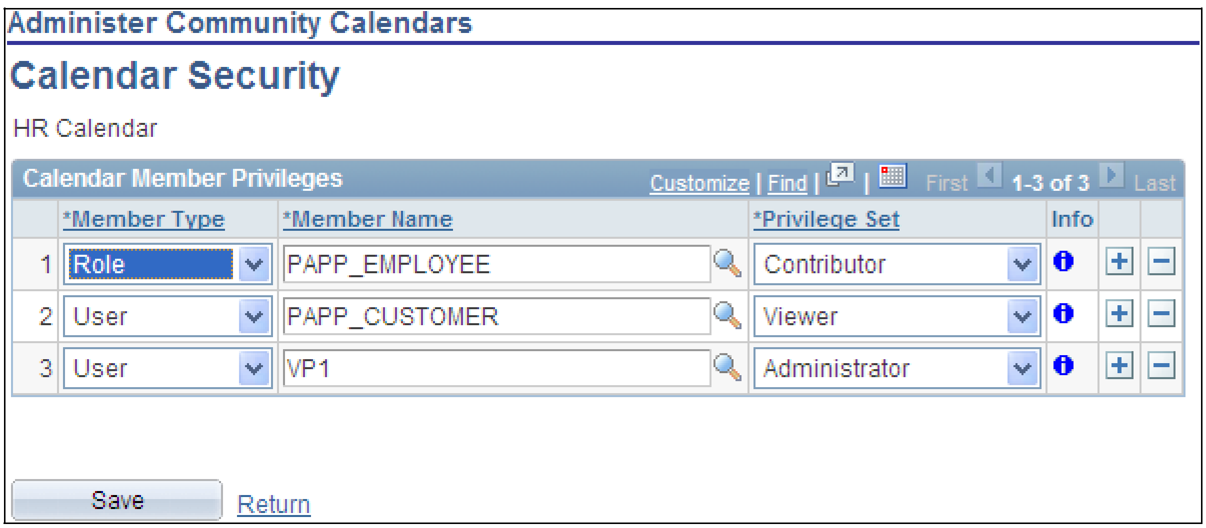
Privileges — Click the Privileges link to access the Administer Community Calendars - Calendar Security page.

Select All or **Clear All** — Click a link to select or clear the selection of all calendars.

Delete — Click to delete the selected calendar or calendars.

Modify Privileges for Calendars

Access the Administer Community Calendars - Calendar Security page (click the Privileges link on the Administer Community Calendars page).



Calendar Security page

Use the Administer Community Calendars - Calendar Security page to assign list members and privileges similar to the Calendar Security page.

See Chapter 9, "Working With Community Calendars," Assigning Community Calendar Participants and Privileges, page 157.

Publishing a Calendar as a Pagelet

This section discusses how to:

- Publish a pagelet from a calendar.
- Publish a calendar from Pagelet Wizard.
- Edit a published pagelet.
- Publish a pagelet to multiple portals.

Pages Used to Publish Calendars as Pagelets

Page Name	***Definition Name***	***Navigation***	***Usage***
Calendar Properties - Publish Pagelet Wizard Definition	EPPPB_PGLT_PUB	• My Content, My Community Calendars Click the Properties link for the calendar on the My Community Calendars page. Click the Publish as Pagelet link on the Calendar Properties page. • Click the Add Pagelet button or the Edit button on the Calendar Properties - Publish as Pagelet page.	Create a pagelet definition for a calendar.

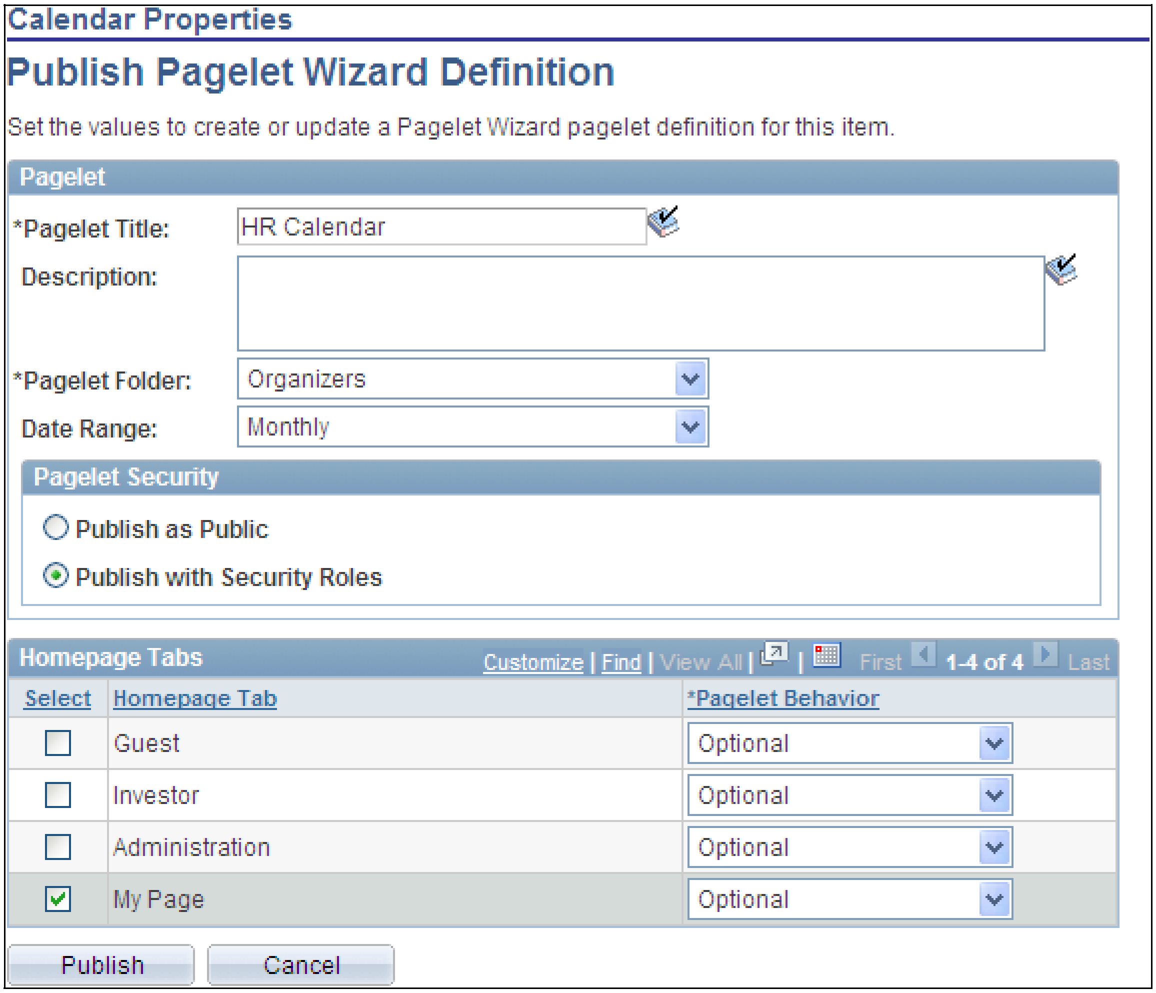
Page Name	***Definition Name***	***Navigation***	***Usage***
Pagelet Wizard - Specify Pagelet Information	PTPPB_WIZ_INFO	• Click the Go to Pagelet Wizard link on the Calendar Properties - Publish Pagelet Wizard Definition page. • Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard • PeopleTools, Portal, Pagelet Wizard, Pagelet Wizard • Click the Pagelet Information button from any page in the wizard.	Provide information to identify and categorize a pagelet.
Pagelet Wizard - Select Data Source	PTPPB_WIZ_DATASRC	• Click the Next button on the Pagelet Wizard - Specify Pagelet Information page. • Click the Data Type button from any page in the wizard.	Select the type of data source for the pagelet.
Pagelet Wizard - Specify Data Source Parameters	PTPPB_WIZ_DATAPRMS	• Click the Next button on the Pagelet Wizard - Select Data Source page. • Click the Data Source Parameters button from any page in the wizard.	Configure the data source parameters that are required for data to be displayed in the pagelet. **Note.** This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.
Pagelet Wizard - Specify Data Source Parameter Values	PTPPB_WIZ_PRMVALS	Click the Values link on the Pagelet Wizard - Specify Data Source Parameters page.	Specify prompt values for the end user to select from when personalizing the pagelet. **Note.** This page is accessible only for data source parameters for which you have selected the *User Specified* or *Admin Specified* usage types.

Page Name	Definition Name	Navigation	Usage
Pagelet Wizard - Select Display Format	PTPPB_WIZ_DISPFRMT	• Click the Next button on the Pagelet Wizard - Specify Data Source Parameters page. • Click the Display Format button from any page in the wizard.	Specify the data transformation method and display format for the pagelet.
Pagelet Wizard - Specify Display Options	PTPPB_WIZ_DISP_CUS	• Select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page. • Click the Transformation button from any page in the wizard.	Enter the custom formatting details for the pagelet as well as header and footer options. Preview the pagelet.
Pagelet Wizard - Specify Publishing Options	PTPPB_WIZ_PUBOPT	• Click the Next button on the Pagelet Wizard - Specify Display Options page. • Click the Register Pagelet icon from any page in the wizard.	Specify the manner in which the pagelet is published. Provide registration, caching, and security details, and register the pagelet.
Pagelet Wizard - Pagelet Creation Confirmed	PTPPB_WIZ_FINISH	Click the Finish button on the Pagelet Wizard - Specify Publishing Options page.	Confirm that the creation of the pagelet is complete.
Calendar Properties - Publish as Pagelet	EPPPB_PGLT_LST	• Click the Publish button on the Calendar Properties - Publish Pagelet Wizard Definition page. • If this calendar has already been published as a pagelet, click the Publish as Pagelet link on the Calendar Properties page.	Administer pagelet definitions for a calendar.

Page Name	*Definition Name*	*Navigation*	*Usage*
Publish to Multiple Portals	PTPP_PMPUBPRTL	• Click the Publish Pagelet in Other Sites link on the Calendar Properties - Publish Pagelet Wizard Definition page. • Portal Administration, Pagelets, Publish Pagelets • PeopleTools, Portal, Portal Utilities, Publish Pagelets	Publish the pagelet definition to additional portals and sites.
Publish Multiple Pagelets	PTPP_PMPUBPGLT	• On the Publish to Multiple Portals page, select Publish Multiple Pagelets. • Portal Administration, Pagelets, Publish Pagelets, Publish Multiple Pagelets • PeopleTools, Portal, Portal Utilities, Publish Pagelets, Publish Multiple Pagelets	Publish multiple pagelet definitions to another portal or site.

Publishing a Pagelet from a Calendar

Access the Calendar Properties - Publish Pagelet Wizard Definition page (click the Publish as Pagelet link on the Calendar Properties page).



Calendar Properties - Publish Pagelet Wizard Definition page

Use the Calendar Properties - Publish Pagelet Wizard Definition page to create a pagelet definition for a calendar.

Pagelet

The pagelet title and description from the Calendar Properties page appear in the Pagelet group box. You can edit these two fields, if necessary.

Pagelet Title Displays the title for the calendar, which can be edited as the title for the pagelet.

Description Displays the description for the calendar, which can be edited as the description for the pagelet.

Pagelet Folder Select a folder to publish to. Only folders from the current site are available to select.

Pagelet Security

Select the security options for viewing the pagelet. Available options are:

Publish as Public, which enables all users to view the pagelet.

Publish with Security Roles, which uses the roles defined on the Calendar Security page when publishing the pagelet.

Note. If there are no roles defined on the Calendar Security page, the system automatically selects to publish the pagelet as public.

Homepage Tabs

Use this group box to define the homepage tab labels and behavior for the pagelet.

Homepage Tab

Select the tabs that will display the pagelet.

Pagelet Behavior

Select the behavior options for the pagelet.

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.

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 homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

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.

Publish

Click the Publish button to publish this pagelet and display the Calendar Properties - Publish as Pagelet page, on which you can review or edit the pagelet definition

Publishing a Calendar from Pagelet Wizard

Pagelets for calendars can be created and published using Pagelet Wizard and then managed from the Calendar Properties page. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.

  Step 3 also includes "Specifying Prompt Values for Data Source Parameters."

- Step 4: Selecting a Pagelet Display Format.
- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

Note. If you access Pagelet Wizard from the Go to Pagelet Wizard link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

Where appropriate, this section provides details specific to using Pagelet Wizard to publish a calendar as a pagelet. The PeopleTools 8.50 PeopleBooks provide detailed information on using Pagelet Wizard.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard."

Step 1: Entering Pagelet Identifying Information

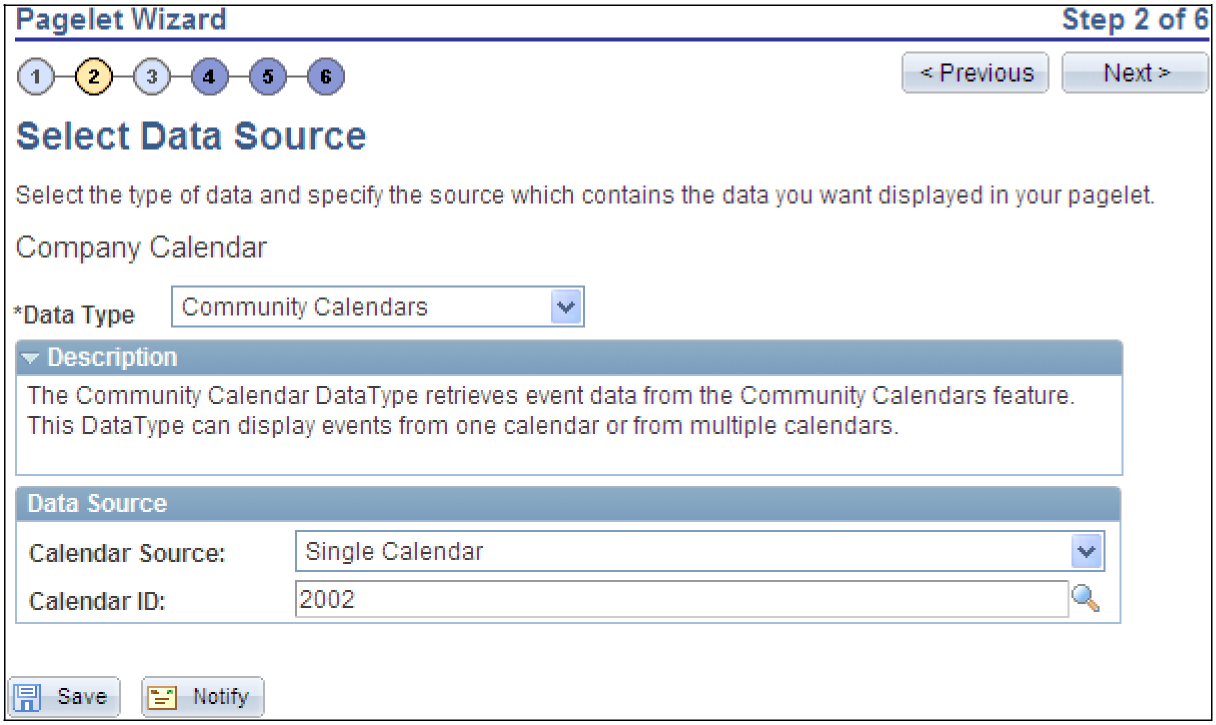
Access the Pagelet Wizard - Specify Pagelet Information page (click the Go to Pagelet Wizard link on the Calendar Properties - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard).

Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 1: Entering Pagelet Identifying Information.

Step 2: Selecting a Pagelet Data Source

Access the Pagelet Wizard - Select Data Source page (click the Next button on the Pagelet Wizard - Specify Pagelet Information page).



Pagelet Wizard - Select Data Source page (community calendars data type)

Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

Data Type For calendars, select *Community Calendars.*

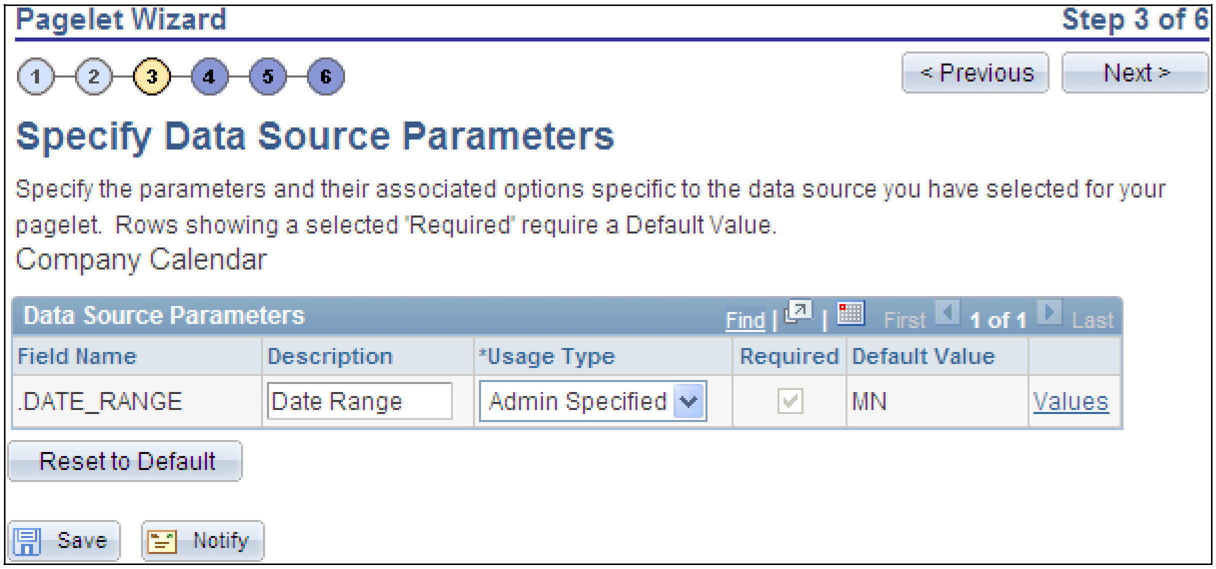
Calendar Source Select the type calendar to display in the pagelet: *All Calendars* or *Single Calendar.* Selecting *All Calendars* creates a pagelet similar to the delivered My Events pagelet.

Note. The *Workspace Calendar* option is for internal use.

Calendar ID Select the calendar to display in the pagelet.

Step 3: Specifying Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameters page (select *Community Calendars* as the data type on the Pagelet Wizard - Select Data Source page, then click the Next button).



Pagelet Wizard - Specify Data Source Parameters page (community calendars data source)

Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

Note. This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

Field Name

Displays the name of the data source parameter.

For calendars, the following data source parameters can be defined:

DATERANGE — Specifies the scope of the calendar: daily, weekly, or monthly.

Description

Displays a description of the data source parameter.

Usage Type

Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are:

- *Admin Specified:* Select to enable those users with administrative privileges to specify variables for this field, as well as access the Configure link on the published pagelet and select from those parameters for users.

- *Context Sensitive:* Select to enable Context Manager to specify a data source parameter value for this field.

- *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify.

- *System Variable:* Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter.

  For example, suppose that you specify *%UserId* as the system variable for a parameter name User. When the pagelet appears on a user's homepage, the User field is populated by the *%UserId* system variable, which is the user ID used to access the pagelet.

- *User Specified:* Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the Customize button appears on the pagelet title bar.

  End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Uers can select a value from a prompt, or they can manually enter their own value if no prompt values are available.

  See Chapter 9, "Working With Community Calendars," Specifying Prompt Values for Data Source Parameters, page 195.

  If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.

Required

This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters.

Default Value

You can enter a value that includes the % and * wildcards at the beginning or end of a value in the Default Value field.

Note the following about default values:

- If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value.

  If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field.

  If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date.*

- If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the Look up Value button to access a list of valid system variables.

  See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters.

- If you select *Fixed* as the usage type, you must enter the fixed value.

Values

If you select *User Specified* or *Admin Specified* as the usage type, click Values to access the Pagelet Wizard - Specify Data Source Parameter Values page.

See Chapter 9, "Working With Community Calendars," Specifying Prompt Values for Data Source Parameters, page 195.

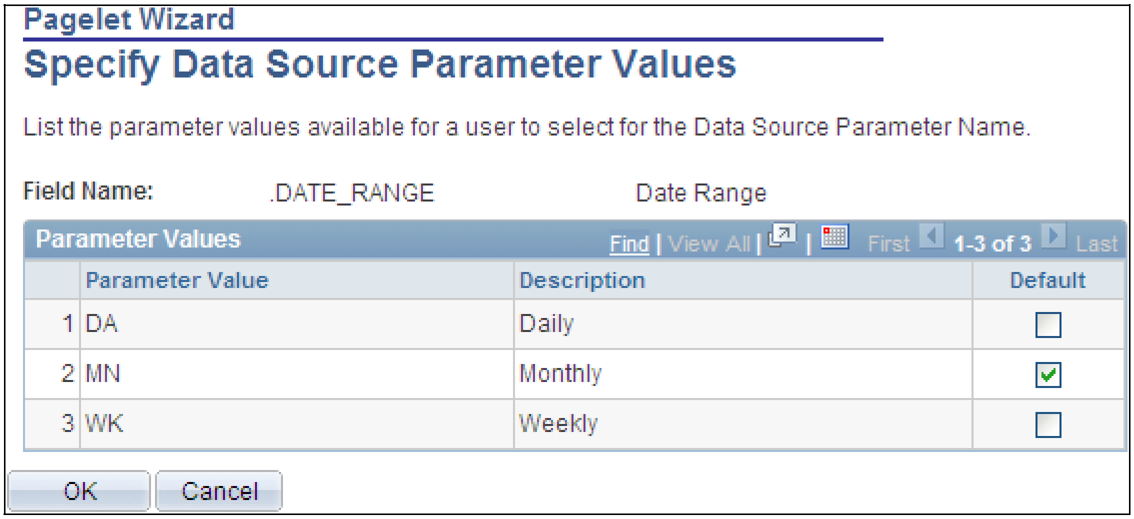
Text

Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet.

Note. Personalization instructions must be translatable.

Specifying Prompt Values for Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameter Values page (click the Values link on the Pagelet Wizard - Specify Data Source Parameters page).



Specify Data Source Parameter Values page (community calendars data type)

Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

Parameter Value Specify the parameter value.

Description Provide an optional description of the parameter value.

Default Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional.

Step 4: Selecting a Pagelet Display Format

Access the Pagelet Wizard - Select Display Format page (click the Next button on the Pagelet Wizard - Specify Data Source Parameters page).

Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 4: Selecting a Pagelet Display Format.

Step 5: Specifying Pagelet Display Options

Access the Pagelet Wizard - Specify Display Options page (select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page}.

Use the Pagelet Wizard - Specify Display Options page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet.

Note. If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 5: Specifying Pagelet Display Options.

Step 6: Specifying Pagelet Publication Options

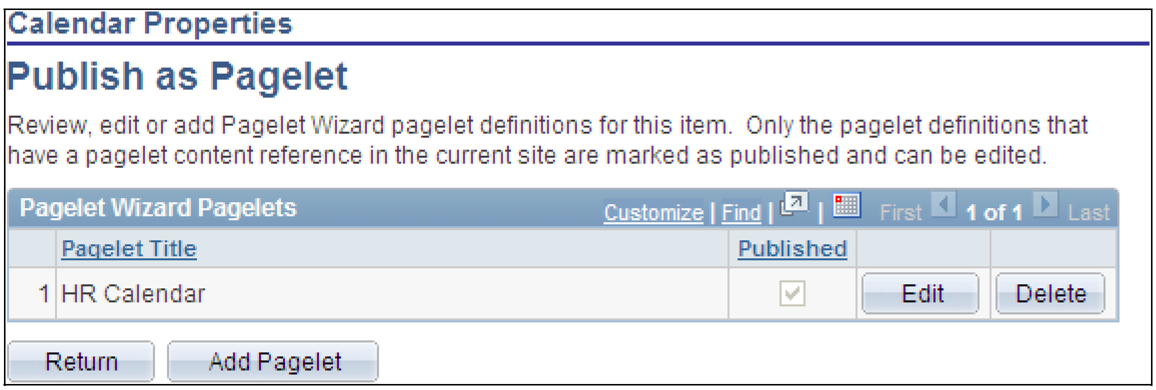
Access the Pagelet Wizard - Specify Publishing Options page (click the Next button on the Pagelet Wizard - Specify Display Options page).

Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 6: Specifying Pagelet Publication Options.

Editing a Published Pagelet

Access the Calendar Properties - Publish as Pagelet page (click the Publish button on the Calendar Properties - Publish Pagelet Wizard Definition page; or if this calendar has already been published as a pagelet, click the Publish as Pagelet link on the Calendar Properties page).



Calendar Properties - Publish as Pagelet page

Use the Calendar Properties - Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this calendar. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

Note. Pagelets for this calendar published directly from Pagelet Wizard also appear in this list.

Edit	Displays the Calendar Properties - Publish Pagelet Wizard Definition page on which you can make changes to the pagelet definition.
Delete	Deletes this pagelet definition and the published pagelet content references in all sites.

Add Pagelet	Adds a new pagelet definition based on the current calendar.

Publishing a Pagelet to Multiple Portals

Access the Publish to Multiple Portals page (click the Publish Pagelet in Other Sites link on the Calendar Properties - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Publish Pagelets).

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.
- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Working With Navigation Pages," Publishing Pagelets.

Chapter 10

Working With Discussion Forums

This chapter provides an overview of discussion forums and discusses how to:

- Create a discussion forum.
- Participate in a discussion forum.
- Manage a discussion forum.
- Publish a discussion forum as a pagelet.
- Use discussion forum alerts and notifications˙.
- Manage tags for a discussion forum.
- Search within discussion forums.
- Work with the Discussion Forums pagelet.

Understanding Discussion Forums

Discussion forums in Oracle's PeopleSoft Enterprise Portal 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. Discussion forums enable multiple relevant individuals to contribute to the review and resolution of a question. In addition, participants can monitor the forums to which they belong using summary and detail pages, as well as the Discussion Forums pagelet, which can be placed on their homepage.

In PeopleSoft Enterprise Portal, discussion forums can be created as "standalone" in portals and sites, or as an integrated module of a collaborative workspace. Standalone discussion forums can be accessed through the My Discussion Forums page and the Discussion Forums homepage pagelet.

When portal system administrators create a standalone discussion forum, they can then assign a moderator to manage each forum. The discussion forum moderator determines the membership and privileges for the forum, and has the option to manage the forum as moderated or unmoderated. Forum moderation can be applied to all posts (new topics or replies), or to first-time posts only. If moderation is set to all posts, the moderator has to approve each post before it can be viewed by the forum participants. If moderation is set to first post only, then the first time that a member makes a post (new topic or reply), it has to be approved by the forum moderator. The approval or rejection of a post causes an email notification to be sent to the participant who posted to the forum.

- The Discussions module of collaborative workspaces.
- The Related Discussion related content service.

- Action items, documents in the content management system, and documents in the Documents module of collaborative workspaces.
- Context Manager's Related Discussion pagelet.

This section also provides an overview of:

- Discussion forum privileges.
- Discussions module in collaborative workspaces.
- Related Discussion related content service.
- Discussion forums in the Related Discussion pagelet.

Common Elements Used in This Chapter

Indicates that no alerts are set at this level. At the forum level, this indicates that a forum-level alert has not been set. At the topic level, this indicates that neither a forum-level alert nor a topic-level alert have been set.

Indicates that an alert is set at this level. At the forum level, this indicates that a forum-level alert has been set. At the topic level, this indicates that either a forum-level alert, a topic-level alert, or both have been set.

Designates that the discussion topic does not yet contain any replies.

Note. This icon also represents replies in the threaded view of a topic.

Designates that the discussion topic contains one or more replies.

Note. This icon also represents a topic on alert subscription pages.

Represents a discussion forum on alert subscription pages.

Understanding Discussion Forum Privileges

The following table summarizes discussion forum privileges granted by portal role or privilege set ID. Privilege set IDs are defined on the Define Privilege Sets page. Privileges are assigned to discussion forum participants on the Forum Privileges page.

Role ID or Privilege Set ID	***Description***	***Privileges***
PAPP_SYSTEM_ADMIN	Enterprise Portal System Admin role.	A portal administrator can: • Create new discussion forums. • Assign moderators to manage discussion forums. • Manage discussion forums. • Reactivate inactive discussion forums. • Delete discussion forums. • Approve or reject forum posts (when moderation of the forum is enabled). In addition, as a participant of discussion forum a portal administrator can: • View discussion topics and replies. • Add topics to discussion forums. • Add replies to discussion forums.
EPPDF_MODERATOR	Moderator privilege set.	• Manage the discussion forum. • Approve or reject forum posts (when moderation of the forum is enabled). • Inactivate the discussion forum. • Add topics. • Edit any topic or reply. • Delete any topic or reply. • Edit own topics or replies. • Delete own topics or replies. • View discussion forum topics and replies.

Role ID or Privilege Set ID	*Description*	*Privileges*
EPPDF_CONTRIBUTOR	Contributor privilege set.	• Add topics. • Edit own topics or replies. • Delete own topics or replies (if no replies have been posted to that topic or reply). • View discussion forum topics and replies.
EPPDF_VIEWER	Viewer privilege set.	View discussion forum topics and replies.

Understanding the Discussions Module in Collaborative Workspaces

The Discussions module provides a platform that workspace members can use to discuss topics of interest. The discussion can be configured as moderated or unmoderated, and members can post discussion topics and replies. In addition, members can monitor current topics using the Recent Discussions pagelet on the workspace homepage. The pages used to participate in discussions in the Discussions module are the same pages used for standalone discussion forums.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Using the Discussions Module.

Understanding the Related Discussion Related Content Service

The Related Discussion related content service provides the features of PeopleSoft Enterprise Portal discussion forums to other PeopleSoft applications, such as PeopleSoft FSCM, PeopleSoft HCM, and so on.

For example, using the Related Discussion service, users can collaborate to share critical data about a specific vendor or vendors (for example, on a purchase requisition process page). In this example, the vendor name or ID could serve as the context of the discussions. As the user navigates to other POs raised to a specific vendor, all the discussions pertinent to the vendor can be discovered through a search.

See Chapter 24, "Working With the Related Discussion Service," page 433.

Understanding Discussion Forums in the Related Discussion Pagelet

The Related Discussion pagelet provides the features of discussion forums in the Context Manager frame on the right side of the page. The Related Discussion pagelet can be assigned to menu items through Context Manager.

See Chapter 20, "Working With Context Manager Pagelets," Working With the Related Discussion Pagelet, page 383.

Creating Discussion Forums

This section discusses how to:

- Create a discussion forum.
- Assign discussion forum participants and privileges.
- Create a discussion forum policy statement.

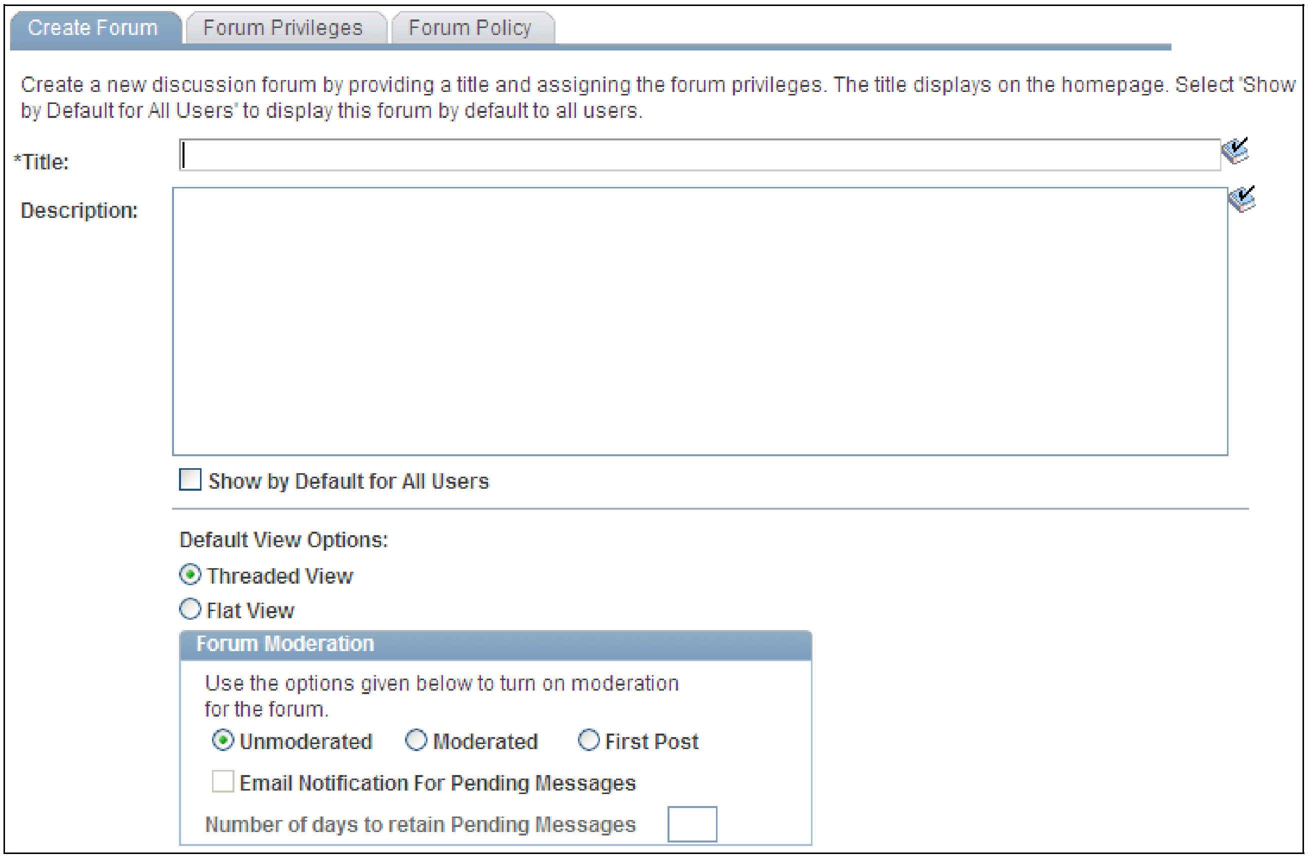
Note. Portal system administrators can create standalone discussion forums and then assign a moderator to manage each forum.

Pages Used to Create Discussion Forums

Page Name	*Definition Name*	*Navigation*	*Usage*
Create Forum	EPPDF_FORUM_NEW	• My Content, Create Discussion Forum • Click the Create Forum link on the Discussion Forums pagelet.	Set the properties for a new discussion forum.
Forum Privileges	EPPDF_FORUM_PRIV	My Content, Create Discussion Forum, Forum Privileges	Assign discussion forum participants by user or role. Assign privileges to the participants.
Forum Policy	EPPDF_FORUM_POLICY	My Content, Create Discussion Forum, Forum Policy	Create a policy statement for the discussion forum.

Creating a Discussion Forum

Access the Create Forum page (My Content, Create Discussion Forum).



Create Forum page

Use the Create Forum page to set the properties for a new discussion forum.

Title	Enter a title for the discussion forum. This text appears on the Discussion Forums pagelet as the link to access the discussion forum.
Description	Enter a description of the goal of the discussion forum. This text appears on the Discussion Forums pagelet as hover text for the link used to access the discussion forum.
Show by Default For All Users	Select to display this discussion forum in the Discussion Forums pagelet by default for all users who are included in the users and roles assigned on the Forum Privileges page.

Default View Options

Select the default view for this discussion forum:

- *Threaded View* **—** Displays the posts for a discussion topic in a hierarchical manner.

- *Flat View* **—** Displays all posts for a discussion topic and the details of each post.

Forum participants can switch between the threaded view and flat view on the Post Details page.

See Chapter 10, "Working With Discussion Forums," Comparing the Threaded and Flat Views, page 216.

Portal administrators can set the system-level default for this option on the Installation Options page.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration,* "Configuring Enterprise Portal," Defining Installation Options.

Forum Moderation

Note. Forum moderation applies to all post types**—**that is, new topics and replies.

Select the moderation option for this forum:

- *Unmoderated* **—** Posts to this forum are not moderated.

- *Moderated* **—** All posts to this forum are moderated.

  The forum moderator must review and approve or reject each post to this forum.

- *First Post* **—** First posts to this forum by each participant are moderated.

  Only the first post for each participant is submitted to the moderator for approval.

Email Notification For Pending Messages

Select this option to send an email notification to the forum moderator for each post that requires approval.

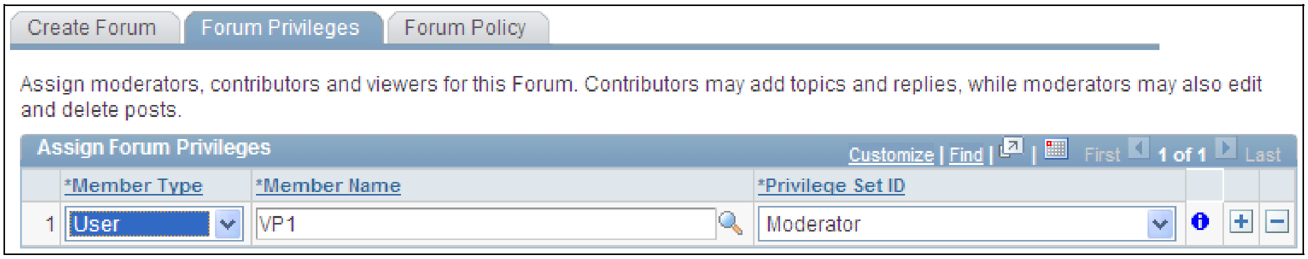
Number of days to retain Pending Messages

Set the number of days to retain a pending post.

After the set number of days has passed, a pending post will be rejected. Set this field to *0* to retain pending posts indefinitely.

Assigning Discussion Forum Participants and Privileges

Access the Forum Privileges page (My Content, Create Discussion Forum, Forum Privileges).



Forum Privileges page

Member Type Select the type of participant you want to add to the discussion forum:

Role — Select to add forum participants by role.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration,* "Setting Up Roles."

User — Select to add forum participants by user ID.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration,* "Administering User Profiles."

Member Name Select the role or user ID.

Privilege Set ID Select the privilege level you want to assign to the member:

Moderator

Contributor

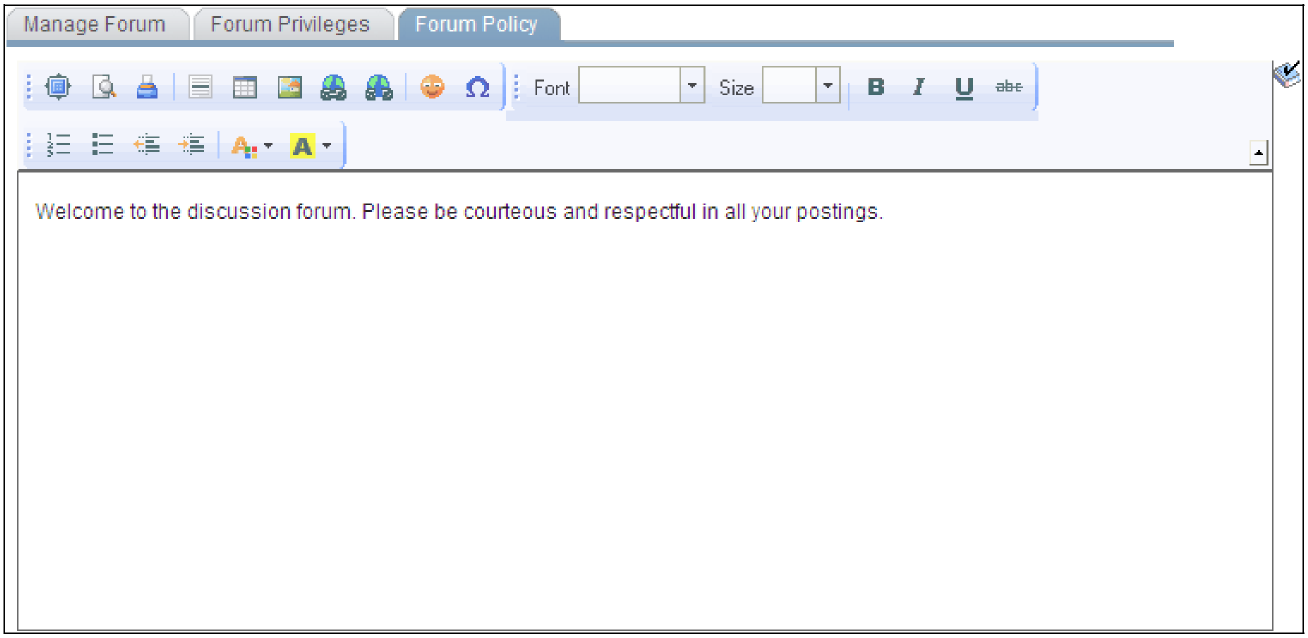
Viewer

Note. At a minimum, every discussion forum requires a moderator.

See Chapter 10, "Working With Discussion Forums," Understanding Discussion Forum Privileges, page 200.

Creating a Discussion Forum Policy Statement

Access the Forum Policy page (My Content, Create Discussion Forum, Forum Policy).



Forum Policy page

Use the rich text editor to enter any policies that apply to the discussion forum.

Participating in Discussion Forums

This section discusses participating in discussion forums and how to:

- Access discussion forums.
- Add or edit a discussion post.
- View post details.
- View pending or rejected posts.
- Delete a post.
- View discussion forum feeds.
- Use tags in a discussion forum.
- View the forum policy statement.

Pages Used to Participate in Discussion Forums

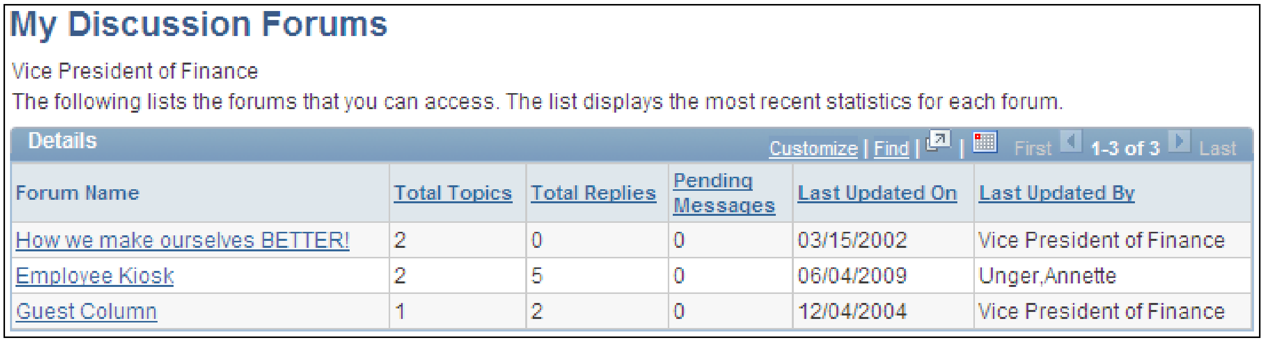
Page Name	***Definition Name***	***Navigation***	***Usage***
My Discussion Forums	EPPDF_MYFORUMS	• My Content, My Discussion Forums • Click the My Forums link on the Discussion Forums pagelet.	Provides access to all of the discussion forums of which you are a participant.
<Discussion Forum> homepage	EPPDF_FORUM	• Click the link for a discussion forum on the My Discussion Forums page. • Click the link for a discussion forum in the Discussion Forums pagelet.	Serves as the homepage for a discussion forum listing all forum topics and providing features to participate in the forum.
Create New Topic	EPPDF_REPLY_TOPIC	• Click the Add Topic button on the discussion forum homepage. •  Click the Create a Topic button in the Discussion Forums pagelet.	Add a discussion topic to a discussion forum.
Add a Reply	EPPDF_REPLY_TOPIC	Click the Reply button on the Post Details page.	Add a reply to a discussion post (topic or reply). **Note.** The fields on this page are the same as those on the Create New Topic page.
Discussion	EPPDF_REPLY_TOPIC	Click the Edit button on the Post Details page.	Edit a discussion post (topic or reply). **Note.** The fields on this page are the same as those on the Create New Topic page.

Page Name	*Definition Name*	*Navigation*	*Usage*
Post Details	EPPDF_VIEW_TOPIC EPPDF_VIEW_TOPICS	• Click the link for a topic on the discussion forum homepage. • Click the link for a topic or a reply in the Discussion Forums pagelet.	View details of a discussion post (topic or reply).
Preferences	EPPDF_VIEW_PREF	Click the Preferences link on the Post Details page.	Set a personal preference for the display view for all your discussion forums.
View Pending Posts	EPPDF_MY_PEND_SEC	Click the View My Pending Posts link on the discussion forum homepage.	Review topics that you added that have not been accepted yet by the forum moderator.
View Rejected Posts	EPPDF_MY_PEND_SEC	Click the View My Rejected Posts link on the discussion forum homepage.	Review topics that you added that have been rejected by the forum moderator.
View Pending Replies	EPPDF_MY_PEND_SEC	Click the View My Pending Replies link on the Post Details page.	Review replies that you added that have not been accepted yet by the forum moderator.
View Rejected Replies	EPPDF_MY_PEND_SEC	Click the View My Rejected Replies link on the Post Details page.	Review replies that you added that have been rejected by the forum moderator.
Forum Policy	EPPDF_POLICYDOC_SP	Click the Forum Policy link on the discussion forum homepage.	View the policy statement for the discussion forum.

Accessing Discussion Forums

To access a discussion forum:

1. Select My Content, My Discussion Forums to access the My Discussion Forums page.



My Discussion Forums

Vice President of Finance

The following lists the forums that you can access. The list displays the most recent statistics for each forum.

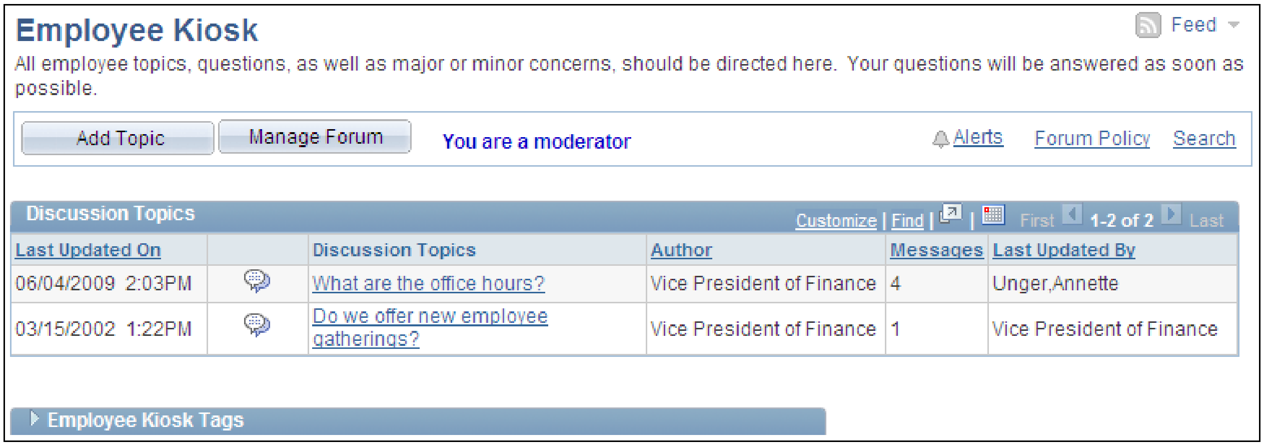
Details Customize | Find | First 1-3 of 3 Last

Forum Name	Total Topics	Total Replies	Pending Messages	Last Updated On	Last Updated By
How we make ourselves BETTER!	2	0	0	03/15/2002	Vice President of Finance
Employee Kiosk	2	5	0	06/04/2009	Unger,Annette
Guest Column	1	2	0	12/04/2004	Vice President of Finance

My Discussion Forums page

Use the My Discussion Forums page to access to all of the discussion forums of which you are a participant. The My Discussion Forums page provides an overview of the activity in each of these forums.

2. Click the link for a discussion forum on the My Discussion Forums page to access the homepage for a discussion forum.



<Discussion Forum> homepage (moderator view)

<Discussion Forum> homepage (contributor view)

Use the discussion forum homepage to participate in the forum.

Note. Certain functions are available on this page only if you have been granted contributor or moderator privilege for this forum.

View My Pending Posts	Click to access the View Pending Posts page to view which of your new forum topics are pending acceptance by the forum moderator.
View My Rejected Posts	Click to access the View Rejected Posts page to view which of your new forum topics were rejected by the forum moderator.

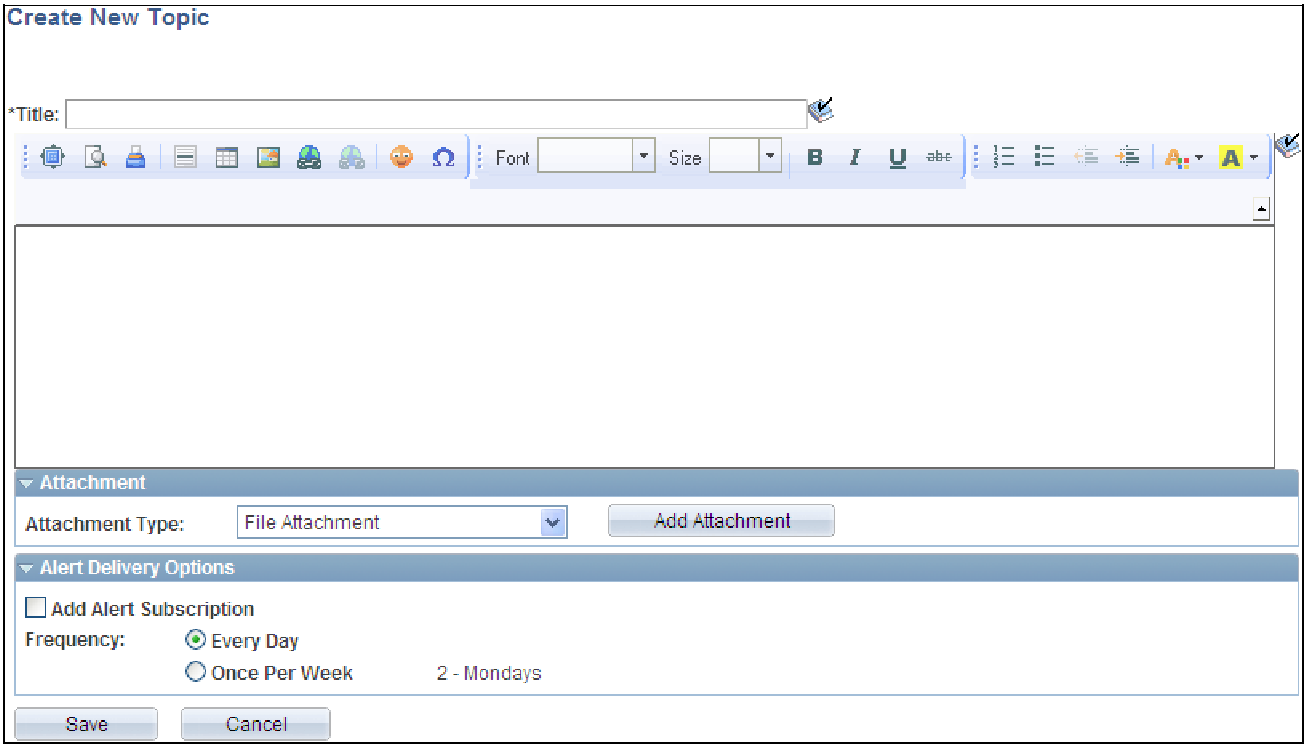
	Hover over any of these to view the list of feeds published for this discussion forum. Click any list item to open that feed document. Click the Feed button or Feed link to open the first feed document in the list. Click the Open menu button to toggle the list of feeds between frozen open and closed. See Chapter 11, "Working With Feeds and Alerts," Viewing and Subscribing to Feeds, page 255.
Add Topic	Click to access the Create New Topic page. **Note.** This button appears only for contributors or moderators of the forum.
Manage Forum	Click to access the Manage Forum page. **Note.** This button and the note "You are a moderator" appear only if you are a moderator of the forum.
Alerts	Click to access the Add Alert Subscription page to manage alerts at the forum level.
Forum Policy	Click to access the Forum Policy page, which displays the policy statement for the discussion forum.
Search	Click to access the Search Discussion Forums page to search in the current forum or other discussion forums.
<Discussion Forum> Tags	Click to view the Tags section for the discussion forum.

Adding or Editing a Discussion Post

Access the Create New Topic page (click the Add Topic button on the discussion forum homepage).

Access the Add a Reply page (click the Reply button on the Post Details page).

Access the Discussion page (click the Edit button on the Post Details page).



Create New Topic page

Use the Create New Topic page to add a new discussion topic to a discussion forum.

Use the Add a Reply page to add a reply to any discussion post (topic or reply). The Add a Reply page has the same fields as the Create New Topic page.

Use the Discussion page to edit a discussion post (topic or reply). The Discussion page has the same fields as the Create New Topic page.

Title

Enter a title for your discussion post.

<edit field>

Use the rich text editor to enter the text of the post.

See "PeopleSoft Enterprise Portal Preface," About the Rich Text Editor, page xxvi.

Attachment Type

Select the type of attachment to include with the post:

- *File Attachment* **—** Select to upload a local file.
- *Managed Content* **—** Select to attach a piece of managed content from the PeopleSoft Enterprise Portal content management system.

Add Attachment

If you have selected the *File Attachment* attachment type, click to browse and select the file to upload.

Select Content

If you have selected the *Managed Content* attachment type, click to look up the items of managed content available in the content management system.

Add Alert Subscription Select if you want to receive email alerts regarding updates to this discussion topic.

Frequency Select the notification frequency:

- *Every Day* — Select to have an email alert sent to you each day that an update occurs.
- *Once Per Week* — Select to have an email alert sent to you once a week during a week in which an update occurs.

  Select the day of the week in the adjacent drop-down list box.

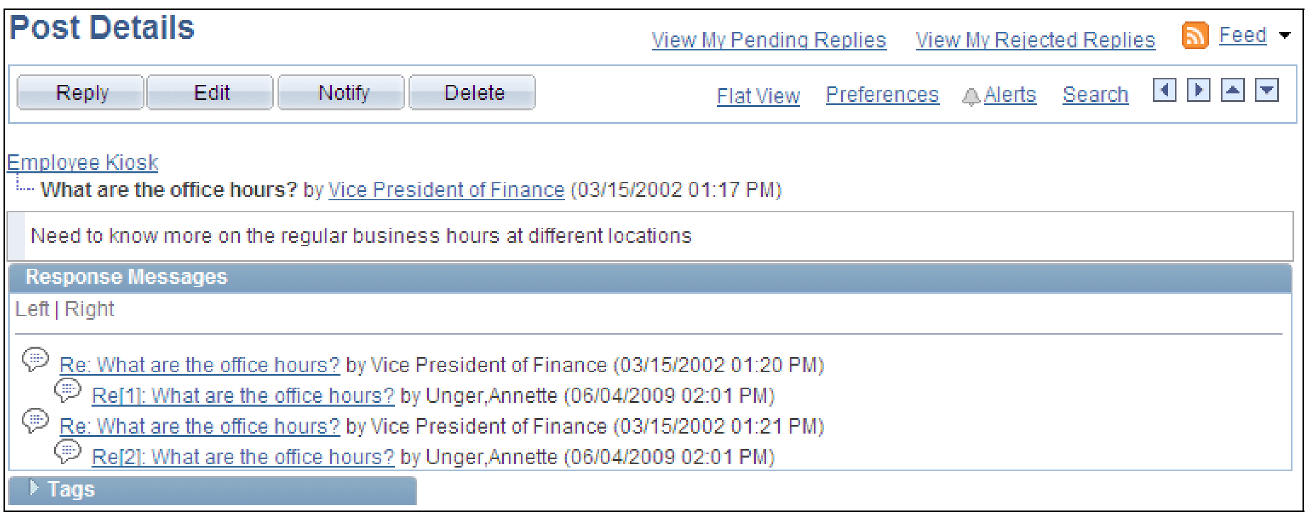
Update Subscriptions

Note. If the original post already contains an alert, the Alert Delivery Options group box on the Discussion page does not enable you to define settings. Instead, it provides the Update Subscriptions link.

Click this link to access the Update Alerts Subscription page.

Viewing a Discussion Post

Access the Post Details page (click the link for a post on the discussion forum homepage or in the Post Details page).



Post Details page (topic selected)

Use the Post Details page to view the details for a discussion post (topic or reply).

View My Pending Replies Click to access the View Pending Replies page to view which of your replies are pending acceptance by the forum moderator.

View My Rejected Replies Click to access the View Rejected Replies page to view which of your replies were rejected by the forum moderator.

Hover over any of these to view the list of feeds published for this discussion forum. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

See Chapter 11, "Working With Feeds and Alerts," Viewing and Subscribing to Feeds, page 255.

Reply

Click to access the Add a Reply page to reply to this topic or reply.

Edit

Click to access the Discussion page to edit this post.

Notify

Click to access the Notify Members page to send a notification to forum participants.

Delete

Click to delete this post. Any replies to this post will also be deleted.

Flat View or **Threaded View**

Click a Change Display View link to toggle between a threaded view and a flat view.

See Chapter 10, "Working With Discussion Forums," Comparing the Threaded and Flat Views, page 216.

Preferences

Click to access the Preferences page to set your preferences for viewing discussion forums.

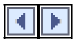
See Chapter 10, "Working With Discussion Forums," Setting Forum View Preferences, page 217.

 **Alerts**

Click to access the Add Alert Subscription page to manage alerts at the topic and forum levels.

Search

Click to access the Search Discussion Forums page to search in the current forum or other discussion forums.



Use the Previous Topic and Next Topic buttons to navigate to the previous or next topic in this forum.

Note. Each button is active only when there is a previous or next topic to navigate to.

Use the Previous Post and Next Post buttons to navigate up and down in the hierarchy of posts for this discussion topic.

Note. Each button is active only when there is a previous or next post to navigate to. When you are viewing the topic post, clicking Previous Post navigates to the discussion forum homepage.

<Forum Title> or **<Post Title>**

Click to navigate to the discussion forum homepage or to a specific post.

<Author>	Click to view the member profile for the author of the current post.
Tags	Click to view the Tags section for the discussion topic.

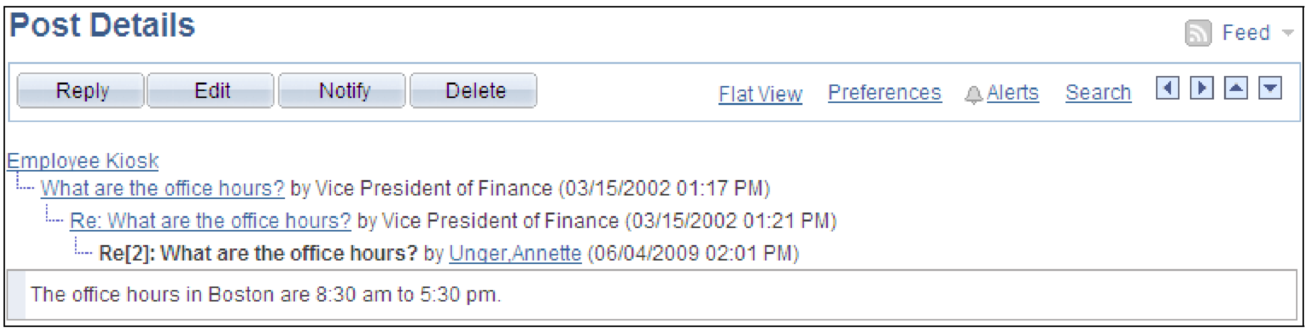
This section also discusses how to:

- Compare the threaded and flat views
- Set forum view preferences

Comparing the Threaded and Flat Views

The threaded view displays only the post titles for a discussion topic in a hierarchical manner. The flat view displays *all* posts for a discussion topic and the *details* of each post.

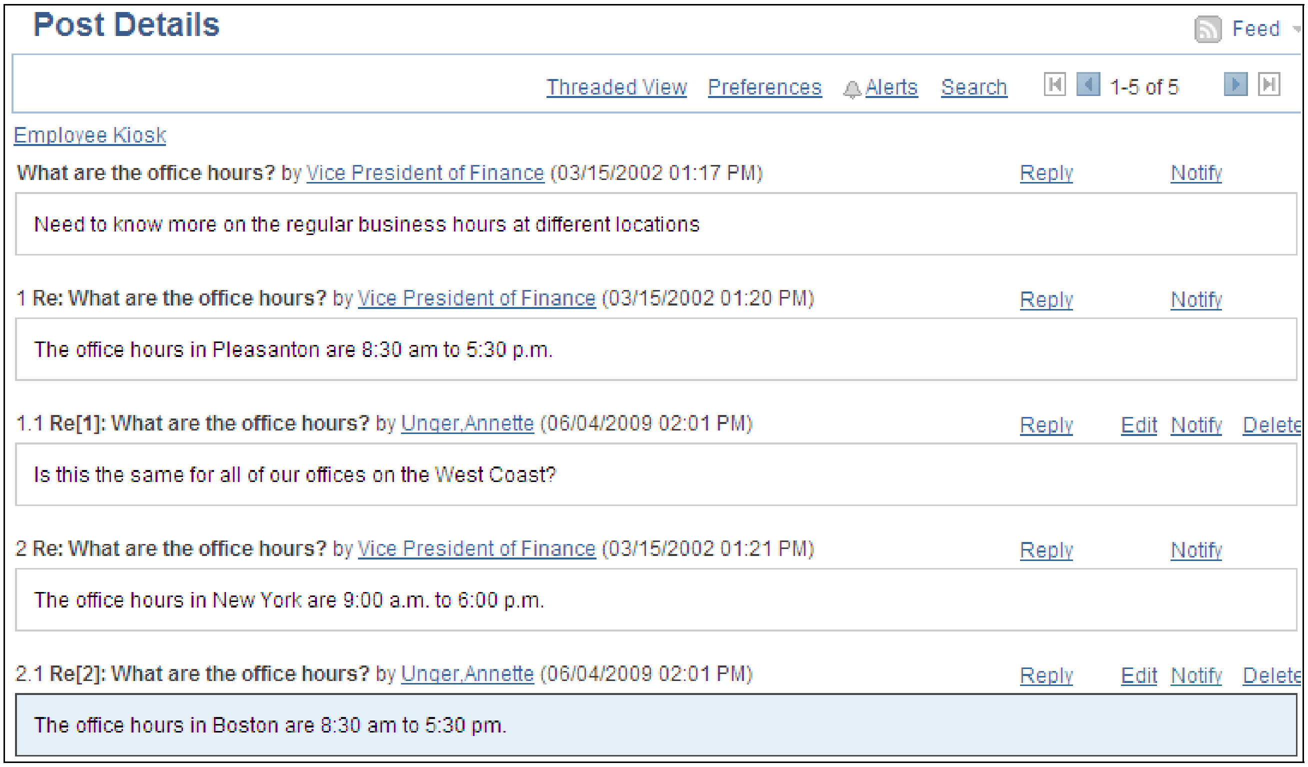
The following is an example of the threaded view, which shows the hierarchy of the discussion topic and replies with details for the selected post only.



Threaded view of the Post Details page

Depending on which post is selected, not all posts are displayed for the topic. For example, only the predecessors in a direct line to the currently selected post are displayed. Compare this threaded view with the following flat view.

The following is an example of the flat view of the same discussion topic. The post details are displayed with replies to the initial post in the order in which they were posted. This view enables you to see the details of all responses with the currently selected post highlighted.

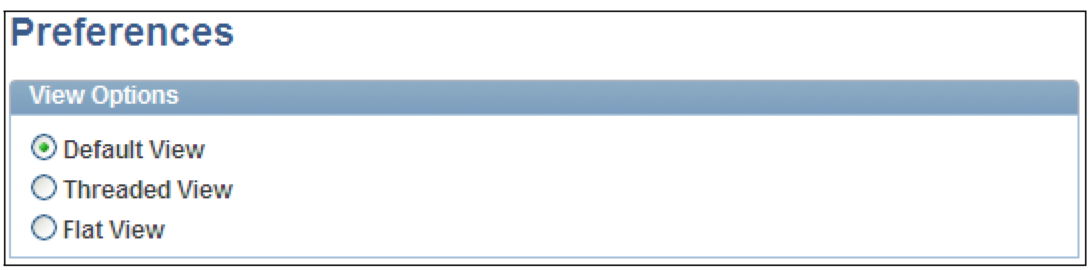


Flat view of the Post Details page

Compare this flat view with the preceding threaded view. The flat view includes all five posts: the original topic, two replies, and one reply to each reply. The threaded view includes three posts only in a direct line from the original topic to the currently selected reply.

Setting Forum View Preferences

Access the Preferences page (click the Preferences link on the Post Details page).



Preferences page

Use the Preferences page to set a personal preference for the display view for all your discussion forums. Select one of the following options:

- *Default View* — Use the view set by the forum moderator.
- *Threaded View* — Use the threaded view for all your discussion forums.
- *Flat View* — Use the flat view for all your discussion forums.

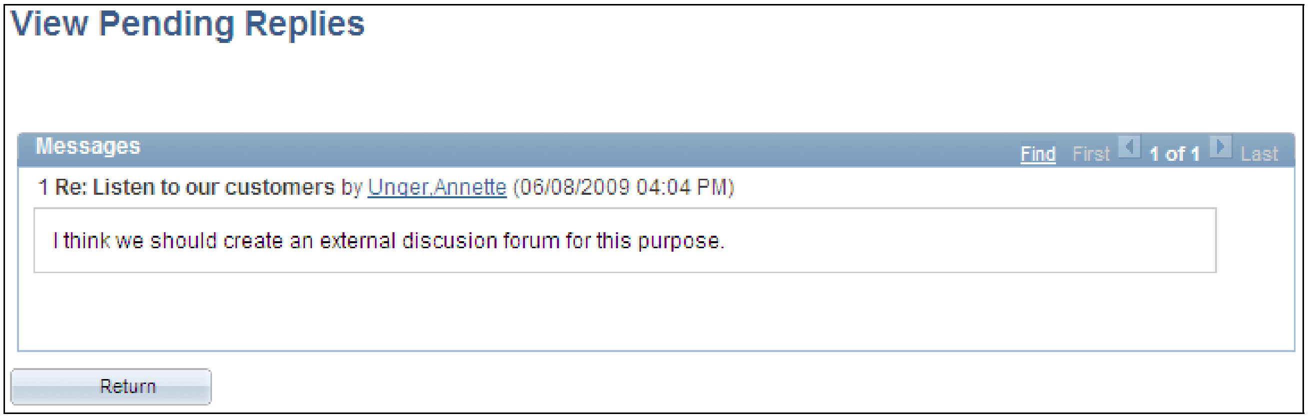
Viewing Pending or Rejected Posts

Access the View Pending Posts page (click the View My Pending Posts link on the discussion forum homepage).

Access the View Rejected Posts page (click the View My Rejected Posts link on the discussion forum homepage).

Access the View Pending Replies page (click the View My Pending Replies link on the Post Details page).

Access the View Rejected Replies page (click the View My Rejected Replies link on the Post Details page).



View Pending Replies page

Use these pages to view your pending or rejected topics and replies for this discussion forum. The links and buttons are the same for each page. In the preceding example, the View Pending Replies page is shown.

Find Click to pop up a dialog box allowing you to search the page contents for a specific topic or reply.

Return Click to return to the previous page.

Deleting a Post

To delete a post from a discussion forum:

1. Go to the Post Details page for the post that you want to delete.

   Note. If the post includes a reply, only the forum moderator can delete the post (and any associated replies). The contributor who added the original post will be unable to delete it.

2. Click the Delete button.
3. Click OK to confirm that you want to delete that post and any associated replies.

Viewing Discussion Forum Feeds

Once a discussion forum is published as a feed, the link to the forum's feed is available on the discussion forum homepage, the Post Details page, the Discussion Forums pagelet, and in other pages and pagelets in the PeopleSoft Enterprise Portal system.

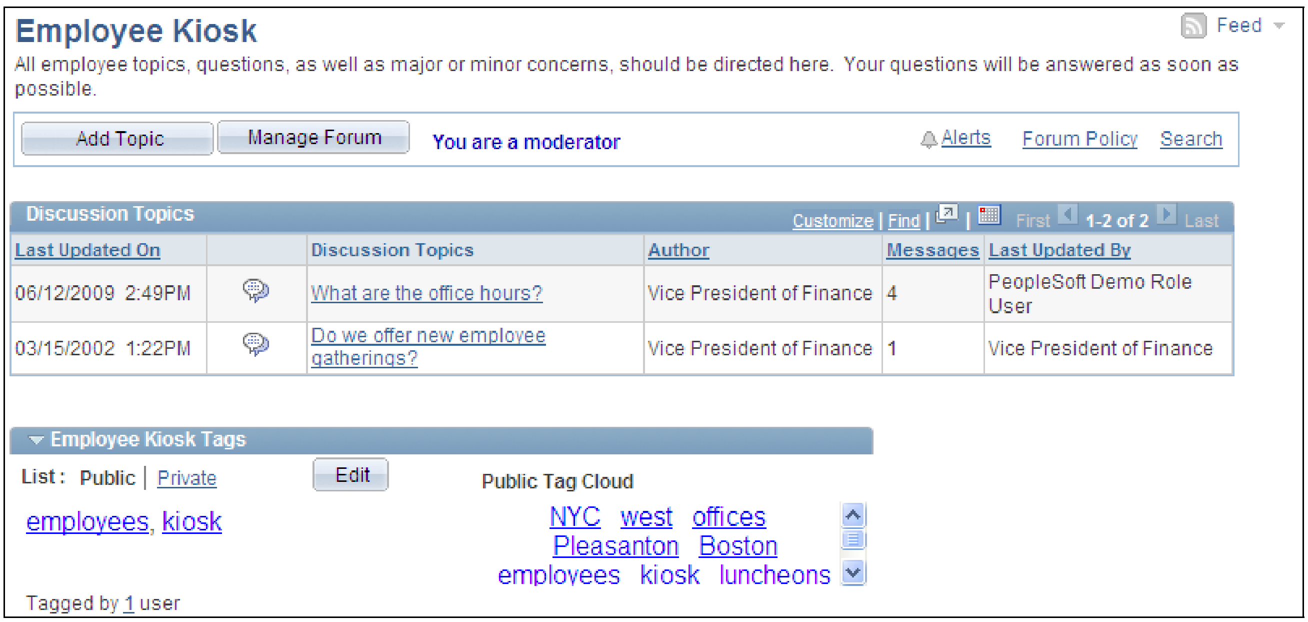
See Chapter 11, "Working With Feeds and Alerts," Viewing and Subscribing to Feeds, page 255.

Using Tags in a Discussion Forum

In a discussion forum, tags can be added and managed in the Tags section at two levels:

- At the forum level on the discussion forum homepage.
- At the topic level on the Post Details page.

In addition, the Tags section on the discussion forum homepage includes a tag cloud showing all tags (forum level and topic level) added to this discussion forum. The following example shows the Tags section from a discussion forum homepage:



A discussion forum homepage showing the Tags section

In this example, *employees* and *kiosk* are tags at the forum level. *NYC*, *west*, *offices*, *Pleasanton*, and *Boston* were added as tags for the first topic; *luncheons* and *gatherings* (not visible) were added as tags for the second topic.

Creating, managing, and using tags is discussed in this PeopleBook.

See Chapter 12, "Working With Tags," page 263.

Viewing the Forum Policy Statement

Access the Forum Policy page (click the Forum Policy link on the discussion forum homepage). Use the Forum Policy page to review the policy statement for the discussion forum.

Managing Discussion Forums

This section discusses how to:

- Manage a discussion forum.
- Approve or reject pending posts.
- Publish a discussion forum as a feed.
- Administer a discussion forum (delete or reactivate).

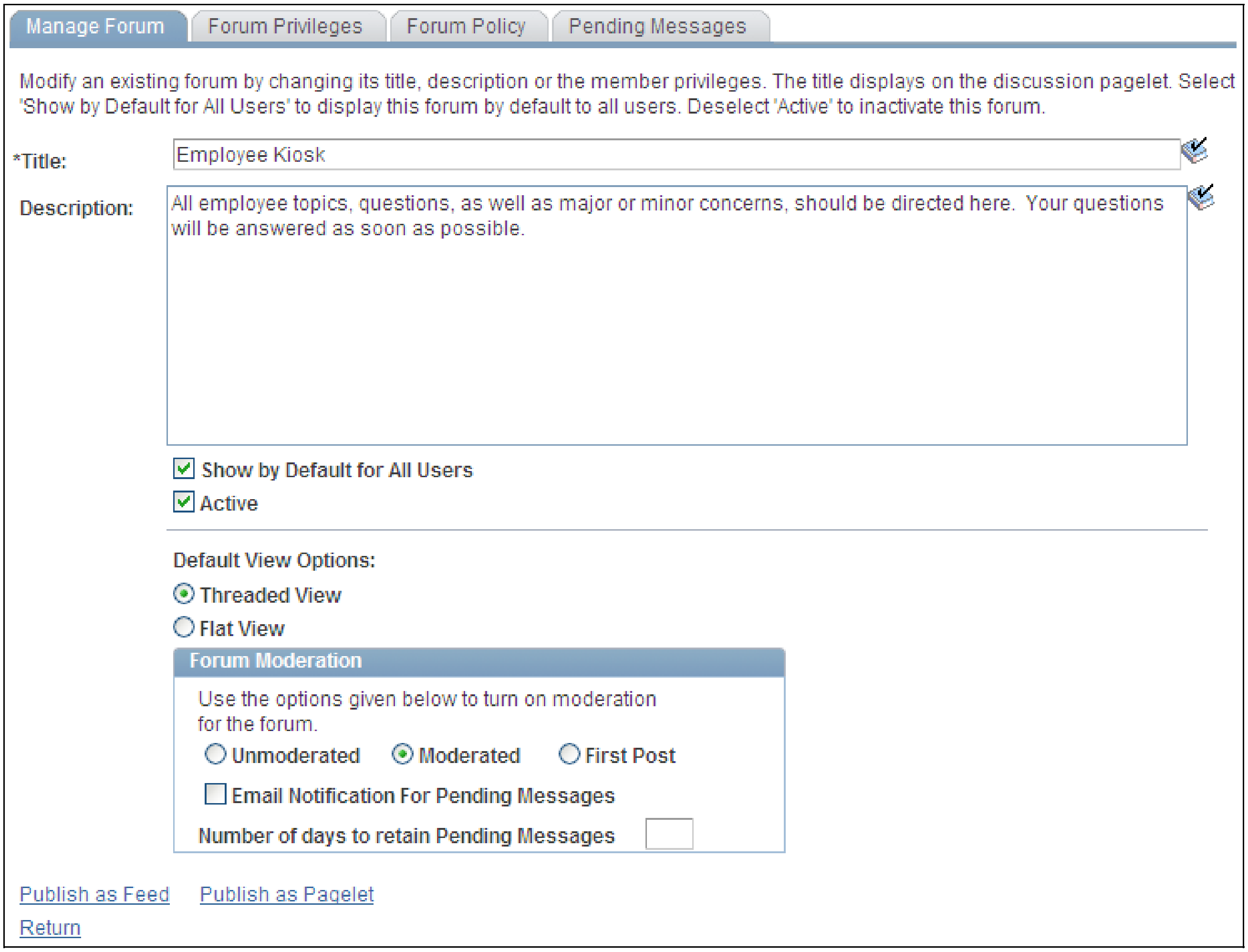
Pages Used to Manage Discussion Forums

Page Name	***Definition Name***	***Navigation***	***Usage***
Manage Forum	EPPDF_FORUM_MANAGE	• Click the Manage Forum button on the discussion forum homepage. • Click the link for a discussion forum on the Administer Discussion Forums page.	Set the properties for a discussion forum.
Forum Privileges	EPPDF_FORUM_PRIV	On the Manage Forum page, select the Forum Privileges page.	Assign discussion forum participants by user or role. Assign privileges to the participants.
Forum Policy	EPPDF_FORUM_POLICY	On the Manage Forum page, select the Forum Policy page.	Enter a policy statement for the discussion forum.
Pending Messages	EPPDF_PENDING_POST	On the Manage Forum page, select the Pending Messages page.	Approve or reject pending posts to the discussion forum.
View a Post	EPPDF_POST_SEC	Click the title for a post on the Pending Messages page.	Review the post text prior to approving or rejecting the post.

Page Name	***Definition Name***	***Navigation***	***Usage***
Reject Expired Pending Forum Posts/Blog Comments	EPPDF_PSTRJT_RUN	Portal Administration, Discussion Forums, Reject Expired Posts/Comments	Run the EPPDF_PSTRJT Application Engine program to reject pending posts that have expired.
Administer Discussion Forums	EPPDF_MYFORUMS	Portal Administration, Discussion Forums, Administer Forums	Delete discussion forums. Also, access the Manage Forum page for each forum.
Administer Discussion Forums - Delete Confirmation	EO_PE_YESNOCONFIRM	On the Administer Discussion Forums page, click the delete button for a discussion forum.	Confirm deletion of the discussion forum.

Managing a Discussion Forum

Access the Manage Forum page (click the Manage Forum button on the discussion forum homepage).



Manage Forum page

Use the Manage Forum page to set the properties for a discussion forum.

Title Enter a title for the discussion forum. This text appears on the Discussion Forums pagelet as the link to access the discussion forum.

Description Enter a description of the goal of the discussion forum. This text appears on the Discussion Forums pagelet as hover text for the link used to access the discussion forum.

Show by Default For All Users Select to display this discussion forum in the Discussion Forums pagelet by default for all users who are included in the users and roles assigned on the Forum Privileges page.

Active

Clear this option to inactivate the discussion forum. The discussion forum will no longer appear for any users in the Discussion Forums pagelet or the My Discussion Forums page.

Note. To activate a discussion forum that has been inactivated, you must go to the Administer Discussion Forums page to access the forum.

Reselect this option to make an inactive forum active again. Reactivating a forum makes existing topics and replies available again.

Default View Options

Select the default view for this discussion forum:

- *Threaded View* — Displays the posts for a discussion topic in a hierarchical manner.
- *Flat View* — Displays all posts for a discussion topic and the details of each post.

Forum participants can switch between the threaded view and flat view on the Post Details page.

See Chapter 10, "Working With Discussion Forums," Comparing the Threaded and Flat Views, page 216.

Portal administrators can set the system-level default for this option on the Installation Options page.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Configuring Enterprise Portal," Defining Installation Options.

Forum Moderation

Note. Forum moderation applies to all post types—that is, new topics and replies.

Select the moderation option for this forum:

- *Unmoderated* — Posts to this forum are not moderated.
- *Moderated* — All posts to this forum are moderated.

  The forum moderator must review and approve or reject each post to this forum.
- *First Post* — First posts to this forum by each participant are moderated.

  Only the first post for each participant is submitted to the moderator for approval.

Email Notification For Pending Messages

Select this option to send an email notification to the forum moderator for each post that requires approval.

Number of days to retain Pending Messages

Set the number of days to retain a pending post.

After the set number of days has passed, a pending post will be rejected. Set this field to *0* to retain pending posts indefinitely.

Publish as Feed	Click to access the Manage Forum - Publish Feed Definition page to publish this discussion forum as a feed.
Publish as Pagelet	Click to access the Manage Forum - Publish Pagelet Wizard Definition page to publish this discussion forum as a pagelet.
Return	Click to return to the previous page.

This section also discusses how to:

- Manage discussion forum participants and privileges.
- Manage the discussion forum policy statement.

Managing Discussion Forum Participants and Privileges

Access the Forum Privileges page (select Forum Privileges on the Manage Forum page). Use the Forum Privileges page to assign discussion forum participants and privileges.

See Chapter 10, "Working With Discussion Forums," Assigning Discussion Forum Participants and Privileges, page 205.

Managing the Discussion Forum Policy Statement

Access the Forum Policy page (select Forum Policy on the Manage Forum page). Use the Forum Policy page to edit the discussion forum policy statement.

See Chapter 10, "Working With Discussion Forums," Creating a Discussion Forum Policy Statement, page 206.

Approving or Rejecting Pending Posts

This section discusses how to:

- Approve or reject posts manually.
- Review a post.
- Reject expired posts automatically.

Note. The approval or rejection of a post causes an email notification to be sent to the participant who posted to the forum.

Approving or Rejecting Posts Manually

Access the Pending Messages page (select Pending Messages on the Manage Forum page).

Pending Messages page

Use the Pending Messages page to approve or reject posts (new topics or replies) to the discussion forum.

Select	Select one or more posts to update in bulk.
Title	Click a post title to access the View a Post page to review the posted text.
Post Status and **Change Selected To**	Select one of the following statuses: • *Approved* • *Pending* • *Rejected*
Select All	Click to select all listed posts.
Clear All	Click to clear the selection of all listed posts.
Return	Click to return to the previous page.

Reviewing a Post

Access the View a Post page (click the link for a post on the Pending Messages page).

View a Post page

Use the View a Post page to review the post text prior to approving or rejecting the post. Click Return to return to the Pending Messages page.

Rejecting Expired Posts Automatically

Access the Reject Expired Pending Forum Posts/Blog Comments page (select Portal Administration, Discussion Forums, Reject Expired Posts/Comments).

Run the EPPDF_PSTRJT Application Engine program to reject pending posts that have expired. This program searches for all pending posts and checks the authored date for each. If the difference between the current date and the authored date is equal to or greater than the number of days set on the Manage Forum page for that discussion forum, then the message status is set to rejected.

Set the process recurrence for the EPPDF_PSTRJT program to a frequency suitable for your system**—**for example, *M-F at 5pm.*

Publishing a Discussion Forum as a Feed

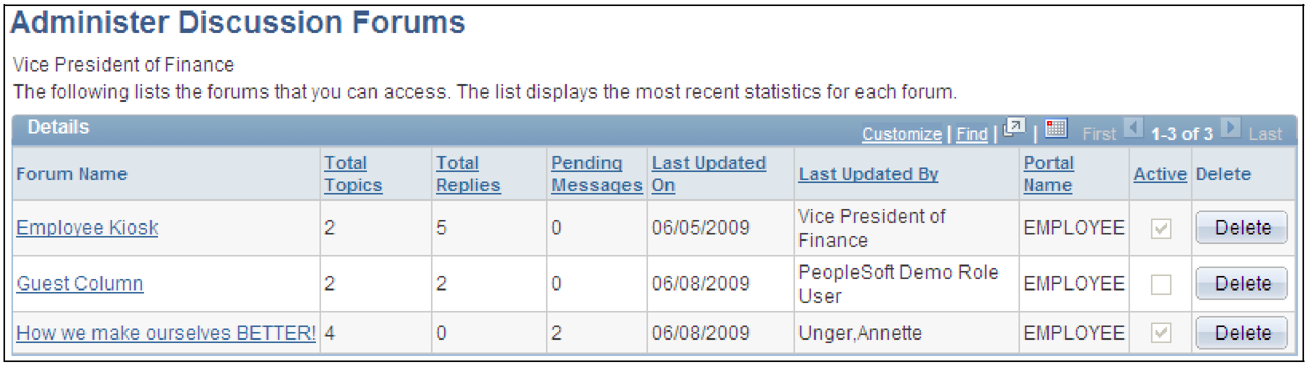
Discussion forums can be published as feeds. Once published, the link to a discussion forum's feed is available on the discussion forum homepage, the Post Details page, the Discussion Forums pagelet, and in other pages and pagelets in the PeopleSoft Enterprise Portal system.

There are no special advanced options for discussion forum feeds. Therefore, the standard feed publishing process can be followed.

See Chapter 11, "Working With Feeds and Alerts," Publishing PeopleSoft Enterprise Portal Content as a Feed, page 251.

Administering Discussion Forums

Access the Administer Discussion Forums page (select Portal Administration, Discussion Forums, Administer Forums).



Administer Discussion Forums

Vice President of Finance

The following lists the forums that you can access. The list displays the most recent statistics for each forum.

Details — Customize | Find | First 1-3 of 3 Last

Forum Name	Total Topics	Total Replies	Pending Messages	Last Updated On	Last Updated By	Portal Name	Active	Delete
Employee Kiosk	2	5	0	06/05/2009	Vice President of Finance	EMPLOYEE	☑	Delete
Guest Column	2	2	0	06/08/2009	PeopleSoft Demo Role User	EMPLOYEE	☐	Delete
How we make ourselves BETTER!	4	0	2	06/08/2009	Unger,Annette	EMPLOYEE	☑	Delete

Administer Discussion Forums page

Use the Administer Discussion Forums page to delete discussion forums and to access the Manage Forum page for each forum.

Forum Name Click the title for a forum to access its Manage Forum page.

Note. Forums that have been inactivated can be accessed through the Administer Discussion Forums page only.

Delete Click to delete the forum.

Publishing a Discussion Forum as a Pagelet

This section discusses how to:

- Publish a pagelet from a discussion forum.
- Publish a discussion forum from Pagelet Wizard.
- Edit a published pagelet.
- Publish a pagelet to multiple portals.

Pages Used to Publish Discussion Forums as Pagelets

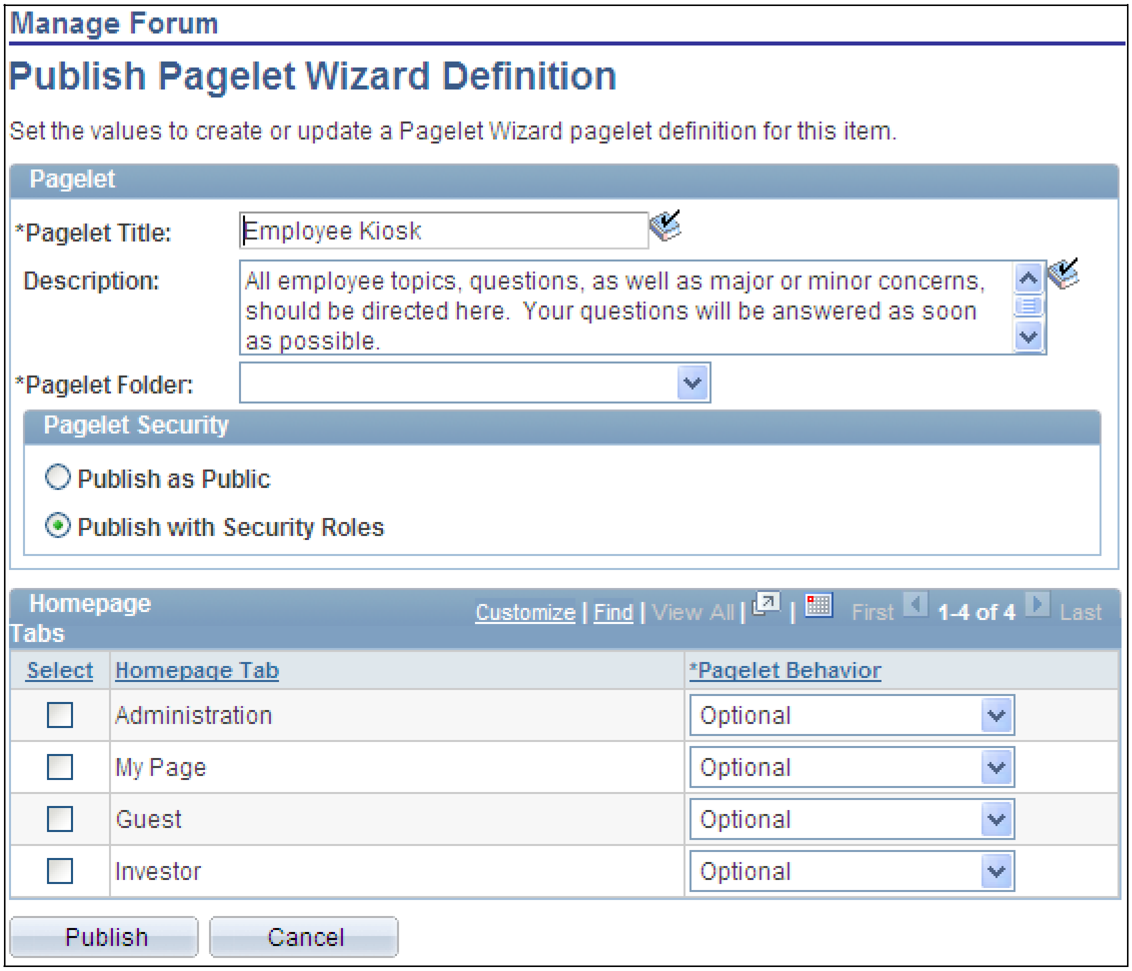
Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Forum - Publish Pagelet Wizard Definition	EPPPB_PGLT_PUB	• My Content, My Discussion Forums Click the link for the discussion forum on the My Discussion Forums page. Click the Manage Forum button on the discussion forum homepage. Click the Publish as Pagelet link on the Manage Forum page. • Click the Add Pagelet button or the Edit button on the Manage Forum - Publish as Pagelet page.	Create a pagelet definition for a discussion forum.
Pagelet Wizard - Specify Pagelet Information	PTPPB_WIZ_INFO	• Click the Go to Pagelet Wizard link on the Manage Forum - Publish Pagelet Wizard Definition page. • Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard • PeopleTools, Portal, Pagelet Wizard, Pagelet Wizard • 1 Click the Pagelet Information button from any page in the wizard.	Provide information to identify and categorize a pagelet.
Pagelet Wizard - Select Data Source	PTPPB_WIZ_DATASRC	• Click the Next button on the Pagelet Wizard - Specify Pagelet Information page. • 2 Click the Data Type button from any page in the wizard.	Select the type of data source for the pagelet.

Page Name	***Definition Name***	***Navigation***	***Usage***
Pagelet Wizard - Specify Data Source Parameters	PTPPB_WIZ_DATAPRMS	• Click the Next button on the Pagelet Wizard - Select Data Source page. • Click the Data Source Parameters button from any page in the wizard.	Configure the data source parameters that are required for data to be displayed in the pagelet. **Note.** This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.
Pagelet Wizard - Specify Data Source Parameter Values	PTPPB_WIZ_PRMVALS	Click the Values link on the Pagelet Wizard - Specify Data Source Parameters page.	Specify prompt values for the end user to select from when personalizing the pagelet. **Note.** This page is accessible only for data source parameters for which you have selected the *User Specified* or *Admin Specified* usage types.
Pagelet Wizard - Select Display Format	PTPPB_WIZ_DISPFRMT	• Click the Next button on the Pagelet Wizard - Specify Data Source Parameters page. • Click the Display Format button from any page in the wizard.	Specify the data transformation method and display format for the pagelet.
Pagelet Wizard - Specify Display Options	PTPPB_WIZ_DISP_CUS	• Select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page. • Click the Transformation button from any page in the wizard.	Enter the custom formatting details for the pagelet as well as header and footer options. Preview the pagelet.
Pagelet Wizard - Specify Publishing Options	PTPPB_WIZ_PUBOPT	• Click the Next button on the Pagelet Wizard - Specify Display Options page. • Click the Register Pagelet icon from any page in the wizard.	Specify the manner in which the pagelet is published. Provide registration, caching, and security details, and register the pagelet.

Page Name	***Definition Name***	***Navigation***	***Usage***
Pagelet Wizard - Pagelet Creation Confirmed	PTPPB_WIZ_FINISH	Click the Finish button on the Pagelet Wizard - Specify Publishing Options page.	Confirm that the creation of the pagelet is complete.
Manage Forum - Publish as Pagelet	EPPPB_PGLT_LST	• Click the Publish button on the Manage Forum - Publish Pagelet Wizard Definition page. • If this discussion forum has already been published as a pagelet, click the Publish as Pagelet link on the Manage Forum page.	Administer pagelet definitions for a discussion forum.
Publish to Multiple Portals	PTPP_PMPUBPRTL	• Click the Publish Pagelet in Other Sites link on the Manage Forum - Publish Pagelet Wizard Definition page. • Portal Administration, Pagelets, Publish Pagelets • PeopleTools, Portal, Portal Utilities, Publish Pagelets	Publish the pagelet definition to additional portals and sites.
Publish Multiple Pagelets	PTPP_PMPUBPGLT	• On the Publish to Multiple Portals page, select Publish Multiple Pagelets. • Portal Administration, Pagelets, Publish Pagelets, Publish Multiple Pagelets • PeopleTools, Portal, Portal Utilities, Publish Pagelets, Publish Multiple Pagelets	Publish multiple pagelet definitions to another portal or site.

Publishing a Pagelet from a Discussion Forum

Access the Manage Forum - Publish Pagelet Wizard Definition page (click the Publish as Pagelet link on the Manage Forum page).



Manage Forum - Publish Pagelet Wizard Definition page

Use the Manage Forum - Publish Pagelet Wizard Definition page to create a pagelet definition for a discussion forum.

Pagelet

The pagelet title and description from the Manage Forum page appear in the Pagelet group box. You can edit these two fields, if necessary.

Pagelet Title Displays the title for the discussion forum, which can be edited as the title for the pagelet.

Description Displays the description for the discussion forum, which can be edited as the description for the pagelet.

Pagelet Folder Select a folder to publish to. Only folders from the current site are available to select.

Pagelet Security Select the security options for viewing the pagelet. Available options are:

Publish as Public, which enables all users to view the pagelet.

Publish with Security Roles, which uses the roles defined on the Forum Privileges page when publishing the pagelet.

Note. If there are no roles defined on the Forum Privileges page, the system automatically selects to publish the pagelet as public.

Homepage Tabs

Use this group box to define the homepage tab labels and behavior for the pagelet.

Homepage Tab Select the tabs that will display the pagelet.

Pagelet Behavior Select the behavior options for the pagelet.

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.

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 homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

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.

Publish Click the Publish button to publish this pagelet and display the Manage Forum - Publish as Pagelet page, on which you can review or edit the pagelet definition

Publishing a Discussion Forum from Pagelet Wizard

Pagelets for discussion forums can be created and published using Pagelet Wizard and then managed from the Manage Forum page. This section provides an overview of how to use Pagelet Wizard to complete the following six steps:

- Step 1: Entering Pagelet Identifying Information.
- Step 2: Selecting a Pagelet Data Source.
- Step 3: Specifying Data Source Parameters.

  Step 3 also includes "Specifying Prompt Values for Data Source Parameters."

- Step 4: Selecting a Pagelet Display Format.
- Step 5: Specifying Pagelet Display Options.
- Step 6: Specifying Pagelet Publication Options.

Note. If you access Pagelet Wizard from the Go to Pagelet Wizard link, you will be modifying an existing pagelet definition. If you want to create a new pagelet definition, start from the Portal Administration or PeopleTools navigation path.

Where appropriate, this section provides details specific to using Pagelet Wizard to publish a discussion forum as a pagelet. The PeopleTools 8.50 PeopleBooks provide detailed information on using Pagelet Wizard.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard."

Step 1: Entering Pagelet Identifying Information

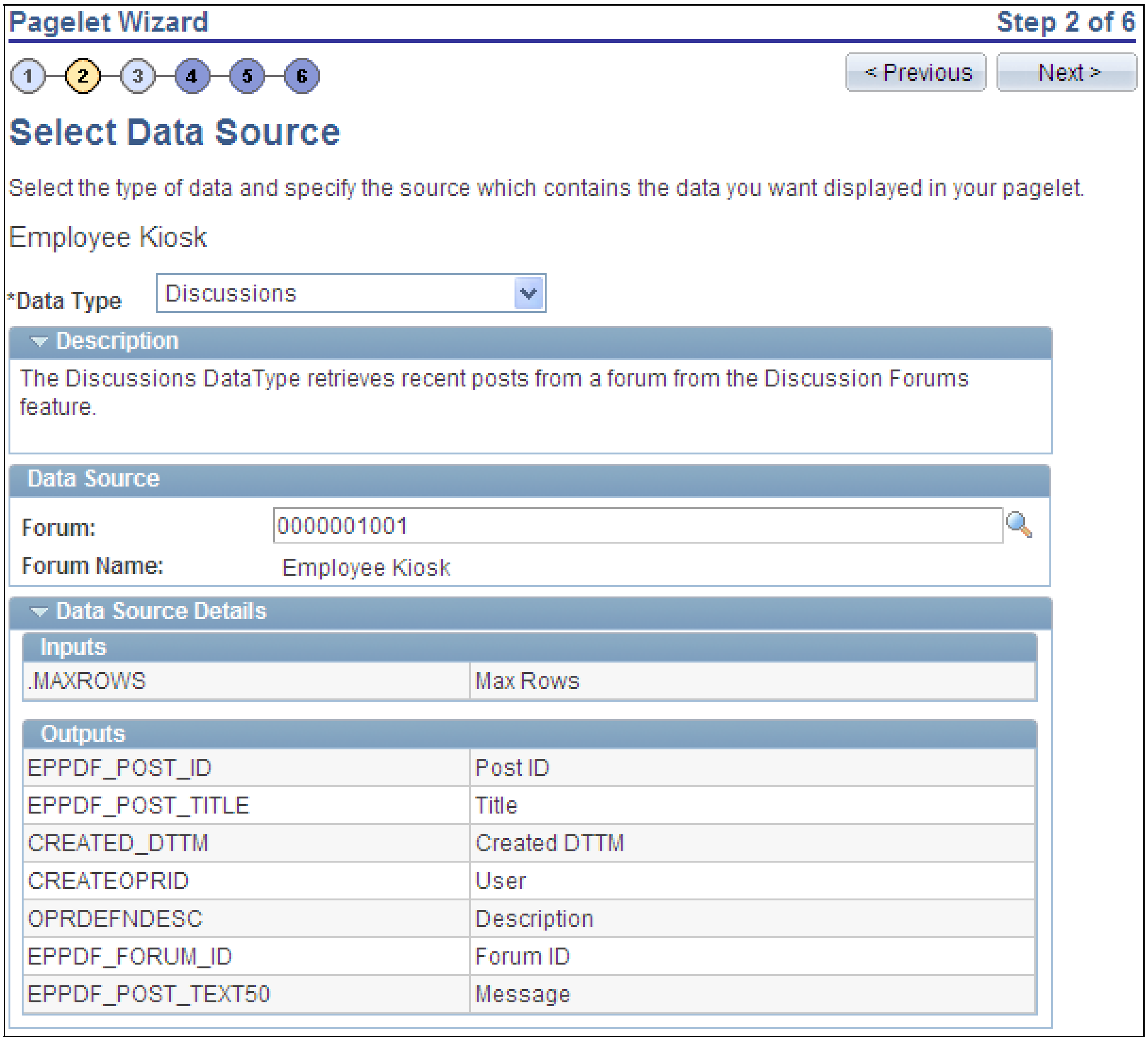
Access the Pagelet Wizard - Specify Pagelet Information page (click the Go to Pagelet Wizard link on the Manage Forum - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Pagelet Wizard, Pagelet Wizard).

Use the Pagelet Wizard - Specify Pagelet Information page to identify and categorize a pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 1: Entering Pagelet Identifying Information.

Step 2: Selecting a Pagelet Data Source

Access the Pagelet Wizard - Select Data Source page (click the Next button on the Pagelet Wizard - Specify Pagelet Information page).



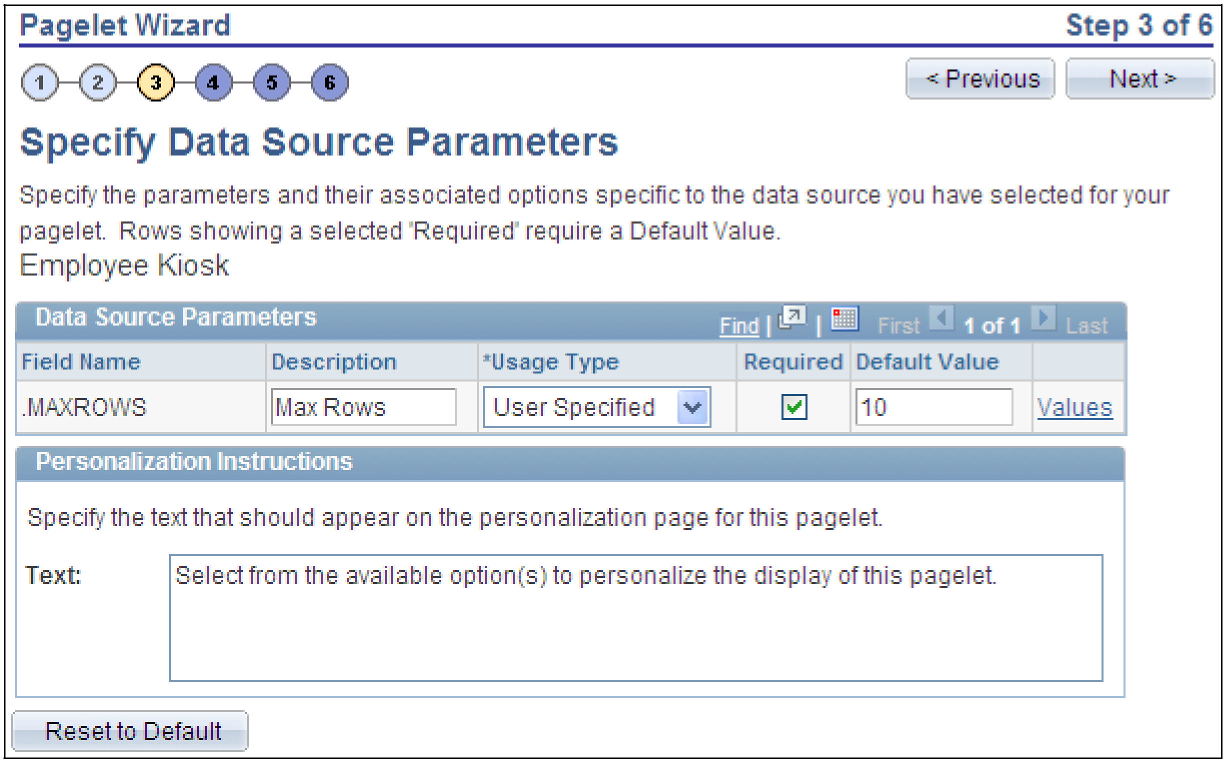
Pagelet Wizard - Select Data Source page (discussions data type)

Use the Pagelet Wizard - Select Data Source page to select the Pagelet Wizard data source type.

Data Type	For discussion forums, select *Discussions.*
Forum	Select the discussion forum to display in the pagelet.
Inputs	Displays the data source parameters that are used to retrieve data for the pagelet.
Outputs	Displays the data source parameter fields that are displayed as output in the pagelet.

Step 3: Specifying Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameters page (select *Discussions* as the data type on the Pagelet Wizard - Select Data Source page, then click the Next button).



Pagelet Wizard - Specify Data Source Parameters page (discussions data source)

Use the Pagelet Wizard - Specify Data Source Parameters page to configure the data source parameters that are required for data to be displayed in the pagelet.

Note. This page is accessible only when you are building a pagelet with a data source that allows modification of associated parameters.

Field Name Displays the name of the data source parameter.

For discussion forums, the following data source parameters can be defined:

MAXROWS — Limits the number of entries displayed in the pagelet

Description Displays a description of the data source parameter.

Usage Type

Select the type of accessibility that you want to grant for the data source parameter when it appears in the pagelet. Options are:

- *Admin Specified:* Select to enable those users with administrative privileges to specify variables for this field, as well as access the Configure link on the published pagelet and select from those parameters for users.
- *Context Sensitive:* Select to enable Context Manager to specify a data source parameter value for this field.
- *Fixed:* Select to enter a fixed value for the data source parameter that the end user cannot modify.
- *System Variable:* Select to assign a system variable as the data source parameter value. The value of the system variable is automatically inserted into the parameter when the pagelet appears. When you select this option, the pagelet end user cannot modify the data source parameter.

  For example, suppose that you specify *%UserId* as the system variable for a parameter name User. When the pagelet appears on a user's homepage, the User field is populated by the *%UserId* system variable, which is the user ID used to access the pagelet.
- *User Specified:* Select to enable end users to specify a data source parameter value for this field. When a pagelet contains a user-specified parameter, the Customize button appears on the pagelet title bar.

  End users can click this button to access a personalization page, on which they can select a data source parameter value that they want to use for the pagelet. Users can select a value from a prompt, or they can manually enter their own value if no prompt values are available.

  See Chapter 10, "Working With Discussion Forums," Specifying Prompt Values for Data Source Parameters, page 237.

  If you change the usage type from or to *User Specified* for a data source parameter on a published homepage pagelet, you must unpublish and then republish the pagelet.

Required

This check box is selected and disabled for parameters specified as administrator-specified, context-sensitive, fixed, and system variable; otherwise, it is selected but enabled for user-specified parameters.

Default Value

You can enter a value that includes the % and * wildcards at the beginning or end of a value in the Default Value field.

Note the following about default values:

- If you select *User Specified* as the usage type and the data source parameter is a required value, you must enter the default value that should appear before a user enters a value. If the data source parameter is not a required value, you do not have to enter a default value.

  If you select a default value when defining prompt values on the Pagelet Wizard - Specify Data Source Parameter Values page, that default value populates this field.

  If you select *User Specified* as the usage type, you can also enter a system variable as the default value. For example, to make the current date the default value for a user-specified parameter, enter a default value of *%Date.*

- If you select *System Variable* as the usage type, you must enter a system variable to use as the data source parameter value. You can use the Look up Value button to access a list of valid system variables.

  See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 3: Specifying Pagelet Data Source Parameters, Understanding System Variables Supported as Data Source Parameters.

- If you select *Fixed* as the usage type, you must enter the fixed value.

Values

If you select *User Specified* or *Admin Specified* as the usage type, click Values to access the Pagelet Wizard - Specify Data Source Parameter Values page.

See Chapter 10, "Working With Discussion Forums," Specifying Prompt Values for Data Source Parameters, page 237.

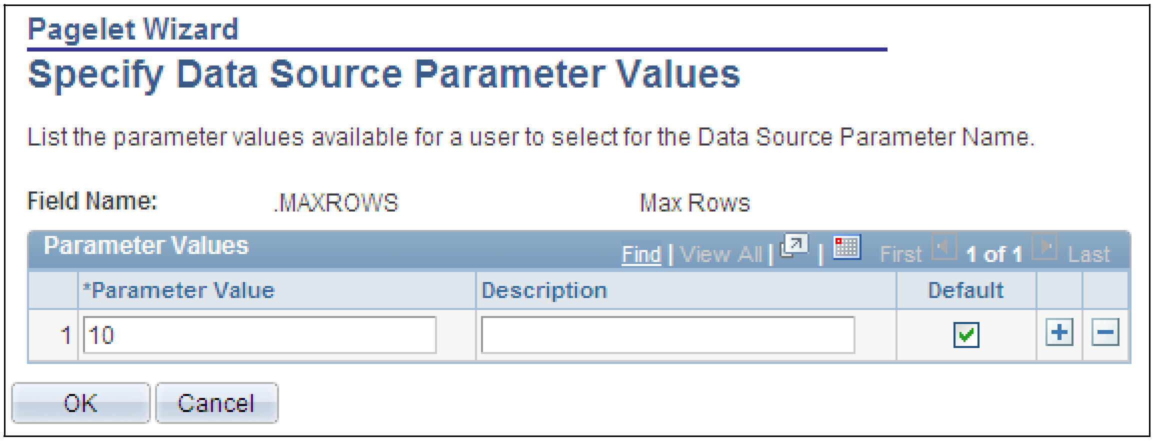
Text

Use the Personalization Instructions group box to enter custom personalization instructions for the pagelet. These personalization instructions appear on the personalization page of the pagelet.

Note. Personalization instructions must be translatable.

Specifying Prompt Values for Data Source Parameters

Access the Pagelet Wizard - Specify Data Source Parameter Values page (click the Values link on the Pagelet Wizard - Specify Data Source Parameters page).



Pagelet Wizard - Specify Data Source Parameter Values page (discussions data source)

Use the Pagelet Wizard - Specify Data Source Parameter Values page to specify the prompt values, which are displayed to users when they personalize the pagelet. In addition, specify the default value for the parameter.

Parameter Value	Specify the parameter value.
Description	Provide an optional description of the parameter value.
Default	Select one value as the default value. If the parameter is required, then a default value is required; otherwise, it is optional.

Step 4: Selecting a Pagelet Display Format

Access the Pagelet Wizard - Select Display Format page (click the Next button on the Pagelet Wizard - Specify Data Source Parameters page).

Use the Pagelet Wizard - Select Display Format page to specify the data transformation method and display format for the pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Using Pagelet Wizard," Step 4: Selecting a Pagelet Display Format.

Step 5: Specifying Pagelet Display Options

Access the Pagelet Wizard - Specify Display Options page (select *Custom* as the display format and click the Next button on the Pagelet Wizard - Select Display Format page}.

Use the Pagelet Wizard - Specify Display Options page to enter the custom formatting details for the pagelet as well as header and footer options, and to preview the pagelet.

Note. If you are modifying an existing pagelet definition or if you modify data source parameter definitions, you might need to reselect the XSL template, regenerate the XSL, or both to have the modified pagelet display actual data.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 5: Specifying Pagelet Display Options.

Step 6: Specifying Pagelet Publication Options

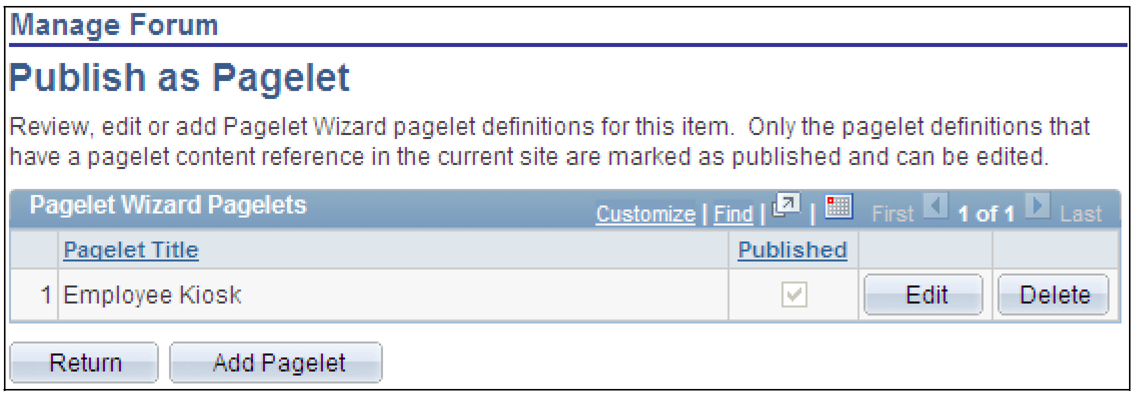
Access the Pagelet Wizard - Specify Publishing Options page (click the Next button on the Pagelet Wizard - Specify Display Options page).

Use the Pagelet Wizard - Specify Publishing Options page to specify the type of pagelet that you want to publish. In addition, provide registration, caching, and security details, and register the pagelet.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Using Pagelet Wizard," Step 6: Specifying Pagelet Publication Options.

Editing a Published Pagelet

Access the Manage Forum - Publish as Pagelet page (click the Publish button on the Manage Forum - Publish Pagelet Wizard Definition page; or if this discussion forum has already been published as a pagelet, click the Publish as Pagelet link on the Manage Forum page).



Manage Forum - Publish as Pagelet page

Use the Manage Forum - Publish as Pagelet page to review, edit, or add Pagelet Wizard pagelet definitions for this discussion forum. To edit a pagelet definition, it must be marked as published and have a content reference in the current site.

Note. Pagelets for this discussion forum published directly from Pagelet Wizard also appear in this list.

Edit
Displays the Manage Forum - Publish Pagelet Wizard Definition page on which you can make changes to the pagelet definition.

Delete
Deletes this pagelet definition and the published pagelet content references in all sites.

Add Pagelet
Adds a new pagelet definition based on the current discussion forum.

Publishing a Pagelet to Multiple Portals

Access the Publish to Multiple Portals page (click the Publish Pagelet in Other Sites link on the Manage Forum - Publish Pagelet Wizard Definition page; or Portal Administration, Pagelets, Publish Pagelets).

Two pages are available for you to publish pagelets to multiple portals:

- Use the Publish to Multiple Portals page to publish the pagelet definition to additional portals and sites.
- Use the Publish Multiple Pagelets page to publish multiple pagelet definitions to another portal or site.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Working With Navigation Pages," Publishing Pagelets.

Using Discussion Forum Alerts and Notifications

This section provides an overview of discussion forum alerts and notifications and discusses how to:

- Subscribe to discussion forum alerts.
- Update discussion forum alerts.
- Send email notifications to forum participants.

Understanding Discussion Forum Alerts and Notifications

You can create personal alert subscriptions at the discussion forum level and at the discussion topic level. In addition, any forum participant can send notifications to selected forum members from any discussion forum post.

Prior to creating any alerts, discussion forum alerts must be enabled on the Alert Setup page. In addition, for alerts to be delivered to subscribers, alert notifications need to be scheduled by the portal administrator.

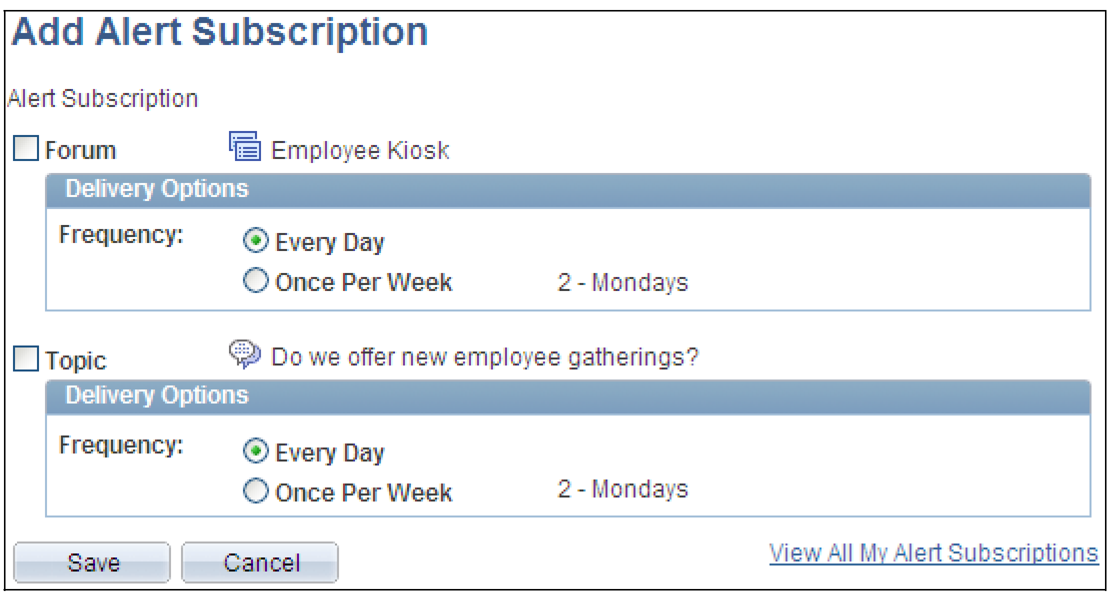
Pages Used for Discussion Forum Alerts and Notifications

Page Name	***Definition Name***	***Navigation***	***Usage***
Add Alert Subscription	EPPAN_ALERTS	• Click the Alerts link on the discussion forum homepage. • Click the Alerts link on the Post Details page.	Create subscriptions for email alerts for the discussion forum.

Page Name	Definition Name	Navigation	Usage
Update Alerts Subscription	EPPAN_ALERTS	• Click the Alerts link on the discussion forum homepage. • Click the Alerts link on the Post Details page. • Click the Update Subscriptions link on the Create New Topic page. • Click the Update Subscriptions link on the Add a Reply page. • Click the Update Subscriptions link on the Discussion page.	Update existing alert subscriptions for the discussion forum.
Notify Members	EPPCW_MBNOTIFY	Click the Notify button (threaded view) or Notify link (flat view) on the Post Details page.	Compose and send an email message to the discussion forum participants.

Subscribing to Discussion Forum Alerts

Access the Add Alert Subscription page (when an alert has not been defined for this forum, click the Alerts link on the discussion forum homepage or click the Alerts link on the Post Details page).



Add Alert Subscription page (topic level view)

Use the Add Alert Subscription page to create subscriptions for email alerts for the discussion forum.

Forum

Select this option to subscribe to an email alert at the discussion forum level.

Topic

Select this option to subscribe to an email alert at the discussion topic level.

Note. This option is available only when accessing this page from the Post Details page.

Frequency

Select the notification frequency:

- *Every Day* — Select to have an email alert sent to you each day that an update occurs.
- *Once Per Week* — Select to have an email alert sent to you once a week during a week in which an update occurs.

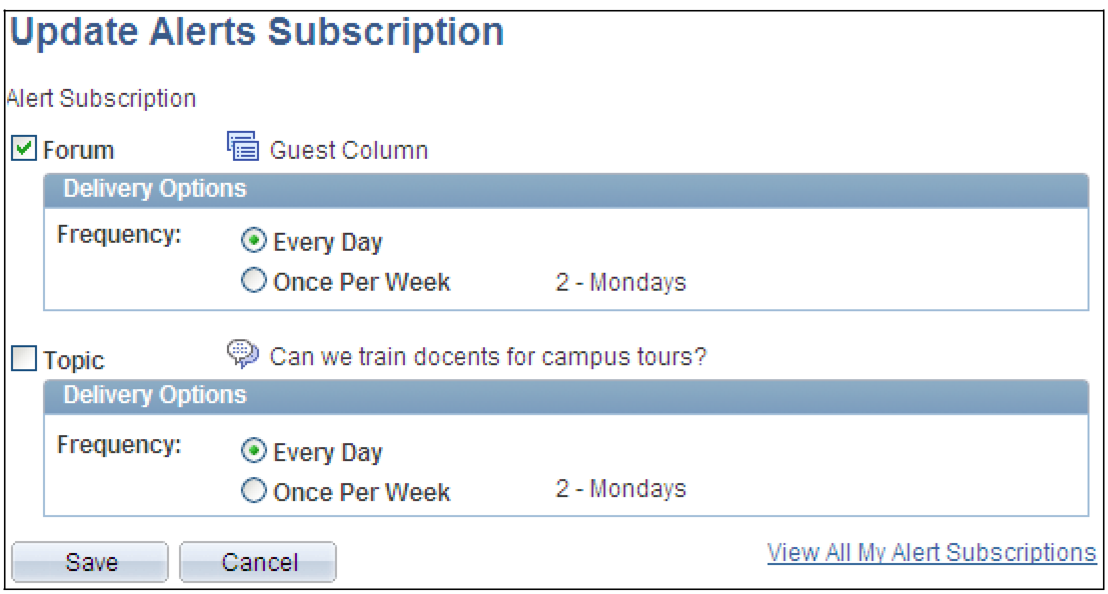
  In addition, select the day of the week in the adjacent drop-down list box.

View All My Alert Subscriptions

Click to view the My Alerts page.

Updating Discussion Forum Alerts

Access the Update Alerts Subscription page (when an alert has already been defined for this forum, click the Alerts link on the discussion forum homepage or click the Alerts link on the Post Details page).



Update Alerts Subscription page (topic level)

Use the Update Alerts Subscription page to update subscriptions for email alerts for the discussion forum.

Forum Select this option to subscribe to an email alert at the discussion forum level.

Topic Select this option to subscribe to an email alert at the discussion topic level.

Note. This option is available only when accessing this page from the topic level within the forum.

Frequency Select the notification frequency:

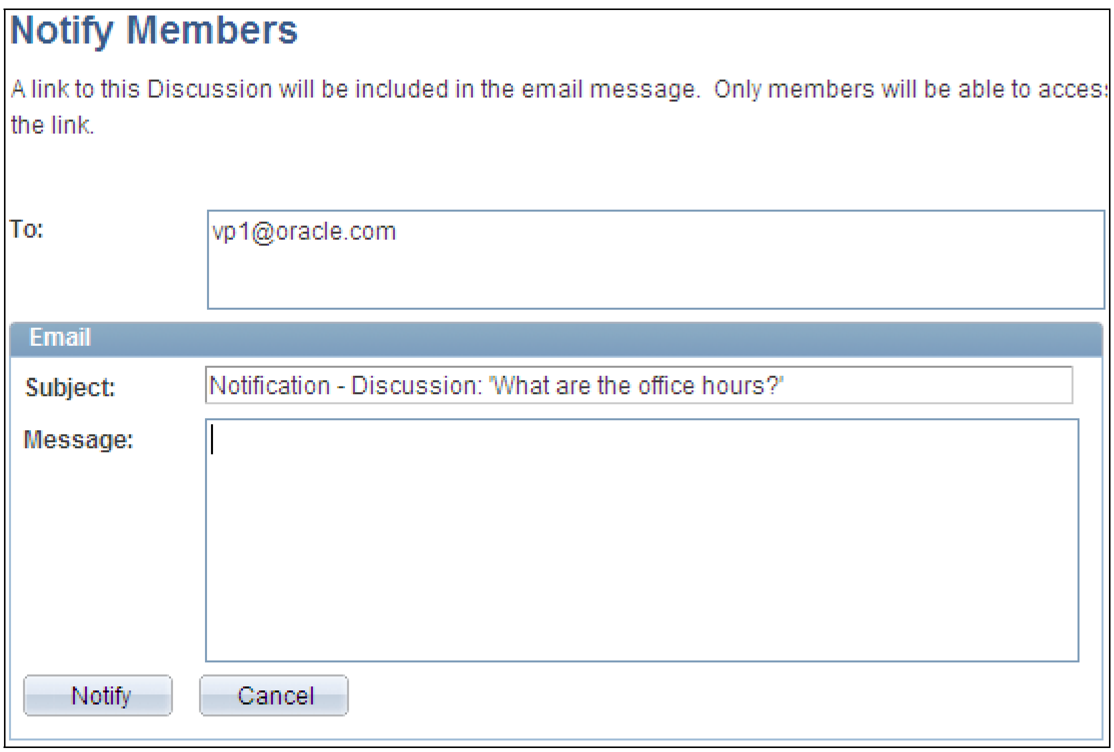
- *Every Day* — Select to have an email alert sent to you each day that an update occurs.
- *Once Per Week* — Select to have an email alert sent to you once a week during a week in which a update occurs.

  In addition, select the day of the week in the adjacent drop-down list box.

View All My Alert Subscriptions Click to view the My Alerts page.

Sending Email Notifications to Forum Participants

Access the Notify Members page (click the Notify button on the Post Details page).



Notify Members page

Use the Notify Members page to compose and send an email message to discussion forum participants. The To field is automatically populated with addresses for all members of the discussion forum who have defined an email address in their system profile.

Note. The email will contain a link to the discussion forum. Only members of the discussion forum will be able to access the forum through the link.

To	Enter additional email addresses for forum participants separated by commas.
Subject	Enter a subject for the email.
Message	Enter the message text for your email.
Notify	Click to send the notification.

Performing Searches Within Discussion Forums

This section provides an overview of searching within discussion forum and describes how to search within discussion forums.

Understanding Searching Within Discussion Forums

You can search for items within a discussion forum in two ways:

- Using the Search link on pages within the discussion forum.

  The Search Discussion Forums page allows you to search within the current discussion forum or across multiple forums and sites.

- Using the Search field in the portal header.

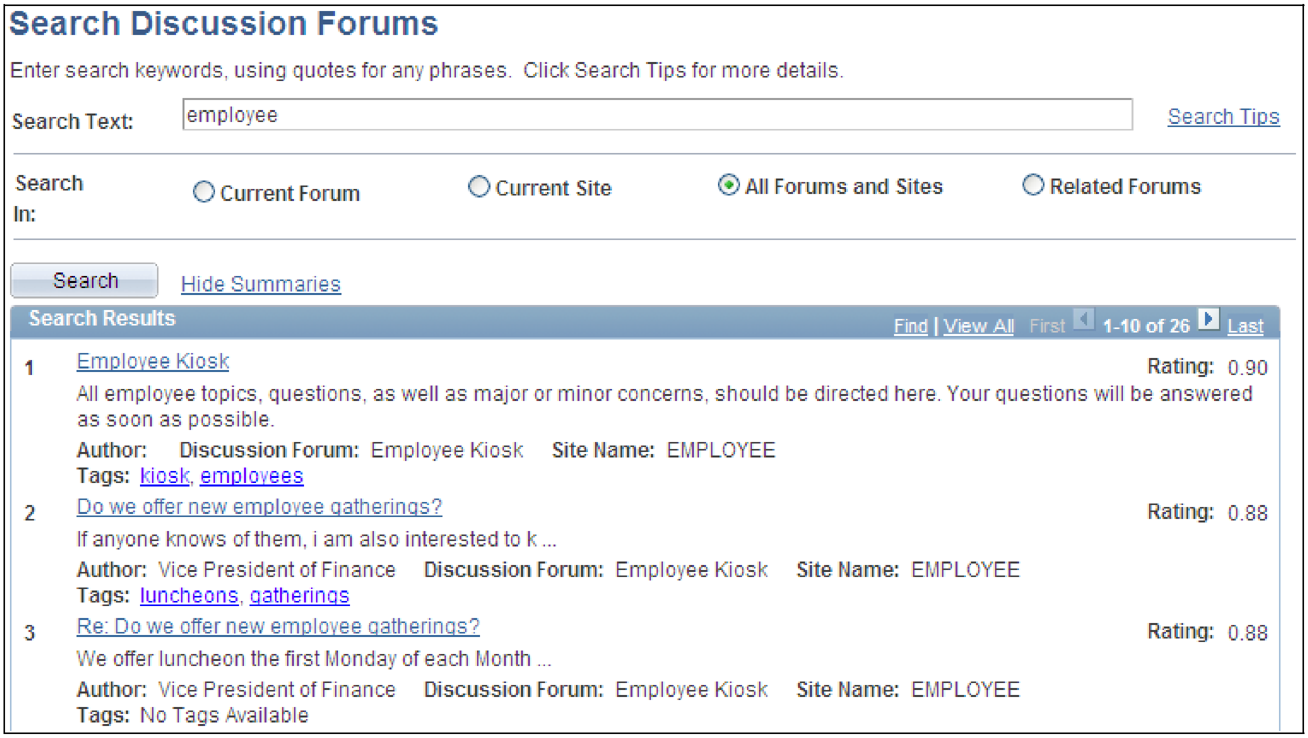
  The *Discussions* scope allows you to search across all discussion forums and sites.

Pages Used to Search Within Discussion Forums

Page Name	***Definition Name***	***Navigation***	***Usage***
Search Discussion Forums	EPPDF_SEARCH	• Click the Search link on the discussion forum homepage. • Click the Search link on the Post Details page. • Click the Search Discussions link in the Discussion Forums pagelet.	Perform a search within a discussion forum or across selected discussion forums and sites.
Search	EO_PE_SRCH_RESULT	• In the portal header, select *Discussions* as the search scope, enter the search string in the Search field, and press ENTER. •  In the portal header, select *Discussions* as the search scope, enter the search string in the Search field, and click the Search button. • On the Search page, select *Discussions* as the search scope, enter the search string in the Search For field, and click the Search button.	Perform a search across all discussion forums sites.
Search Tips	EO_PE_SRCH_TIPS	• Click the Search Tips link on the Search Discussion Forums page. • Click the Search Tips link on the Search page.	Display search syntax and examples.

Searching Within Discussion Forums

Access the Search Discussion Forums page (click the Search link on the discussion forum homepage).



Search Discussion Forums page

Use the Search Discussion Forums page to perform a search within a discussion forum or across selected discussion forums and sites.

Search Text Enter the search criteria.

Search Tips Click to display search syntax and examples on the Search Tips page.

See Chapter 17, "Submitting Searches in the Portal," Search Considerations and Syntax, page 337.

Search In *Current Forum* — Select to search within the current discussion forum only.

Note. The Current Forum option is not displayed when the page is accessed from the Discussion Forums pagelet.

Current Site — Select to search within all discussion forums of which you are a member in the current site.

All Forums and Sites — Select to search within all discussion forums of which you are a member across all sites.

Related Forums — Select to search within related forums created through the Discussions related content service.

Search Click to perform the search.

Hide Summaries and **Show Summaries** Click to hide or show the summaries in the search results.

Search Results	Click a link to view that item.
Return to <Discussion Forum>	If the search originated from a particular discussion forum, click to return to that forum or post.

Working With the Discussion Forums Pagelet

This section provides an overview of the Discussion Forums pagelet and discusses how to:

- Personalize the Discussion Forums pagelet.
- Use the Discussion Forums pagelet.

Understanding the Discussion Forums Pagelet

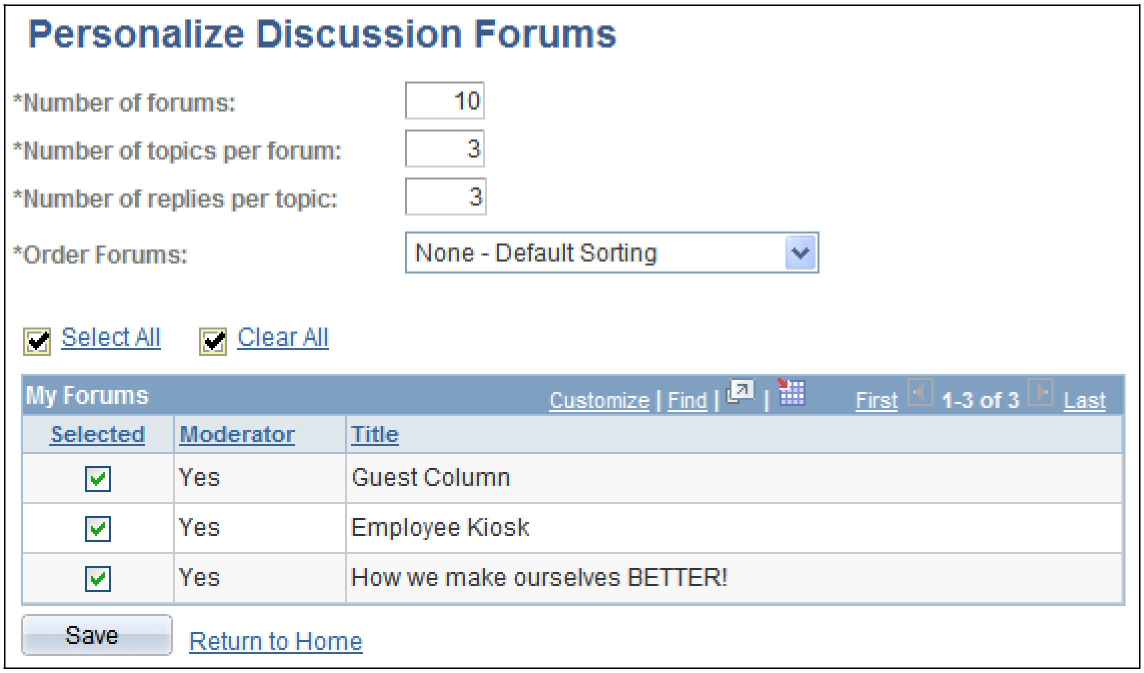
The Discussion Forums pagelet lists discussion forums, topics, and replies. If you do not personalize the Discussion Forums pagelet, the pagelet displays the first 10 forums to which you have access, including those forums created with the *Show by Default for All Users* option selected, with three topics per forum and three replies per topic. In wide format, the pagelet also provides identification of the author of a topic or reply, as well as the date of the post. In narrow format, the pagelet does not provide this additional information.

Page Used to Personalize the Discussion Forums Pagelet

Page Name	*Definition Name*	*Navigation*	*Usage*
Personalize Discussion Forums	EPPDF_USER_PREF	Click the Customize button in the Discussion Forums pagelet.	Select the discussion forums and options for display in your Discussion Forums pagelet.

Personalizing Your Discussion Forums Pagelet

Access the Personalize Discussion Forums page (click the Customize icon in the Discussion Forums pagelet).



Personalize Discussion Forums page

Use the Personalize Discussion Forums page to select the discussion forums and options for display in your Discussion Forums pagelet.

Number of Forums

Enter the maximum number of discussion forums you want to display in the pagelet. The default value is 10. The maximum number is 99.

Number of topics per forum

Enter the maximum number of topics that you want to display per forum in the pagelet. The default value is 3. The maximum number is 99.

Number of replies per topic

Enter the maximum number of replies you want to display per topic in the pagelet. The default value is 3. The maximum number is 99,999.

Order Forums

Select one of the following:

- *Alphabetically - Ascending* — Select to sort by forum title in ascending order.
- *None - Default Sorting* — Select to have no sort order. This is the default.
- *Time Ascending* — Select to sort by date and time of creation in ascending order.
- *Time Descending* — Select to sort by date and time of creation in descending order.
- *User Defined* — Select to order explicitly by number. An Order of Appearance column appears in the My Forums grid.

Select All

Select to select all discussion forums.

Clear All Select to clear all selected discussion forums.

Selected Select the discussion forums you want to display on the pagelet.

Using the Discussion Forums Pagelet

Access the Discussion Forums pagelet on the portal homepage.

Discussion Forums pagelet

Use the Discussion Forums pagelet to access and manage discussion forums, topics, and replies.

 Click the Create a Topic button to access the Create New Topic page within the corresponding discussion forum.

<Discussion Forum> Click a discussion forum link to access the discussion forum's homepage on which you can view details about the forum.

The hover text of the discussion forum link displays the description of the discussion forum.

<Topic Title> Click a topic link to access the Post Details page on which you can view details about the topic.

<Reply Title>	Click a reply link to access the Post Details page on which you can view details about the reply.
Create Forum	Click to access the Create Forum page from which you can create a new discussion forum. This link displays for portal administrators only.
Administer Forums	Click to access to the Administer Discussion Forums page for all discussion forums. This link displays for portal administrators only.
My Forums	Click to access to the My Discussion Forums page.
Search Forums	Click to access the Search Discussion Forums page on which you can perform a search of text in the discussion forums to which you belong.
	Hover over any of these to view the list of feeds published for all discussion forums. Click any list item to open that feed document. Click the Feed button or Feed link to open the first feed document in the list. Click the Open menu button to toggle the list of feeds between frozen open and closed. See Chapter 11, "Working With Feeds and Alerts," Viewing and Subscribing to Feeds, page 255.

Chapter 11

Working With Feeds and Alerts

This chapter discusses how to:

- Publish PeopleSoft Enterprise Portal content as a feed.
- View and subscribe to feeds.
- Maintain alert subscriptions.

Publishing PeopleSoft Enterprise Portal Content as a Feed

This section provides an overview of which PeopleSoft Enterprise Portal items can be published as a feed and discusses how to publish that content as a feed.

Understanding Which PeopleSoft Enterprise Portal Items Can Be Published as a Feed

PeopleSoft Enterprise Portal provides the capability to publish many types of PeopleSoft Enterprise Portal content as feeds. Typically, a feed for one of these items can be published through a Publish as Feed link directly from the administration pages for that item without having to specify any advanced feed options. In PeopleSoft Enterprise Portal, you can publish the following types of content as feeds:

- Blogs.

  Advanced feed options do not need to be defined when publishing a blog as a feed.

- Content management folders including managed content folders, categorized content folders, and news publications.

  You can determine which subfolders are to be excluded from the feed through the advanced feed options for the content management folder.

- Discussion forums.

  Advanced feed options do not need to be defined when publishing a discussion forum as a feed.

- Workspaces including action item lists, blogs, calendar events, discussion topics, documents, and wiki content from the workspace.

  You must determine which modules are to be included in the workspace feed through the advanced feed options for the workspace.

  Note. While action items, calendars, and wiki content appear in the list of feed data types delivered with PeopleSoft Enterprise Portal, these items can only be published as part of a workspace feed and therefore cannot be published independently from a workspace.

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Administering Collaborative Workspaces," Setting Advanced Options for Workspace Feeds.

- Workspace Blogs modules.

  Advanced feed options do not need to be defined when publishing a workspace Blogs module as a feed.

- Workspace Discussions modules.

  Advanced feed options do not need to be defined when publishing a workspace Discussions module as a feed.

- Workspace Documents modules.

  You can determine which subfolders are to be excluded from the feed through the advanced feed options for the Documents module.

In addition, PeopleTools delivers the capability to publish several types of feeds including queries, worklists, Integration Broker messages, and lists of feeds. The PeopleTools PeopleBooks cover publishing and managing PeopleTools feed data types.

See *Enterprise PeopleTools 8.50 PeopleBook: Feed Publishing Framework*, "Creating and Using Feeds." Defining and Publishing Feeds.

Additional information on specific PeopleSoft Enterprise Portal feed types can be found in the Enterprise Portal PeopleBooks.

Pages Used to Publish PeopleSoft Enterprise Portal Content as a Feed

Page Name	***Definition Name***	***Navigation***	***Usage***
Publish Feed Definition	PTFP_PUB_AS_FEED	• Click the Publish as Feed link on the administration page for the item to be published. • Click the Edit button on the Publish as Feed page. • Click the Add Feed button on the Publish as Feed page.	Define feed security options, enter additional feed properties, and access advanced options.

Page Name	***Definition Name***	***Navigation***	***Usage***
Advanced Feed Options	PTFP_PUB_AS_ADVOPT	Click the Advanced Options link on the Publish Feed Definition page.	Enter advanced option values that are specific to the feed data type.
Publish as Feed	PTFP_PUB_AS_LIST	• When one or more feeds have been defined for this item, click the Publish as Feed link on the administration page for the item. • Click the Publish button on the Publish Feed Definition page. • Click the Cancel button on the Publish Feed Definition page.	Review, edit, add, or delete feed definitions for this item.
Publish Feed Definition to Sites	PTFP_PUB_AS_SITES	Click the Publish Feed to Other Sites link on the Publish Feed Definition page.	Publish an existing feed to other sites.
Define Feed Data Types	PTFP_DATATYPE	PeopleTools, Feeds, Define Feed Data Types	Define feed data types and publish the list of feeds for that type.

Publishing Feed Content

This section provides a high-level overview of the process to publish PeopleSoft Enterprise Portal items as feeds.

Note. In order to have the privileges to publish an item as a feed, you must be an administrator, manager, or owner of that item.

To publish an item as a feed:

1. Go to the administration page for that item.

   For example, for a blog, go to the Manage Blog page; for a news publication, go to the Folder Properties page; for a workspace, go to the Administration - Feeds page; and so on.

2. Click the Publish as Feed link.

   Depending on whether feed has already been published for this item, one of the following pages is displayed:

   - The Publish as Feed page is displayed if a feed has already been published for this item. Continue with step 3.
   - The Publish Feed Definition page is displayed if a feed has not been published for this item. Continue with step 4.

3. Determine whether you want to edit one of the current feeds, or create a new feed.

   On the Publish as Feed page, click Edit to edit an existing feed; click Add New to create a new feed.

4. Set the feed parameters, additional feed parameters, and feed security options on the Publish Feed Definition page.

   See *Enterprise PeopleTools 8.50 PeopleBook: Feed Publishing Framework*, "Creating and Using Feeds," Defining and Publishing Feeds, Defining Feed Properties.

5. If you are required to set advanced options for this feed data type or if you wish to define advanced options for this feed, click the Advanced Options link.

   a. Set the advanced options for the feed.

   b. Click OK on the Advanced Feed Options page.

6. Click the Publish button on the Publish Feed Definition page to save any new or revised feed definitions.

This section also discusses the following topics:

- Publishing feeds to other sites.
- Publishing feed lists.

Publishing Feeds to Other Sites

PeopleSoft Enterprise Portal feeds can also be published to other sites within the system. You use the Publish Feed Definition to Sites page to do this.

See *Enterprise PeopleTools 8.50 PeopleBook: Feed Publishing Framework*, "Creating and Using Feeds," Defining and Publishing Feeds, Publishing Feeds to Additional Sites.

Publishing a List of Feeds

Each of the delivered PeopleSoft Enterprise Portal feed data types can also be published as a list of feeds, which provides a list of published feeds of that type.

To publish a list of feeds for a feed data type:

1. Select PeopleTools, Feeds, Define Feed Data Types to access the Define Feed Data Types page for the type of feed you wish to publish as a list.

2. Select the data type for which to produce the list of feeds.

   Note. While action items, calendars, and wiki content appear in the list of feed data types delivered with PeopleSoft Enterprise Portal, these items can only be published as part of a workspace feed. Therefore, if you publish a list of feeds for one of these types, the feed document will always be empty even though some items have been published as part of a workspace feed.

3. Click the Publish as Feed link.
4. Enter the feed definition information.

   Note. To distinguish this as a list of feeds, you can change the feed title to include "List of" — for example, "List of Workspace Feeds."

5. Publish and save the feed definition.

See *Enterprise PeopleTools 8.50 PeopleBook: Feed Publishing Framework*, "Creating and Using Feeds," Publishing Feeds Lists.

Viewing and Subscribing to Feeds

This section discusses how to:

- View and search the list of feeds.
- Work with the My Feeds pagelet.
- Access and view feeds.
- Subscribe to feeds.

Pages Used to View and Subscribe to Feeds

Page Name	***Definition Name***	***Navigation***	***Usage***
My Feeds	PTFP_VIEW	• My Feeds • Click the View All Feeds link in the My Feeds pagelet. •  Click the search button in the My Feeds pagelet.	Search and view published feeds to which you have access.
Personalize My Feeds	EPPFP_MYFEEDS_PREF	Click the Customize My Feeds button in the My Feeds pagelet.	Customize the display of the My Feeds pagelet.

Viewing and Searching the List of Feeds

Access the My Feeds page (click the My Feeds link).

Use the My Feeds page to search for and view a list of published feeds to which you have access. For example, you must select the All Sites option on the My Feeds page to view published workspace feeds.

See *Enterprise PeopleTools 8.50 PeopleBook: Feed Publishing Framework*, "Creating and Using Feeds," Accessing Feeds, Using the My Feeds Page.

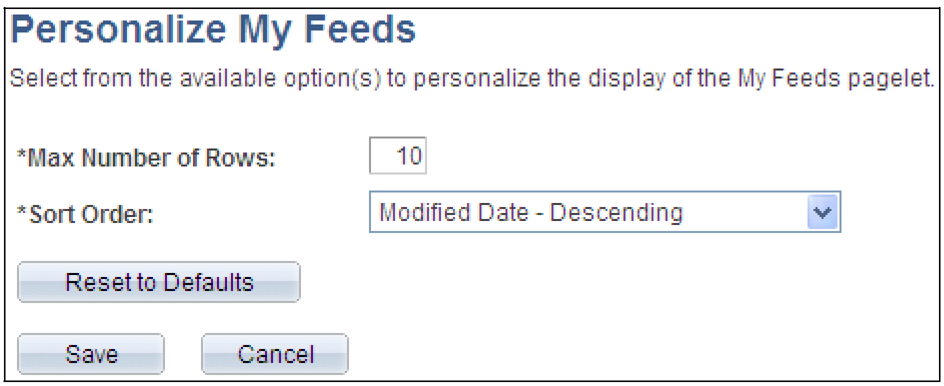
Working With the My Feeds Pagelet

This section discusses how to:

- Personalize the My Feeds pagelet.
- Use the My Feeds pagelet.

Personalizing the My Feeds Pagelet

Access the Personalize My Feeds page (click the Customize My Feeds button in the My Feeds pagelet).



Personalize My Feeds page

Use the Personalize My Feeds page to customize the display of the My Feeds pagelet.

Max Number of Rows Enter the maximum number of feeds you want to display in the pagelet. The default value is 10.

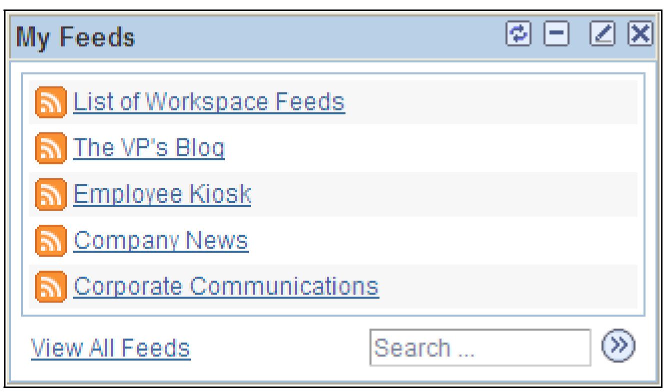
Sort Order

Select one of the following:

- *Created Date - Ascending* — Select to sort by feed definition creation date in ascending order—that is, from first to last.
- *Created Date - Descending* — Select to sort by feed definition creation date in descending order—that is, from last to first.
- *Feed Data Type ID* — Select to group feeds by their feed data type.
- *Feed ID* — Select to sort by the feed ID.
- *Feed Title - Ascending* — Select to sort by user-specified feed title in ascending order.
- *Feed Title - Descending* — Select to sort by user-specified feed title in descending order
- *Modified Date - Ascending* — Select to sort by feed definition modification date in ascending order—that is, from first to last.
- *Modified Date - Descending* — Select to sort by feed definition modification date in descending order—that is, from last to first. This is the default sort order.

Using the My Feeds Pagelet

Access the My Feeds pagelet on the portal homepage.



My Feeds pagelet

Use the My Feeds pagelet to access and search for the feeds you are authorized to view. The My Feeds pagelet shows feeds from the *current site* only. To access feeds from a different site—for example, from a workspace—use the My Feeds page, or publish the feed definition to the current site using the Publish to Sites page.

See Chapter 11, "Working With Feeds and Alerts," Viewing and Searching the List of Feeds, page 256.

<Feed Title>

Click a feed title link to open and view the feed document in a separate browser window.

View All Feeds

Click to access the My Feeds page to search for and view a list of published feeds to which you have access.

Click to access the My Feeds page having searched on the text entered in the Search field.

Accessing and Viewing Feeds

In PeopleSoft Enterprise Portal, feeds can be accessed and viewed in multiple locations including:

- The My Feeds page.

  See *Enterprise PeopleTools 8.50 PeopleBook: Feed Publishing Framework*, "Creating and Using Feeds," Accessing Feeds, Using the My Feeds Page.

- The My Feeds pagelet.

  See Chapter 11, "Working With Feeds and Alerts," Using the My Feeds Pagelet, page 257.

- The Feed Reader pagelet.

  See Chapter 5, "Working With Homepage Pagelets," Using the Feed Reader Pagelet, page 37.

- The feeds hover menu on pages and pagelets used with PeopleSoft Enterprise Portal features including blogs, content management folders, discussion forums, and workspaces.

  The feeds hover menu displays a list of feeds that is relevant to your current context. For example, if you are currently viewing a specific blog, then the feeds hover menu displays all feeds for that blog. However, if you are viewing the Blogs pagelet, then the feeds hover menu displays all feeds for all blogs that you have access to view.

  Feed

  Hover over any of these to view the list of feeds published for this context. Click any list item to open that feed document.

  Click the Feed button or Feed link to open the first feed document in the list.

  Click the Open menu button to toggle the list of feeds between frozen open and closed.

When you click a link to view a feed, the feed document opens in a separate browser window.

Subscribing to Feeds

You can subscribe to PeopleSoft Enterprise Portal feeds using the Feed Reader pagelet, using your browser, or using a third-party feed aggregator or reader. To subscribe to a feed, obtain the feed URL by:

- Copying the URL from an open feed document.
- Right-clicking on a feed link and selecting to copy the link from the pop-up menu.

Maintaining Alert Subscriptions

This section discusses:

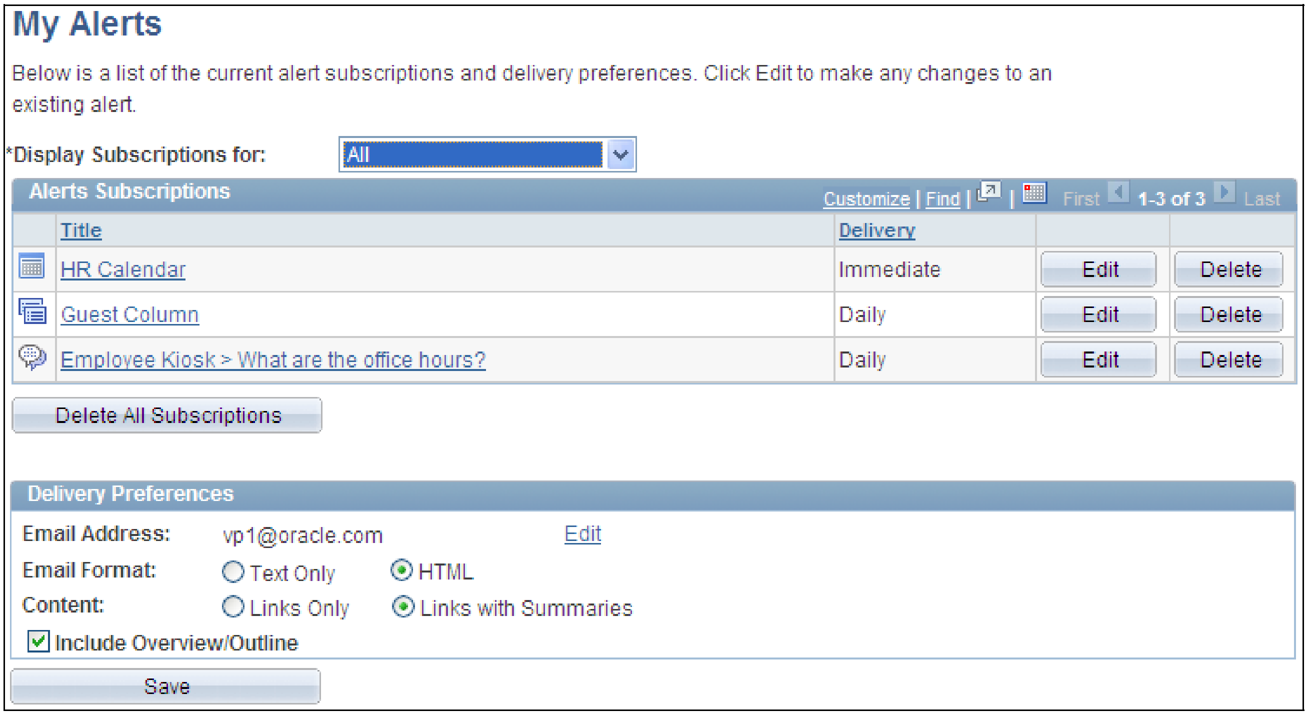
- Maintaining your alert subscriptions.
- Specifying your email address.

Pages Used to Maintain Alert Subscriptions

Page Name	***Definition Name***	***Navigation***	***Usage***
My Alerts	EPPAN_MY_ALERTS	• My Content, My Alerts • Click the View All My Alert Subscriptions on the Update Alerts Subscription page. • Click the View All My Alert Subscriptions on the Add Alert Subscription page.	View and maintain all of your alert subscriptions.
General Profile Information	USER_SELF_SERVICE	• Click the Edit link on the My Alerts page. • My System Profile	Maintain your system profile including the email address used for alert subscriptions.

Maintaining Your Alert Subscriptions

Access the My Alerts page (My Content, My Alerts).



My Alerts page

Use the My Alerts page to view and maintain all of your alert subscriptions. You can subscribe to alerts for:

- Discussion forums.
- Discussion forum topics.
- Collaborative workspace discussions.
- Collaborative workspace discussion topics.
- Community calendars.
- Collaborative workspace calendars.

Display Subscriptions for

Select a scope:

- *All* — To display all your calendar and discussion forum subscriptions.
- *Community Calendars*— To display all your calendar subscriptions.
- *Discussion Forum*— To display all your discussion forum subscriptions.

Title

Click a title to open that item in a new window.

Edit

Click the Edit button to access the Update Alerts Subscription page to edit that alert subscription.

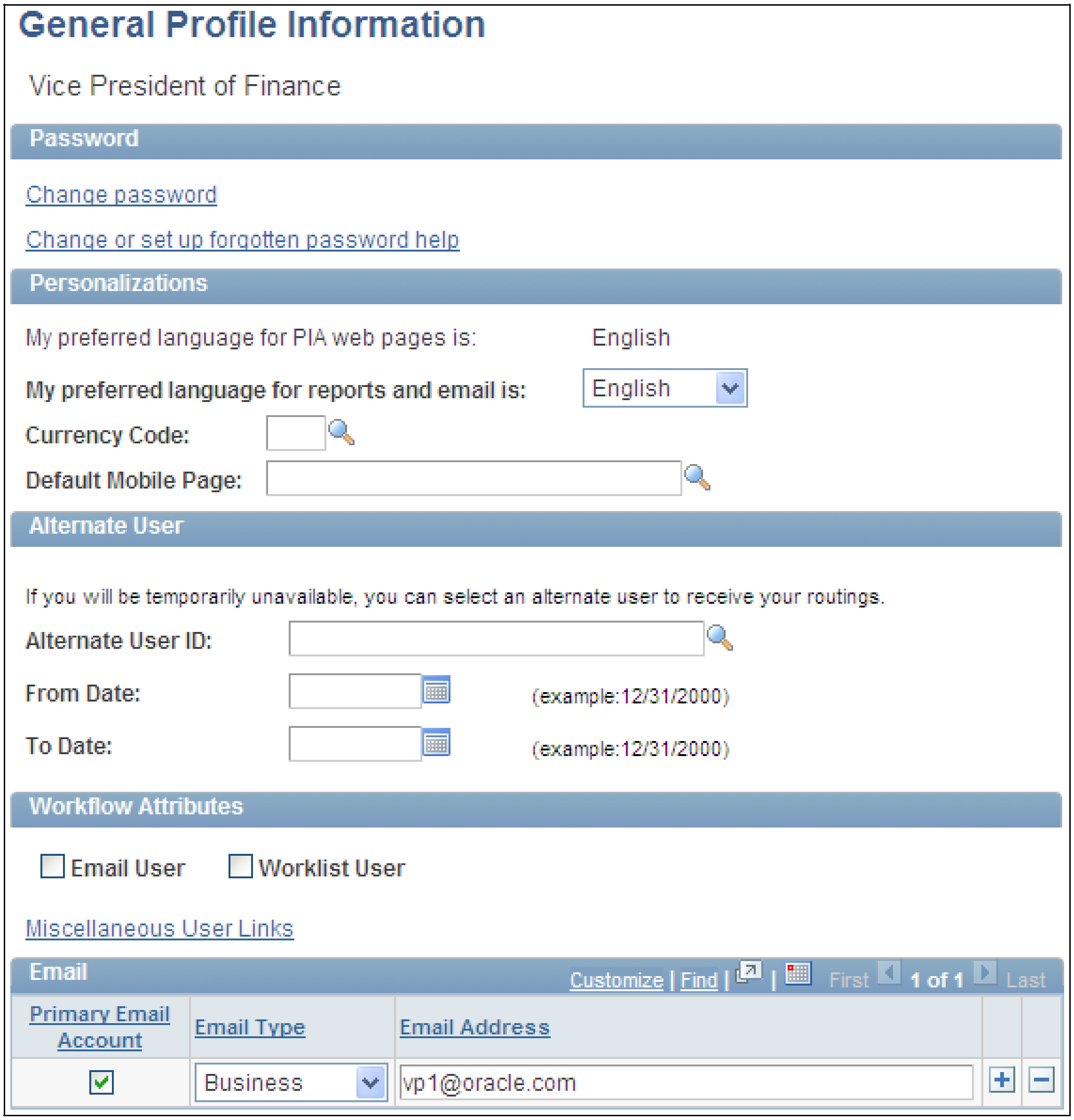
Delete

Click the Delete button to delete the alert subscription. You are prompted to confirm the deletion.

Delete All Subscriptions	Click to delete all alert subscriptions. You are prompted to confirm the deletions.
Edit	Click the Edit link to access the General Profile Information page, on which you can enter the email address at which you want to receive email alerts.
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.
Email Format	Select the format in which email alerts should be sent to you: • *Text Only* **—** Select for text-based email alerts. **Note.** The contents of the email will use any text header and footer definitions defined by the portal administrator on the Define Alerts Email page. • *HTML* **—** Select for HTML-based email alerts. **Note.** For this option to be available, the Allow HTML Email option must be selected by the portal administrator on the Define Alerts Email page. The contents of the email will use any HTML header and footer definitions defined by the portal administrator on the Define Alerts Email page.
Content	Select one of the following: • *Links Only* **—** Select to indicate that the email should contain only links to the items in the alert. • *Links with Summaries* **—** Select to indicate that the email should contain links to and summaries about the items in the alert.
Include Overview/Outline	Select to have email alerts sent with an overview at the beginning of the email. The overview contains an outline of the email contents.

Specifying Your Email Address

Access the General Profile Information page (click the Edit link on the My Alerts page).



General Profile Information page

Use the General Profile Information page to maintain your system profile including the email address used for alert subscriptions.

Primary Email Account	Select to identify the email account for alert subscriptions.
Email Type	Select the type for this email address.
Email Address	Enter your complete email address.

The other fields on this page are documented in PeopleTools PeopleBooks.

See *Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications*, "Setting User Preferences," Setting User Personalizations, Setting Up Your System Profile.

Chapter 12

Working With Tags

This chapter provides an overview of tagging in Oracle's PeopleSoft Enterprise Portal and discusses how to:

- Creating and managing tags.
- Work with the Tag Cloud pagelet.
- Perform searches for tags.

Understanding Tagging in PeopleSoft Enterprise Portal

Tagging, also known as social bookmarking, provides the means for you to store, organize, search, and manage content bookmarks in PeopleSoft Enterprise Portal. Tagging enables both publishers and consumers of content to classify the material in a way that is meaningful. Moreover, tags are shared with other users, thus benefitting the entire user community. This increases the probability of properly characterizing the content and hence its discovery and use. Tags are also a way to measure which particular topics are of relevance to the user community. Tagging provides for discovery of and 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 content and a way of creating ad hoc navigation paths among related items.

PeopleSoft Enterprise Portal supports three models for tagging content:

- As a feature integrated directly with other PeopleSoft Enterprise Portal content types including blogs, collaborative workspaces, content management system items, and discussion forums. Specifically, PeopleSoft Enterprise Portal is delivered with the ability for you to tag:

  - Blogs and blog posts.
  - Collaborative workspaces, workspace blogs and blog posts, workspace discussion forums and topics, and workspace content.
  - Content management system items including news articles, managed content, and categorized content.
  - Discussion forums and topics.

  See the remainder of this chapter for a discussion of how to use the built-in tagging features of PeopleSoft Enterprise Portal.

- As the Related Tags related content service that can be added to transaction pages in other PeopleSoft applications.

  See Chapter 26, "Working With the Related Tags Service," page 455.

- As a web service for consumption by non-PeopleSoft applications.

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Administering the Tagging Framework," Enabling Web Services.

For each of these models, the PeopleSoft Enterprise Portal database serves as the central tag repository.

In addition, PeopleSoft Enterprise Portal provides tag cloud features and a tag browser (search) allowing you to discover content using tags. Moreover, tagging is integrated into PeopleSoft Enterprise Portal search and enhances the ability to search and retrieve PeopleSoft Enterprise Portal content.

Creating and Managing Tags

This section provides an overview of creating and managing tags and discusses how to:

- Create and update tags.
- Manage tags as a portal administrator.

Understanding Creating and Managing Tags

In PeopleSoft Enterprise Portal, tags can be assigned to the following items:

- Blogs and blog posts.
- Collaborative workspaces, workspace blogs and blog posts, workspace discussion forums and topics, and workspace content.
- Content management system items including news articles, managed content, and categorized content.
- Discussion forums and topics.

The tools to create and manage tags are integrated directly into the pages where those content items are displayed. These tagging tools are located in an expandable Tags section that includes:

- Tag list **—** The tag list provides the ability to view, create, and update your public and private tags for the current item.
- Tag cloud **—** The tag cloud displays all of the public tags for the current scope.

The following example shows the expandable Tags section from a discussion forum. At this level, the Tags section includes the tag list and the tag cloud:

Expandable tags section (from a discussion forum)

This section also discusses the following topics:

- Scope of the tag cloud.
- Public tags vs. private tags.
- Special characters and tag searches.
- Tags in a multi-language environment.

Scope of the Tag Cloud

In PeopleSoft Enterprise Portal, there are three different types of tag clouds:

- Feature-specific tag clouds.

  This section provides additional information on feature-specific tag clouds.

- Tag Cloud homepage pagelet.

  See Chapter 12, "Working With Tags," Working With the Tag Cloud Pagelet, page 268.

- Search page tag cloud.

  See Chapter 12, "Working With Tags," Searching for Tags, page 272.

A feature-specific tag cloud displays all of the public tags for the current scope. Tag clouds are provided for high-level features (blogs, collaborative workspaces, discussion forums, workspace blogs, and workspace discussions) and not for individual content items in that feature (for example, blog posts, discussion topics, news articles, items of managed content, and so on). The scope of the tag cloud spans tags for that item as well as all the content within that item. For example, the scope of the tag cloud for a blog includes tags on the blog itself plus the tags for all of the posts in that blog. The scope of the tag cloud for a workspace includes tags on the workspace itself plus all tags for all features within the workspace including the workspace blog, documents, and discussions.

The following example shows the expandable Tags section from a discussion forum. In this Tags section, the tag list shows tags at the discussion forum level, while the tag cloud shows public tags for the forum itself plus all public tags for all topics within this forum:

Scope of a feature-specific tag cloud

In this example, *employees* and *offices* are tags at the forum level. Furthermore, you can deduce that *gatherings*, *Pleasanton*, and *New York* are tags at the topic level only because they do not appear in the tag list for the forum itself. Because of its larger font size, you can deduce that *offices* must also be a tag at the topic level as well as a tag at the forum level.

The default sort order in the tag cloud is from the most recently created tag to the oldest tag. The sort order in feature-specific tag clouds is not user configurable.

Public Tags vs. Private Tags

Public tags are shared with everyone who has access to a feature. Public tags are the essence of social bookmarking. In addition, PeopleSoft Enterprise Portal provides the ability for you to create private tags. These tags are visible to and searchable by you only and provide a mechanism for you to create your own private bookmarks. Private tags can be deleted only by the user who created the private tag.

Special Characters and Tag Searches

Special characters—such as, +, -, #, $, *, and so on—can be used as part of a tag. However, because these characters are filtered out of a search when you click on a tag, your search results do not display the tag or the tagged content. You must manually re-enter the search term and click the Search button to retrieve the correct results.

For example, if *C++* is the tag that you created, then clicking the C++ tag searches on the term *C*, and not *C++*. You must manually re-enter *C++* on the Search Tags page and click the Search button to retrieve the correct results.

Therefore, we recommend you avoid using the following special characters in tags:

```
,  !  @  #  $  %  ^  &  (  )  *  +  =  {
}  [  ]  :  ;  "  `  <  >  ?  /  .  |  \
```

Note. A comma (,) is always interpreted as the tag separator.

Tags in a Multi-Language Environment

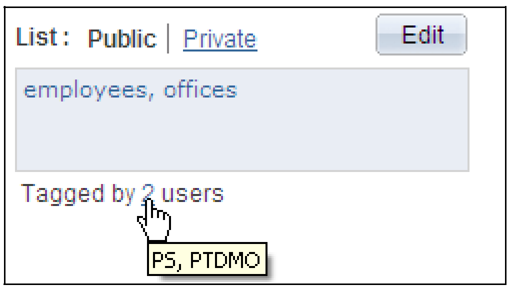
In a multi-language environment, when there are tags available for an item in the base language but not in the session language, then you are presented with an option to view the base language tags. This is because there can be only one base language per database and this base language is typically a common language. However, tags are not displayed for other non-base languages that are different from the session language.

PeopleSoft Enterprise Portal displays session language tags and base language tags as follows:

- If the session language is the base language and there are no base language tags, no tags are displayed even if there are tags in a non-base language.
- If the session language is not the base language and there are session language tags, the session language tags are displayed. You are also given the option to view base language tags if there are base language tags present.
- If the session language is not the base language and there are no session language tags, you are given the option to view base language tags if there are base language tags present.
- If the session language is not the base language and there are no session language tags and no base language, no tags are displayed even if there are tags in another non-base language.

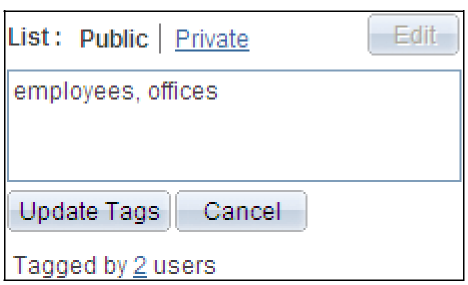
Creating and Updating Tags

In the expandable Tags section, use the tag list to create and update tags.



Tag list (view mode)

Use the tag list to view and create tags for the current item. In view mode, the Edit button is active. In update mode, the Update Tags and Cancel buttons are active.



Tag list (update mode)

	Click the Expand section button to reveal the content in the Tags section; click the Collapse section button to hide the content in the Tags section.
Public	Click this link to view or edit your public tags for the current item.
Private	Click this link to view or edit your private tags for the current item.
Edit	Click this button to create tags or update tags for the current item.

<edit box>	In view mode, click a tag link to open the Search Tags page searching on this tag and using a scope that is appropriate for the current feature (that is, if the tag clicked is in a blog post, then the search scope on the Search Tags page is set to all blogs). In update mode, enter tags here separated by commas. **Important!** We recommend that you avoid special characters in tags. See Chapter 12, "Working With Tags," Special Characters and Tag Searches, page 266.
Update Tags	Click to save any changes and return to view mode.
Cancel	Click to cancel any changes and return to view mode
Tagged by # users	Mouse over the number link to view which users have tagged this item.

Managing Tags as an Administrator

As an administrator for a particular item, you have the ability to manage not only your own tags, but all public tags created for that feature. This tag administration capability applies to blog moderators, content management folder administrators, discussion forum moderators, workspace administrators, and workspace contributors, as well as portal administrators. As an administrator, when you click the Edit button for public tags, you are able to edit and update any of the public tags. However, when you click the Private link you are able to see your private tags only. Similarly, when you click the Edit button for private tags, you are able to edit and update your private tags only.

Note. However, the news publication details (EPPCM_NWDSPSEC) pages accessible from news publication homepage pagelets do not allow an administrator to manage public tags for other users. When the same news article is accessed through the content management system, the administrator can manage all public tags.

Working With the Tag Cloud Pagelet

This section describes how to:

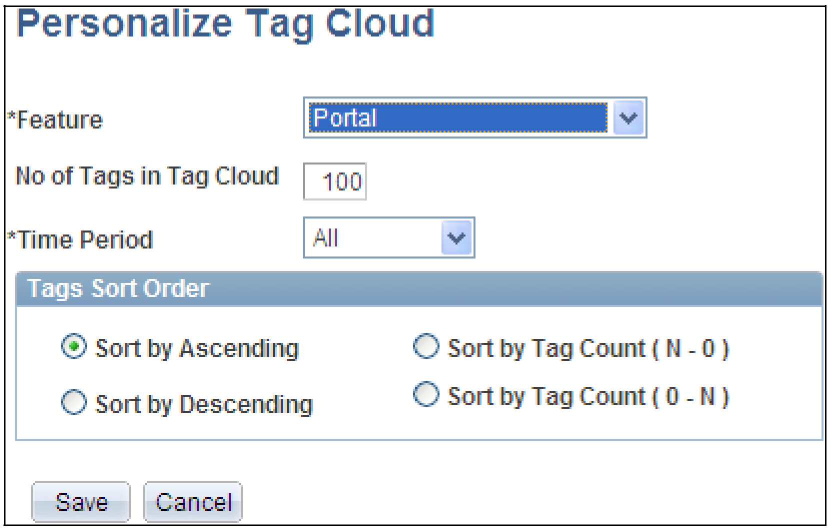
- Personalize the Tag Cloud pagelet.
- Use the Tag Cloud pagelet.

Page Used to Personalize the Tag Cloud Pagelet

Page Name	Definition Name	Navigation	Usage
Personalize Tag Cloud	EPPTG_CLOUD_PREF	Click the Customize Tag Cloud button on the Tag Cloud pagelet.	Customize the display of tags in the Tag Cloud pagelet.

Personalizing the Tag Cloud Pagelet

Access the Personalize Tag Cloud page (click the Customize Tag Cloud button on the Tag Cloud pagelet).



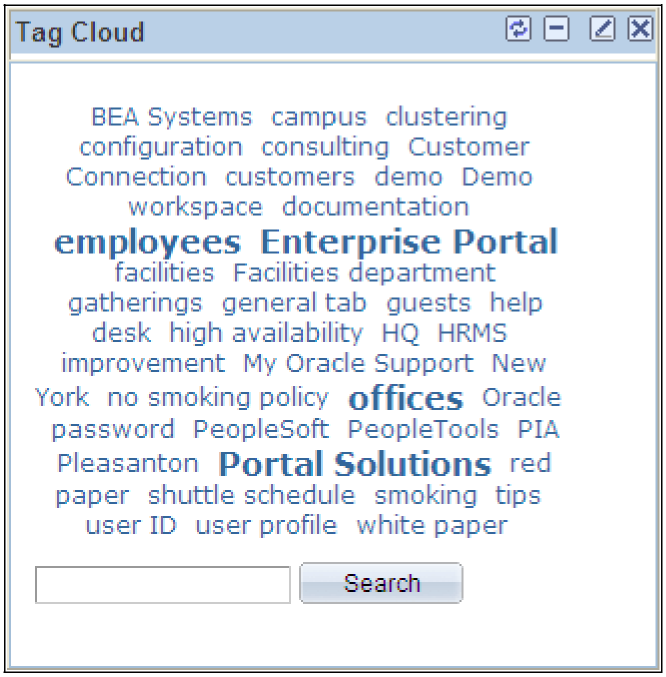
Personalize Tag Cloud page

Use the Personalize Tag Cloud page to customize the display of tags in the Tag Cloud pagelet.

Feature	Select the scope for the tags displayed in the pagelet: • *All My Tags* **—** Displays all of your public and private tags. • *All Tags* **—** Displays all public tags across all systems including tags added through the Related Tags related content service. • *Blogs* **—** Displays all public tags for blog content. • *Content* **—** Displays all public tags for content in the content management system. • *Discussions* **—** Displays all public tags for discussion forum content. • *Portal* **—** Displays all public tags across all content types within the portal. • *Workspaces* **—** Displays all public tags for collaborative workspaces and content residing in workspaces.
No of Tags in Tag Cloud	Specify the maximum number of tags to display in the pagelet. **Note.** Setting this to 0 or no value results in the maximum number being reset to the default of 100.
Time Period	Select the time period for the tags displayed in the pagelet: • *1 Day* **—** Display tags created within the last 24 hours. • *1 Week* **—** Display tags created within the last 7 days. • *1 Month* **—** Display tags created within the last 30 days. • *1 Quarter* **—** Display tags created within the last 90 days. • *1 Year* **—** Display tags created within the last 365 days. • *All* **—** Display all tags.
Tag Sort Order	Select the sort order for the tags displayed in the pagelet: • *Sort by Ascending* **—** Sort alphabetically in ascending order (A-Z). • *Sort by Descending* **—** Sort alphabetically in descending order (Z-A). • *Sort by Tag Count (N - 0)* **—** Sort by tag usage from most used to least used. • *Sort by Tag Count (0 - N)* **—** Sort by tag usage from least used to most used.

Using the Tag Cloud Pagelet

Access the Tag Cloud pagelet on the portal homepage.



Tag Cloud pagelet

Use the Tag Cloud pagelet to view tags in use in the system. The information displayed in the pagelet depends on the personalizations you set on the Personalize Tag Cloud page. You can personalize the information displayed in the cloud by:

- Scope — Select the feature for which tags are displayed.
- Sort order — Alphabetic or by count.
- Time period — The period in which tags were created.

You can use the Tag Cloud pagelet to:

- Visually review the tags in use in the system and the relative frequency of their use. *(Use* refers to the number of times a tag has been assigned to an item, and not the number of times a tag has been clicked, accessed, or searched.)

  Tags appearing in the largest font have been assigned to items more frequently than other tags have. In the preceding example, *employees, Enterprise Portal, offices,* and *Portal Solutions* have been used the most frequently.

- Click on a specific tag to access the Search Tags page with a search on where that tag has been used using the scope specified for the Tag Cloud pagelet.
- Enter your own search term to access the Search Tags page with a search to determine if that tag has been used anywhere within the portal scope.

Performing Searches for Tags

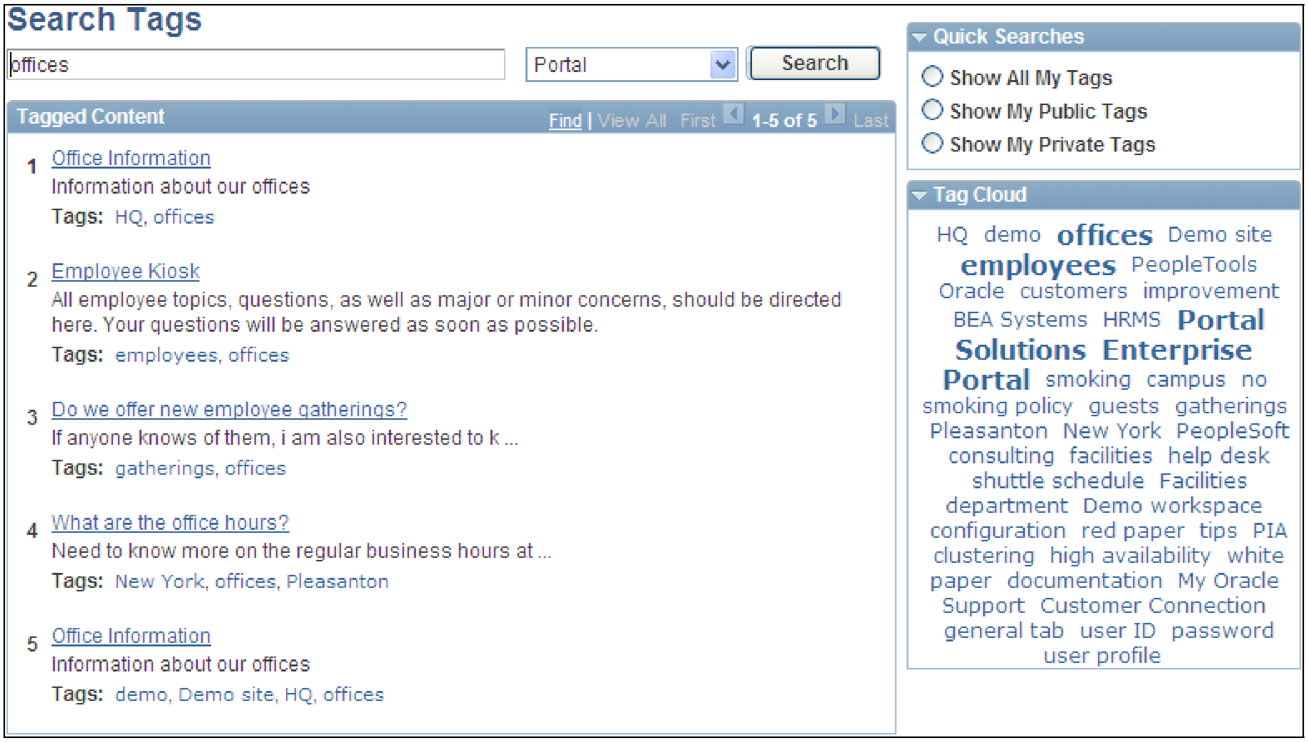
This section describes how to search for tags.

Page Used to Perform Searches for Tags

Page Name	***Definition Name***	***Navigation***	***Usage***
Search Tags	EPPTG_TAG_BROWSE	• Click a tag anywhere in the portal. • My Content, Search Tags • Enter the search text and click the Search button in the Tag Cloud pagelet.	Search for tags.

Searching for Tags

Access the Search Tags page (click a tag anywhere in the portal; or My Content, Search Tags).



Search Tags page

Use the Search Tags page to search for tags. You can specify a search term and scope or click a tag in the Tag Cloud section to perform a search on this page.

Important! Special characters in tags do not give the expected search results.

See Chapter 12, "Working With Tags," Special Characters and Tag Searches, page 266.

search text	Enter the tag to search for.

scope

Select the scope for the search:

- *All My Tags* **—** Searches in all of your public and private tags.
- *All Tags* **—** Displays all public tags across all systems including tags added through the Related Tags related content service.
- *Blogs* **—** Searches in all public tags for blog content.
- *Content* **—** Searches in all public tags for content in the content management system.
- *Current Workspace* **—** Searches in all public tags for the current workspace and content residing in the workspace.

  Note. *Current Workspace* is available only while you are in a workspace; this is the default scope when searching tags while in a workspace.

- *Discussions* **—** Searches in all public tags for discussion forum content.
- *<Node> Domain* **—** Searches in all public tags within the remote node.

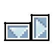
  Note. If the Related Tags service is configured for use with one or more PeopleSoft applications, then a separate scope exists for each remote node on which the service is in use.

- *Portal* **—** Searches in all public tags across all content types within the portal.
- *Workspaces* **—** Searches in all public tags for collaborative workspaces and content residing in workspaces.

Note. A search is executed when the scope is selected. The Tag Cloud section is updated with all public tags for the selected scope.

Search

Click to execute a search with the given search text and scope.



Click the arrow to the left of Quick Searches to collapse or expand this section.

Quick Searches

Select an option in the Quick Searches group box to perform a search:

Note. When selecting one of these options, the search scope is automatically set to All My Tags and the search is executed.

- *Show All My Tags* **—** Shows all of your public and private tags.
- *Show My Public Tags* **—** Shows all of your public tags only.

  Note. If you have tagged an item with both public and private tags, then the private tags are also displayed in this search.

- *Show My Private Tags* **—** Shows all of your private tags only.

  Note. If you have tagged an item with both public and private tags, then the public tags are also displayed in this search.

Tagged Content

Review the list of results and:

- Click the link for an item to open that content in the current browser window.

  Note. Content residing in a collaborative workspace or another site is opened in a separate browser window.

- Click a tag to perform a new search on that tag using the current search scope.

Click the arrow to the left of Tag Cloud to collapse or expand this section.

Tag Cloud

The Tag Cloud section displays all the public tags for the currently selected search scope or the tags that reflect the selected quick search option.

Click a tag in the tag cloud to perform a new search on that tag using the current search scope.

The default sort order in the tag cloud is from the most recently created tag to the oldest tag. The sort order in the tag cloud on the Search Tags page is not user configurable.

Part 4

Other Portal Features

Chapter 13

Managing Polls

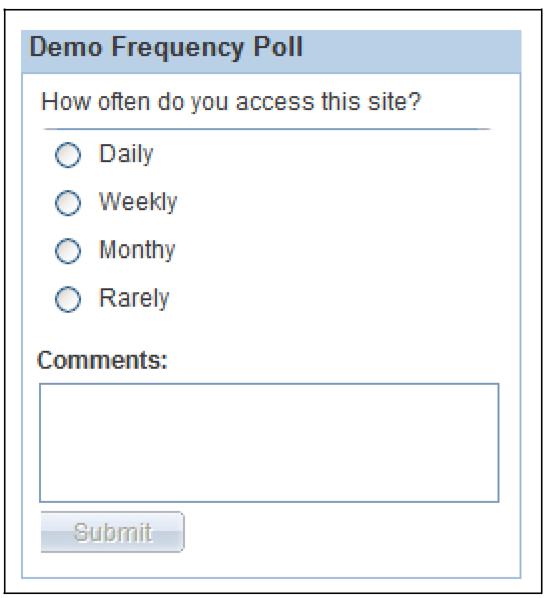
This chapter provides an overview of polls and discusses how to:

- Define polls
- View poll results

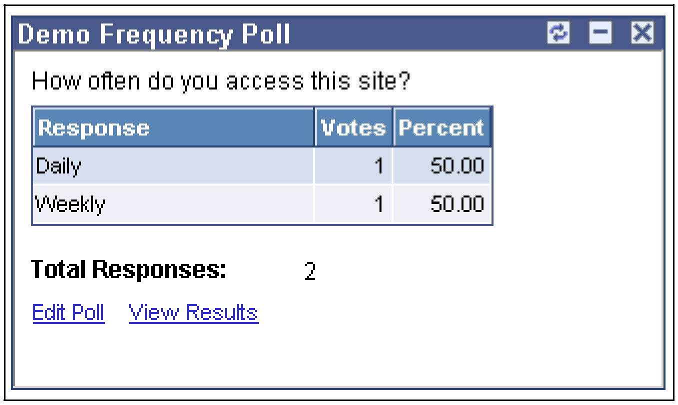
Understanding Polls

Polls are a simple way for you to gather opinions and comments from your portal users using a pagelet that is displayed on the homepage or in a workspace. Use Poll pagelets to show a single question or poll in a pagelet and enable users to add comments and see other responses to the poll. Until the user has answered the poll, only the poll question appears in the pagelet. After the user has responded to the poll, the current poll results appear in the pagelet.

Poll pagelets are not created using Pagelet Wizard, but are created from within the Poll component for sites. Workspace polls are created at the time the workspace is created and can display only one poll.



Unanswered Poll pagelet



Poll pagelet with responses

The poll administrator can manage the display and content of the poll by clicking the Edit Poll link to access the Maintain Polls component.

Although only one question is displayed in the pagelet at a time, you can create multiple questions and have them appear based on different publishing dates. For example, you can create the Poll pagelet and have a different question appear each month by assigning effective-dated publishing dates to the future questions.

Note. To ask a single question using a template pagelet, use the Content Ratings feature. To ask users a series of questions, use the Surveys feature.

Understanding Polls in Workspaces

Defining Polls

This section discusses defining polls and how to:

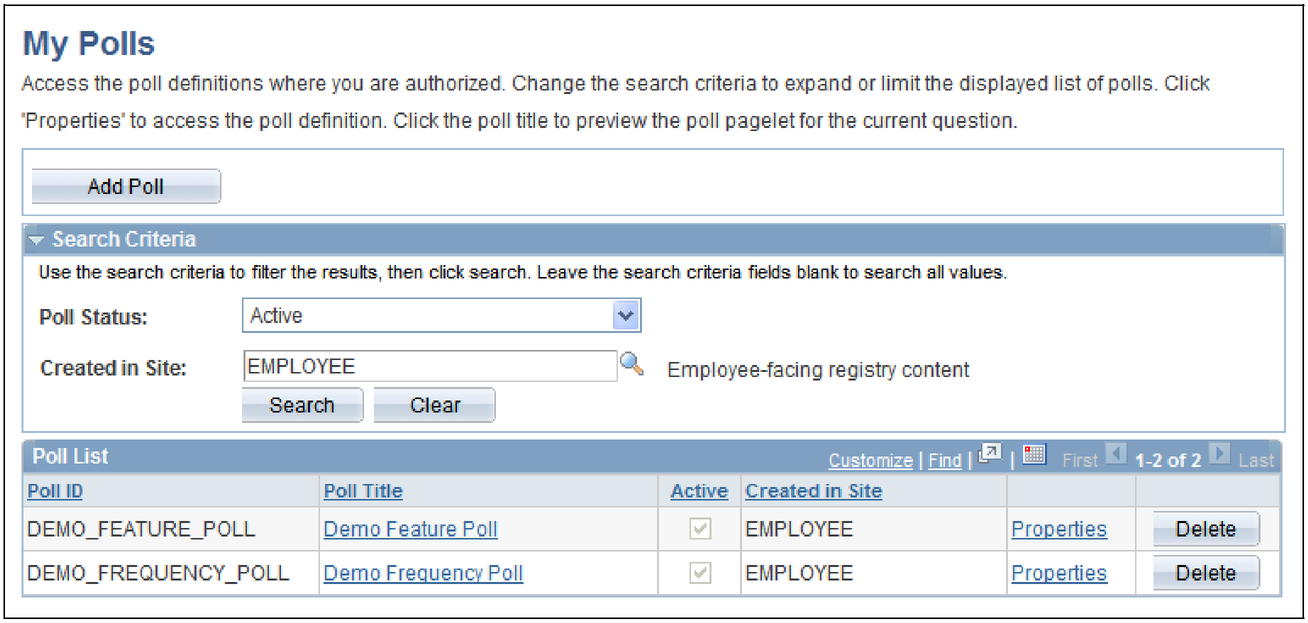
- Access polls.
- Add a poll.
- Maintain a poll.
- Add a question to a poll.
- Delete a poll.
- Publish the poll as a pagelet.
- Assign members to polls.
- Assign security access to respondents.

Pages Used to Define Polls

Page Name	***Definition Name***	***Navigation***	***Usage***
My Polls	EPPSP_LST_POLL	My Content, My Polls	View all existing polls that you have access to.
Add Poll	EPPSP_ADD_POLL	Click the Add Poll button on the My Polls page.	Add a poll to a site.
Maintain Polls	EPPSP_CFG_POLL	Click the Properties link for a poll on the My Polls page. Click Edit Poll in the pagelet, if you have the appropriate privileges. In Workspaces, select Polls in the menu navigation.	Define high-level information, such as the poll ID and description. Add, edit, and delete poll questions.
Question Details	EPPSP_CFG_QUEST	Click the Add Question button on the Maintain Polls page. Click the Properties button on the Maintain Polls page.	Enter a poll question and possible responses.
Preview Poll Pagelet	EPPSP_CFG_PGLT_SEC	Click the text of the question in the Question Title field.	Enables you to preview the Poll pagelet before it is published.
Publish Poll as Pagelet	EPPSP_CFG_PUB	Click the Publish as Pagelet link on the Maintain Poll page.	Set the values to create or update the pagelet for the poll definition.
Members	EPPSP_CFG_MBR	On the My Polls page, click theProperties link and select the Members tab.	Create and edit lists of members and their associated access privilege sets to the poll. Access to the poll definition is limited to the listed members.
Respondents	EPPSP_CFG_VWR	On the My Polls page, click theProperties link and select the Respondents tab.	Set the security for the published Poll pagelet enabling users with the specified security access to respond to poll questions.

Accessing Polls

Access the My Polls page (My Content, My Polls).



My Polls page

Search Criteria

Poll Status Select the status of the poll to define your search. Valid values are *Inactive* or *Active.*

Created in Site Displays the list of poll definitions that you can view.

Poll List

The Poll List grid displays basic poll definition information and enables you to preview the poll as well as access the pages to edit and manage existing polls.

Poll ID Displays the identifier for the poll.

Poll Title Displays the title of the poll. Click this link to view a preview of the current question displayed in the poll pagelet.

Active If the poll question is active, the checkbox appears as selected.

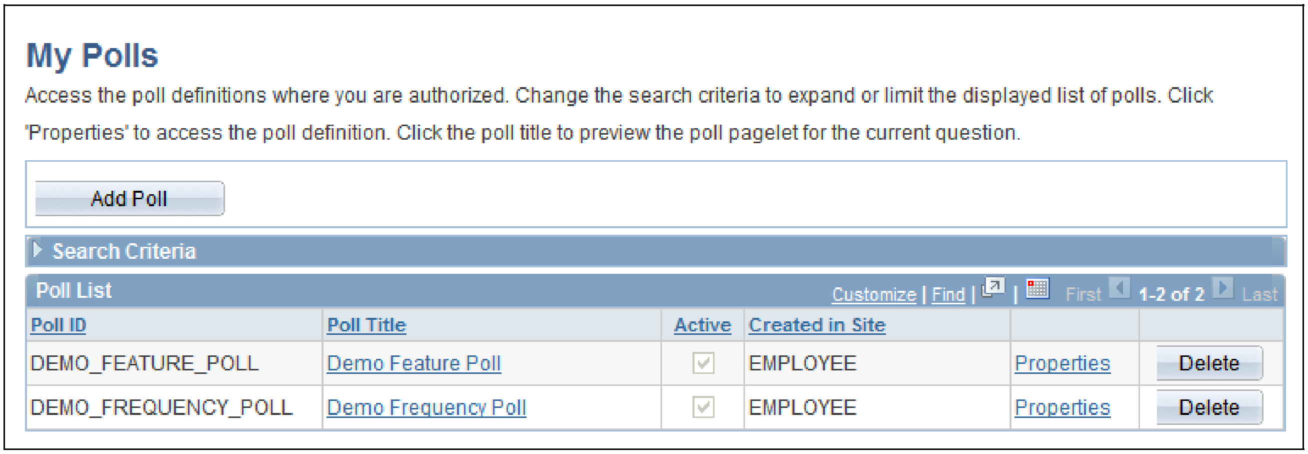
Created In Displays where the poll was initially created.

Properties Click to access the Maintain Polls component where you can manage those poll properties you have privileges for.

Delete Click to delete the poll definition along with the associated questions, results, comments, and content references for the poll. You will be prompted to confirm your deletion.

Adding a Poll

Access the Add Poll page by entering the Poll ID on the My Poll page. Enter the poll ID and clickAdd.



My Polls page

Poll Title Enter the text that will appear as the title of the pagelet.

Active Select the checkbox to make the Poll pagelet active on the site homepage. Although the pagelet will still appear on the homepage, the poll question will not be available to view or answer unless this box is selected.

Show Results to Respondents Select to enable respondents to view the poll results when they have completed the poll question. .

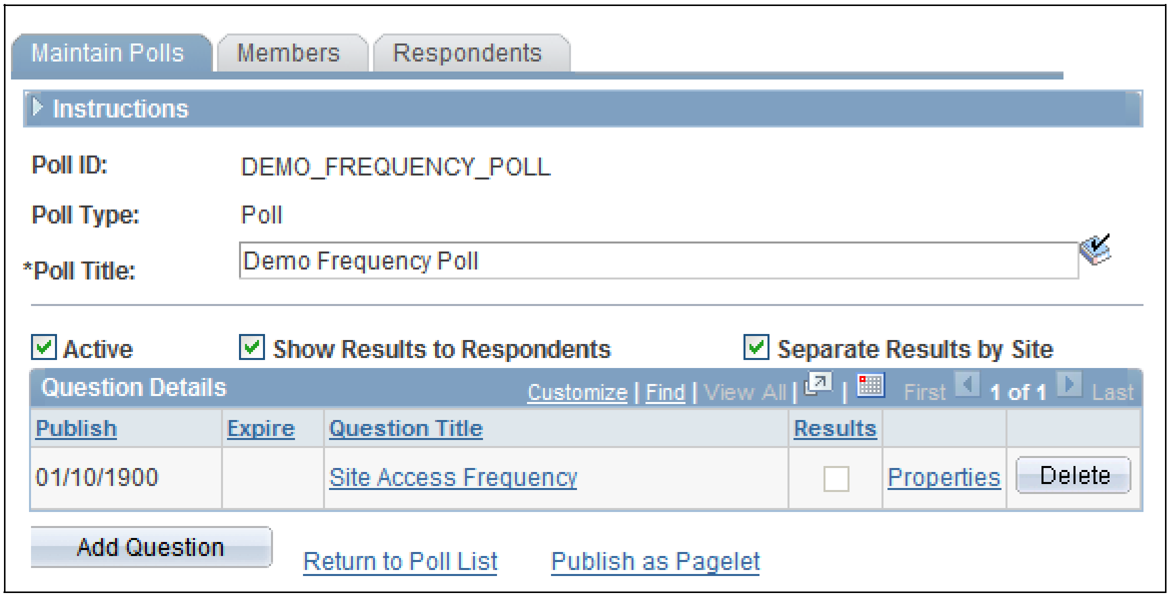
Separate Results by Site Select to sort poll results by site. For example, you can have the same poll available on multiple sites. If a user answers the same poll on different sites, it will count those results separately for each site. This also enables the user to answer the poll differently on each site, if appropriate. Once a user submits a response to any question associated with this poll, this checkbox becomes unavailable.

Note. This option is not available for polls created for workspaces.

Once you save the Add Polls page, the system displays the poll information in the Maintain Polls page.

Maintaining Polls

Access the Maintain Polls page (click the Properties link for a poll on the My Polls page).



Maintain Polls page

The poll definition information from the Add Poll page appears on the page for you to edit, if appropriate and if you have privileges.

Question Details

Publish

Displays the publish date entered on the Question Details page.

Expire

The value that appears is based on the publication date of subsequent questions. The current question is retired when the next question is published.

Question Title

Displays the contents of the Question Title field entered on the Question Details page. Click the text of the question to display the Preview Poll Pagelet page.

Results

Select to enable specified users to view the results after completing the poll question.

Properties

Click to access the Question Details page, where you can edit the associated question.

You can only edit the question until the first user responds to the question. At that time, it becomes ready-only.

Note. Once a user has responded to the poll question, it is no longer available for editing.

Delete

Click to delete the associated question, results, and comments. You will be prompted to confirm your deletion.

Add a Question

Click to access the Question Details page, where you can enter a poll question.

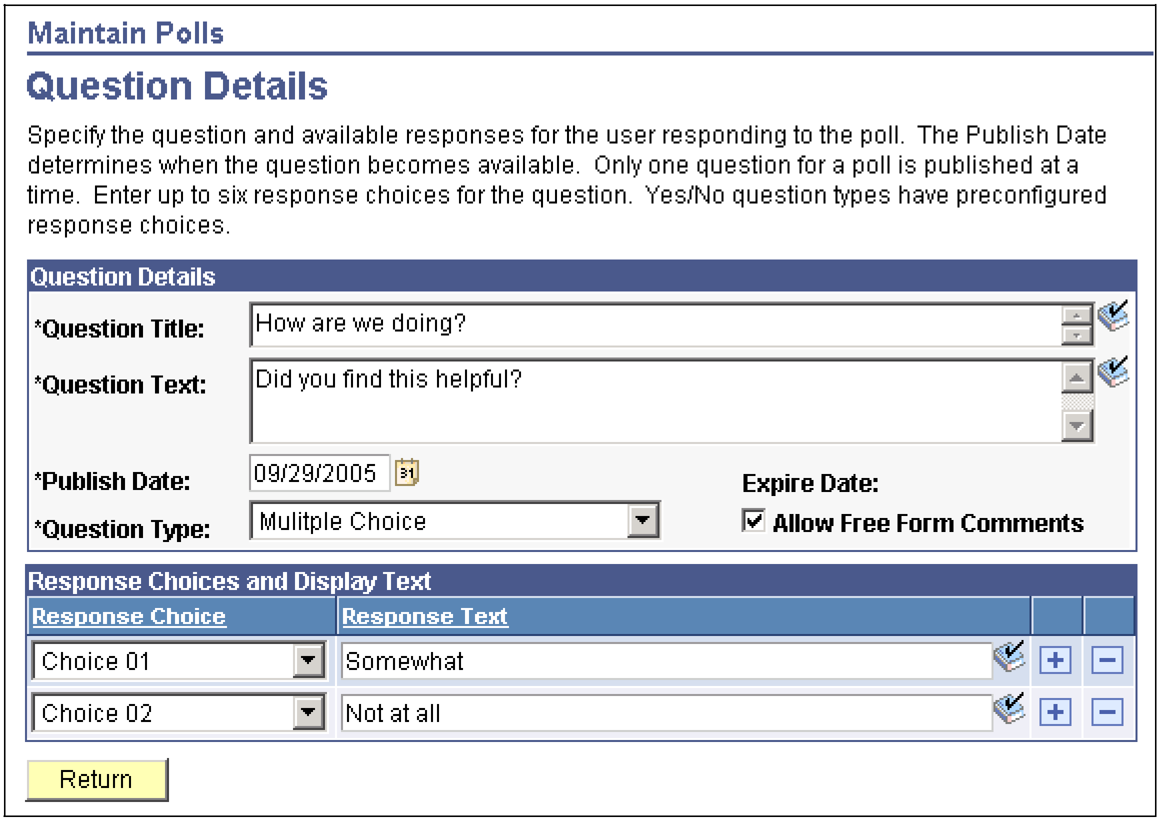
Return to Poll List	Click the link to access the My Polls page where the polls you have access to are listed. **Note.** This option is not available for polls created for Workspaces.
Publish as Pagelet	Click to access the Publish Poll as Pagelet page. See Chapter 13, "Managing Polls," Publishing the Poll as a Pagelet, page 287. **Note.** This option is not available for polls created for Workspaces. Workspace polls are predefined as part of the workspace template.
View Poll Results	Click to access the Poll Results page where you can view the results of the poll if you have the privileges to view results. See Chapter 13, "Managing Polls," Managing Poll Results, page 292.

Previewing the Poll Pagelet

Click the text of the Question Title field to access the Preview Poll Pagelet page. The question and its answers appear in the pagelet, enabling you to view the pagelet before you have published it.

Adding a Question to a Poll

Access the Question Details page (click the Add Question button on the Maintain Polls page).



Question Details page

Question Title

Enter a title for the question. The text is used as an identifier for the question.

Note. The published pagelet title is taken from the poll title rather than the question title.

Question Text

Enter the poll question.

Publish Date

Select the question publication date. This value defaults to the current date.

When this question is published, any currently running question will expire. Only one question can be published for a single poll ID.

Expire Date

Displays a date based on the publication date of subsequent polls. The question is retired (expires) when the next poll question is published. If there is only one question for the poll, this field is not populated.

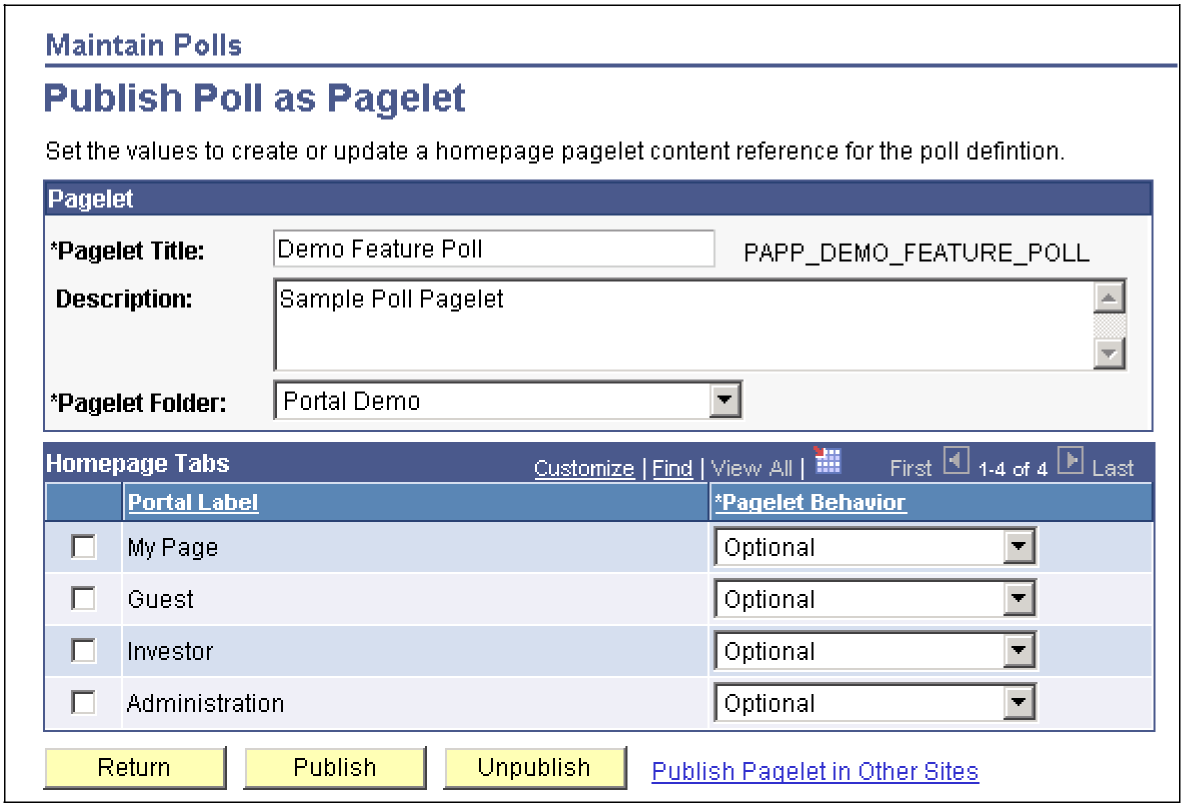
Question Type	Select the type of question you want to present in the poll. Available values are: *Multiple Choice.* Select to present a multiple choice question. When this value is selected, the Answers and Descriptions group box displays. *Ranking List.* Select to present a ranking system with which the user can rank the associated content. When this value is selected, the Answers and Descriptions group box displays. *Yes/No.* Select to present yes and no answer options to the question. When this value is selected, the Yes/No Response Options group box displays. See Chapter 14, "Gathering Feedback Using Surveys," Completing Surveys, page 306.
Allow Free Form Comments	Select to have a Comments field appear along with the poll question in which users can enter free-form text comments.

Response Choices and Display Text

Select Response Choice field values to set the order in which the responses you provide in the Response Text field are present in the poll.

Publishing the Poll as a Pagelet

Access the Publish Poll as Pagelet page (click the Publish as Pagelet link on the Maintain Poll page).



Publish Poll as Pagelet page

Poll pagelets are created using the My Polls component rather than Pagelet Wizard.

Pagelet Title Enter a title for the pagelet that is used to populate the title/label field. This text becomes the title displayed on the pagelet title bar. The system uses a unique content reference object name that it generates based on the Poll ID. This ID includes the Registry Object Prefix set up under the Portal system options.

Description Enter a description of the pagelet.

Pagelet Folder Select the pagelet folder in which you want to register the pagelet.

Homepage Tabs

Use this group box to define the homepage tab labels and behavior for the Poll pagelet.

Portal Label Select the tabs that will display the pagelet.

Pagelet Behavior

Select the behavior options for the pagelet.

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.

Optional-Default (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.

Required-Fixed (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.

Go to Layout

Click this link to display the Tab Layout page where you can define the pagelet layout properties. This link only appears if the pagelet has been published and you are the site administrator.

Publishing the Pagelet

Publish

Click the button to create or update the pagelet content reference on the current site.

The system displays a confirmation message when the content has been created or updated successfully.

Unpublish

Click the button to delete the pagelet content reference and remove it from any homepages.

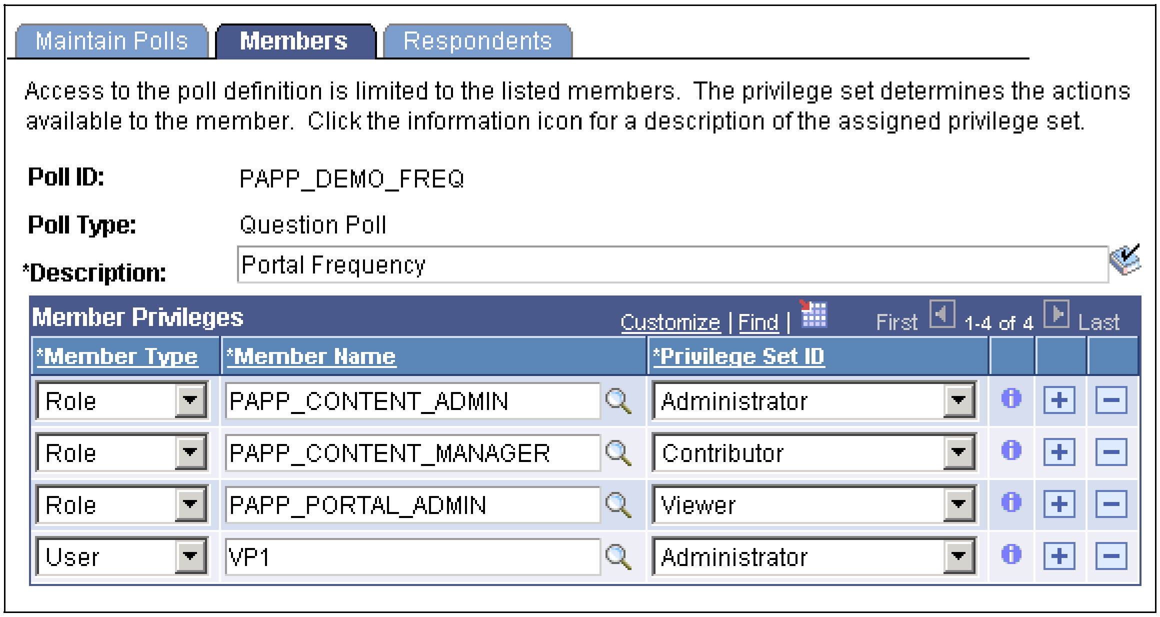
Publish Pagelets in Other Sites

Click to display the Publish to Multiple Portals page where you can publish the poll to multiple sites.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Working With Navigation Pages," Publishing Pagelets, Publishing a Pagelet to Multiple Portals .

Assigning Members to Polls

Access the Members tab.



Maintain Polls page– Members tab

Use this page to define privilege sets for different groups of users.

Member Type

Select the type of participant you want to add to the Poll. Available values include:

Role. Select to be able to select a role in the Member Name field. Available group names are derived from PeopleSoft roles defined in the Roles component.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration,* "Setting Up Roles"

User. Select to be able to select a user in the Member Name field. Available users are derived from PeopleSoft users defined in the User Profiles component.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration,* "Administering User Profiles"

Member Name

The name of the member as defined in the Roles component or the list of users from the User Profiles component.

Note. If the pagelet is created in a site, the prompt for members is limited to only members of that site.

Privilege Set ID

Select a privilege level you want to assign to the member. Available values are:

Administrator

Author

Moderator

Publisher

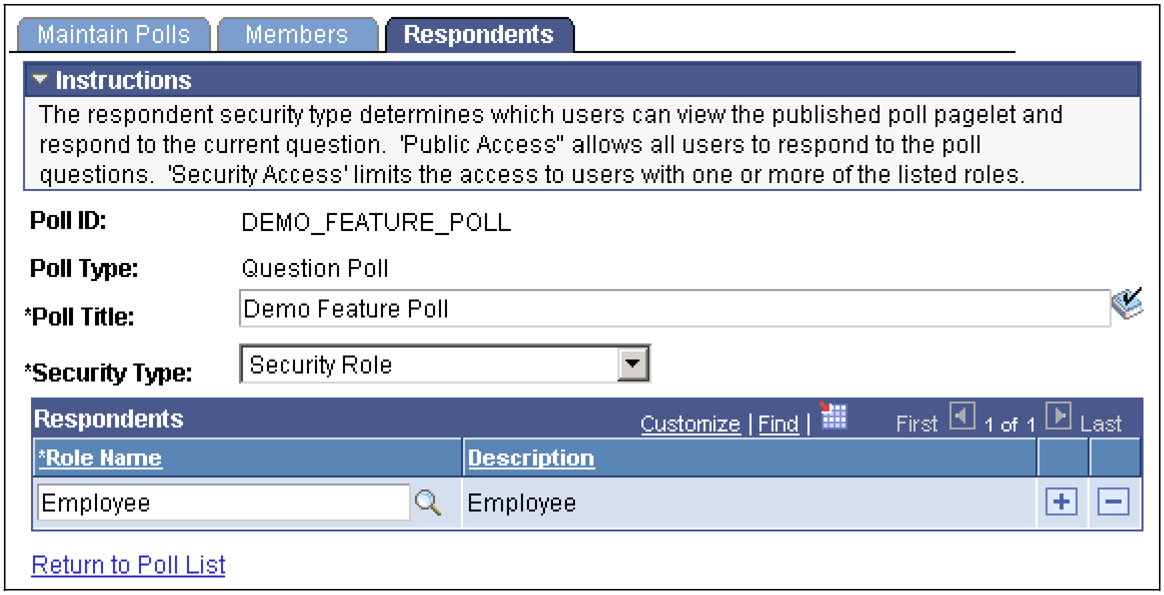
Viewer

Click to view additional information about the actions that the privilege set enables the member to use.

Warning! Use care when changing roles and privilege sets to ensure that you do not inadvertently remove yourself as administrator or you will lose access to the administrative features of the component.

Assigning Security Access to Respondents

Access the Respondents tab.



Maintain Polls– Respondents tab

Security Type

Select the security level for viewing how other users respond to the poll. Available values are:

Public Access. This value enables all users to respond to the question.

Security Role. This value enables only users with one of more of the listed security roles to respond to the question.

Respondents

Select a Role Name to enable the users in the role to respond to the poll question.

Warning! Ensure that you include your role in the list of respondents or you will be unable to edit or update the pagelet definition after publication.

Managing Poll Results

The following section discusses how to:

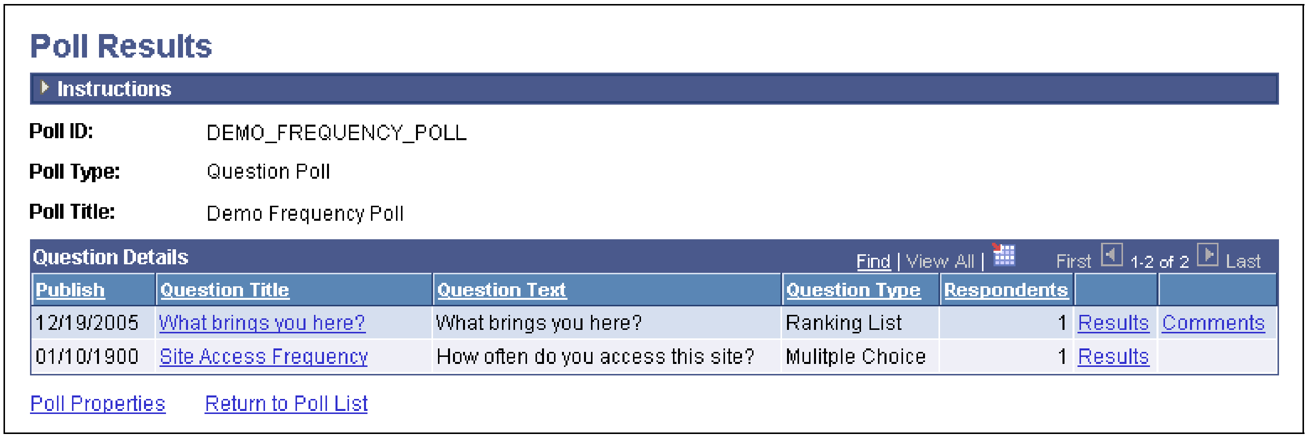
- View the poll results.
- View poll response results.
- View respondent comments.

Pages Used to Manage Poll Results

Page Name	*Definition Name*	*Navigation*	*Usage*
Poll Results	EPPSP_INQ_RSLT	Click View Results link on the pagelet for the poll. Click the Results link on the My Polls page.	View detailed results of active poll pagelets.
Preview Poll Pagelet	EPPSP_INQ_PGLT_SEC	Click the name of the question in the Question Title field.	Preview the Poll pagelet.
Response Results	EPPSP_INQ_RESP_SEC	Click the Results link on the Poll Results page.	View the results and number of respondents for each question.
Respondent Comments	EPPSP_INQ_CMT_SEC	Click the Comments link on the Poll Results page.	View comments that respondents have submitted.

Viewing the Poll Results

Access the Poll Results page (click View Results link on the pagelet for the poll).



Poll Results page

The View Results link is only visible to users who have privileges to access to view results.

Publish

Displays the publish date entered on the Question Details page.

Question Title

Displays the contents of the Question Title field entered on the Question Details page. Click the text of the question to display the Preview Poll Pagelet page

Question Text

Displays the contents of the question.

Question Type

Displays the type of question presented in the poll. Available values are:

Multiple Choice.

Ranking List.

Yes/No.

Respondents

Displays the number of user who have responded to the poll.

Results

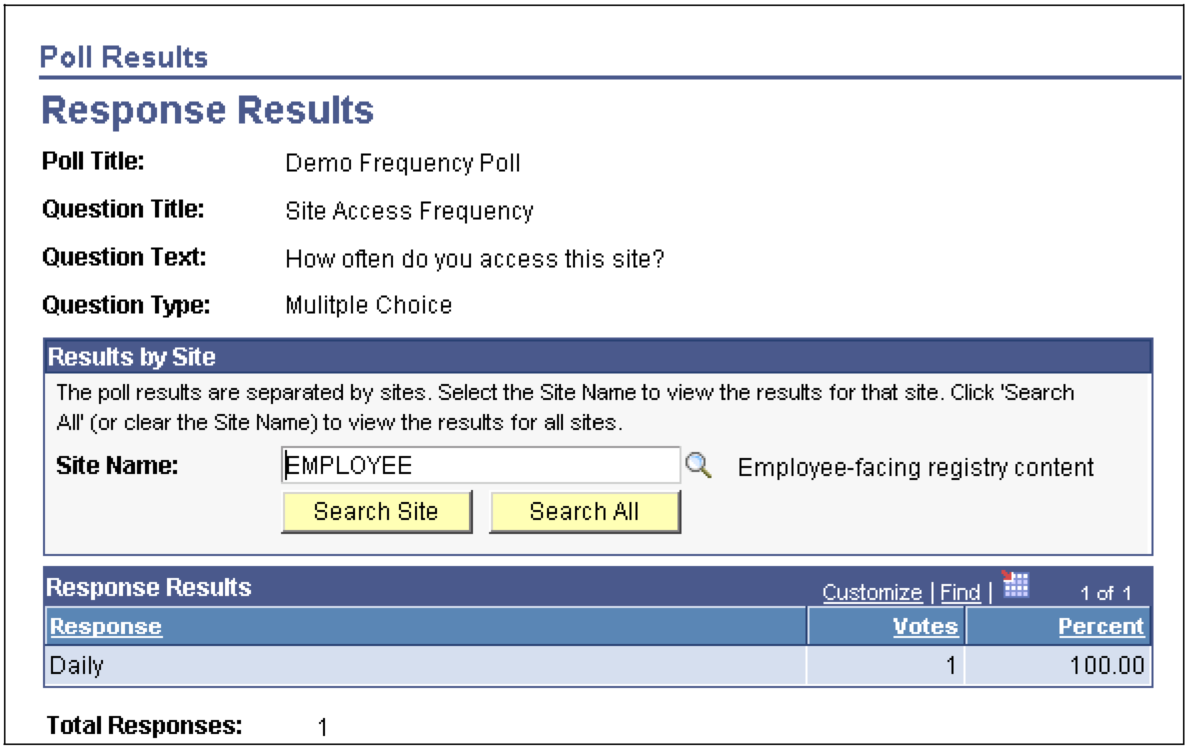
Click the Results link to view the Results page.

Comments

Click the Comments link to view the comments that users enter in response to the poll on the Respondent Comments page.

Viewing Poll Response Results

Access the Response Results page (click the Results link on the Poll Results page).

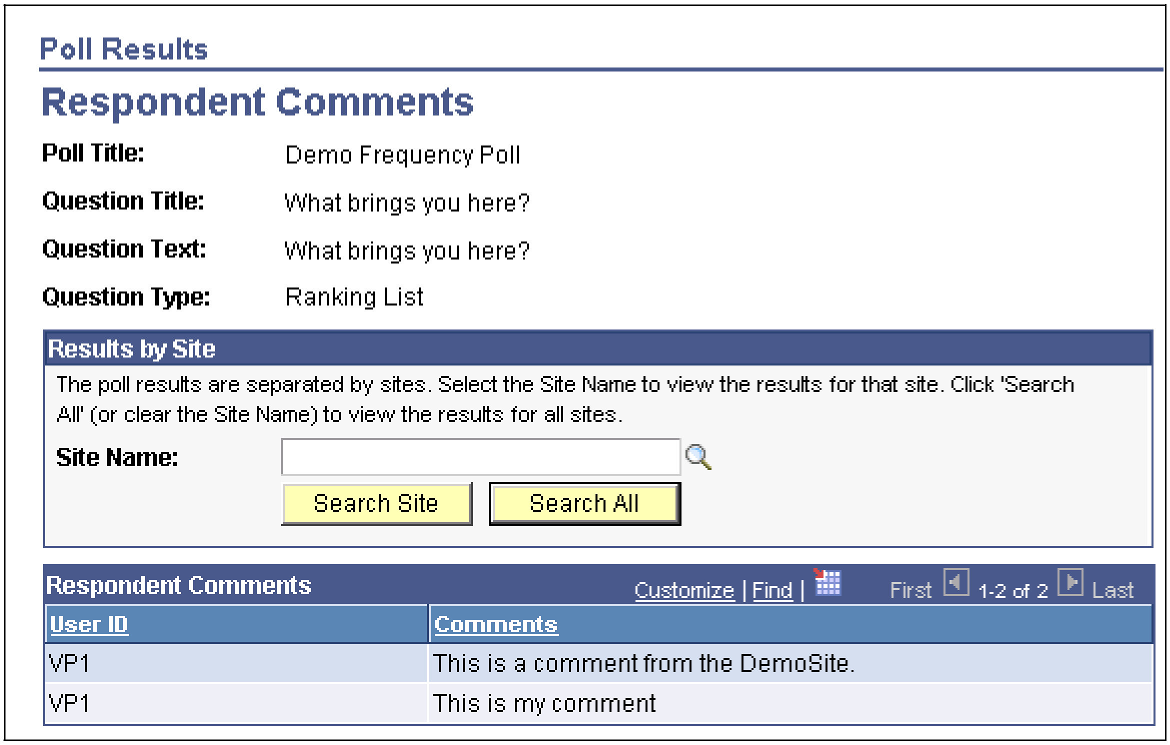


Response Results page

The Response Results page displays the poll question information and the compiled answers to the question. If you have published the poll to multiple sites, you can search for results based on the site name or you can search all of the sites for responses to the poll.

Viewing Respondent Comments

Access the Respondent Comments page (click the Comments link on the Poll Results page).



Respondent Comments page

Use this page to view lists of comments that users have entered. If you have published the poll to multiple sites, you can search for comments based on the site name or you can search all of the sites for comments. Comments appear in alphanumeric order based on user ID.

Administering Polls

This section discusses how to:

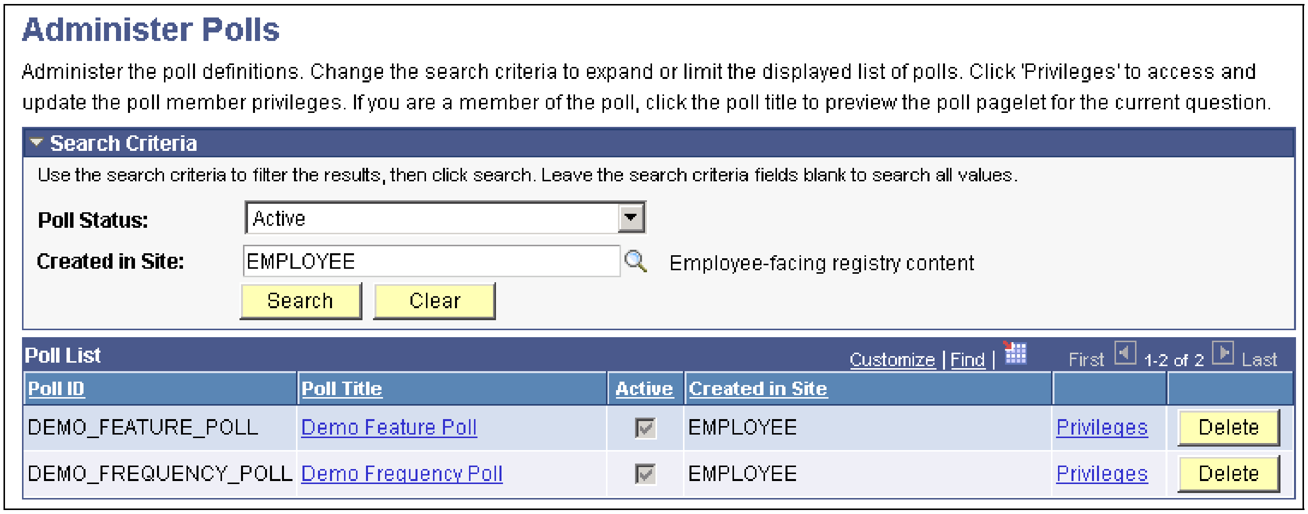
- Administer polls.
- Change privileges for polls.

Page Used to Administer Polls

Page Name	*Definition Name*	*Navigation*	*Usage*
Administer Polls	EPPSP_ADM_POLL	Portal Administration, Administer Polls	Manage polls and user privileges.

Administering Polls

Access the Administer Polls page (Portal Administration, Administer Polls).



Administer Polls page

Poll Status Select polls that are either *Active* or *Inactive.*

Created in Site Select the name of the site in which the poll was created.

Search Click this button to view the search results.

Poll ID The system displays the ID of the poll.

Poll Title Click the title of the poll to view the Preview Poll pagelet page.

Note. Titles will not be active unless you have security access to the poll.

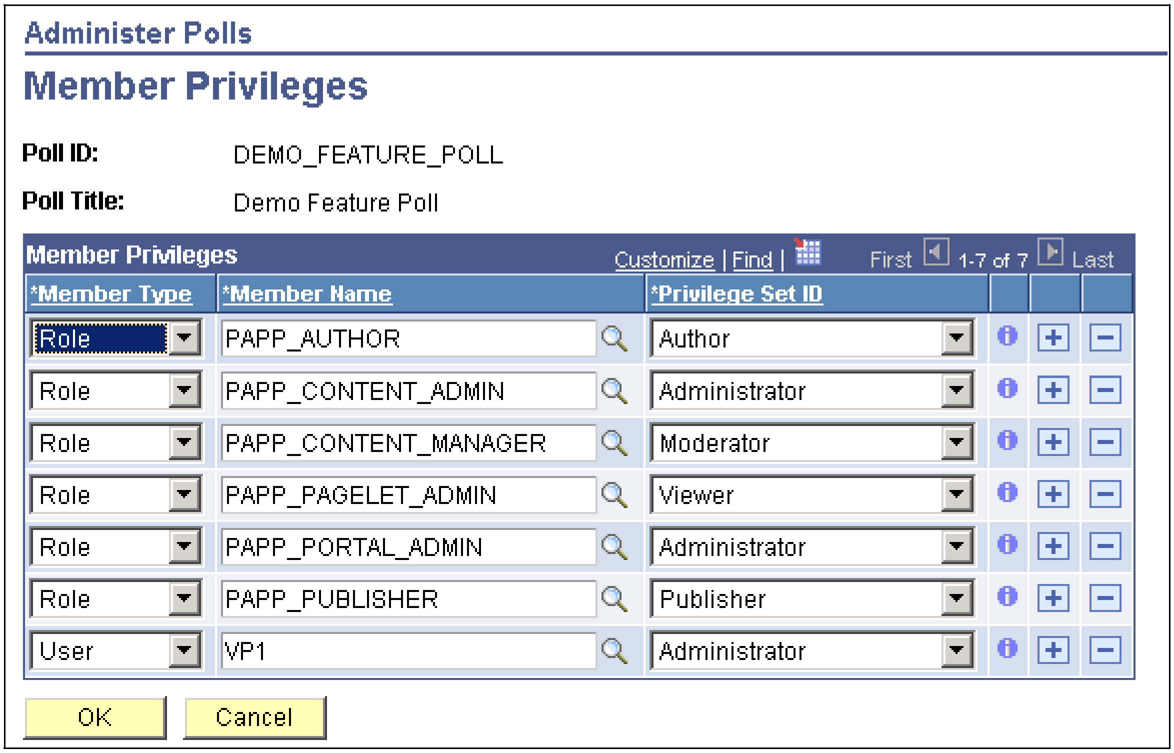
Privileges Select the Privileges link to access the Member Privileges page.

See Chapter 13, "Managing Polls," Changing Privileges for Polls, page 296.

Delete Click to delete the poll.

Changing Privileges for Polls

Access the Member Privileges page (Portal Administration, Administer Polls).



Member Privileges page

Member Type

Select the type of participant you want to add to the poll. Available values include:

Role. Select to be able to select a role in the Member Name field. Available group names are derived from PeopleSoft roles defined in the Roles component.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration,* "Setting Up Roles"

User. Select to be able to select a user in the Member Name field. Available users are derived from PeopleSoft users defined in the User Profiles component.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration,* "Administering User Profiles"

Member Name

The name of the member as defined in the Roles component or the list of users from the User Profiles component.

Privilege Set ID

Select a privilege level you want to assign to the member. Delivered values are:

Author.

Authors can view and add questions to a poll as well as edit and delete questions without responses.

Administrator. Administrators can add, edit, or delete action items, and action item lists. In addition, they can add and delete list members.

Contributor. Contributors can add or edit action items. They can delete their own action items, but not those belonging to others.

Viewer. Viewers have read-only access to the action items.

Moderator. A moderator can view, add, edit, and delete members, respondents, and questions for the poll. A moderator can also update metadata and view the poll results.

Click to view additional information about the actions that the privilege set enables the member to use.

Chapter 14

Gathering Feedback Using Surveys

This chapter provides an overview of the Survey feature and discusses how to:

- Set up survey options.
- Create and distribute surveys.
- Complete surveys.
- Review survey results.

Understanding the Survey Feature

You can use the Survey feature to facilitate an organization's ongoing goal of encouraging and validating user input into processes and controls. For example, there may be a requirement to request feedback from the individuals who are directly involved in key business processes about how effective those processes are, and you can use the Surveys feature to request input on how they could be improved. The Survey feature enables you to create and distribute questionnaires, and evaluate the responses.

Setting Up Survey Options

This section provides overviews of distribution lists, response types and values and discusses how to:

- Create distribution lists.
- Establish response types.

Understanding Distribution Lists

Distribution lists enable you to define a group of user IDs that are related in some way, such as department managers, to use as survey recipients. When you establish a survey, you can use distribution lists to specify who will receive the survey. Use of distribution lists is optional, because you can also specify survey recipients by selecting individual user IDs.

Understanding Response Types and Response Values

Response types define the set of valid answers for a survey question. For example, an answer of either *yes* or *no* can be one response type. When you define the questions that are included on a survey, you specify their response type. This enables the system to list the possible valid answers to each question in the drop-down list box for generated surveys. When participants complete a survey, they select their response from this list. Several response types are delivered as system data; you can modify the delivered response types or create additional response types to suit a particular implementation.

Each response within a response type is associated with a numeric value. When you define a survey, you indicate what responses are expected or acceptable for each question. The system compares the expected response value with the actual responses to enable you to gauge whether responses match your expectations, and displays the information on the pages that you use to review the survey results.

For example, if the available responses and their corresponding values are 1 through 10, respectively, and 8 through 10 are acceptable, the expected response for a question would be ≥ 8. The Survey Summary page uses this range to indicate whether a response is expected. In the summary page, the expected column would display *Yes* for responses 8, 9, and 10 and *No* for the other responses.

This table lists the delivered response types:

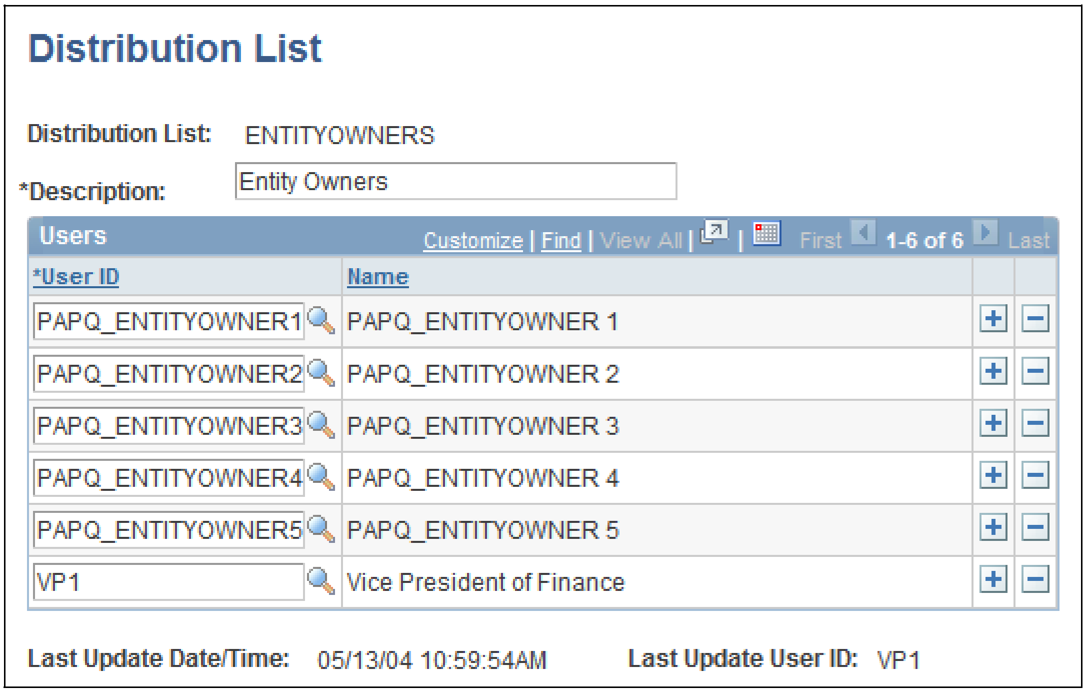
Response Type ID	***Description***	***Responses and Response Value (in Parentheses)***
1	Yes - No	No (1), Yes (2)
2	Strongly Agree - Strongly Disagree	Strongly Disagree (1), Disagree (2), No Opinion / Not Applicable (3), Agree (4), Strongly Agree (5)
3	Extremely Valuable - Irrelevant	Irrelevant (1), Not Valuable (2), No Opinion / Not Applicable (3), Valuable (4), Extremely Valuable (5)
4	Excellent - Poor	Poor (1), Fair (2), No Opinion / Not Applicable (3), Good (4), Excellent (5)
5	Scale 1-10	1, 2, 3, 4, 5, 6, 7, 8, 9, 10 The response values are equivalent to the responses.
6	Most Likely - Not Likely	Extremely Likely (10), Most Likely (20), Somewhat Likely (30), Unlikely (40), Not at all Likely (50)

Pages Used to Set Up Surveys

Page Name	*Definition Name*	*Navigation*	*Usage*
Distribution List	EO_PE_SV_DSTRLST	Portal Administration, Survey, Distribution List	Create distribution lists to use for surveys.
Response Type	EO_PE_SV_RESPTYP	Portal Administration, Survey, Response Type	Establish the responses for survey questions.

Creating Distribution Lists

Access the Distribution List page (Portal Administration, Survey, Distribution List).



Distribution List page

Distribution List and **Description**
Enter a name and description for the distribution list. These appear in the selection list for the Distribution List field on the Survey Setup - Recipients page.

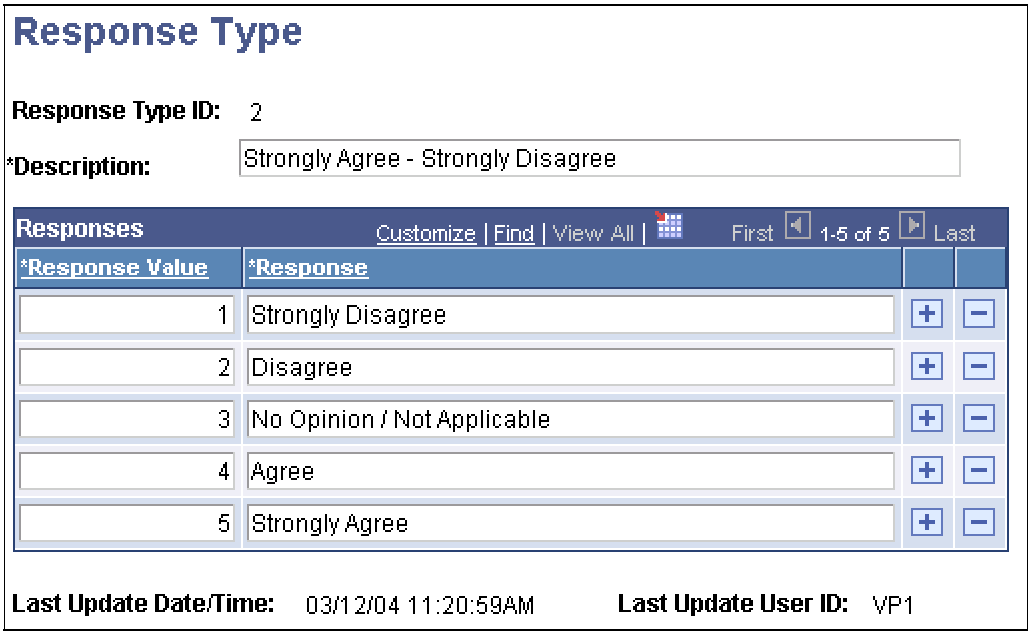
User ID
Insert rows in the Users grid, and specify the ID of each user who belongs to the distribution list.

To specify the distribution lists for a survey, use the Survey Setup - Recipients page.

See Chapter 14, "Gathering Feedback Using Surveys," Defining Recipients and Distributing Surveys, page 305.

Establishing Response Types

Access the Response Type page (Portal Administration, Survey, Response Type).



Response Type page

Response Type ID Enter an identifier for the response type.

Description Enter a description for the response type. The description appears in the selection list for the Response Type field for a question when you define a survey by using the Survey Setup page.

Responses

To specify the valid responses for this response type, add rows in the Response grid, and complete the following fields:

Response Value Enter the numeric value to use for this response. The system uses this value when determining if a particular response is acceptable or expected.

Response Enter the response. The system displays the response in the drop-down list box for the Answer field for a distributed survey for questions associated with this response type.

When you establish questions during survey setup, you can only select response types that have defined responses. Response types that have been saved but have no responses defined do not appear in the selection list for the Response Type ID field on the Survey Setup page.

Creating and Distributing Surveys

This section provides an overview of survey distribution and discusses how to:

- Create surveys.
- Define recipients and distribute surveys.

Understanding Survey Distribution

Once a survey is distributed, it becomes locked and no new questions can be added; however, you can still add new recipients and send them the survey, or copy the survey to create a new survey.

When surveys are distributed, the system sends recipients an email informing them that there is a survey that they need to complete, with a link to their survey. A blind carbon copy (BCC) option is available, to prevent the system from displaying the recipient names in the email that is generated. Recipients can click the link to access the survey and complete their responses to each question. Survey questions appear in ascending order based on the sequence number that was specified for each question when the survey was defined. The survey can be saved and edited by the recipients as needed while it is being worked on. After it is complete, the recipient submits it. Once submitted, the survey can't be modified. During this procedure, the system updates the survey status accordingly, assigning one of the following values:

- *Not Started.*

  The initial value for a survey when it is distributed.

- *In Progress.*

  The assigned value once a recipient saves a distributed survey.

- *Completed.*

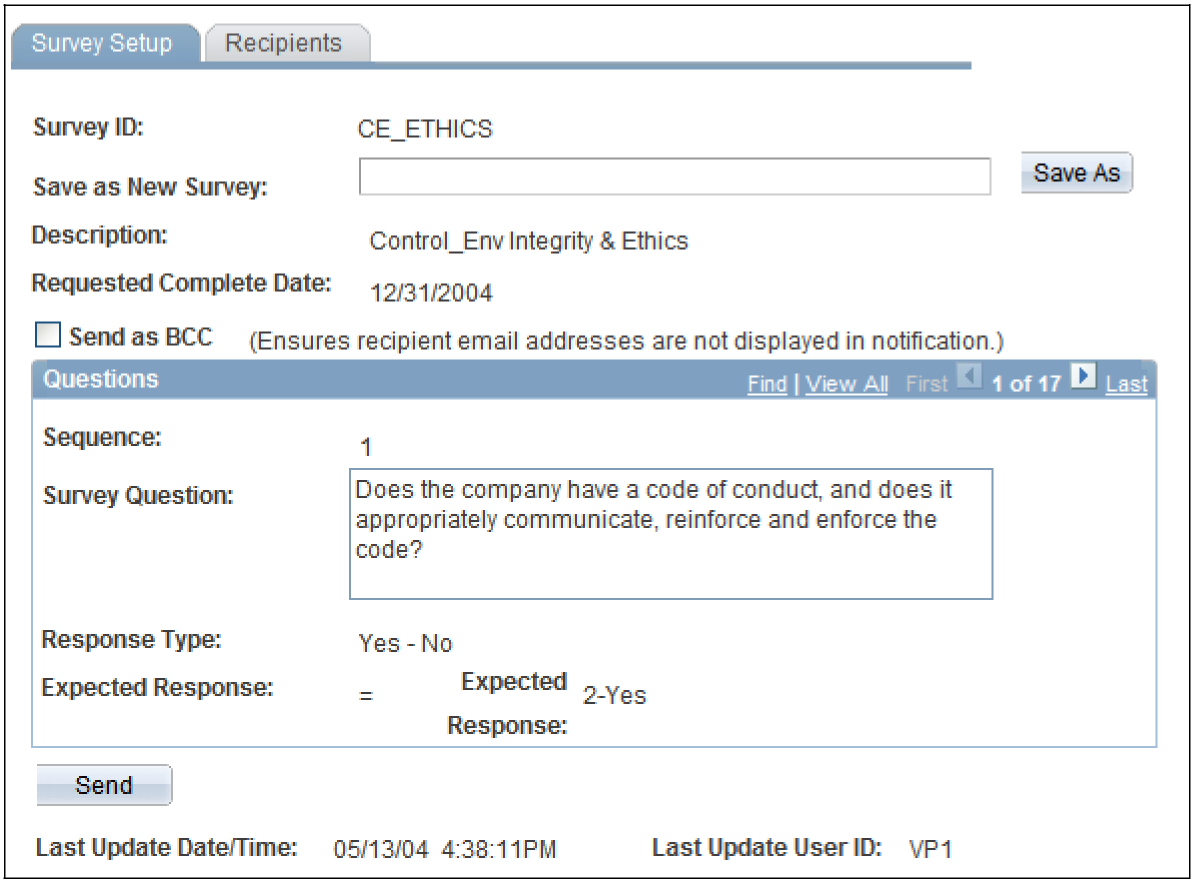
  The assigned value once a recipient completes and submits a distributed survey.

Pages Used to Create and Distribute Surveys

Page Name	***Definition Name***	***Navigation***	***Usage***
Survey Setup	EO_PE_SV_DEFN	Portal Administration, Survey, Maintain Surveys, Survey Setup	Establish a survey definition and identify survey questions.
Survey Setup - Recipients	EO_PE_SV_RC	Portal Administration, Survey, Maintain Surveys, Recipients	Specify survey recipients using defined distribution lists and individual user IDs.

Creating Surveys

Access the Survey Setup page (Portal Administration, Survey, Maintain Surveys, Survey Setup).



Survey Setup page

To set up a survey:

1. Specify the survey ID, description, and requested completion date.

Survey ID and **Description**	Enter a survey identifier and a description of the survey.
Requested Complete Date	Enter the target completion date for the survey. This date does not affect any processing; it is provided only for your information. This field is unavailable for entry once the survey is sent.
Send as BCC	Select to display only the name of the email recipient in the survey notification emails. The names of the other individuals to whom the notification was sent will not appear.

2. Define the survey questions.

   For each question, indicate the associated response type and the expected response. These fields are unavailable for entry once the survey is sent.

   For each survey question, complete the following fields:

Sequence	Enter a numeric value to indicate the order in which the question will appear on the survey. The system displays questions in sequential ascending order using this number.
Survey Question	Enter the text of the survey question; the system enables up to 254 characters.
Response Type	Specify the valid response types for this question by selecting a response type description from the drop-down list box. Only response type IDs with defined responses appear in the list.
Expected Response	Indicate the acceptable or expected results for each question by selecting an operand and a valid response (based on the specified response type).

3. Indicate who will receive the survey.

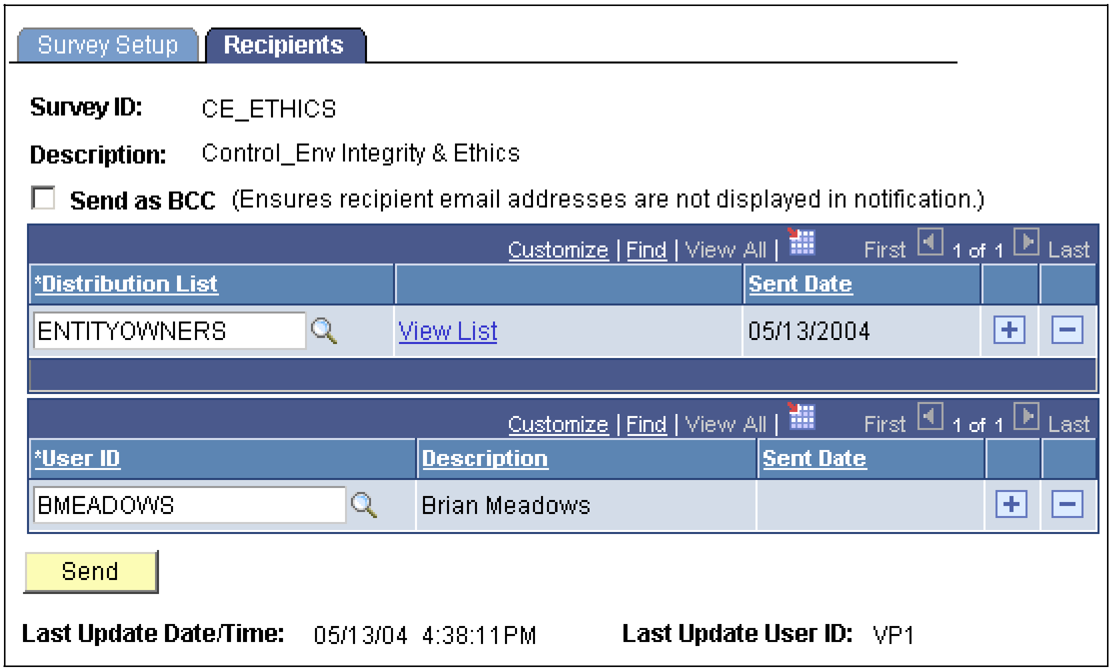
   You can use distribution lists and user IDs to define the survey recipients.

4. Save and distribute the survey.

Save as New Survey and **Save As**	To create a new survey based on this survey, enter a name for the new survey, and then click Save As. A new survey definition page appears, where you can complete the survey definition. You can also copy an existing survey to create a new survey using this button.
Send	Click to distribute the survey. You must define survey recipients by using the Survey Setup - Recipients page before you can send the survey. If you have already sent the survey, you can still add more recipients and click Send again; the system will distribute the survey to only the new recipients.

Defining Recipients and Distributing Surveys

Access the Survey Setup - Recipients page (Portal Administration, Survey, Maintain Surveys, Recipients).



Survey Setup - Recipients page

You can specify survey recipients by individual user ID and by defined distribution lists.

Send as BCC
Select to display only the name of the email recipient in the survey notification emails. The names of the other individuals to whom the notification was sent will not appear.

Distribution List
To specify survey recipients by distribution lists, insert rows in the this grid and select the distribution list for each inserted row.

View List
Click to access the Distribution List page, where you can view the user IDs that are included in the distribution list.

User ID
To specify survey recipients by user IDs, insert rows in this grid and select the user ID for each inserted row.

Sent Date
If the survey has been sent, this field displays the date on which the survey was sent to a particular user ID or distribution list.

Send
Click to distribute the survey. If you have already sent the survey, you can still add more recipients and click Send again; the system will distribute the survey to only the new recipients.

Completing Surveys

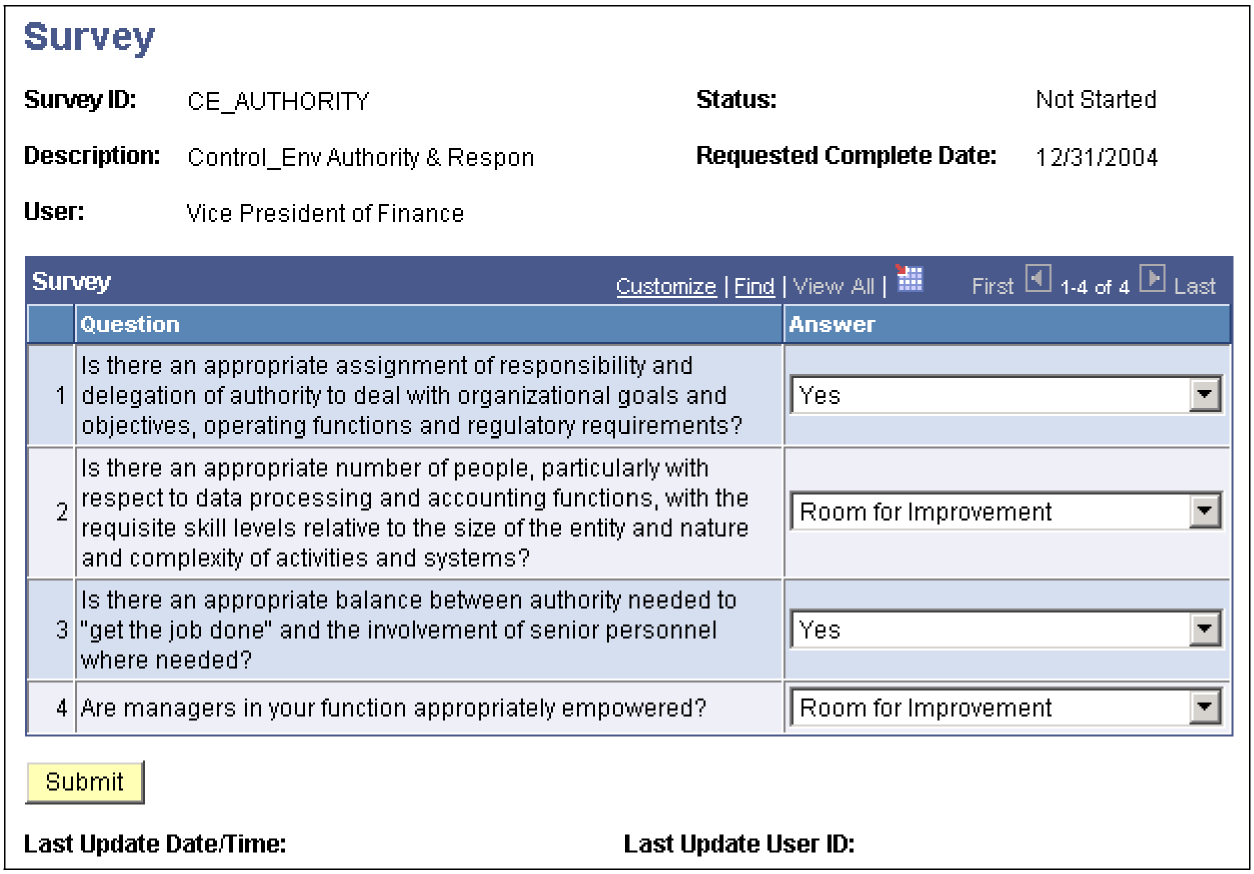
This section discusses how to complete surveys.

Page Used to Complete Surveys

Page Name	Definition Name	Navigation	Usage
Survey	EO_PE_SV_FILLSVY	• Click the link from the email notification for the survey. • Take a Survey	Complete distributed surveys.

Completing Surveys

Access the Survey page (click the link from the email notification for the survey) or (Take a Survey).



Example Survey page

To complete the survey:

1. Select the answer to each question from the drop-down list box.
2. Save the survey if you need to finish it at a later time.

   The system stores your in-progress work.

3. Click Submit to indicate that you have completed the survey.

Once you submit the survey, you can't modify any answers.

Reviewing Survey Results

This section provides an overview of survey results and discusses how to:

- Review overall survey responses.
- View response details.
- Review survey status by user.
- Review an individual's survey responses.

Understanding Survey Results

The Survey Summary component (EO_PE_SV_SUMMARY) displays survey results. It enables you to:

- View the completion status of a survey.
- View the response percentages for each question.
- View the list of recipients who chose a particular response.
- View individual responses.

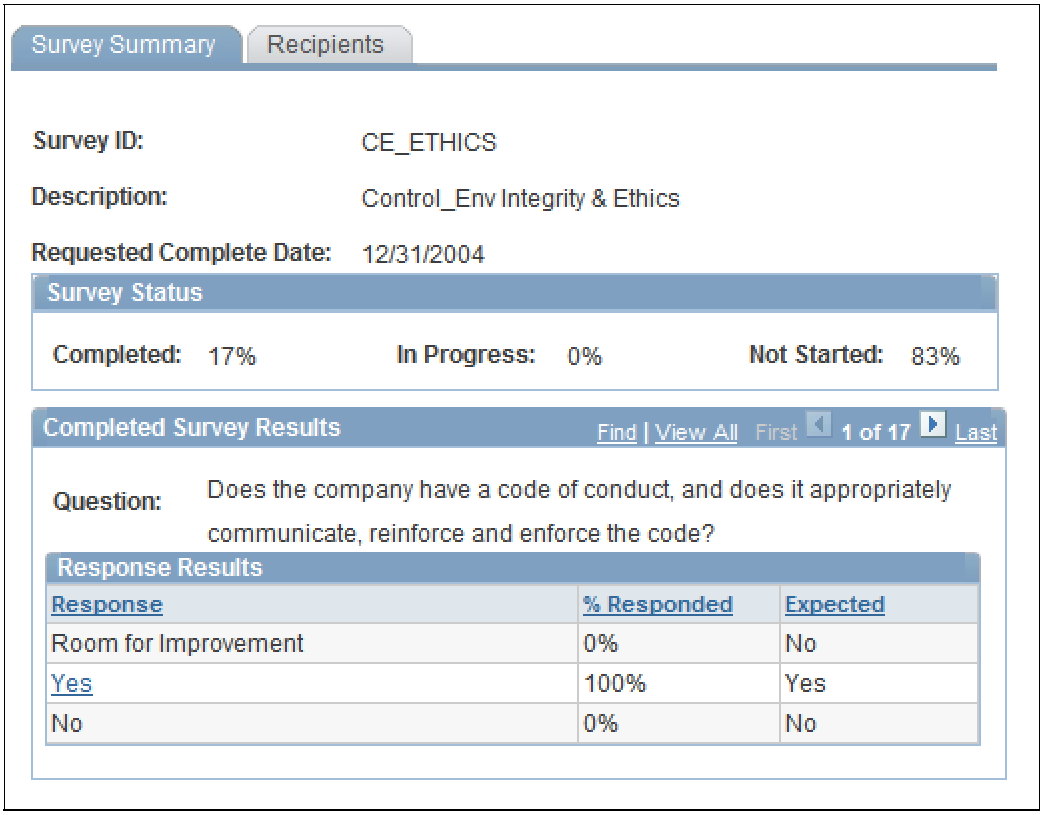
Pages Used to Review Survey Results

Page Name	***Definition Name***	***Navigation***	***Usage***
Survey Summary	EO_PE_SV_SUMMARY	Portal Administration, Survey, Survey Summary, Survey Summary	Review the survey completion status and the percentage of responses for each survey question.
Survey Summary - Recipients	EO_PE_SV_SUMMRYRCP	Portal Administration, Survey, Survey Summary, Recipients	Review the survey completion status, and the response status for each recipient.
Response Detail	EO_PE_SV_RESDTL	Click a response description for a question on the Survey Summary page.	View each recipient's response to a survey question.
User Response	EO_PE_SV_FILLSVY	Click a user ID on the Survey Summary - Recipients page.	View a single user ID's responses to all survey questions.

Page Name	Definition Name	Navigation	Usage
Contact Information	EO_PE_SV_CONTACT	Click the User link on the User Response page.	Send an email to the user.

Reviewing Overall Survey Responses

Access the Survey Summary page (Portal Administration, Survey, Survey Summary, Survey Summary).



Survey Summary page

Survey Status

Completed Displays the percentage of surveys that have been submitted.

In Progress Displays the percentage of surveys that have been accessed and saved but have not yet been submitted.

Not Started Displays the percentage of surveys that have not been accessed and saved.

Completed Survey Results

For each survey question, the system displays the results, distributed by response.

Response

Displays the response description.

Click the response description to access the Response Detail page, where you can view the list of all individuals (user IDs), if any, who chose this response.

% Responded

Displays the percentage of recipients that responded with this answer.

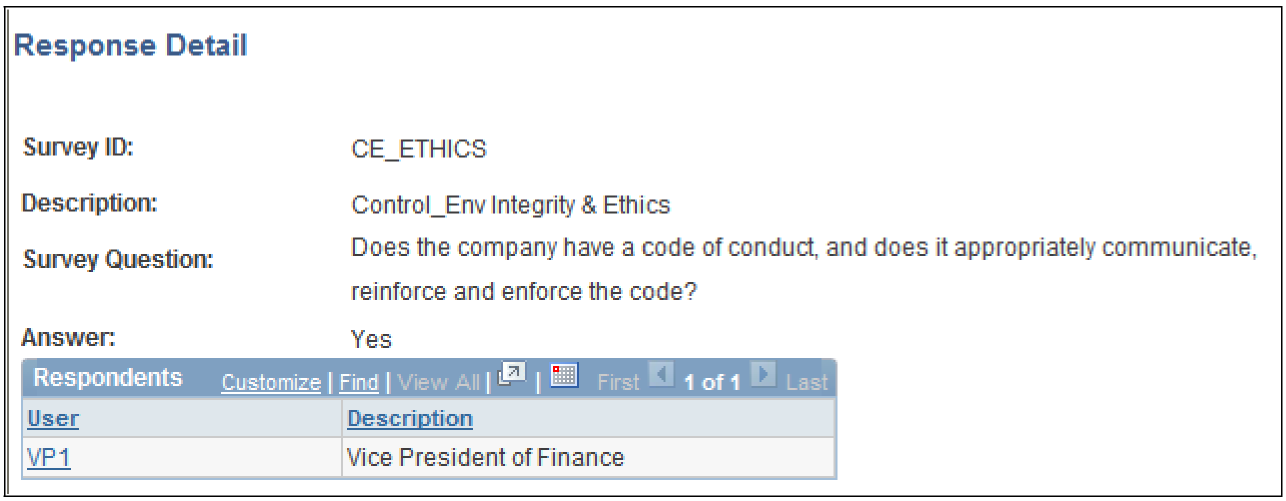
Expected

If this response meets the expected results criteria, this field displays *Yes*, otherwise it displays *No.*This is based on the expected results defined for this survey.

See Chapter 14, "Gathering Feedback Using Surveys," Creating Surveys, page 304.

Viewing Response Details

Access the Response Detail page (click the link for the response on the Survey Summary page).



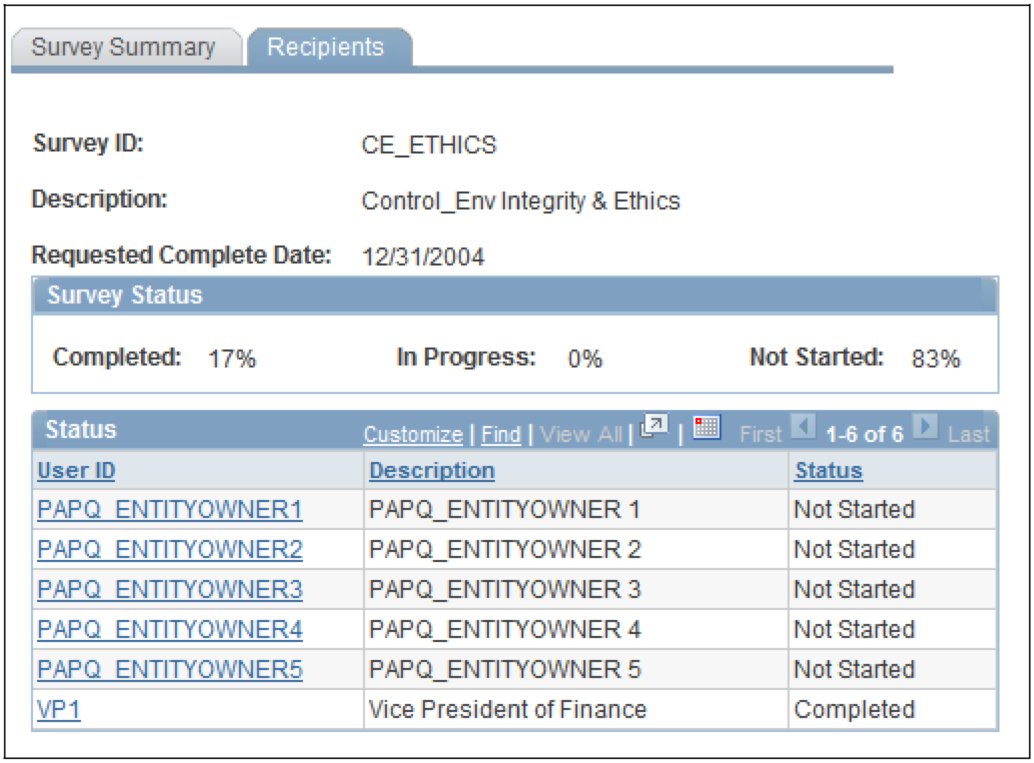
Response Detail page

This page lists all users who responded to the survey question with a particular answer.

Click a user ID to access the User Response page, where you can review the user's response to all survey questions.

Reviewing Survey Status by User

Access the Survey Summary - Recipients page (Portal Administration, Survey, Survey Summary, Recipients).



Survey Summary - Recipients page

Survey Status

This group box details the current status of the survey.

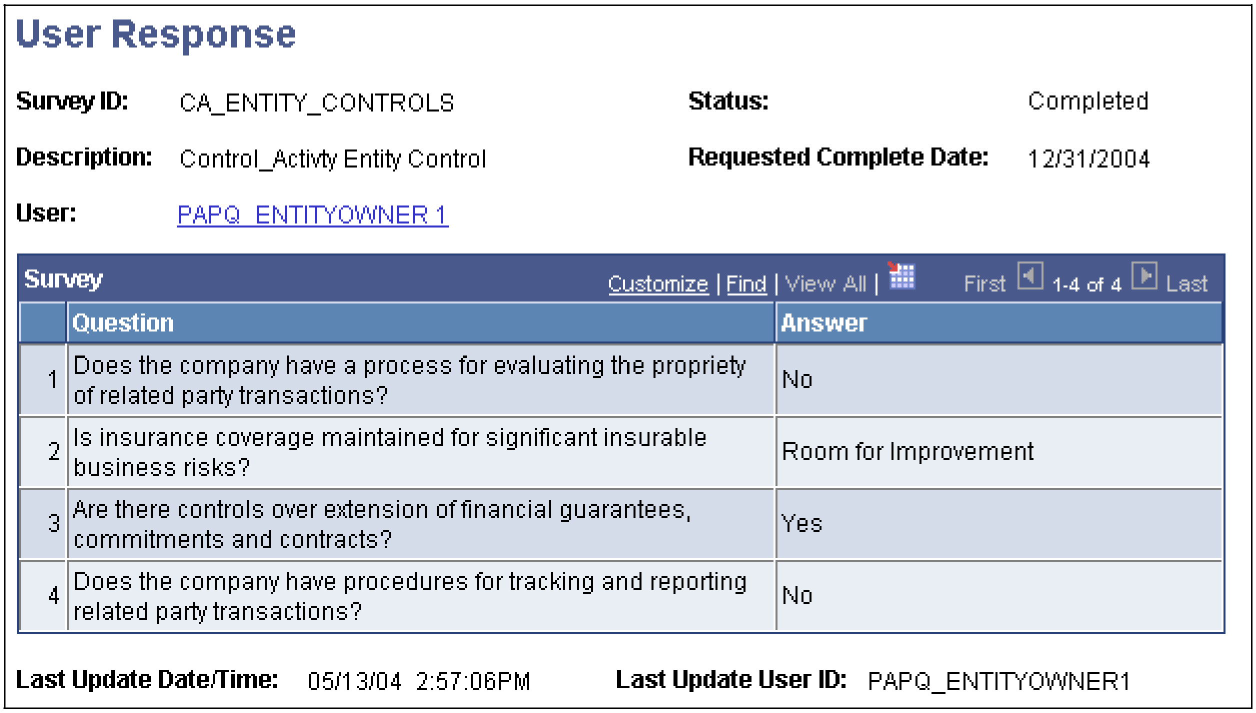
See Chapter 14, "Gathering Feedback Using Surveys," Reviewing Overall Survey Responses, page 309.

Status

User ID	Displays the recipient's user ID. Click to access the User Response page, where you can view the user's responses to every survey question.
Status	Displays the survey completion state for the user. Values are: *Not Started,In Progress*, and *Completed.*

Reviewing an Individual's Survey Responses

Access the User Response page (click the link for the user ID on the Recipients page).



User Response

Survey ID: CA_ENTITY_CONTROLS

Status: Completed

Description: Control_Activty Entity Control

Requested Complete Date: 12/31/2004

User: PAPQ_ENTITYOWNER 1

Survey Customize | Find | View All | First 1-4 of 4 Last

	Question	Answer
1	Does the company have a process for evaluating the propriety of related party transactions?	No
2	Is insurance coverage maintained for significant insurable business risks?	Room for Improvement
3	Are there controls over extension of financial guarantees, commitments and contracts?	Yes
4	Does the company have procedures for tracking and reporting related party transactions?	No

Last Update Date/Time: 05/13/04 2:57:06PM

Last Update User ID: PAPQ_ENTITYOWNER1

User Response page

This page lists the user's current responses to each question. Click the user ID description to access the Contact Information page for this individual, and send the individual an email.

Chapter 15

Using External Email, Calendar Data, and Instant Messaging

This chapter provides an overview of the Email pagelet and the Calendar Events pagelet and discusses how to:

- Work with the Email pagelet.
- Work with the Calendar Events pagelet.
- Enter your instant messaging information.

Understanding the Email Pagelet and Calendar Events Pagelet

PeopleSoft Enterprise Portal offers homepage pagelets that enable users to access email and calendar information without leaving the portal. The portal administrator sets up a default mail system and can also (optionally) enable external Post Office Protocol 3 (POP3) mail systems. Users then configure their own homepage Email pagelet and Calendar Events pagelet with their IDs and passwords. If multiple mail systems are enabled, users can include mail from multiple systems on their Email pagelet.

Because the Email pagelet and Calendar Events pagelet share the same integration technology, users need to install and set up these pagelets only once. For the homepage, however, users must separately select each pagelet that is to be included.

Email Integration

The Email pagelet displays a list of the latest email messages. If the email system is web-enabled, users can navigate to that email system from a link on the pagelet. Integrations are delivered for these servers:

- Internet Message Access Protocol (IMAP).
- Lotus Domino.
- Microsoft Exchange 2003 and 2007.
- Post Office Protocol (POP).

In the Email pagelet, you can have one primary external email system: an IMAP, Lotus Domino, Microsoft Exchange, or POP server. In addition, POP-enabled mail can also be used as a secondary email system.

Calendar Integration

The Calendar Events pagelet displays appointments for the current day. Integrations are delivered for:

- Lotus Domino.
- Microsoft Exchange 2003 and 2007.

Instant Messaging

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.

Working With the Email Pagelet

This section discusses how to:

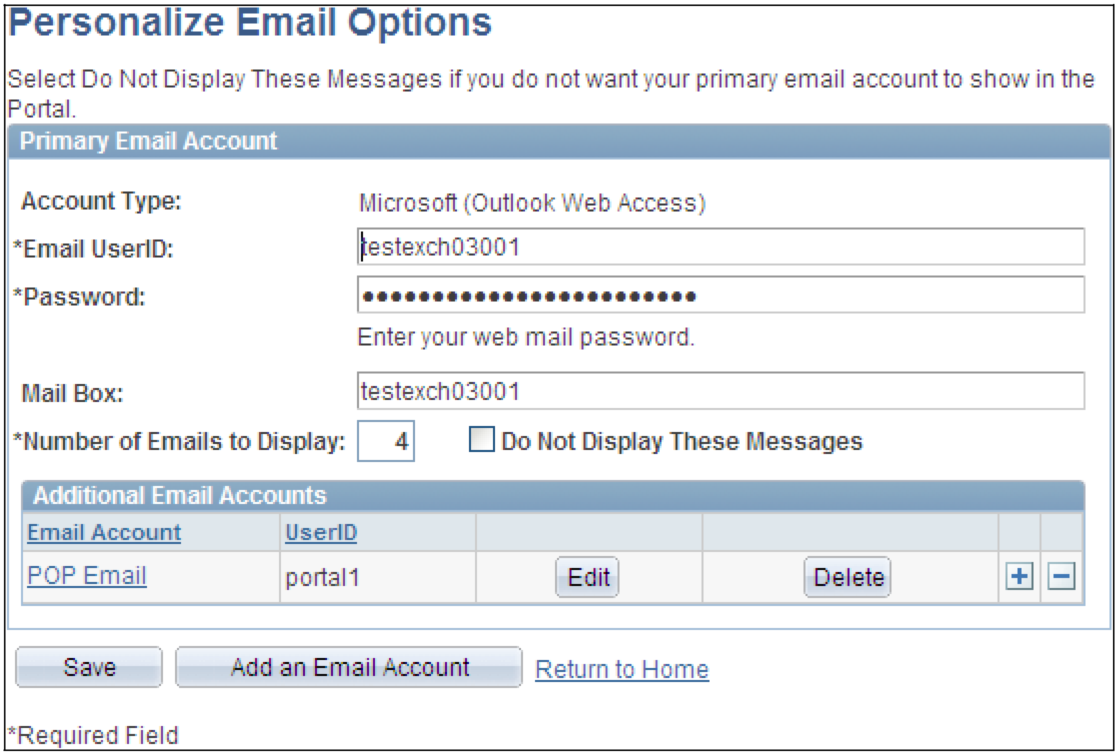
- Personalize your Email pagelet.
- Add an additional email account.
- Use the Email pagelet.

Pages Used to Work With the Email Pagelet

Page Name	*Definition Name*	*Navigation*	*Usage*
Personalize Email Options	EO_PE_EML_PREF	Click the Customize icon on the Email pagelet.	Specify the employee user email ID and password and the number of most recent email messages that should appear on the Email pagelet.
Add a Personal Email Account	EO_PE_EML_OTHR	Click the Add an Email Account button on the Personalize Email Options page.	Add a new personal external email account. Add any number of POP3 mail accounts
Update a Personal Email Account	EO_PE_EML_OTHR	Click the Edit button on the Personalize Email Options page.	Edit an existing personal email account supplying data to your Email pagelet. The fields on this page are the same as those on the Add a Personal Email Account page.

Personalizing Your Email Pagelet

Access the Personalize Email Options page (click the Customize button on the Email pagelet).



Personalize Email Options page

Primary Email Account

Use the fields in the Primary Email Account group box to enter information regarding your email account supplied by your organization's designated primary email system.

Email UserID

Enter the user ID that corresponds to the mail type.

Note. For Lotus Notes user ID, the domain needs to be specified after the user name (for example, Bob Jones/CORP).

Mail Box

Displays if you are using Microsoft Exchange 2003 or 2007. Enter your mailbox name.

Number of Emails to Display

Enter the number of messages to display on the pagelet.

Do Not Display These Messages

Select to have no messages appear on the pagelet. Use this feature to temporarily hide an email account.

Additional Email Accounts

Use the Additional Email Accounts group box to add external POP3 mail accounts to your Email pagelet.

Email Account — This field displays after you have set up at least one email profile on the Add a Personal Email Account page. Click the account name link to access the Update a Personal Email Account page.

UserID — The user ID whose mail messages will appear in the pagelet.

Edit — Click to access the Update a Personal Email Account page, where you can change the email account setup information.

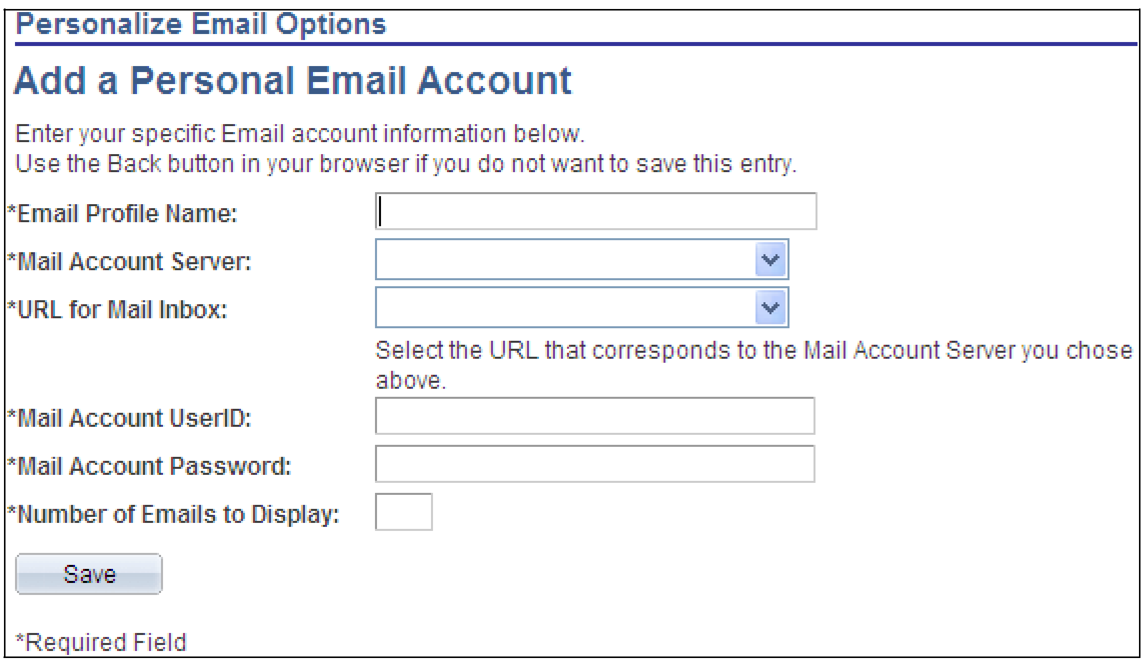
Delete — Click to permanently remove the email account from the pagelet. You will be prompted to confirm the deletion.

Add an Email Account — Click to access the Add a Personal Email Account page, where you can add new email accounts. The portal administrator predefines the account choices.

Note. All password and ID information is stored using common functions for password data store.

Adding an Additional Email Account

Access the Add a Personal Email Account page (click the Add an Email Account button on the Personalize Email Options page).



Add a Personal Email Account page

Email Profile Name Enter a unique email profile name. This is the mail identifier that appears in the pagelet.

Mail Account Server Select the appropriate server. The portal administrator adds POP3 email servers to this list on the URL Maintenance page.

URL for Mail Inbox Select the appropriate mail URL. The portal administrator adds URLs to this list on the URL Maintenance page.

Note. Ensure that the URL selection corresponds to the mail account server.

Mail Account UserID Enter the email user ID.

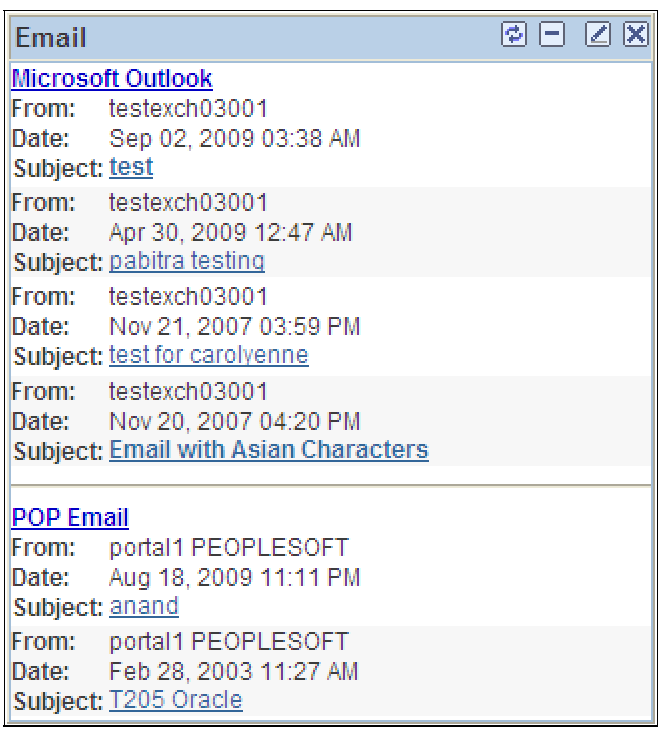
Mail Account Password Enter the email password.

Number of Emails to Display Specify the number of emails the system should display on the Email pagelet for this mail profile.

Note. The email account must enable POP access and forwarding for it to display on the Email pagelet. Check your profile with the POP mail vendor.

Using the Email Pagelet

Access the Email pagelet on the portal homepage.



Email pagelet

The Email pagelet displays a list of your latest email messages.

In the preceding example, the Email pagelet uses Microsoft Outlook as the primary email service and a POP server as a secondary service.

<Server Name> Click the link for a server to access the server's URL in a separate browser window.

Subject Click the link for a subject to open that message in a separate browser window.

Working With the Calendar Events Pagelet

This section discusses how to:

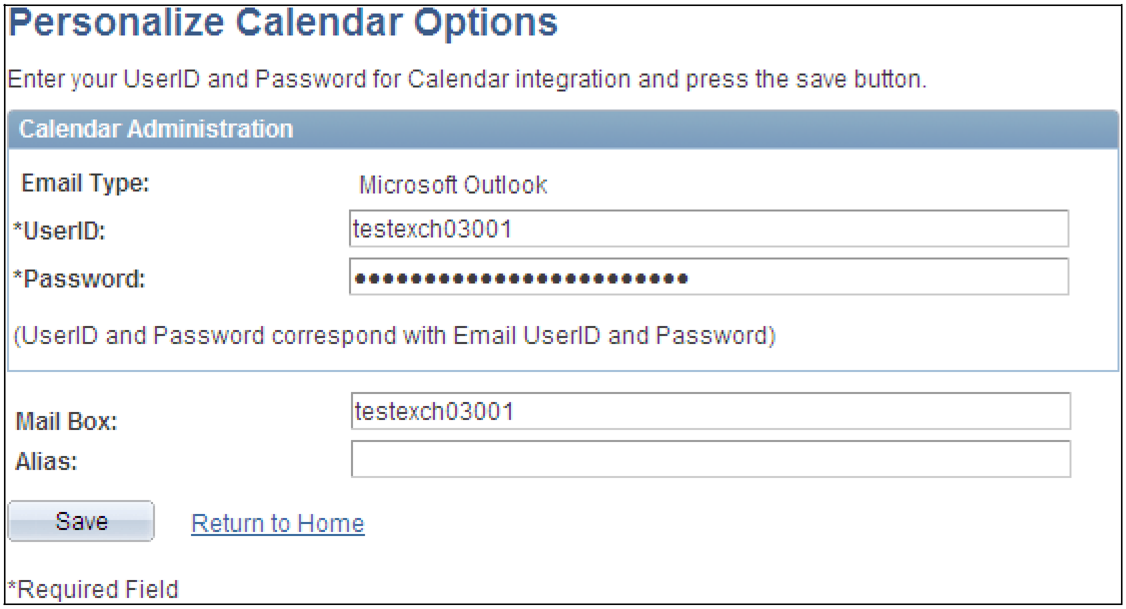
- Personalize your Calendar Events pagelet.
- Use the Calendar Events pagelet.

Page Used to Personalize the Calendar Events Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize Calendar Options	EO_PE_CAL_PREF	Click the Customize icon on the Calendar Events pagelet.	Enter data that allows the Calendar Events pagelet to display your calendar data.

Personalizing Your Calendar Events Pagelet

Access the Personalize Calendar Options page (click the Customize button on the Calendar Events pagelet).



Personalize Calendar Options page

UserID Enter the user ID that corresponds to the account type.

Password Enter your password.

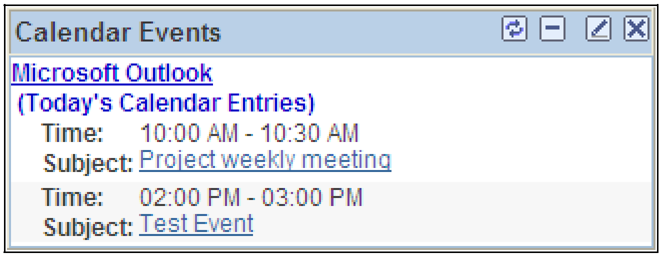
Note. For Lotus Notes users, use the internet password. This password is stored in the Person document in the Lotus Name and Address Book on the Domino server.

Mail Box Displays if you are using Microsoft Exchange 2003 or 2007. Enter your mailbox name.

Alias This field displays when the Email Type field value is set to *Microsoft Outlook.* Enter the same alias value that was defined in the active directory setup for the user. This value is used to define the Outlook Web Access/Exchange Server URL. If this field is left blank, then the mailbox name is used to generate the URL.

Using the Calendar Events Pagelet

Access the Calendar Events pagelet on the portal homepage.



Calendar Events pagelet

The Calendar Events pagelet displays appointments for the current day.

<Server Name> Click the link for a server to access the server's URL in a separate browser window.

Subject Click the link for a subject to open that event in a separate browser window.

Entering Your Instant Messaging Information

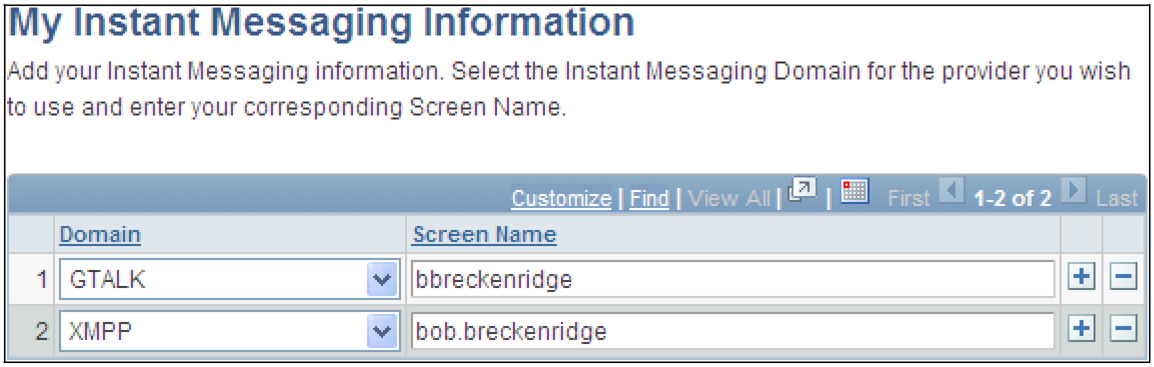
This section discusses how to enter your instant messaging information.

Page Used to Enter Your Instant Messaging Information

Page Name	***Definition Name***	***Navigation***	***Usage***
My Instant Messaging Information	EPPRC_IM_USER	Select the My Instant Messaging link that displays as a top-level link in the menu.	Add, edit, or delete your instant messaging information, such as your available screen names and domains.

Entering Your Instant Messaging Information

Access the My Instant Messaging Information page (My Instant Messaging).



My Instant Messaging Information page

Domain

Select the domain for which you want to define instant messaging information.

- *GTALK* — Google Talk.
- *SAMETIME* — IBM Lotus Sametime.
- *XMPP* — Extensible Messaging and Presence Protocol .
- *YAHOO* — Yahoo! Messenger.

Screen Name

Enter your screen name for the selected domain.

Chapter 16

Submitting and Editing Menu Item Requests

This chapter provides an overview of the Menu Item Requests feature, a list of common elements, and discusses how to:

- Search for menu item requests.
- Submit and edit menu item requests.

Understanding Menu Item Requests

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.

Oracle 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.

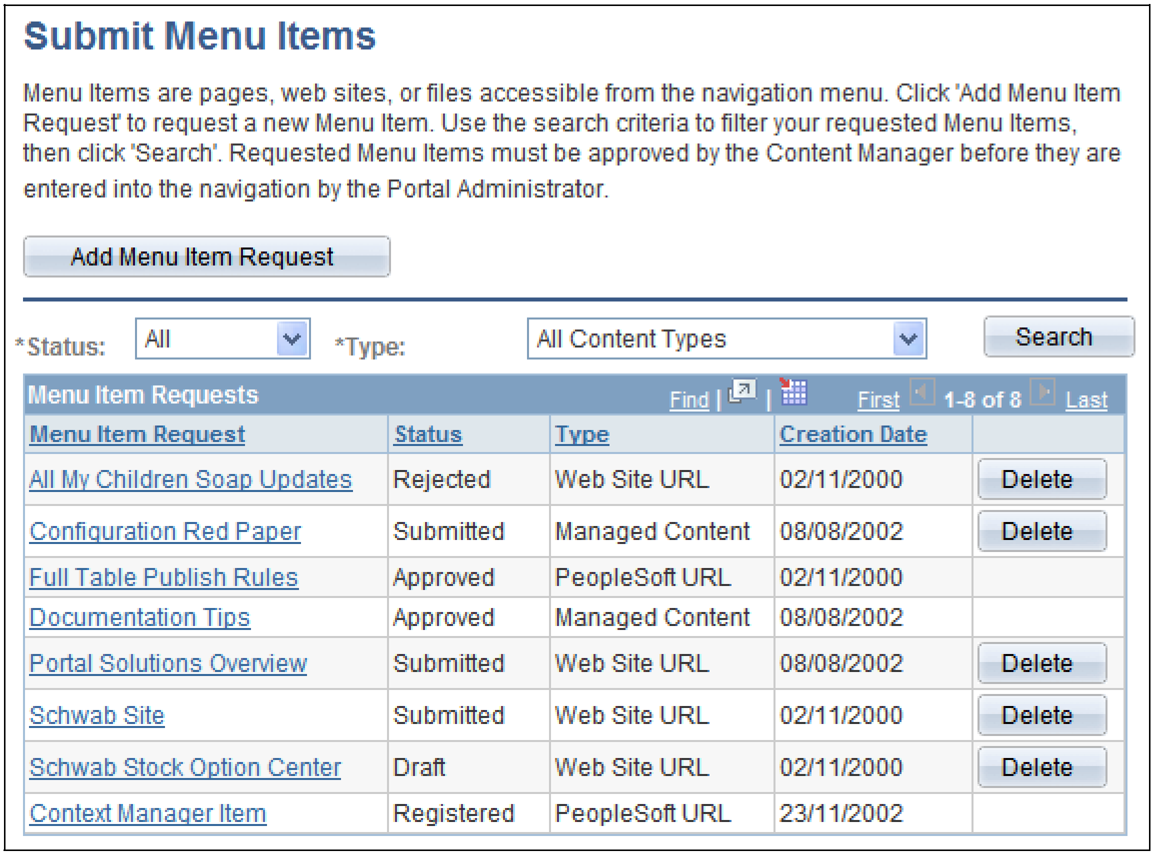
Pages Used to Submit and Edit Menu Item Requests

Pages Used to Submit and Edit Menu Item Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Submit Menu Items	EPPMI_SUBMIT_LST	My Content, Submit Menu Items	Search for requested menu items for reviewing, deleting, or editing.
Delete Confirmation	EO_PE_DEL_CONFIRM	Click the Delete button on the Submit Menu Items page.	Confirm deletion of a requested menu item.
Edit Menu Item Request	EPPMI_ITM_EDIT	• Click the Add Menu Item Request button on the Submit Menu Items page. • Click a Menu Item Request link for a menu item request in *Draft, Submitted,* or *Rework* status.	Add a new menu item request, or edit an existing request in *Draft,Submitted,* or *Rework* status.
View Menu Item Request	EPPMI_ITM_VIEW	Click a Menu Item Request link for a menu item request in *Rejected,Approved,* or *Registered* status.	View an existing menu item request.

Searching for Menu Item Requests

Access the Submit Menu Items page (My Content, Submit Menu Items).



Submit Menu Items page

Add Menu Item Request Click to access the Edit Menu Item Request page, where you can add a new menu item request.

Search Click to execute a menu item request search using criteria you have specified in the Status and Content Type fields. The Submit Menu Item page lists menu item requests that meet your search criteria.

Menu Item Request Click for a menu item request in *Draft*,*Submitted*, or *Rework* status to access the Edit Menu Item Request page, where you can edit all fields of the menu item request.

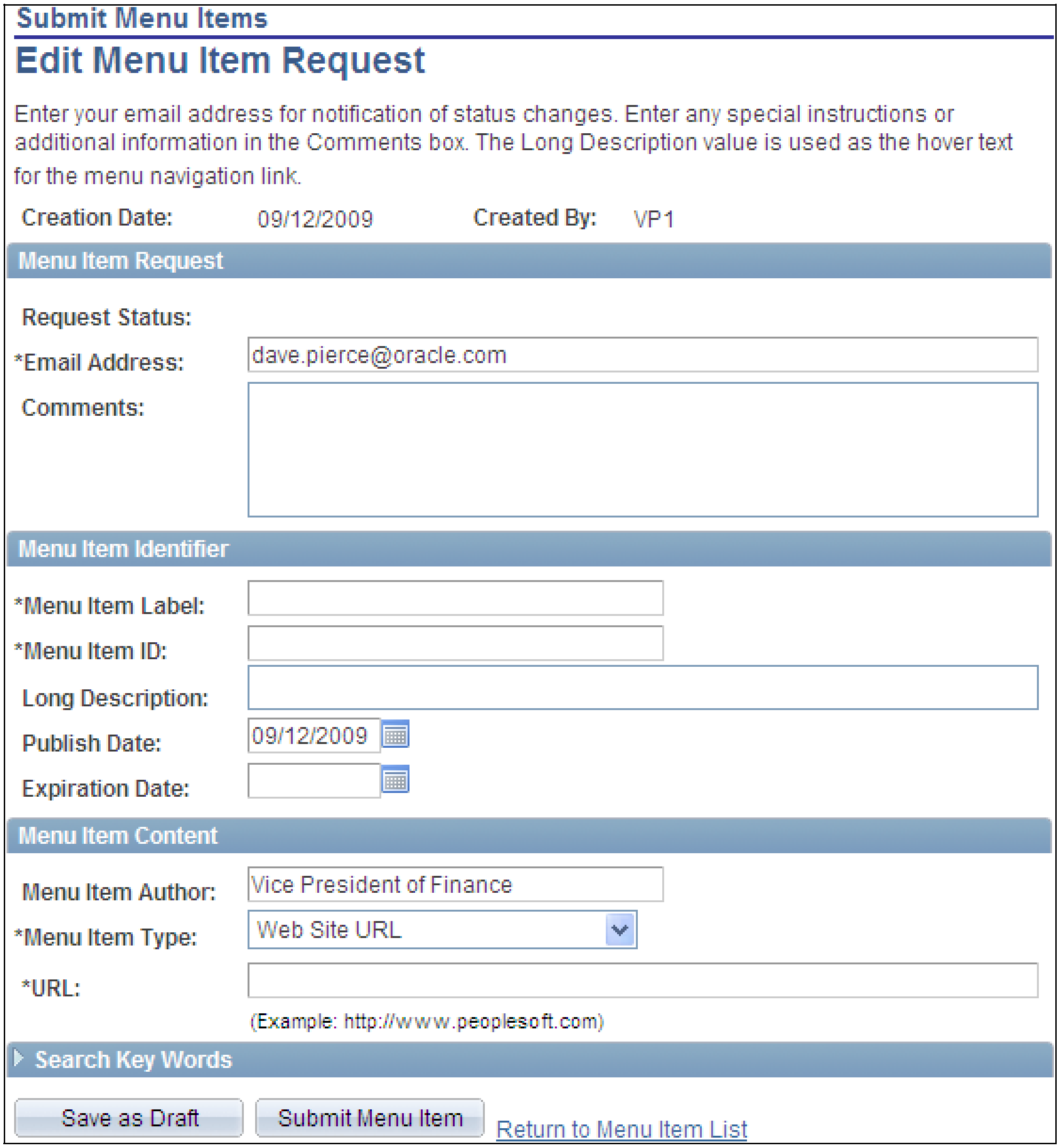
Click for a menu item request in *Rejected*,*Approved*, or *Registered* status to access the View Menu Item Request page, where you can view all fields of the menu item request.

Delete Click to delete the associated menu item request. You will be prompted to confirm your deletion.

The Delete button displays only for menu item requests with a status of *Draft*, *Rejected*,*Rework*, or *Submitted*.

Submitting or Editing Menu Item Requests

Access the Edit Menu Item Request page (click the Add Menu Item Request button on the Submit Menu Items page).



Edit Menu Items Request page

Menu Item Request

Request Status Displays the current status of this request. If this is a new request, the field is clear.

Email Address If available, the email address will default from the user profile, but can be overridden. Status change notifications will be sent to this address.

Comments Enter special instructions or additional information.

Menu Item Identifier

Menu Item Label Enter the link text that will appear for the menu item in the portal menu.

Menu Item ID Defaults from the menu item label, but can be changed. Special characters are removed, spaces are replaced with underscores, the defined prefix is added, and text is changed to uppercase. For example, *My Submitted Item* is stored as *ADMN_MY_SUBMITTED_ITEM,* where ADMN is the prefix as defined on the Installation Options page.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Configuring Enterprise Portal," Defining Installation Options.

Long Description Enter text that you want to appear as hover text for the menu item link.

Publish Date Select the date on which you want to publish the menu item. Defaults to today's date.

Expiration Date Select the date on which you want to discontinue the menu item. Leave this field clear if there is no expiration date for the menu item.

Menu Item Content

Menu Item Author This value initially defaults from information available in the user profile, but can be edited.

Menu Item Type Select the content type for the menu item. Available values include:

File Attachment.

Managed Content.

PeopleSoft URL.

Web Site URL.

Note. Remaining fields discussed in this section are based on the content type selected.

Add Attachment Click to access a page where you can browse for the file for which you want to submit a menu item request.

This button displays when the Content Type field is set to *File Attachment.*

File Name The name of the selected file attachment displays as a link to the contents of the file.

This field displays when the Content Type field is set to *File Attachment.*

Delete Attachment Click to delete the file attachment from the menu item request. This field displays when a file attachment has been added to a menu item request.

Date Added Displays the date and time at which the file attachment was added to the menu item request.

This field displays when a file attachment has been added to a menu item request.

Select Content Click to access the Select Managed Content page, where you can access a list of content that is available for selection.

Only approved content that is in a publishable category and for which you have viewer privileges is listed. Click the Content Title link to select the content and return to the Edit Menu Item Request page.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Setting Up and Working With Managed Content," Importing Managed Content into Other Features.

This field displays when the Content Type field is set to *Managed Content.*

Content Title The name of the selected content displays as a link to the content.

This field displays when the Content Type field is set to *Managed Content.*

Re-Select Content Click to access the Select Managed Content page, where you can select different managed content for your menu item request.

This field displays when managed content has been added to a menu item request.

Content Type Displays the content type. *File Attachment*,*Text*, or *HTML,* for example.

This field displays when managed content has been added to a menu item request.

Content ID Displays the identifier of the content.

This field displays when managed content has been added to a menu item request.

Market Select the market for the PeopleSoft URL.

This field displays when the Content Type field is set to *PeopleSoft URL.*

Menu Name Enter a valid menu name for the PeopleSoft URL.

This field displays when the Content Type field is set to *PeopleSoft URL.*

Component Name Enter a valid component name for the PeopleSoft URL.

This field displays when the Content Type field is set to *PeopleSoft URL.*

Parameters

Enter any existing parameters for the PeopleSoft URL. For example: *?P1=value1&P2=value2&P3=value3.*

This field displays when the Content Type field is set to *PeopleSoft URL.*

URL

Enter the website URL for your menu item request. For example: *http://www.peoplesoft.com.*

This field displays when the Content Type field is set to *Web Site URL.*

Search Key Words

Use the Search Key Words group box to enter up to three key words. Entering a keyword creates an attribute on a registered menu item with a Keyword parameter that contains the keyword value you enter.

The keywords you enter for the menu item are picked up in a search of the portal registry. Portal registry searches use the following criteria: Label, Long Description, and Attribute Values (with the attribute parameter of Keyword).

Save as Draft

Click to save your request in draft mode. Use this option when you want to save the menu item request, but are not ready to submit it for review and approval.

Note. No email notifications are triggered for requests with a status of *Draft.*

Submit Menu Item

Click to submit your menu item request for review and approval.

This action triggers an email notification to the submitter with a link to the Submit Menu Item page. The submitted status is defaulted from the email.

This action also triggers an email notification to the designated navigation manager with a link to the Manage Menu Item Requests page. The email URL sets the filter to display only submitted items.

Part 5

Performing Searches

Chapter 17

Submitting Searches in the Portal

This chapter provides an overview of searching in the portal discusses how to:

- Submit searches requests.
- Integrate content ratings into search results.

Understanding Searching in the Portal

You perform searches of PeopleSoft Enterprise Portal content by specifying a search string and search scope in the portal header. Once you have viewed results on the Search page, you can refine your original search or specify entirely different search criteria and scope. You can also search for content by executing saved searches.

In addition, many features in PeopleSoft Enterprise Portal provide a Search link that allows you to search for content within the scope of that feature. You can search within each of the following:

- Action item lists

  See Chapter 7, "Working With Action Items," Searching Within Action Item Lists, page 81.

- Blogs

  See Chapter 8, "Working With Blogs," Performing Searches Within Blogs, page 146.

- Calendars

  See Chapter 9, "Working With Community Calendars," Searching for an Event, page 169.

- Content management folders

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Content Management System*, "Using the Advanced Options," Searching for Content.

- Discussion forums

  See Chapter 10, "Working With Discussion Forums," Performing Searches Within Discussion Forums, page 244.

- Resource Finder

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

- Tags

  See Chapter 12, "Working With Tags," Searching for Tags, page 272.

- Workspaces

  See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces,* "Working in Collaborative Workspaces," Searching Within Workspaces.

PeopleSoft Enterprise Portal content is not dynamically indexed. Except for content that has been deleted, the search results are only as current as the last time the search indexing process (or processes) ran. It is the responsibility of the portal administrator to ensure that search indexing is performed on a regular schedule.

Submitting Search Requests

This section discusses how to submit a search

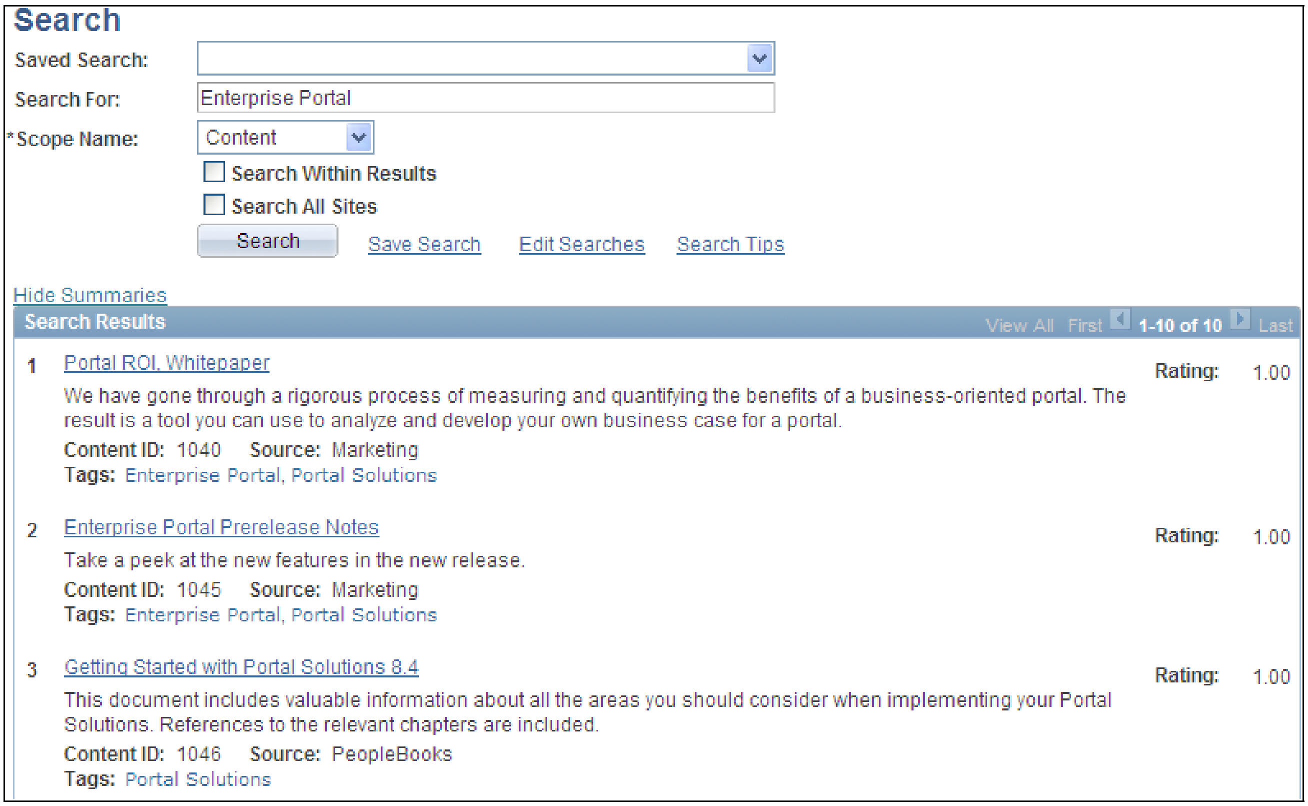
Pages Used to Submit Search Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Search	EO_PE_SRCH_RESULT	• In the portal header, select the search scope, enter the search string in the Search field, and press ENTER. •  In the portal header, enter the search string in the Search field, select the search scope, and click the GO button. • On the Search page, enter the search criteria and click the Search button. • On the Search page, select a saved search in the Saved Search drop-down list box. • Click the link for a search in the Saved Searches pagelet. • Click the link for a search on the Saved Searches page.	Perform a search on all content in the portal for the selected scope.

Page Name	**Definition Name**	**Navigation**	**Usage**
Search Tips	EO_PE_SRCH_TIPS	• Click the Search Tips link on the Search page. • Click the Search Tips link on the Saved Searches Detail page.	View search tips.

Submitting a Search

Access the Search page (in the portal header, enter the search string in the Search field, select the search scope, and click the GO button).



Search page

Use the Search page to perform a search on all content in the portal for the selected scope, and to review the search results.

Saved Search Select and immediately execute a saved search.

Search For

Enter the search text.

Note. Searches in PeopleSoft Enterprise Portal are case insensitive. In addition, you can use a wildcard character * and logical operators such as *AND, OR,* and *NOT.*

See Chapter 17, "Submitting Searches in the Portal," Search Considerations and Syntax, page 337.

Scope Name

Select the search scope:

- *Action Items* **—** Search all action item lists.
- *Blogs* **—** Search all blogs, posts, and comments.
- *Calendars* **—** Search all calendars and events.
- *Content* **—** Search all content management folders and items.
- *Discussions* **—** Search all discussion forums, topics, and replies.
- *Portal* **—** Search the portal registry and crefs.
- *Resource Finder* **—** Search resource finder profiles.
- *Workspaces* **—** Search collaborative workspaces and workspace content.

Search Within Results

Select this option to restrict the search to the current result set.

Search All Sites

Select this option to search across all sites to which you have access.

Search

Click to execute the search.

Save Search

Click to access the Saved Searches Detail page to name and save the current search.

Edit Searches

Click to access the Saved Searches page to review your saved searches.

Search Tips

Click to display search syntax and examples on the Search Tips page.

Note. Searches in PeopleSoft Enterprise Portal are case insensitive. In addition, you can use a wildcard character * and logical operators such as *AND, OR*, and *NOT.*

See Chapter 17, "Submitting Searches in the Portal," Search Considerations and Syntax, page 337.

Search Results

The Search Results scroll area displays the results of your search.

<title> Click a link to access that item.

Note. If the item is in a workspace or a different site, the item is opened in a separate browser window.

Tags Click a tag to access the Search Tags page with a search on the selected tag.

See Chapter 12, "Working With Tags," Searching for Tags, page 272.

Rating Presents the Verity relevance rating for the item.

Search Considerations and Syntax

Remember these considerations as you construct searches and review search results:

- Searches in PeopleSoft Enterprise Portal are case insensitive. Therefore, searching for *portal* is equivalent to searching for *Portal* and *PORTAL.*

  Note. While search terms and operators are case insensitive, for ease of reading the examples in this section, we use all caps to distinguish search operators such as *AND, OR,* and *NOT* from search terms.

- Many special characters are stripped out of the search string. Therefore, we recommend you avoid using the following special characters in your searches:

```
,  !  @  #  $  %  ^  &  (  )  *  +  =  {
}  [  ]  :  ;  "  `  <  >  ?  /  .  |  \
```

Searches in PeopleSoft Enterprise Portal use the following syntax:

exact phrase Enter an exact phrase without enclosing quotation marks.

For example: *PeopleSoft Enterprise Portal*

For example: *stock options*

***** Use * as the wildcard character.

For example: * **—** Returns all items for the selected search scope.

For example: *people** **—** Returns all items with terms such as *people,PeopleSoft,* or *PeopleTools,* and so on.

AND Use *AND* to find items with all of the specified search terms or phrases.

For example: *configuration AND Enterprise Portal* **—** Returns all items with *configuration* and *Enterprise Portal.*

OR Use *OR* to find items one or more of the specified search terms or phrases.

NOT	Use *NOT* to exclude a search term or phrase. For example: *people* NOT PeopleTools* — Returns all items with terms such as *people* or *PeopleSoft* and so on, but excludes those with *PeopleTools.*

Some search tips and examples are available on the Search Tips page. To access the Search Tips page, click Search Tips from either the Search page or the Saved Searches Detail page.

Integrating Content Ratings into Search Results

Select the Include Content Rating Results option on the Installation Options page to indicate that you want to include content ratings results in the search relevance rating. If you don't select the option, content ratings results are not used in the relevance rating.

Integrating results from content ratings into the Verity search results score enables past input to affect the outcome of searches. If a particular registered content reference was rated highly, it increases the content's relevance rating on the Search page. The content may be ranked higher or lower than the initial Verity relevance score.

Only results from content ratings feed into the search relevance rating. This feature allows content to be rated between 1 and 5. A rating of 3 is considered average and does not affect the Verity score. A rating of 1 or 2 decreases the Verity score; a rating of 4 or 5 increases it.

This formula is used to calculate the adjusted score:

(Adjusted Score) = *(Verity Score)* + (0.05 x *(Content Ratings Score* − 3)) x (1 − *Verity Score)*

Verity Score represents the unadjusted Verity relevance rating, *Content Ratings Score* is the content rating (1 through 5). The magnitude of the score adjustment is inversely proportional to the original Verity rating.

The Search page displays the combined relevance score for each result. Only content ratings for the current user are considered when adjusting the score.

Chapter 18

Using Saved Searches

This chapter discusses saved searches and how to:

- Create and use saved searches.
- Work with the Saved Searches pagelet.

Creating and Using Saved Searches

This section discusses how to:

- Create a saved search.
- Execute saved searches.
- Edit and delete saved searches.

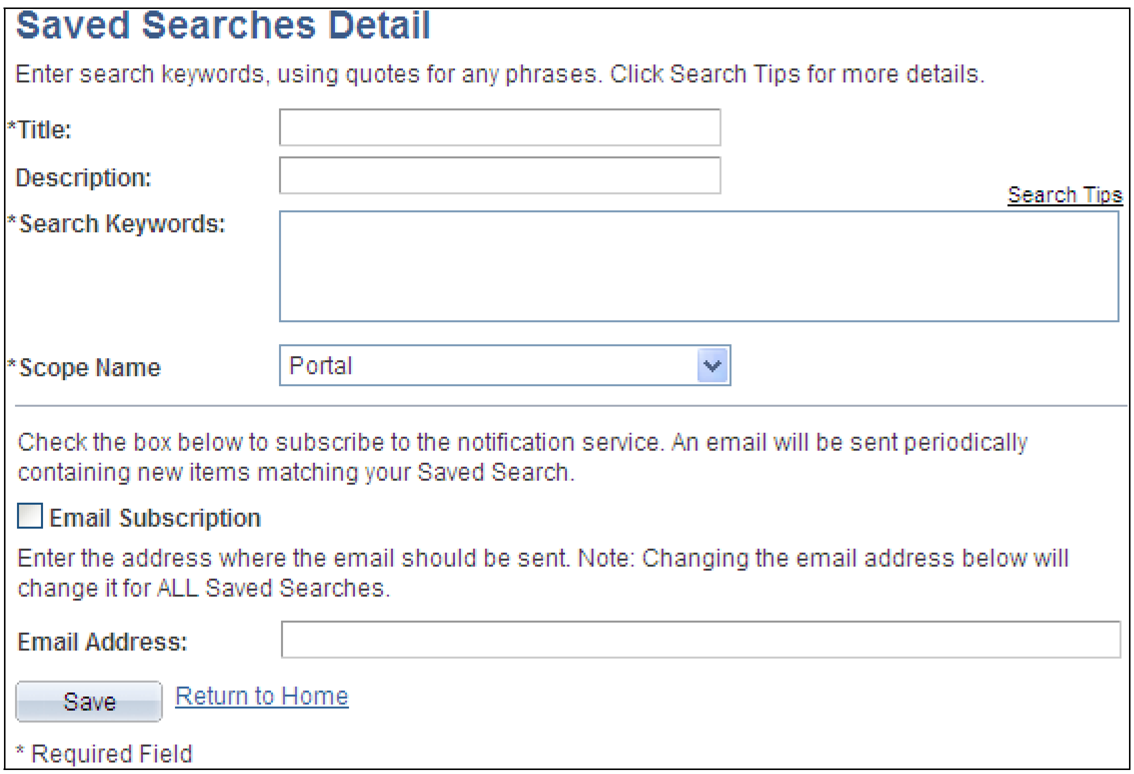
Pages Used to Create and Use Saved Searches

Page Name	***Definition Name***	***Navigation***	***Usage***
Saved Searches Detail	EO_PE_SRCHSV_DTL	• Click the Save Search link on the Search page. • Click the Add a Search button in the Saved Searches pagelet. • Click the Add a Search button on the Saved Searches page. • Click the Edit button on the Saved Searches page.	Add or edit a saved search.

Page Name	Definition Name	Navigation	Usage
Saved Searches	EO_PE_SRCHSV_LIST	• Click the Edit Searches button on the Search page. • Click the Show All/Enhanced link in the Saved Searches pagelet.	Review a summary of your saved searches and edit or delete a saved search.
Delete Confirmation	EO_PE_DEL_CONFIRM	Click the Delete button for a saved search on the Saved Searches page.	Confirm deletion of the selected saved search.

Creating a Saved Search

Access the Saved Searches Detail page (click the Save Search link on the Search page).



Saved Searches Detail page

Title	Enter the title of the saved search.
Description	Enter a description for the saved search.
Search Tips	Click to display search syntax and examples on the Search Tips page.

Search Keywords

Enter the search text.

Note. Searches in PeopleSoft Enterprise Portal are case insensitive. In addition, you can use a wildcard character * and logical operators such as *AND, OR,* and *NOT.*

See Chapter 17, "Submitting Searches in the Portal," Search Considerations and Syntax, page 337.

Scope Name

Select the search scope:

- *Action Items* **—** Search all action item lists.
- *Blogs* **—** Search all blogs, posts, and comments.
- *Calendars* **—** Search all calendars and events.
- *Content* **—** Search all content management folders and items.
- *Discussions* **—** Search all discussion forums, topics, and replies.
- *Portal* **—** Search the portal registry and crefs.
- *Resource Finder* **—** Search resource finder profiles.
- *Workspaces* **—** Search collaborative workspaces and workspace content.

Email Subscription

Select to indicate that you want to be notified by email when content that matches your search criteria is modified or added.

Note. The email subscription option is enabled for a scope of *Portal* only. In addition, search notifications must be enabled on the Installation Options page and the notification Application Engine must be scheduled by the portal administrator to run on a regular basis.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Configuring Enterprise Portal," Defining Installation Options.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Administering Saved Searches," Scheduling Saved Search Email Notifications.

Email Address

After selecting the email subscription option, enter the email address to which you want email notifications sent.

Executing Saved Searches

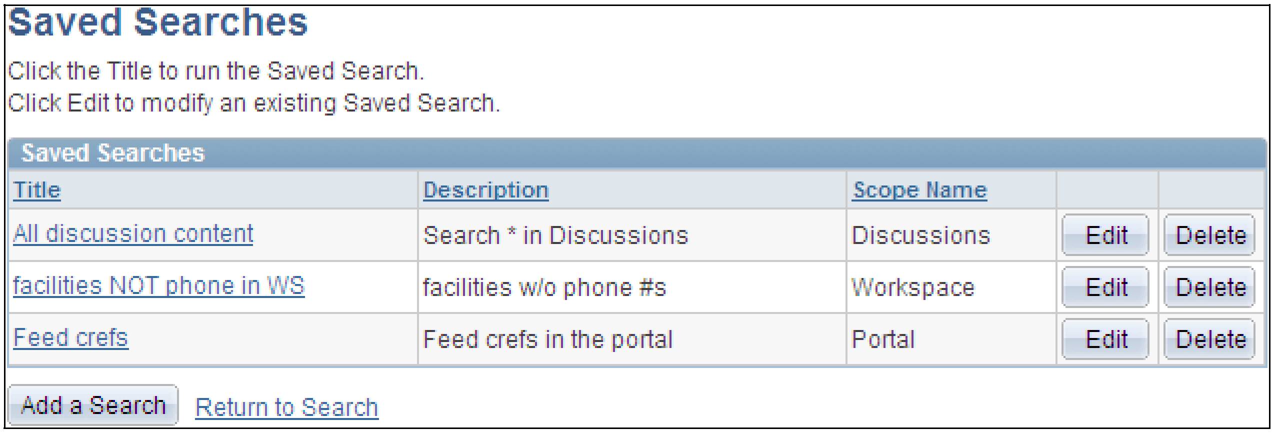
There are three ways to execute a saved search:

- Select a saved search from the Saved Search drop-down list box on the Search page. The saved search is executed immediately.

- Click the link for a saved search in the Saved Searches pagelet.
- Click the link for a saved search on the Saved Searches page.

Editing and Deleting Saved Searches

Access the Saved Searches page (click the Edit Searches link on the Search page).



Saved Searches page

Title	Click a link to execute the saved search and access the Search page.
Edit	Click to access the Saved Searches Detail page on which you can edit the details of the selected saved search.
Delete	Click to delete the saved search item. **Note.** You are prompted to confirm your deletion.
Add a Search	Click to access the Saved Searches Detail page on which you can add a new saved search.
Return to	Click the Return to link to return to the originating page: the Search page or the portal homepage.

Working With the Saved Searches Pagelet

This section discusses how to:

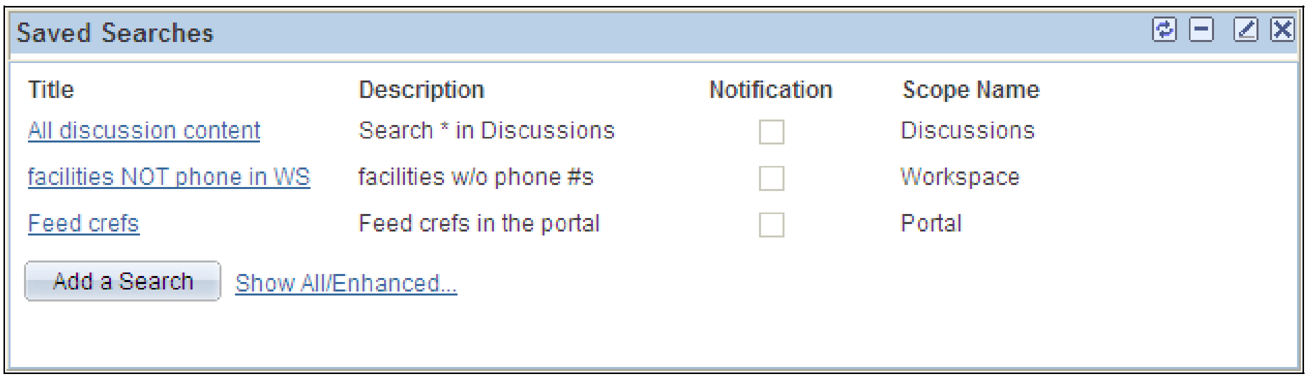
- Use the Saved Searches pagelet.
- Personalize the Saved Searches pagelet.

Page Used to Work With the Saved Searches Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Personalize Saved Searches	EO_PE_SRCHSV_PREF	Click the Customize Saved Searches button in the Saved Searches pagelet.	Change the display settings for the Saved Searches pagelet.

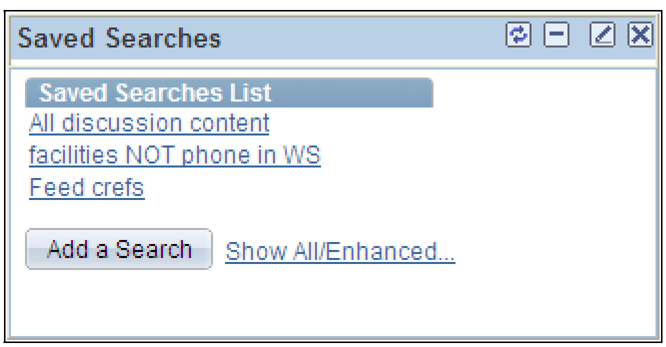
Using the Saved Searches Pagelet

Access the Saved Searches pagelet on the portal homepage.



Saved Searches pagelet

When placed in a narrow column, the Saved Searches pagelet displays less information.



Saved Searches pagelet (in a narrow column)

Use the Saved Searches pagelet to execute a saved search. Saved searches are displayed alphanumeric order.

Title	Click the link for saved search execute the search and access the Search page.
Add a Search	Click to access the Saved Searches Detail page on which you can add a new saved search item.

Show All/Enhanced Click to access the Saved Searches page on which you can review a summary of all of your saved searches.

Personalizing the Saved Searches Pagelet

Access the Personalize Saved Searches page (click the Customize Saved Searches button in the Saved Searches pagelet).

Personalize Saved Searches page

Max Number of Displayed Rows Specify the maximum number of rows to display: *05, 10, 15, 20, 25,* or *All.* The default value is *All.*

Part 6

Context Manager

Chapter 19

Working With Context Manager in PeopleSoft Enterprise Portal

This chapter provides an overview of working with the Context Manager in Oracle's PeopleSoft Enterprise Portal and discusses how to:

- Create additional template pagelet publications.
- Assign default template pagelets for the dynamic content template.
- Assign the dynamic content template to menu items.
- Create context-sensitive relationships between template pagelets and menu items.
- Assign topic experts.
- View and search for Context Manager data.
- Work with the Context Manager Center and Context Manager Center pagelet.

Understanding Context Manager

To the users, 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. Therefore, Context Manager can be considered to be the framework within which features—such as, related information, related contacts, related resources, related discussions, related workspaces, related links, and content ratings—operate.

Note. Defined security rules are maintained such that items to which a user does not have access will not appear.

Context Manager is just one method that PeopleSoft Enterprise Portal delivers for providing contextually relevant information to your users. PeopleSoft Enterprise Portal also provides a general purpose solution that can be deployed to any of your PeopleSoft application pages. PeopleSoft Enterprise Portal related content services provide PeopleSoft Enterprise Portal features on PeopleSoft application pages.

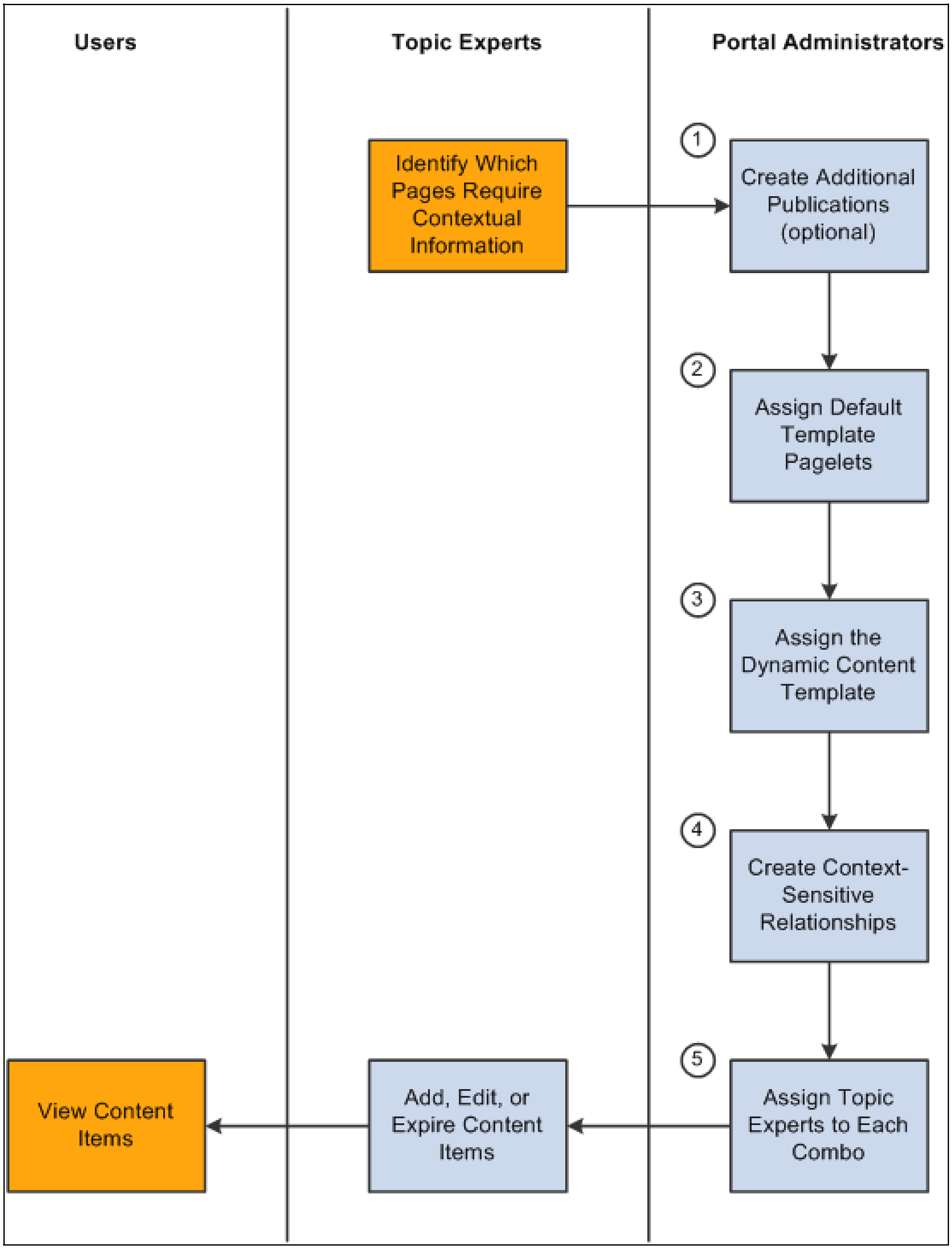
See Chapter 22, "Understanding PeopleSoft Enterprise Portal-Delivered Related Content Services," page 417.

The following example shows the Context Manager frame on the right side of the sample Context Manager Item Tester page with portions of four pagelets that have been assigned to the page. Two pagelets—Related Resources and Related Information—display items that have been identified by the topic experts to be related to the page:

Example Context Manager Item Tester page

Understanding Context Manager Setup

Setting up Context Manager so that content can be delivered to users requires the collaboration of portal administrators and designated topic experts as shown in the following diagram:



Setting up Context Manager

The diagram shows that after the topic experts have identified which pages or transactions require contextual information, the portal administrator must complete five tasks:

1. Create additional template pagelet publications (optional).
2. Assign default template pagelets for the dynamic content template.

3. Assign the dynamic content template to menu items.
4. Create context-sensitive relationships between template pagelets and menu items .
5. Assign topic experts to each combination of menu item and template pagelet publication.

After the portal administrator has completed these tasks, the topic experts can add, edit, expire, or delete content items for each combination of menu item and template pagelet publication.

The sections in this chapter provide the details for each of these set up tasks.

Creating Additional Template Pagelet Publications

This section provides an overview of creating additional template pagelets, a list of common elements used in this section, and discusses how to create a template pagelet publication.

Understanding Creation of Additional Template Pagelet Publications

A "template pagelet publication" is an instance of a template pagelet. For example, Internal Contacts and External Contacts could be two publications of the Related Contacts template pagelet. Each publication is displayed as a separate pagelet using the label that is defined for the publication.

PeopleSoft Enterprise Portal is delivered with one publication for each template pagelet. Therefore, this task is optional if you require the delivered template pagelets only. The portal administrator can define multiple publications for related contacts, related information, and related resources, but not for related discussions and related workspaces.

Pages Used to Create Additional Template Pagelet Publications

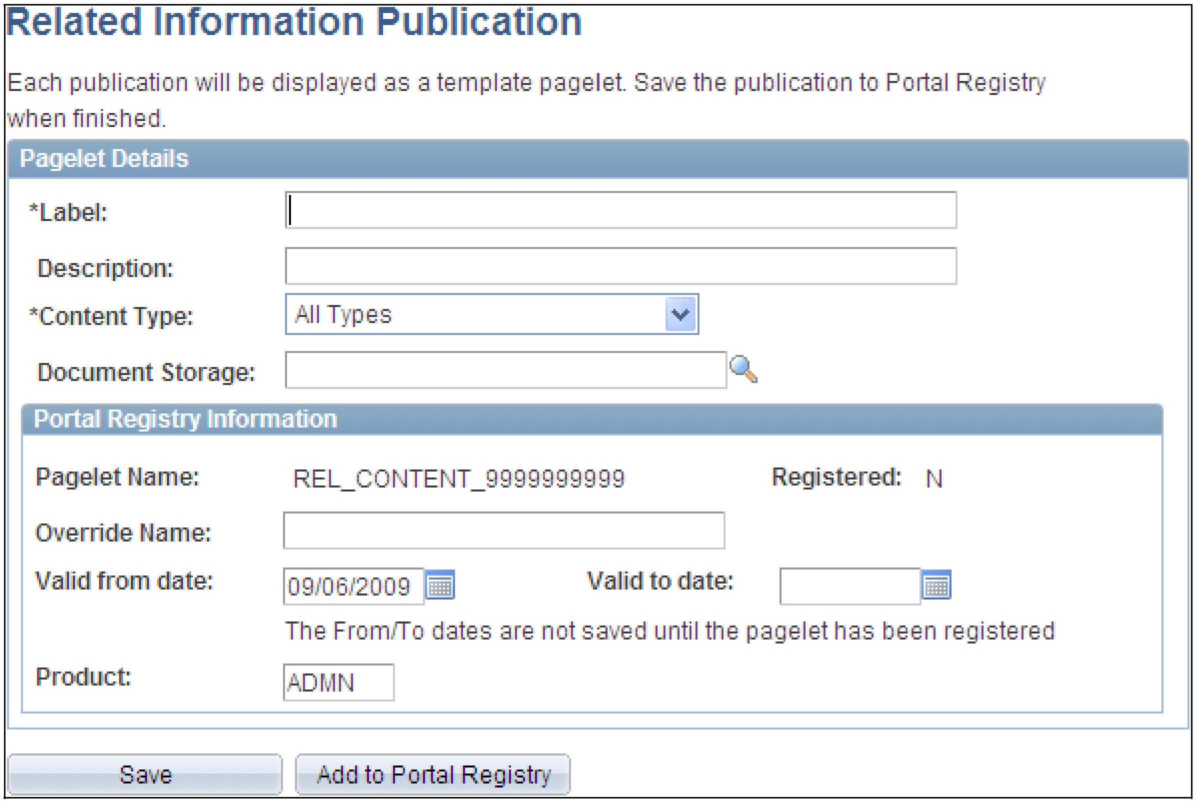
Note. Each of these pages can also be accessed through the Context Manager Center and through the Context Manager Center pagelet.

Page Name	***Definition Name***	***Navigation***	***Usage***
Related Information Publication	EPPRC_PUB	Portal Administration, Context, Related Information, Define Publications	Define Related Information pagelet publications and save them to the portal registry.
Related Contacts Publication	EPPRC_PUB	Portal Administration, Context, Related Contacts, Define Publications	Define Related Contacts pagelet publications and save them to the portal registry.
Related Resources Publication	EPPRC_PUB	Portal Administration, Context, Related Resources, Define Publications	Define Related Resources pagelet publications and save them to the portal registry.

Creating a Template Pagelet Publication

Access one of the following pages:

- Related Contacts Publication page (Portal Administration, Context, Related Contacts, Define Publications).
- Related Information Publication page (Portal Administration, Context, Related Information, Define Publications).
- Related Resources Publication page (Portal Administration, Context, Related Information, Define Publications).



Related Information Publication page

The Related Contacts Publication page, Related Information Publication page, and Related Resources Publication page all display similar page elements.

Label Enter the name of the pagelet. This name will be used in the portal menu as the menu item for this publication—for example, Related Managed Content.

Description Enter a description for the publication.

Enable Instant Messaging	Select to enable instant messaging functionality from the Related Contacts publication. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Setting Up Instant Messaging in PeopleSoft Enterprise Portal."
Content Type	For a Related Information publication, select the type of content you want to be available as related information on the publication. If you select a value other than *All Types,* topic experts can only assign that type of content to the publication. Available values are: • *All Types.* Content can be of any type. • *External Website.* Content originating from an external website. • *File Attachment.* Content is contained in a file. • *Managed Content.* Content is managed by the Content Management system in PeopleSoft Enterprise Portal. • *Menu Item.* Content is registered in the portal registry.
Document Storage	For a Related Information publication, select the storage location for content items. Delivered values include: • *RCDOCDB.* Database. • *RCDOCFS.* File server.
Pagelet Name	Displays a default name for the pagelet. This name is originally generated automatically.
Registered	Displays either *Y* or *N* to indicate whether the pagelet has been registered.
Override Name	Enter a new pagelet name. **Note.** Once the publication has been registered in the portal registry, the pagelet name cannot be changed.
Valid from date	Select the date on which you want the publication to become active. Defaults to today's date.
Valid to date	Select the date on which you want the publication to become inactive. Clear this field to keep the publication active indefinitely.
Product	Indicates which product is associated with this publication. The default value for this field is *ADMN* when a new publication is created, but it can be overridden by an administrator.

Save	Click to save your changes. **Note.** Saving does not make the publication available. You must add new publications to the portal registry, or update the portal registry with changes made to existing publications.
Add to Portal Registry or **Update Portal Registry**	Click to add the publication to the portal registry. If you are making changes to an existing publication, the Update Portal Registry button displays instead.

Assigning Default Template Pagelets for the Dynamic Content Template

This section discusses how to assign default template pagelets to display for all menu items that use the dynamic content template (PTCXM_DYNAMIC_CON_TEMPLATE).

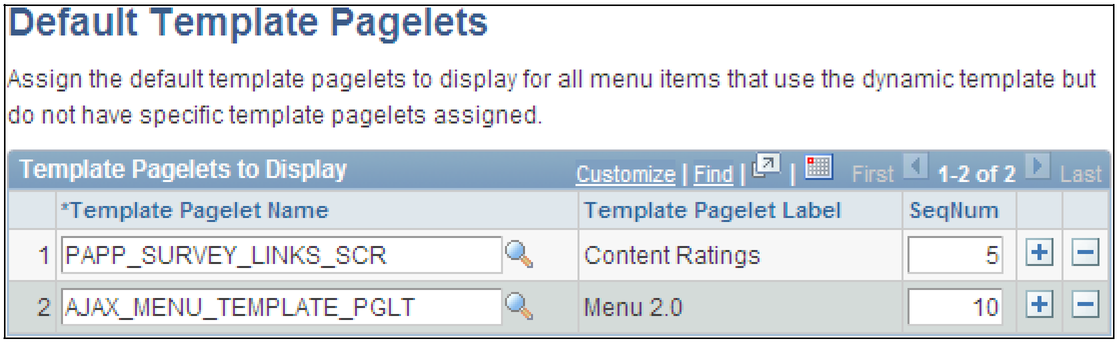
Page Used to Assign Default Template Pagelets for the Dynamic Content Template

Note. This page can also be accessed through the Context Manager Center and through the Context Manager Center pagelet.

Page Name	*Definition Name*	*Navigation*	*Usage*
Default Template Pagelets	PTCXM_DEFAULT	Portal Administration. Context, Context Manager, Default Template Pagelets	Assign default template pagelets that will display for all content references that have been assigned the dynamic content template (PTCXM_DYNAMIC_CON_TEMPLATE).

Assigning Default Template Pagelets

Access the Default Template Pagelets page (Portal Administration. Context, Context Manager, Default Template Pagelets).



Default Template Pagelets page

Template Pagelet Name Select the pagelet or pagelets that you want to appear as default pagelets on pages that use the dynamic content template. The label of each selected template pagelet displays.

Note. For each page (menu item) that uses the dynamic content template, additional template pagelets can be added and the default pagelets can be removed.

See Chapter 19, "Working With Context Manager in PeopleSoft Enterprise Portal," Assigning Additional Template Pagelets to Menu Items, page 358.

SeqNum Enter the order in which you want the template pagelets to appear in the Context Manager frame.

Assigning the Dynamic Content Template to Menu Items

This section discusses how to the dynamic content template to menu items. In this chapter, *menu item*, *page*, and *content reference* are all synonymous terms.

In order for a page to display Context Manager template pagelets, the content reference must be use the dynamic content template (PTCXM_DYNAMIC_CON_TEMPLATE). This template displays the template pagelets in the Context Manager frame on the right side of the page.

Pages Used to Assign the Dynamic Content Template to Menu Items

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Note. The Structure and Content page can also be accessed through the Context Manager Center and through the Context Manager Center pagelet.

Page Name	Definition Name	Navigation	Usage
Structure and Content	PORTAL_OBJ_LIST	• Portal Administration, Navigation, Structure and Content • PeopleTools, Portal, Structure and Content	Navigate the structure of the portal registry items to manage folders and perform content reference administration.
Content Ref Administration	PORTAL_CREF_ADM	Navigate the structure of the portal registry and click a content reference to be modified.	Maintain attributes of the content reference—in this instance, assign the dynamic content template (PTCXM_DYNAMIC_CON_TEMPLATE).

Assigning the Dynamic Content Template

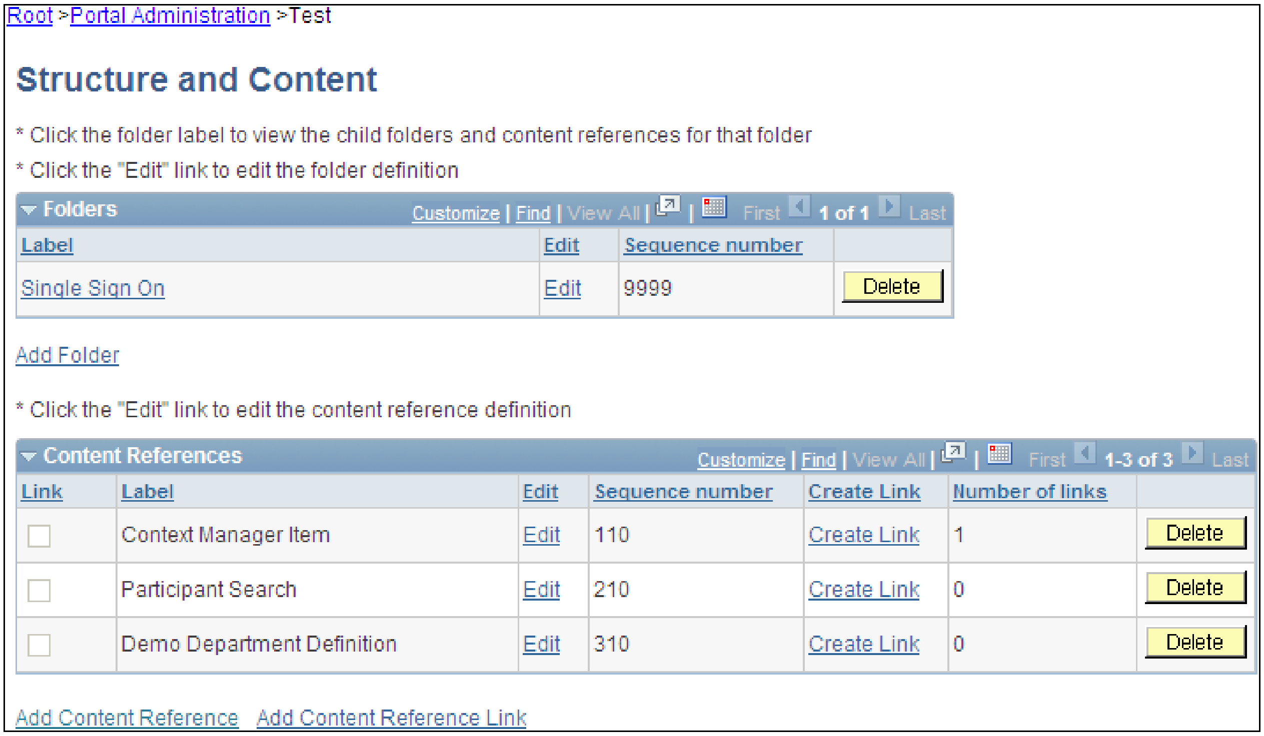
To assign the dynamic content template to menu items:

1. Select Portal Administration, Navigation, Structure and Content.

   The Structure and Content page is displayed.

2. Navigate through the portal registry folders to the folder containing the content reference to which you want to add the dynamic content template.

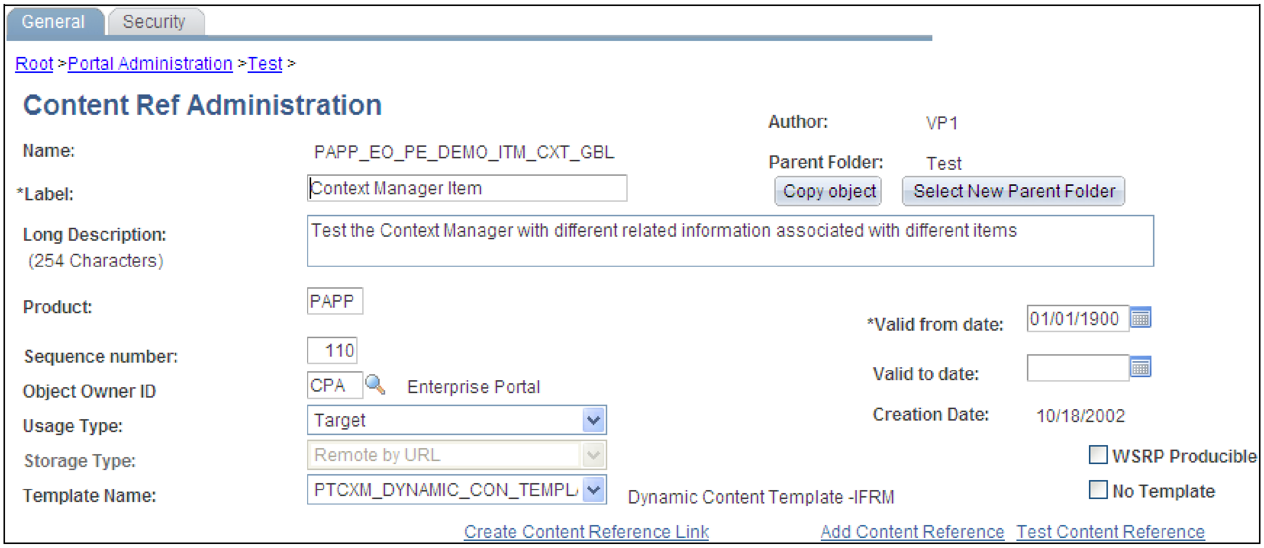
   In the following example, the sample Context Manager Item page resides in the Portal Administration -> Test folder.



Structure and Content page (example showing the Portal Administration -> Test folder)

3. Click theEdit link to edit the content reference definition. The Content Ref Administration page is displayed.

   In this example, Content Ref Administration page is displayed for the sample Context Manger Item page:



Content Ref Administration page (for the sample Context Manger Item page)

4. In the Template Name field, select the *PTCXM_DYNAMIC_CON_TEMPLATE* value.

5. Click Save.

Note. This assignment is site-specific. If the same content reference (CREF) appears in multiple sites, you must perform the assignment for each instance.

Creating Context-Sensitive Relationships Between Template Pagelets and Menu Items

This section discusses how to:

- Assign additional template pagelets to menu items.
- Define minimization options and key fields for context sensitivity.
- Auto-populate key fields for context sensitivity.

Note. In this chapter, *menu item*, *page,* and *content reference* are all synonymous terms and are used interchangeably.

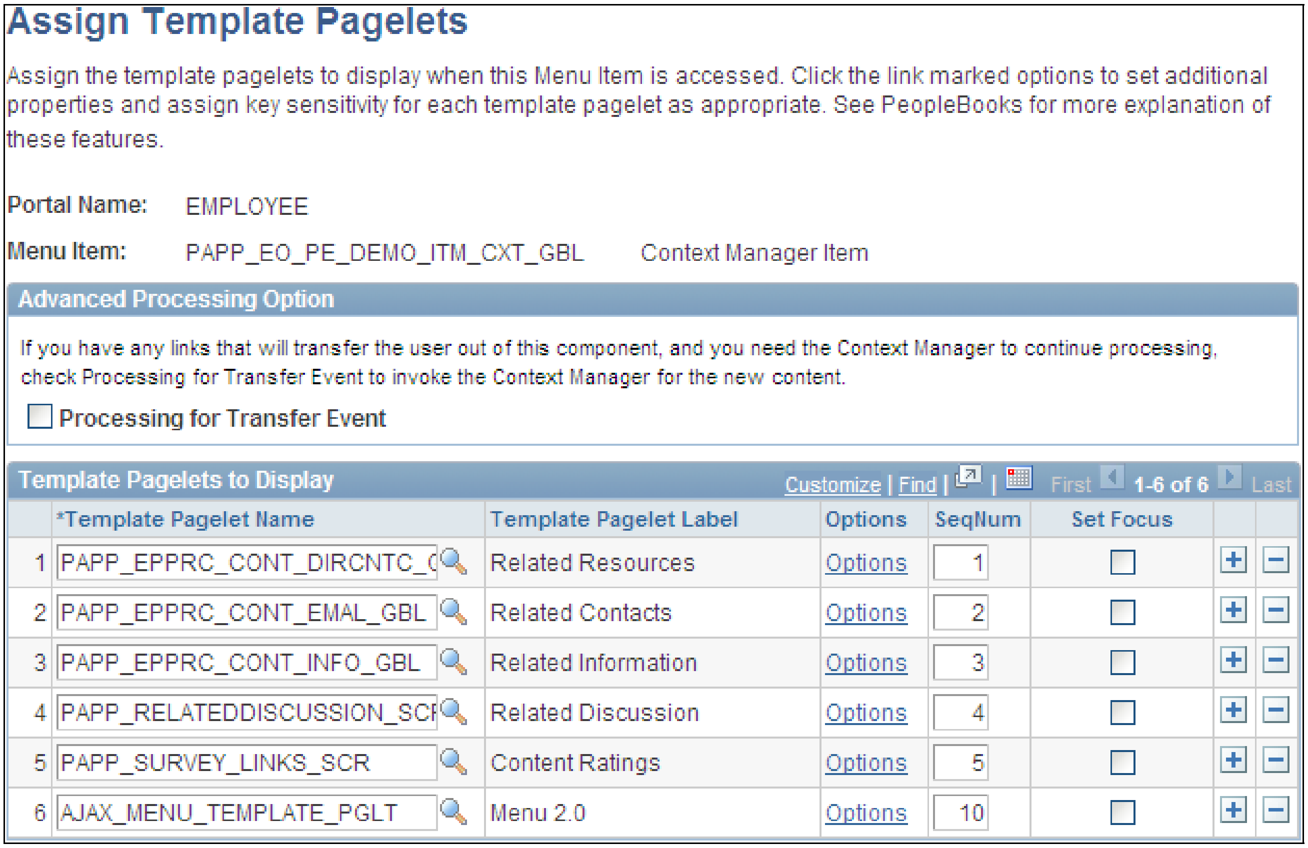
Pages Used to Create Context-Sensitive Relationships

Note. The Assign Template Pagelets page can also be accessed through the Context Manager Center and through the Context Manager Center pagelet.

Page Name	***Definition Name***	***Navigation***	***Usage***
Assign Template Pagelets	PTCXM_DISPLAY	• Portal Administration, Context, Context Manager, Assign Template Pagelets • Navigate to the page to which you have assigned the dynamic content template. Click the Administer Pagelets link that displays at the top of the Context Manager frame.	Assign template pagelets to menu items.
Template Pagelet Options	PTCXM_DISPLAY_SECB	Click an Options link on the Assign Template Pagelets page.	Assign minimization options and key field context sensitivity for the menu item–template pagelet combination.

Assigning Additional Template Pagelets to Menu Items

Access the Assign Template Pagelets page (Portal Administration, Context, Context Manager, Assign Template Pagelets).



Assign Template Pagelets page

Use the Assign Template Pagelets page to assign additional template pagelets to this menu item. On this page, you can review, modify, and delete the default template pagelets assigned through the template as well as assign additional pagelets.

See Chapter 19, "Working With Context Manager in PeopleSoft Enterprise Portal," Assigning Default Template Pagelets, page 353.

Portal Name — Defaults to the portal or site that you are signed into.

Menu Item — Displays the portal object (content reference) name and label for the selected menu item.

Note. The example displayed shows the sample Context Manager Item page delivered with PeopleSoft Enterprise Portal.

Processing for Transfer Event

Select if any links that are displayed on the template pagelet will transfer the user out of the selected menu item component, but you need PeopleTools Context Manager to continue processing for the newly accessed content.

For example, let's say that you have assigned the Assign Themes page to use the Related Information pagelet and the Assemble Themes page to use the Related Contact pagelet. Then you access the Assign Themes page from the menu and the Related Information pagelet displays in the Context Manager frame. When you click the Details link for the theme, the Assemble Themes page displays. If this option is selected, the system will look for the pagelets that are assigned to the new content (Assemble Themes page) and display the Related Contacts pagelet in the Context Manager frame. If this option is not selected, the Context Manager frame will remain unchanged and continue to display the Related Information pagelet.

Template Pagelet Name

Select the template pagelet you want to associate with the current menu item.

Note. When you initially view this page for a specific menu items, the default template pagelets assigned to the template are displayed.

Options

Click to access the Template Pagelet Options page on which you can specify minimization options and key field context sensitivity.

SeqNum (sequence number)

Enter the order in which you want the template pagelets to display in the Context Manager frame.

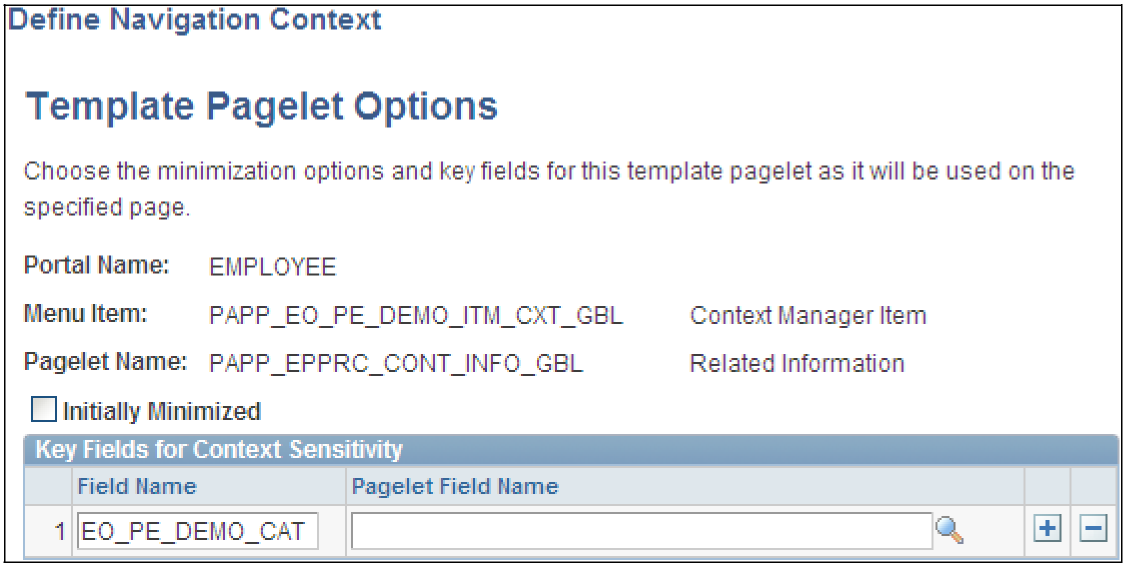
Set Focus

Select to bring context sensitive pagelet into view when you access the target content.

Note. Only one template pagelet in the list can have focus. If you select Set Focus for a second template pagelet, the system clears any previous selection.

Defining Minimization Options and Key Fields for Context Sensitivity

Access the Template Pagelet Options page (Click the Options link on the Assign Template Pagelets page).



Template Pagelet Options page

Initially Minimized Select if you want the pagelet to appear as minimized in the Context Manager frame the first time the associated menu item is accessed.

Note. If you maximize a pagelet, any time you access the target page during the session, the pagelet remains maximized. If you sign out or close the session, the pagelet appears minimized the next time you access the target page.

Key Fields for Context Sensitivity

The values in the key fields are used to correlate context between the content reference and the template pagelet. If you did not access the Assign Template page using Administer Pagelets link on the target page, you must manually enter the key field name for the menu item.

Field Name Enter the target page key field name whose value is passed to the template pagelet to establish context sensitivity.

Pagelet Field Name Use this field to map PeopleSoft field names to field names used by template pagelets based on OBIEE reports.

Additional Key Fields

The Additional Key Fields group box is displayed when this page is accessed using Administer Pagelets link on the target page. Enter additional fields to be used to relate context from the menu item to the template pagelet.

Note. Template pagelets can use a maximum of three key fields.

Auto-populating Key Fields for Context Sensitivity

You use the Template Pagelet Options page to assign key field context sensitivity between content references and template pagelets. You can access this page through the Assign Template Pagelets page through the Portal Administration menu navigation (or through the Context Manager Center). Alternatively, if have the key field names that are used for context-sensitivity auto-populated, access the Template Pagelet Options page by using the following procedure.

To auto-populate the key fields when you access the Template Pagelet Options page:

1. Navigate to the target page.

2. From the Search page, select any value.

   When you make a selection, the key values are loaded into PeopleTools Context Manager so that the key fields of the pagelet are in the PIA_KEYSTRUCT object.

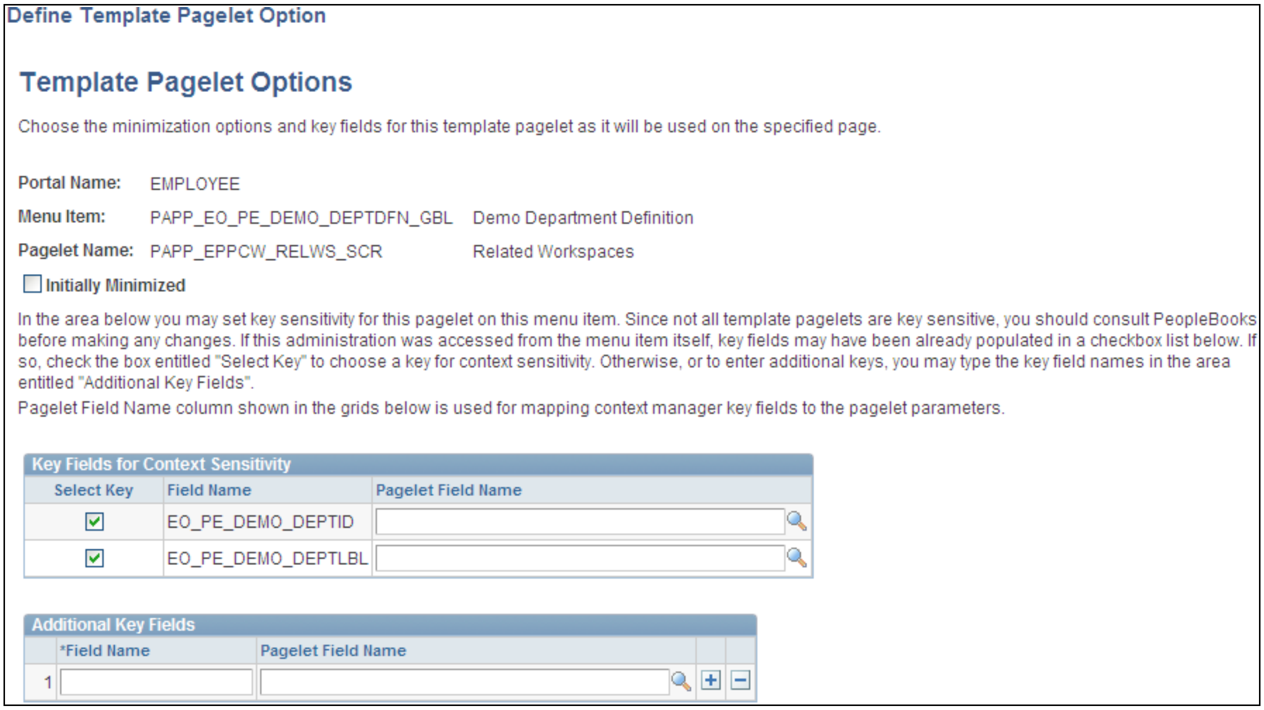
3. Click the Administer Pagelets link that appears at the top of the Context Manager frame.

   Note. This link appears when you have assigned the dynamic content template to the menu item.

   The Assign Template Pagelets page appears.

4. Click the Options link for the template pagelet for which you want to assign key sensitivity.

   The Template Pagelet Options page displays with the Key Fields for Context Sensitivity group box auto-populated with key fields as shown in this example:



Template Pagelet Options page (key fields auto-populated)

5. Select the Select Key check box to activate context-sensitivity for the associated key field.

   Note. All search key fields are loaded into the buffer. Choose the appropriate fields to pass to the pagelet.

6. Click OK.

Assigning Topic Experts

This section provides an overview of assigning topic experts and discusses how to assign topic experts (also known as content managers) to template pagelet publications.

Understanding Topic Expert Assignments

Content displayed within a template pagelet is regulated and maintained according to the menu item. Topic experts are subject matter experts who are authorized to add, edit, or expire content for specific menu item–template pagelet combinations.

Topic experts enable the portal administrator to delegate the administration of Context Manager content to the person who is most knowledgeable about that topic. For example, the business process expert for the Human Resources Report Time Off transaction could be the topic expert for the Related Information publications that are assigned to the Report Time Off menu item.

If the expertise is shared among several people, different publications can be assigned different topic experts for a menu item. For example, if one person manages the external vendor relationships for a menu item and someone else manages the internal representatives, you could create two publications of the Related Contacts pagelet, each with its own topic experts.

Assign topic experts to all menu item and template pagelet combinations for Related Information, Related Contacts, and Related Resources.

Pages Used to Assign Topic Experts

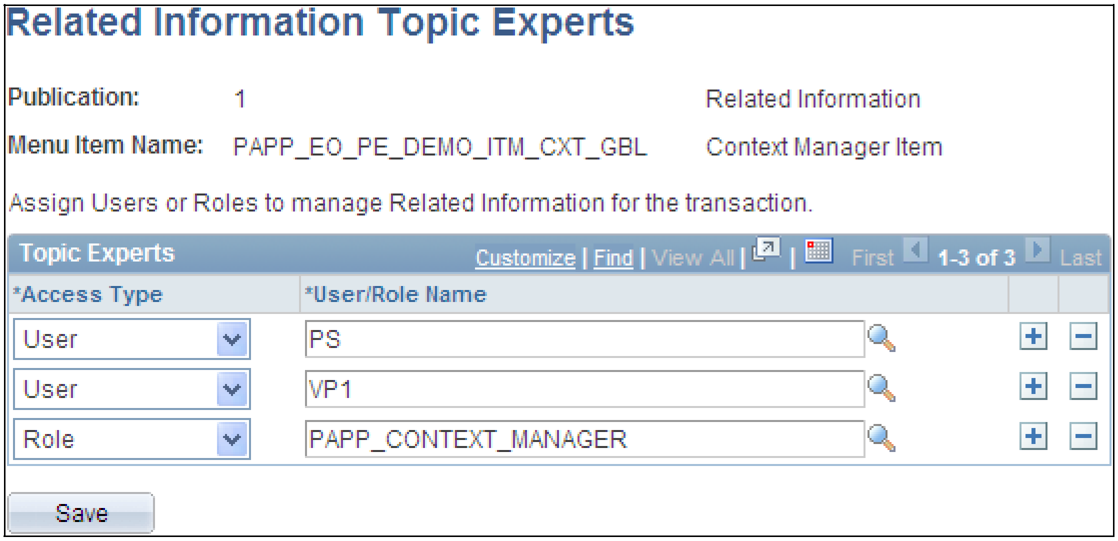
Note. These pages can also be accessed through the Context Manager Center and through the Context Manager Center pagelet.

Page Name	***Definition Name***	***Navigation***	***Usage***
Related Information Topic Experts	EPPRC_USER	Portal Administration, Context, Related Information, Define Topic Experts	Assign topic experts to each menu item and Related Information template pagelet combination.
Related Contacts Topic Experts	EPPRC_USER	Portal Administration, Context, Related Contacts, Define Topic Experts	Assign topic experts to each menu item and Related Contacts template pagelet combination.
Related Resources Topic Experts	EPPRC_USER	Portal Administration, Context, Related Resources, Define Topic Experts	Assign topic experts to each menu item and Related Resources template pagelet combination.

Assigning Topic Experts to Page-Pagelet Combinations

Access one of the following pages:

- Related Contacts Topic Experts page (Portal Administration, Context, Related Contacts, Define Topic Experts).
- Related Information Topic Experts page (Portal Administration, Context, Related Information, Define Topic Experts).
- Related Resources Topic Experts page (Portal Administration, Context, Related Information, Define Topic Experts).



Related Information Topic Experts page

The Related Contacts Topic Experts page, Related Information Topic Experts page, and Related Resources Topic Experts page all display the following page elements.

Publication and **Menu Item Name**	Displays the template pagelet–menu item combination for which you are defining topic experts.
Access Type	Select *User* to be able to select the user ID of the topic expert in the User/Role Name field. Select *Role* to be able to select the role of the topic expert in the User/Role Name field.
User/Role Name	Select the user ID or role name for the topic expert.

Viewing and Searching for Context Manager Data

This section provides and overview of viewing Context Manager data and discusses how to:

- View template pagelet and menu item combinations.
- Searching for items assigned to menu items.
- View item details.

Understanding Context Manager Data

This section describes the pages that allow portal administrators to view and gather information about where Context Manager pagelets are deployed in the portal. In addition, you can perform searches to determine which pieces of content, which contacts, or which resources have been assigned by topic experts to specific template pagelet–menu item combinations.

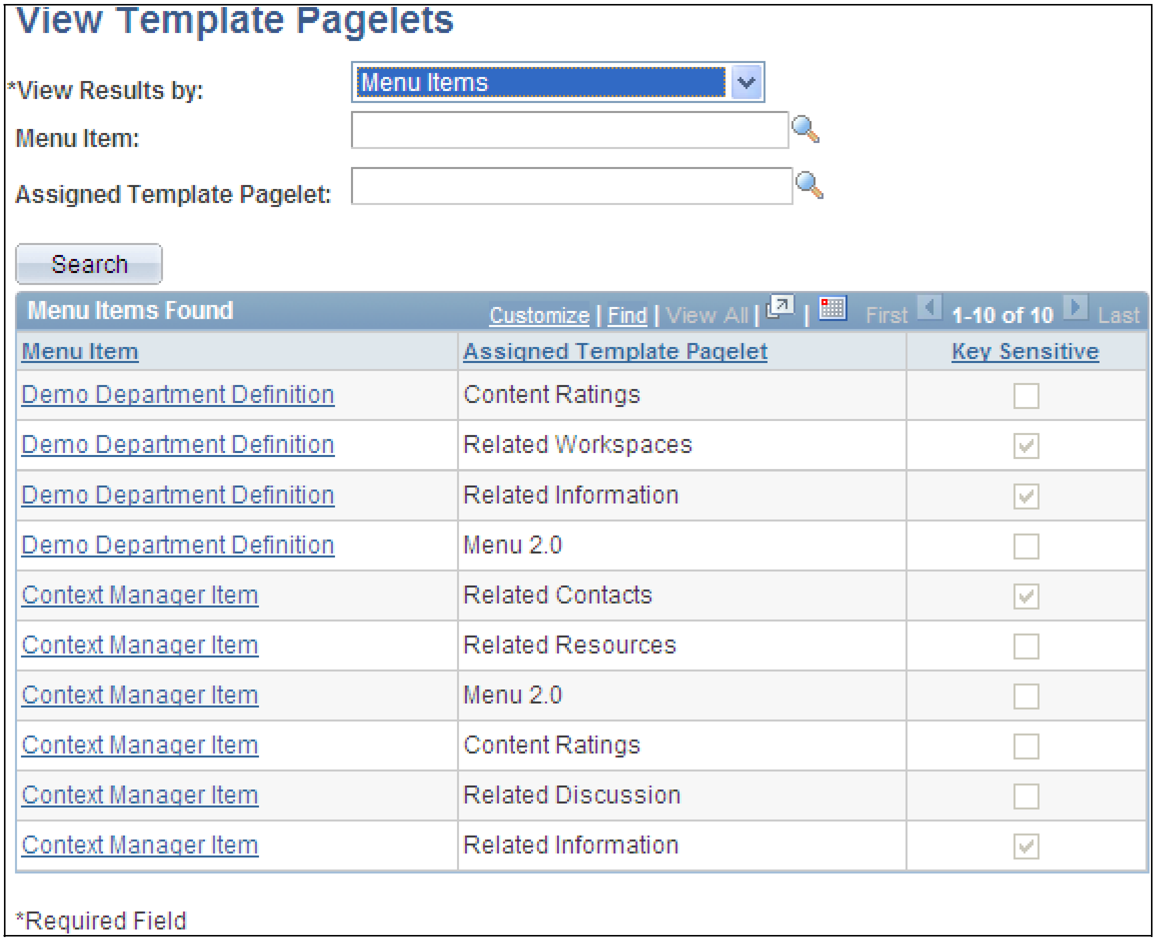
Pages Used to View and Search for Context Manager Data

Note. These pages can also be accessed through the Context Manager Center and through the Context Manager Center pagelet.

Page Name	***Definition Name***	***Navigation***	***Usage***
View Template Pagelets	EPPLN_INQUIRY	Portal Administration, Context, Context Manager, View Template Pagelets	View current template pagelet and menu item combinations.
View Related Information	EPPRC_INQUIRY	Portal Administration, Context, Related Information, View Related Information	Search by topic expert, template pagelet publication, content, or menu item to see which pieces of content have been added to which menu item.
View Related Information - Content Detail	EPPRC_INQUIRY_DTL	Click a Content Details link on the View Related Information page.	Access details about the content and its associated menu item.
View Related Contacts	EPPRC_INQUIRY	Portal Administration, Context, Related Contacts, View Related Contacts	Search by topic expert, template pagelet publication, contact, or menu item to see which contacts have been added to which menu item.
View Related Contacts - Content Detail	EPPRC_INQUIRY_DTL	Click a Content Details link on the View Related Contacts page.	Access details about the contact and its associated menu item. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Setting Up Instant Messaging in PeopleSoft Enterprise Portal."
View Related Resources	EPPRC_INQUIRY	Portal Administration, Context, Related Resources, View Related Resources	Search by topic expert, template pagelet publication, resource, or menu item to see which resources have been added to which menu item.
View Related Resources - Content Detail	EPPRC_INQUIRY_DTL	Click a Content Details link on the View Related Resources page.	Access details about a resource and its associated menu item.

Viewing Template Pagelet and Menu Item Combinations

Access the View Template Pagelets page (Portal Administration, Context, Context Manager, View Template Pagelets).



View Template Pagelets page

View Results By

Select the criteria by which you want to view results. Available values include:

- *Menu Items.* Select to be able to enter menu item and template pagelet search criteria.
- *Topic Experts/Moderators.* Select to be able to enter topic expert, menu item, and template pagelet search criteria. When you select this value, the Topic Expert Type options and Topic Expert field display.

Topic Expert Type

These options are displayed when the View Results By field value is set to *Topic Experts/Moderators.* Available values include:

- *User.* Select to select a user in the Topic Expert field.
- *Role.* Select to select a role in the Topic Expert field.

Topic Expert

This field displays when the View Results By field value is set to *Topic Experts/Moderators.*

If you selected *User* in the Topic Expert Type field, select the user name of the topic expert or moderator for which you want to search for associated template pagelets.

If you selected *Role* in the Topic Expert Type field, select the role name of the topic expert or moderator for which you want to search for associated template pagelets.

Menu Item

Select the menu item for which you want to search for associated template pagelets.

Assigned Template Pagelet

Select the template pagelet for which you want to view associated menu items.

Menu Items Found

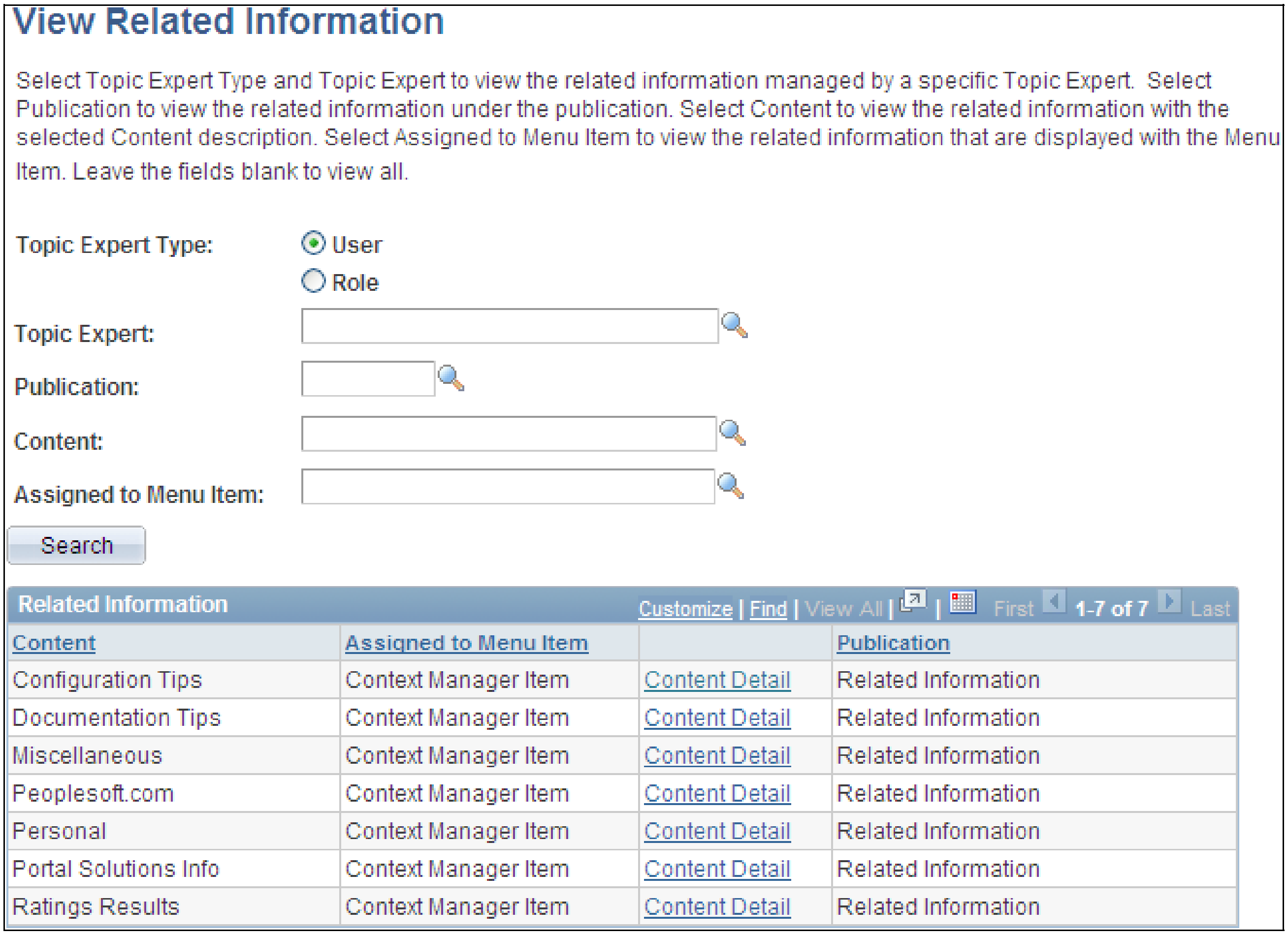
Displays associated menu items and template pagelets. If the Key Sensitive option is selected, this indicates that the menu item and template pagelet combination contains key sensitive fields.

Select a Menu Item link to access the menu item.

Searching for Items Assigned to Menu Items

Access one of the following pages to search for items assigned to template pagelet–menu item combinations:

- View Related Contacts page (Portal Administration, Context, Related Contacts, View Related Contacts).
- View Related Information page (Portal Administration, Context, Related Information, View Related Information).
- View Related Resources page (Portal Administration, Context, Related Information, View Related Resources).



View Related Information page

The View Related Contacts page, View Related Information page, and View Related Resources page all display the following page elements.

Topic Expert Type Select *User* or *Role* to specify the type of topic expert.

Topic Expert Select a user ID or role name. Leave this field blank to search for items assigned by all topic experts.

Publication Select the publication number for the template pagelet publication. Leave this field blank to search for items assigned to all template pagelet publications.

Content or **Related Contact** Select the content ID or related contact ID. Leave this field blank to search for assignments of all content or all contacts.

Assigned to Menu Item Select the menu item. Leave this field blank to search for items assigned to all menu items.

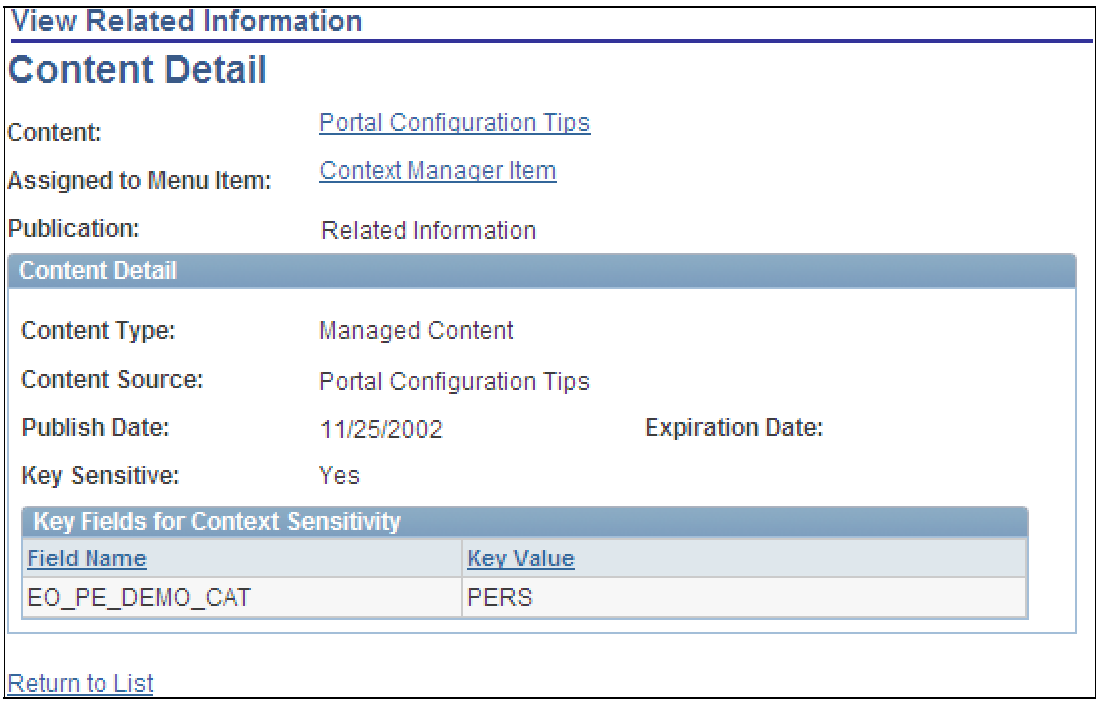
Search Click to execute the search based on the specified criteria.

Content Details Select a Content Details link to access the Content Detail page for that item.

Viewing Item Details

Access one of the following pages to view content details:

- View Related Contacts - Content Detail page (click the Content Details link on the View Related Contacts page).
- View Related Information - Content Detail page (click the Content Details link on the View Related Information page).
- View Related Resources - Content Detail page (click the Content Details link on the View Related Resources page).



View Related Information - Content Detail page

The Content Detail pages provide detailed information about each item that has been assigned to a template pagelet–menu item combination. Each page contains the following information:

Content or **Related Contact**	• For related information items, click the Content link to open the content item itself in a separate window. • For related contact items, click the Related Contact link to open a separate window that allows you to send email to that contact if the contact has defined an email address. • For related resource items, click the Related Contact link to open the contact's Resource Finder profile in a separate window.
Assigned to Menu Item	Click this link to open the target page in a separate window.

Working With the Context Manager Center and the Context Manager Center Pagelet

This section discusses how to:

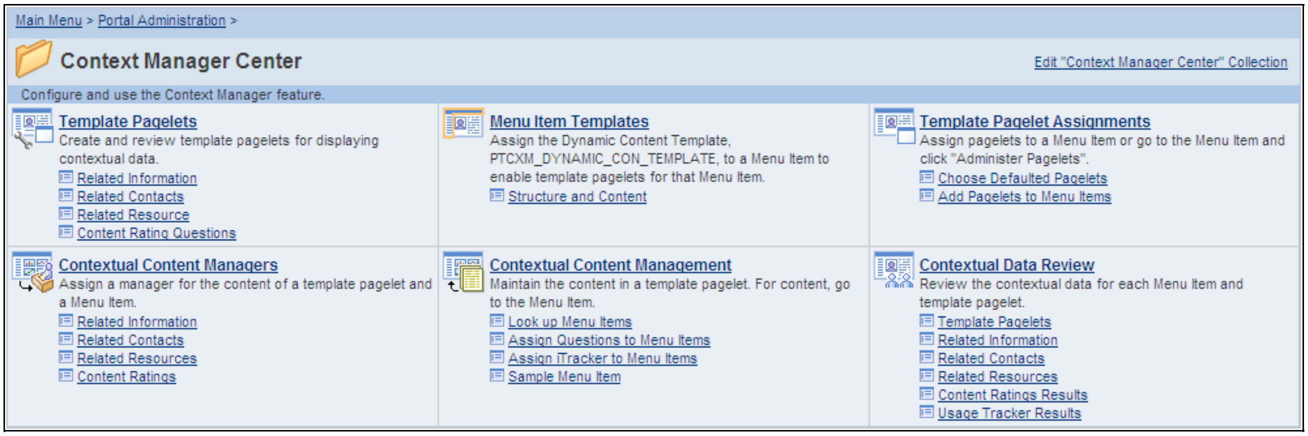
- Work with the Context Manager Center.
- Work with the Context Manager Center pagelet.

The Context Manager Center navigation collection and its pagelet are delivered to provide convenient access to the activities involved in using Context Manager.

Note. Navigation collections provide you with a flexible tool for building alternative taxonomies of the contents stored in your portal registry. These alternative taxonomies, or groupings of links to portal content, can then be deployed to different users or groups of users, creating navigation that specifically addresses your users' business needs.

Working With the Context Manager Center

Access the Context Manager Center (Portal Administration, Context Manager Center).



Context Manager Center

This table lists the custom navigation pages that are used to navigate in the Context Manager Center:

Page Name	***Navigation***	***Usage***
Context Manager Center	Portal Administration, Context Manager Center	Configure and use the Context Manager feature.
Template Pagelets	Click the Template Pagelets link on the Context Manager Center page.	Create or review related publications or content rating questions to be contextually displayed within a template pagelet.
Menu Item Templates	Click the Menu Item Templates link on the Context Manager Center page.	Assign the Dynamic Content Template, PTCXM_DYNAMIC_CON_TEMPLATE, to a menu item to enable template pagelets for that menu item.
Template Pagelet Assignments	Click the Template Pagelet Assignments link on the Context Manager Center page.	Determine which template pagelets are displayed with each menu item.
Contextual Content Managers	Click the Contextual Content Managers link on the Context Manager Center page.	Assign users/roles to specific menu item and template pagelet combinations. Content displayed within a template pagelet is regulated and maintained according to the menu item.

Page Name	***Navigation***	***Usage***
Contextual Content Management	Click the Contextual Content Management link on the Context Manager Center page.	Assign content displayed in each template pagelet at the menu item level. • For related information, contacts, or resources, navigate to the menu item, then add or edit the template pagelet content. • For rating surveys, add the menu item to the question.
Contextual Data Review	Click the Contextual Data Review link on the Context Manager Center page.	Review the contextual data for each menu item and template pagelet.

Working With the Context Manager Center Pagelet

Access the Context Manager Center pagelet on the portal homepage.

Note. The Context Manager Center pagelet is also available on the Administration tab.

Context Manager Center pagelet

The Context Manager Center pagelet is a navigation collection displayed as a pagelet.

Chapter 20

Working With Context Manager Pagelets

This chapter provides an overview of Context Manager pagelets and discusses how to:

- Work with the Context Manager frame.
- Work with the Related Contacts pagelet.
- Work with the Related Discussion pagelet.
- Work with the Related Information pagelet.
- Work with the Related Resources pagelet.
- Work with the Related Workspaces pagelet.
- Work with the Content Ratings pagelet.

Understanding Context Manager Pagelets

Context Manager provides the user with immediate, relevant information for any business transaction without requiring a manual search. To the users, 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. Therefore, Context Manager can be considered to be the framework within which features—such as, related information, related contacts, related resources, related discussions, related workspaces, related links, and content ratings—operate.

Note. Defined security rules are maintained such that items to which a user does not have access will not appear.

Context Manager is just one method that PeopleSoft Enterprise Portal delivers for providing contextually relevant information to your users. PeopleSoft Enterprise Portal also provides a general purpose solution that can be deployed to any of your PeopleSoft application pages. PeopleSoft Enterprise Portal related content services provide PeopleSoft Enterprise Portal features on PeopleSoft application pages.

See Chapter 22, "Understanding PeopleSoft Enterprise Portal-Delivered Related Content Services," page 417.

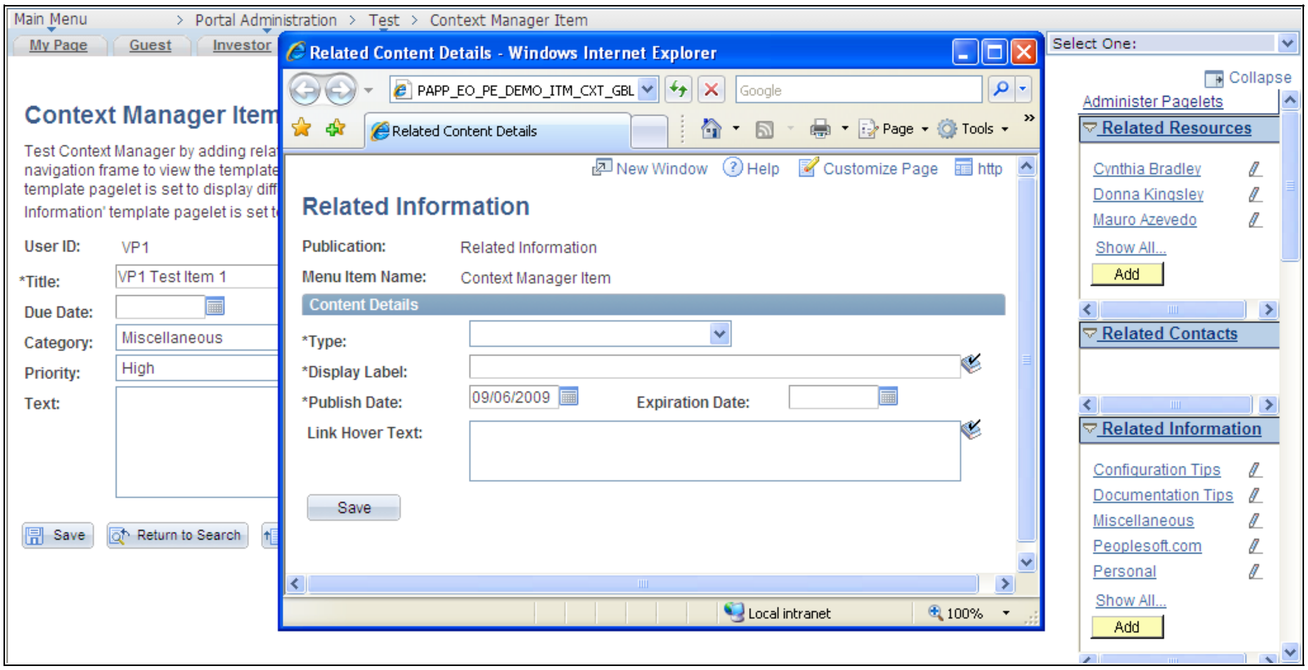
Once pagelets have been assigned to menu items, these pagelets can be used by:

- Topic experts to manage content.
- Users to view the added content.

Managing Content in the Context Manager Pagelets

Context Manager pagelets provide features for topic experts to manage the content items displayed within each pagelet. Topic experts are responsible for adding, editing, expiring, or deleting content items for each combination of menu item and template pagelet publication.

The following example shows a page (the sample Context Manager Item page) with a number of Context Manager pagelets, including the Related Information pagelet. In this example, the topic expert has clicked the Add button in the Related Information pagelet, which opens the Related Information page in a separate window, allowing the expert to add a new content item.



Topic expert adding content to the Related Information pagelet

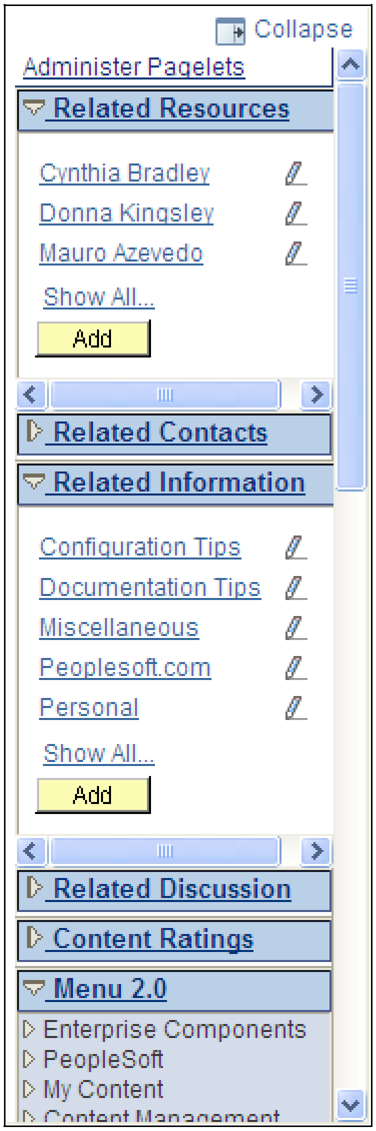
Viewing Content in the Context Manager Pagelets

Unlike homepage pagelets, Context Manager pagelets display in the Context Manager frame on the right side of the page. The Context Manager frame displays when you accesses a transaction or page to which one or more of the pagelets has been assigned. The Context Manager pagelets are designed to provide convenient access to data that is contextually relevant to the transaction or page being displayed.

Working With the Context Manager Frame

Access a page that has the dynamic content template and pagelets assigned.

The following example displays the Context Manager frame showing the pagelets configured for this page:



Context Manager frame

Expand

Click the Click to Expand Contextual Pagelets button to expand the Context Manager frame to display the configured pagelets.

Collapse

Click the Click to Collapse Contextual Pagelets button to collapse the Context Manager frame to hide the configured pagelets.

Administer Pagelets

Click the Administer Pagelets link to access the Assign Template Pagelets page to manage template pagelets assigned to this menu item.

Note. The Administer Pagelets link displays for portal administrators with privileges to manage template pagelet assignments.

See Chapter 19, "Working With Context Manager in PeopleSoft Enterprise Portal," Assigning Additional Template Pagelets to Menu Items, page 358.

 or 

Click the Maximize button or Minimize button to display or hide the contents of a specific pagelet.

<link title>

Click the title of a link to open that content item in a separate browser window.

Note. A maximum of five links can appear on each pagelet. If more than five links are available, the pagelet displays the five most recently added links along with a Show All link. You can click this link to access a page listing all available links.

Note. The system checks the publication and expiration dates and displays only currently active content.

Click the Edit this link button to edit the attributes of this content item.

Note. The Edit this link button displays for topic experts who have been assigned to manage content for this pagelet–menu item combination.

Add

Click the Add button to add a new content item to this pagelet.

Note. The Add button displays for topic experts who have been assigned to manage content for this pagelet–menu item combination.

Working With the Related Contacts Pagelet

This section discusses how to:

- Use the Related Contacts pagelet.
- Contact a related contact.
- View a list of related contacts.
- Add or edit related contacts.

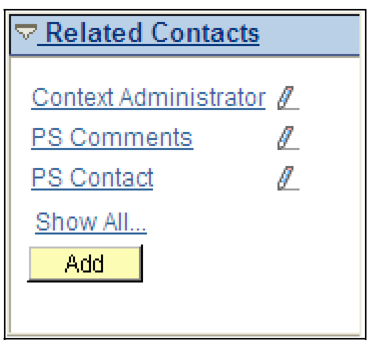
Pages Used to Work With the Related Contacts Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Contact User	EPPRC_SEND_EMAIL	Click the name of a contact in the Related Contacts pagelet.	Open a new browser window to send an email to a related contact.

Page Name	Definition Name	Navigation	Usage
Related Contacts List	EPPRC_EMAIL_EDIT	Click the Show All… link in the Related Contacts pagelet.	Open a new browser window to view the entire list of related contacts. **Note.** From this page, topic experts can also maintain related contacts.
Related Contact	EPPRC_EMAIL_DTL	• Click the Edit this link button or the Add button in the Related Contacts pagelet. • Click the Edit button or the Add button on the Related Contacts List page.	Open a new browser window to add a new related contact or edit an existing related contact. **Note.** Only topic experts can add or edit related contacts.

Using the Related Contacts Pagelet

Access the Related Contacts pagelet in the Context Manager frame.



Related Contacts pagelet

Use these elements in the Related Contacts pagelet:

<Contact description> Click a contact link to open a new browser window showing the Contact User page on which you can send an email to the selected contact.

Click the Edit this link button to open a new browser window showing the Related Contact page on which you can update information for the contact.

Note. The Edit this link button displays for topic experts only.

Show All... Click the Show All... link to open a new browser window showing the Related Contacts List page on which you can view the complete list of contacts.

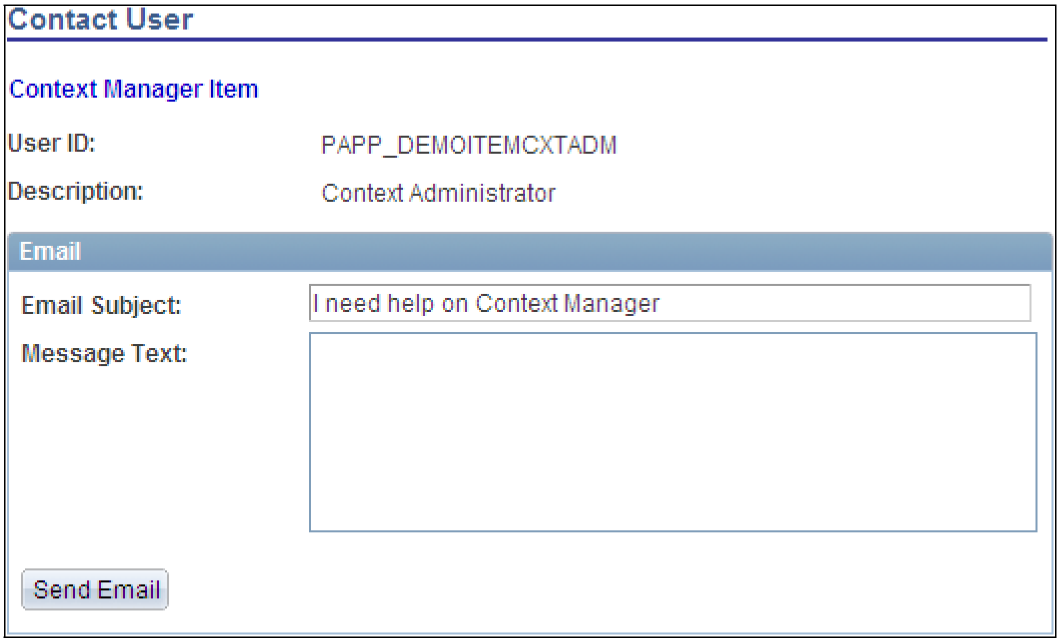
Add

Click the Add button to open a new browser window showing the Related Contact page on which you can add a new contact for the current menu item.

Note. The Add button displays for topic experts only.

Contacting a Related Contact

Access the Contact User page (click the name of a contact in the Related Contacts pagelet or click the Email button on the Related Contacts List page).



Contact User page

User ID and **Description**

Displays the user ID and description of the selected contact.

Email Subject

Enter a subject for your email.

Note. The topic expert can define a default email subject, which you can override, on the Related Contact page.

Message Text

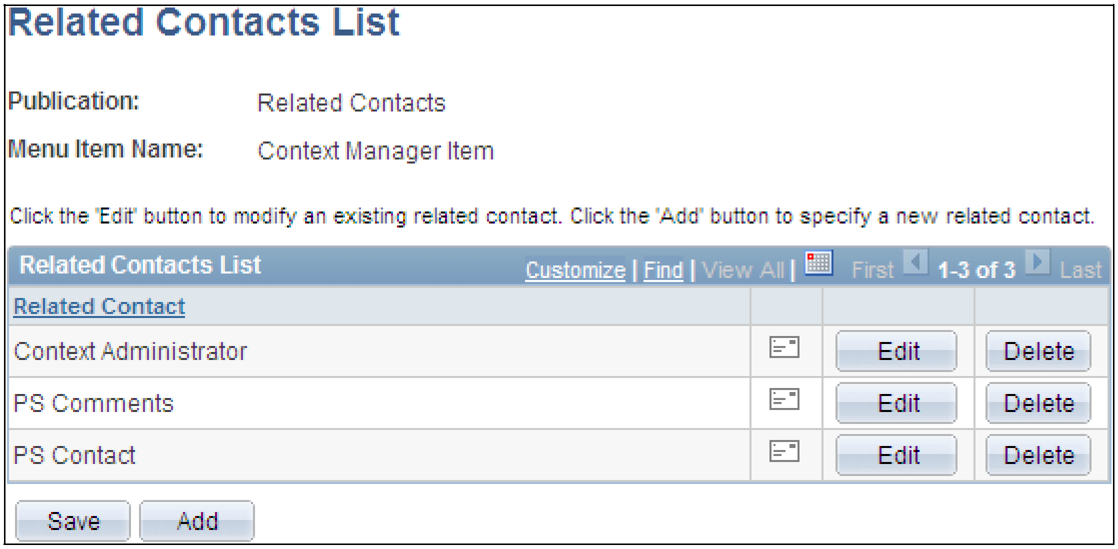
Enter the email message.

Send

Click to send your email. A confirmation page appears to inform you that your email was transmitted.

Viewing a List of Related Contacts

Access the Related Contacts List page (click the Show All… link in the Related Contacts pagelet).



Related Contacts List page

Use the Related Contacts List page to send an email to any of the related contacts.

Note. From this page, topic experts can also maintain related contacts.

Click the Email button to access the Contact User page to send an email to that contact.

Edit

Click the Edit button to access the Related Contact page to edit the contact information for this related contact.

Note. The Edit button appears only for topic experts assigned to this pagelet–menu item combination.

Delete

Click the Delete button to delete this related contact.

Note. The Delete button appears only for topic experts assigned to this pagelet–menu item combination.

Add

Click the Add button to access the Related Contact page to add a new related contact.

Note. The Add button appears only for topic experts assigned to this pagelet–menu item combination.

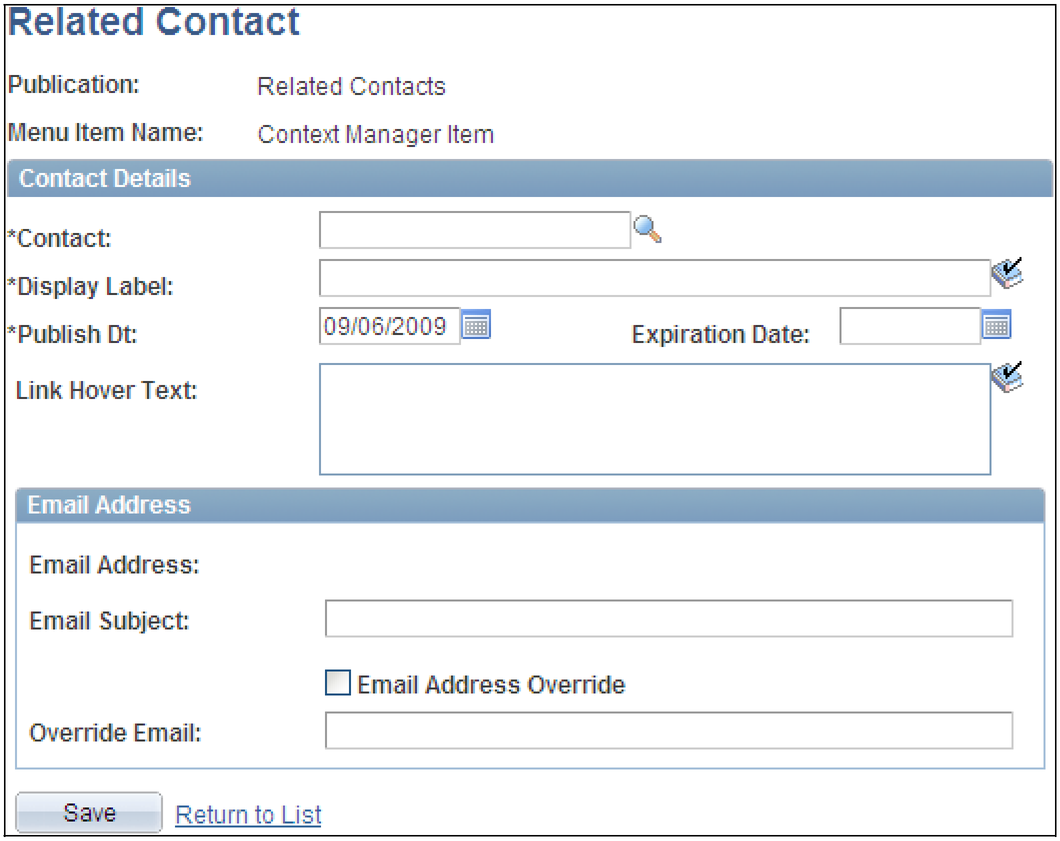
Save

Click the Save button to save your changes.

Note. The Save button appears only for topic experts assigned to this pagelet–menu item combination.

Adding or Editing Related Contacts

Access the Related Contact page (click the Edit this link button or the Add button in the Related Contacts pagelet).



Related Contact page

Publication	Displays the name of the template pagelet publication.
Menu Item Name	Displays the name of the current menu item.
Contact	Select the user ID of the related contact.
Display Label	Enter a description for the contact, which appears in the Related Contacts pagelet and on the Related Contacts List page.
Publish Dt(publish date)	Select the date on which the contact should be published and available for viewing in the pagelet for this menu item.
Expiration Date	Select the date on which you want this contact to become inactive for this menu item. Leave this field blank if there is no expiration date.

Note. Enter a date in the past to immediately remove a related contact link from the pagelet.

Link Hover Text	Enter tool tip text that you want to display when the user's cursor hovers over the link for this related contact.
Email Address	Displays the contact's default email address from his or her system profile.
Email Subject	Enter a default subject to appear when a user sends an email to this contact.
Email Address Override	Select if you want to override the default email address for the contact.
Override Email	If you selected the *Email Address Override,* option, enter the overriding email address for this contact.

Working With the Related Discussion Pagelet

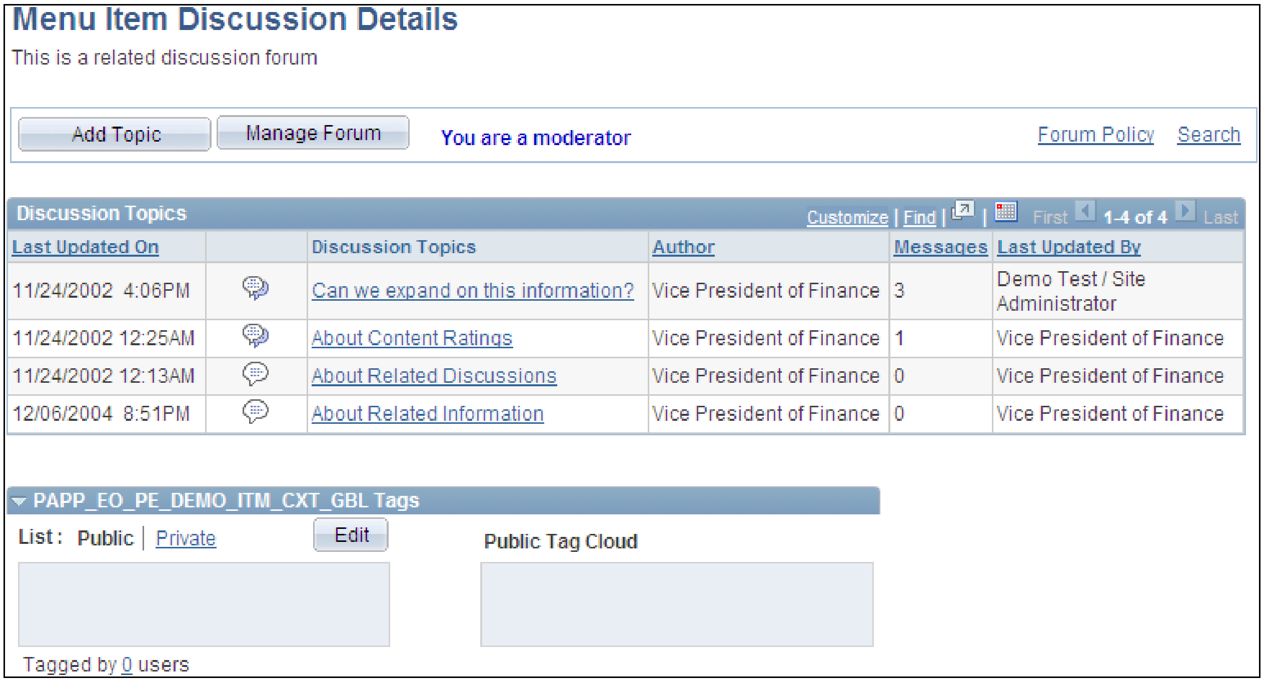
This section provides an overview of forums started from the Related Discussion pagelet and discusses how to:

- Use the Related Discussion pagelet.
- Participate in and manage forums started from the Related Discussion pagelet.

Understanding Forums Started from the Related Discussion Pagelet

Discussions started from the Related Discussion pagelet are similar to stand alone discussions created in the portal. However, these discussions have several distinctions from stand alone discussions including:

- You cannot define the name of the discussion. While the discussion for each menu item is distinct and separate, all such discussions have the same title, Menu Item Discussion Details, on the discussion forum's homepage.

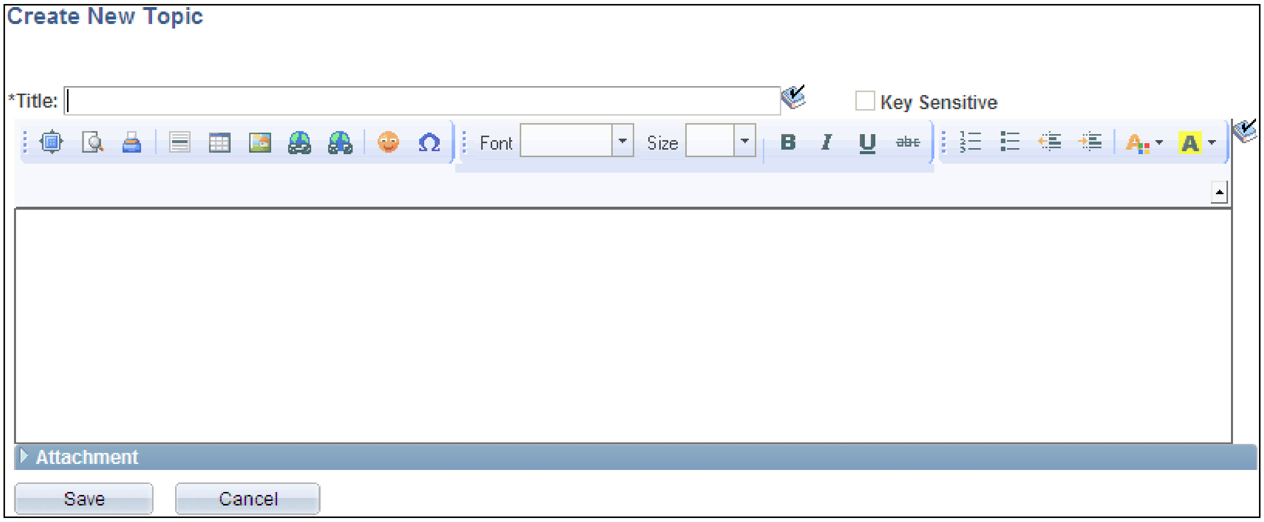


Discussion forum homepage (discussion started from the Related Discussion pagelet)

Note. The menu item ID appears as the title for the Tags expandable section.

- The first user to access the transaction or page after the Related Discussion pagelet has been assigned to the menu item becomes the forum moderator by default. This user (or other users with portal administrator or discussion administrator privileges) is then responsible for managing the forum including maintaining forum participants.

- Discussion topics and replies can be defined as *key sensitive.*



Create New Topic page with the Key Sensitive field

Select the Key Sensitive option to make this post key sensitive—that is, the post is available for the specific page key (or keys) only.

Note. To make a post available across all instances, clear this option.

Using the Related Discussion Pagelet

Access the Related Discussion pagelet in the Context Manager frame.

Related Discussion pagelet

<Topic title>	Click the link for a discussion topic to view the Post Details page.
View / Add Topic	Click the View / Add Topic link access discussion forum homepage.

Manage	Click the Manage link to open the Forum Privileges page in a new window. **Note.** The Manage link appears for the first user to access the page after the Related Discussion pagelet has been assigned. This user becomes the default forum moderator. The Manage link also appears for users who have discussion administrator privileges.

Participating in and Managing Forums Started from the Related Discussion Pagelet

Discussions started from the Related Discussion pagelet are similar to stand alone discussions created in the portal.

To participate in a discussion started from the Related Discussion pagelet, see the chapter on discussion forums in this PeopleBook.

See Chapter 10, "Working With Discussion Forums," Participating in Discussion Forums, page 207.

To manage in a discussion forum started from the Related Discussion pagelet, see the chapter on discussion forums in this PeopleBook.

See Chapter 10, "Working With Discussion Forums," Creating Discussion Forums, page 203.

Working With the Related Information Pagelet

This section discusses how to:

- Use the Related Information pagelet.
- View a related information item
- View a list of related information items.
- Add or edit related information.

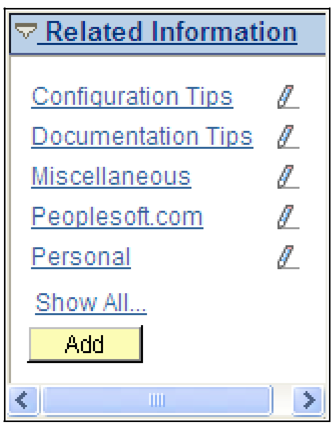
Pages Used to Work With the Related Information Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Related Information - <Content Title>	EPPCM_PUB_VIEWHTML EPPCM_PUB_VIEWFILE	Click the link for a related information item in the Related Information pagelet.	Open a new browser window to view the selected related information item.

Page Name	Definition Name	Navigation	Usage
Related Information List	EPPRC_CONT_EDIT	Click the Show All... link in the Related Information pagelet.	Open a new browser window to view the entire list of related information items. **Note.** From this page, topic experts can also maintain related information items.
Related Information	EPPRC_CONT_DTL	• Click the Edit this link button or the Add button in the Related Information pagelet. • Click the Edit button or the Add button on the Related Information List page.	Open a new browser window to add a new related information item or edit an existing related information item. **Note.** Only topic experts can add or edit related information items.

Using the Related Information Pagelet

Access the Related Information pagelet in the Context Manager frame.



Related Information pagelet

Use these elements in the Related Information pagelet:

<Content description>

Click a content link to open a new browser window displaying the related information item. The links listed in the Related Information pagelet can connect to any of the following:

- External websites
- File attachments
- Managed content items
- Menu items

Click the Edit this link button to open a new browser window showing the Related Information page on which you can update information for the related information item.

Note. The Edit this link button displays for topic experts only.

Show All...

Click the Show All... link to open a new browser window showing the Related Information List page on which you can view the complete list of items.

Add

Click the Add button to open a new browser window showing the Related Information page on which you can add a new related information item for the current menu item.

Note. The Add button displays for topic experts only.

Viewing a Related Information Item

Access the item of related information (click the link for an item in the Related Information pagelet or click the link for an item on the Related Information List page).

Depending on the type of related information, a new browser window is opened displaying the following:

- The web site when the information type is *External Website.*
- The file attachment when the information type is *File Attachment.*

- The Related Information - <Content Title> page when the information type is *Managed Content.*

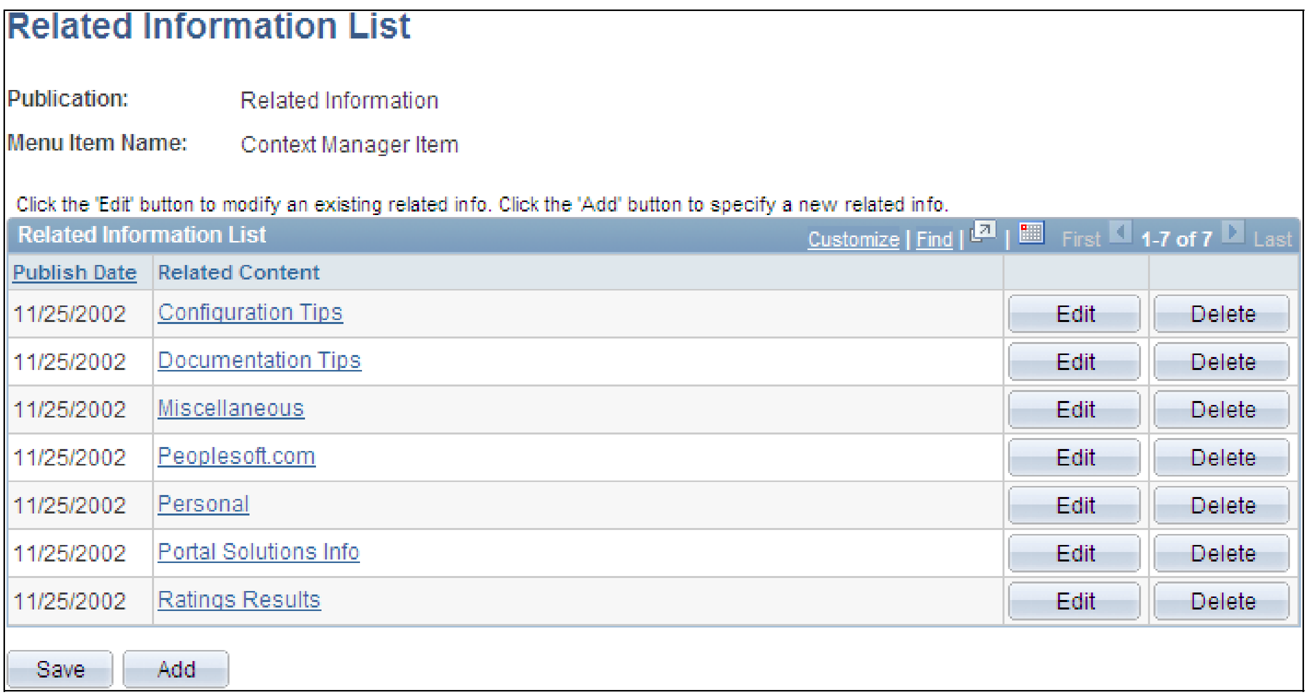
Related Information - <Content Title> page

Note. A second browser window is opened displaying the content itself if it is a managed content attachment.

- The PeopleSoft transaction page when the information type is *Menu Item.*

Viewing a List of Related Information Items

Access the Related Information List page (click the Show All... link in the Related Information pagelet).



Related Information List page

Related Content

Click a link to open a new browser window displaying the content item or the Related Information - <Content Title> page for an item of managed content.

Edit

Click the Edit button to access the Related Information page to edit the information for this related information item.

Note. The Edit button appears only for topic experts assigned to this pagelet–menu item combination.

Delete

Click the Delete button to delete this related information item.

Note. The Delete button appears only for topic experts assigned to this pagelet–menu item combination.

Add

Click the Add button to access the Related Information page to add a new related information item.

Note. The Add button appears only for topic experts assigned to this pagelet–menu item combination.

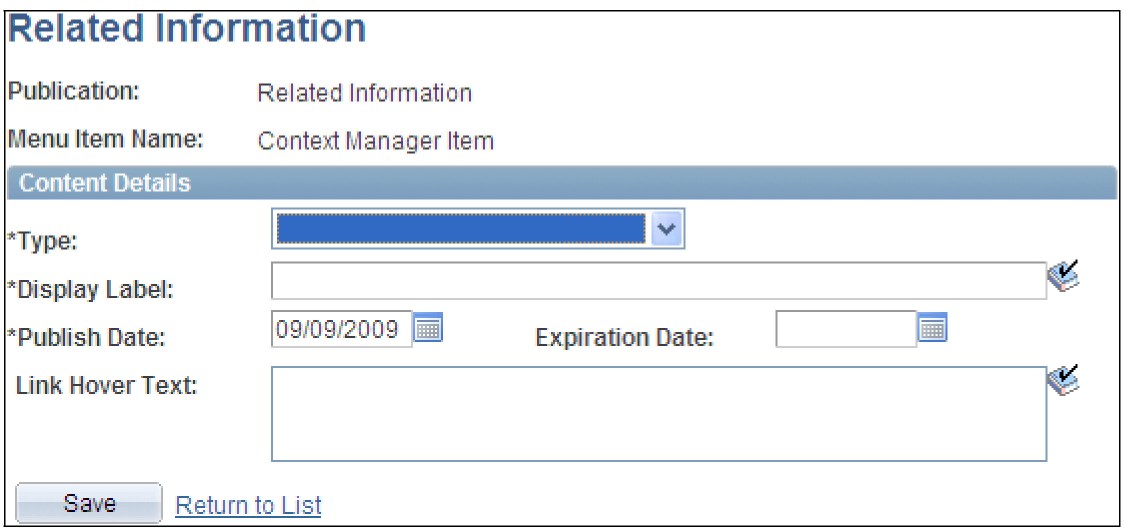
Save

Click the Save button to save your changes.

Note. The Save button appears only for topic experts assigned to this pagelet–menu item combination.

Adding or Editing Related Information

Access the Related Information page (click the Edit this link button or the Add button on the Related Information pagelet).



Related Information page

Publication

Displays the name of the template pagelet publication.

Menu Item Name

Displays the name of the menu item for this pagelet–menu item combination.

Content Type

If the administrator specified *All Types* on the Related Information Publication page, use the drop-down list to select a type for this related information item:

- *External Website* **—** Specify an external website URL as related information.
- *File Attachment* **—** Upload a text file as related information.
- *Managed Content* Select an item of managed content as related information.
- *Menu Item* **—** Select a menu item from the portal registry as related information.

Important! If the portal administrator specified a content type for the publication on the Related Information Publication page, then that value is displayed in this field and should not be changed.

Note. After you select a type, the page presents only the fields necessary to further define the selected related information type.

Display Label

Enter a value in this required field before attempting to select or define an item.

URL

If the type is set to *External Website,* enter the URL for the website.

File Name

If the type is set to *File Attachment,* click the Add Attachment button to upload the file.

Once uploaded, the name of the file appears as a link. Click the link to display the contents of the file in a new browser window. Click the Delete Attachment button to remove an uploaded file.

Content Title

If the type is set to *Managed Content,* click the Select Content button to select the item of managed content.

Once selected, the content title appears as a link. Click the link to display the item in a new browser window. Click the Re-Select Content button to select a different item of managed content.

Menu Item Name

If the type is set to *Menu Item,* select the menu item.

Publish Dt(publish date)

Select the date on which the information should be published and available for viewing in the pagelet for this menu item.

Expiration Date

Select the date on which you want this related information link to become inactive for this menu item. Leave this field blank if there is no expiration date.

Note. Enter a date in the past to immediately remove a related information link from the pagelet.

Link Hover Text Enter tool tip text that you want to display when the user's cursor hovers over the link for this related information item.

Working With the Related Resources Pagelet

This section discusses how to:

- Use the Related Resources pagelet.
- View a related resource profile
- View a list of related resources.
- Add or edit related resources.
- Search for a related resource.

Note. You must set up Resource Finder and its search indices before you can use Related Resources pagelet. In addition, the Resource Finder installationoption must be enabled.

Pages Used to Work With the Related Resources Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Resource Finder profile	EPX_PRF_MAIN	Click the link for a related resource in the Related Resources pagelet.	Open a new browser window to view the Resource Finder profile for the selected resource.
Related Resources List	EPX_DIRCNTC_EDIT	Click the Show All... link in the Related Resources pagelet.	Open a new browser window to view the entire list of related resources. **Note.** From this page, topic experts can also maintain related resources.
Related Resources	EPX_DIRCNTC_DTL	Click the Edit this link button or the Add button in the Related Resources pagelet.	Open a new browser window to add a new related resource or edit an existing related resource. **Note.** Only topic experts can add or edit related resources.
Related Resources - Advanced Search	EPX_DIRCNTC_SRCH	Click the Search button on the Related Resources page.	Search for and select a Resource Finder resource as a related resource.

Using the Related Resources Pagelet

Access the Related Resources pagelet in the Context Manager frame.

Related Resources pagelet

The Related Resources pagelet derives its resources from the Resource Finder feature. Resource Finder is a highly flexible repository that can receive data loads containing information about any entity, along with links that relate these entities to each other. These entities are typically things like customers, suppliers, employees, departments, locations, companies, and business units.

Use these elements in the Related Resources pagelet:

<Resource Name>

Click a resource name to open a new browser window displaying the Resource Finder profile for that resource.

Click the Edit this link button to open a new browser window showing the Related Resources page on which you can update information for the related resource.

Note. The Edit this link button displays for topic experts only.

Show All...

Click the Show All... link to open a new browser window showing the Related Resources List page on which you can view the complete list of resources.

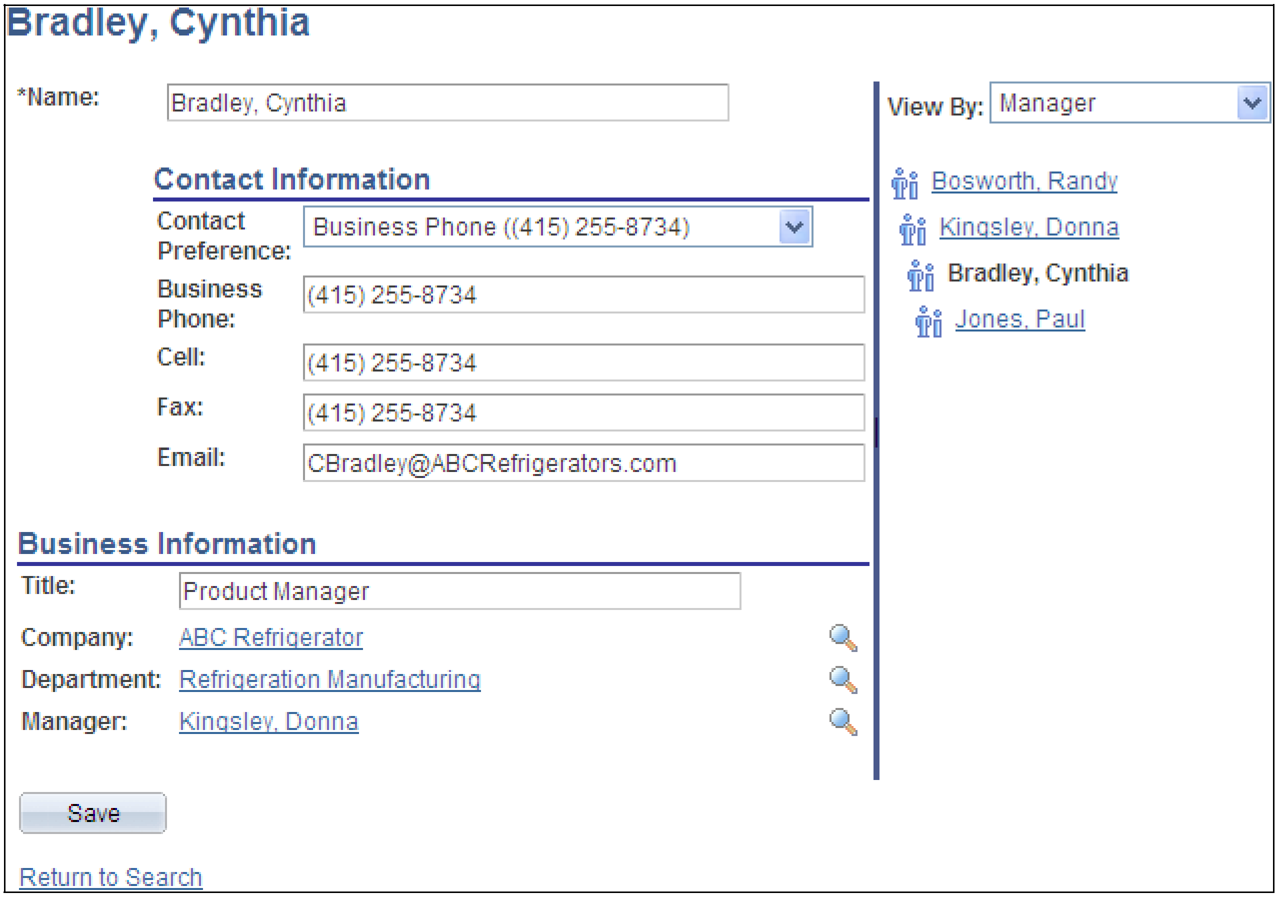
Add

Click the Add button to open a new browser window showing the Related Resources page on which you can add a new related resource for the current menu item.

Note. The Add button displays for topic experts only.

Viewing a Related Resource Profile

Access the Resource Finder profile page (click the link for an item in the Related Resources pagelet or click the link for an item on the Related Resources List page).



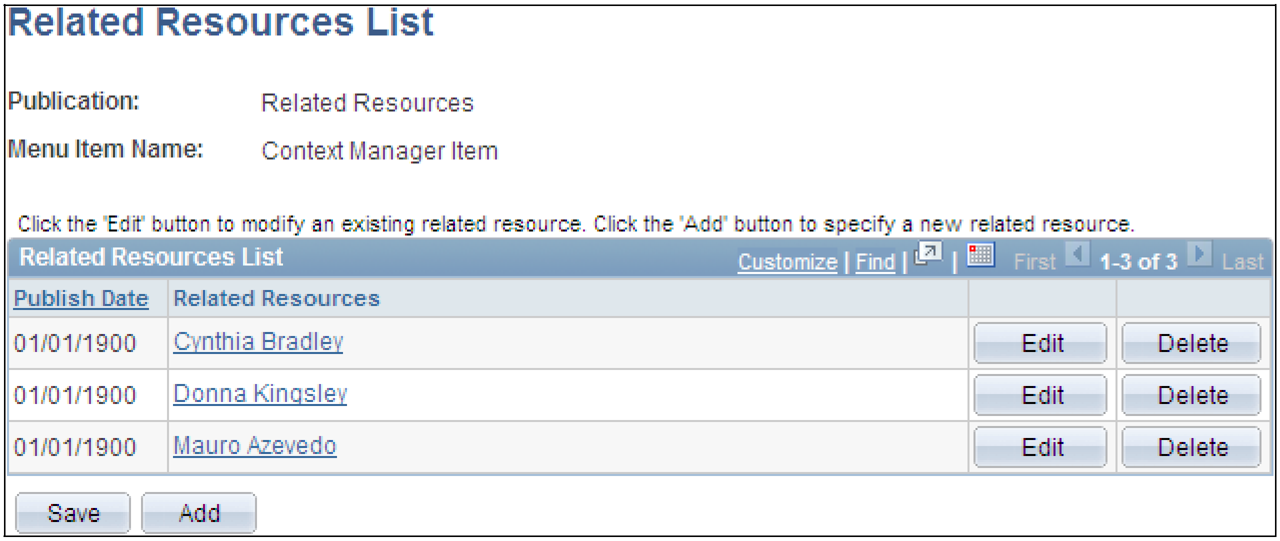
Resource Finder profile page

A Resource Finder profile displays contact information about a resource along with relationships amongst the resource and other resources in the system. Resource Finder and Resource Finder profiles are discussed in the Resource Finder PeopleBook.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Resource Finder*, "Using Participant Profiles and Organization Charts."

Viewing a List of Related Resources

Access the Related Resources List page (click the Show All... link in the Related Resources pagelet).



Related Resources List page

Related Resources

Click a link to open a new browser window displaying the Resource Finder profile for the related resource.

Edit

Click the Edit button to access the Related Resources page to edit the information for this related resource.

Note. The Edit button appears only for topic experts assigned to this pagelet–menu item combination.

Delete

Click the Delete button to delete this related resource.

Note. The Delete button appears only for topic experts assigned to this pagelet–menu item combination.

Add

Click the Add button to access the Related Resources page to add a new related resource.

Note. The Add button appears only for topic experts assigned to this pagelet–menu item combination.

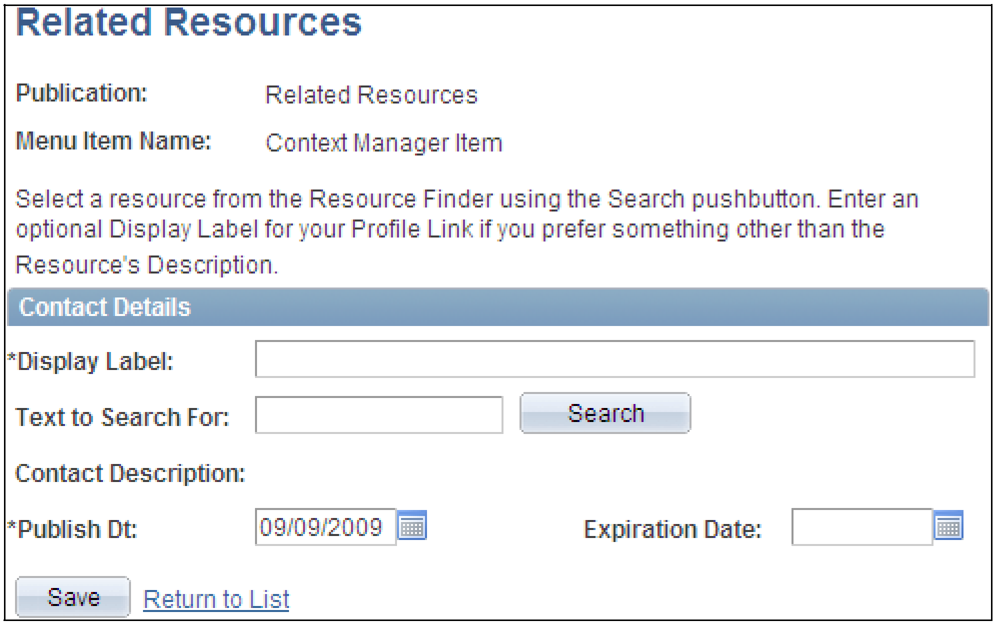
Save

Click the Save button to save your changes.

Note. The Save button appears only for topic experts assigned to this pagelet–menu item combination.

Adding or Editing Related Resources

Access the Related Resources page (click the Edit this link button or the Add button in the Related Resources pagelet).



Related Resources page

Publication

Displays the name of the template pagelet publication.

Menu Item Name

Displays the name of the menu item for this pagelet–menu item combination.

Display Label

Enter the link name that is displayed in the Related Resources pagelet for this resource.

Note. The default is the name of the resource, which is populated after a resource is selected.

Text to Search For

Enter search criteria to select a resource from Resource Finder.

Search

Click the Search button to access the Related Resources - Advanced Search page.

Contact Description

Displays the name of the selected resource.

Publish Dt(publish date)

Select the date on which the resource should be published and available for viewing on the pagelet for this menu item.

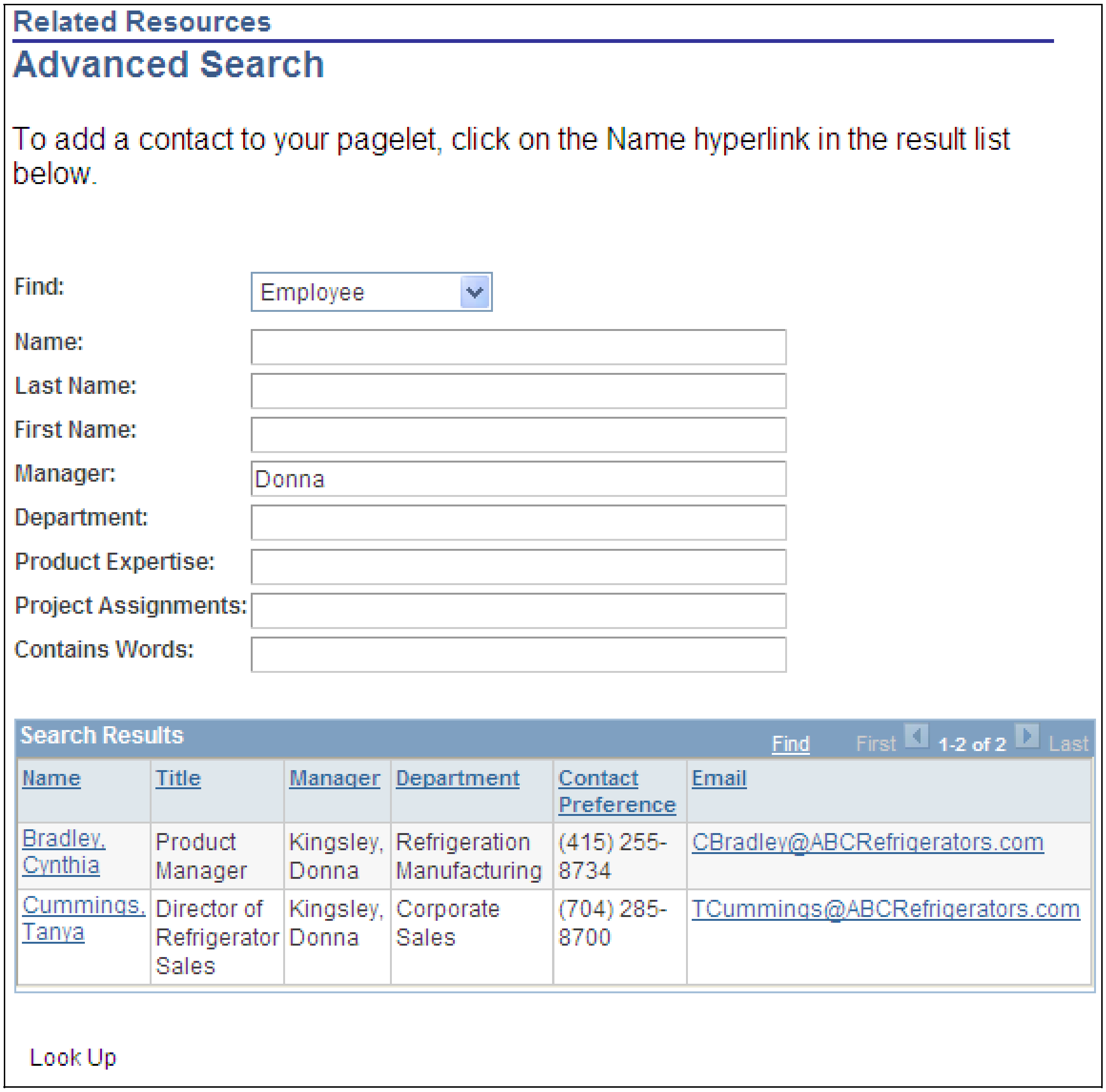
Expiration Date

Select the date on which you want this resource to become inactive for this menu item. Leave this field blank if there is no expiration date.

Note. Enter a date in the past to immediately remove a related resource link from the pagelet.

Searching for a Related Resource

Access the Related Resources - Advanced Search page (enter search criteria and click the Search button on the Related Resources page).



Related Resources - Advanced Search page

Find

Select the resource type: *Customer Contact*, *Employee*, and *Product Expert.*

Note. The resource type determines the available search fields.

Name

Enter text to search for in the the resource's name.

Contains Words

Enter any text (word, phrase, or word fragment) to search for in all fields of the resource's profile.

Look Up Click the Look Up button to execute the search.

Name Click a Name link in the search results to select that profile as the related resource.

Working With the Related Workspaces Pagelet

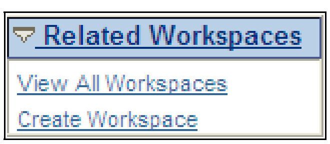
This section discusses how to use the Related Workspaces pagelet.

Pages Used to Work With the Related Workspaces Pagelet

Page Name	*Definition Name*	*Navigation*	*Usage*
Select A Workspace Template	EPPCW_WIZ_TMPL	Click the Create Workspace link in the My Workspaces pagelet.	Select the template on which you want to base the new workspace.
Workspaces - Search	EPPCW_MYWS	Click the View All Workspaces link in the My Workspaces pagelet.	Specify criteria to search for workspaces of which you are already a member.

Using the Related Workspaces Pagelet

Access the Related Workspaces pagelet in the Context Manager frame.



Related Workspaces pagelet

View All Workspaces Click to access the Browse Workspaces search page.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Working in Collaborative Workspaces," Searching for Workspaces.

Create Workspace	Click to display step 1 of the workspace creation wizard. **Note.** When you access this wizard through the Related Workspaces pagelet from the transaction for which you are building this workspace and the transaction has been associated with a workspace template, that recommended template is selected by default, but can be overridden. See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Collaborative Workspaces*, "Creating Collaborative Workspaces," Step 1: Selecting a Workspace Template.

Working With the Content Ratings Pagelet

This section discusses how to:

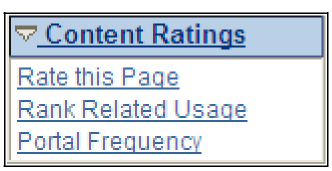
- Use the Content Ratings pagelet.
- Participate in content ratings surveys.

Page Used with the Content Ratings Pagelet

Page Name	***Definition Name***	***Navigation***	***Usage***
Content ratings survey	EO_PE_SR_SURVEY	• Click the link for a survey in the Content Ratings pagelet. • Click the View Results button after completing the survey.	Participate in a content ratings survey associated with the current menu item.

Using the Content Ratings Pagelet

Access the Content Ratings pagelet in the Context Manager frame.



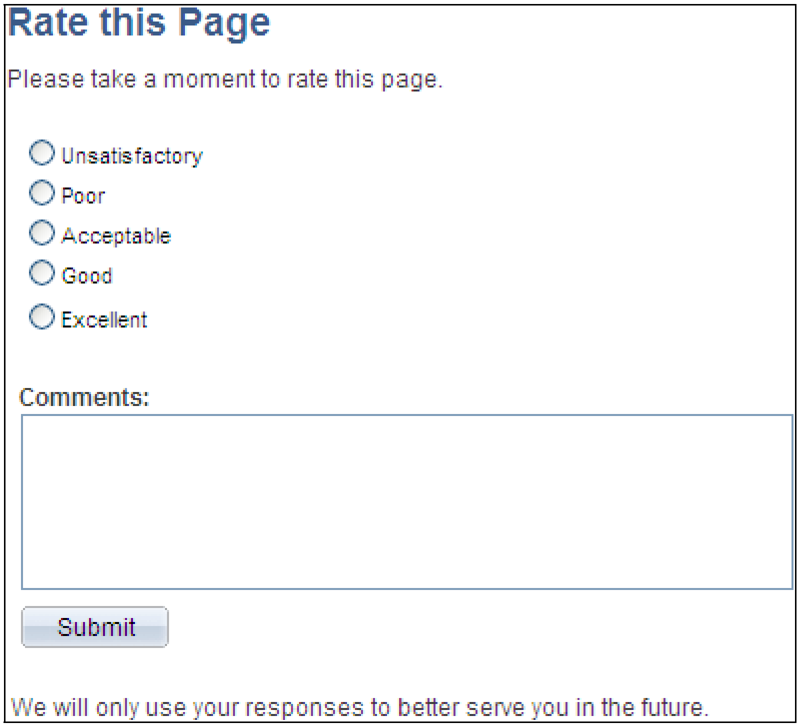
Content Ratings pagelet

Click a link to access a survey that has been assigned to the menu item.

Participating in Content Ratings Surveys

Access a content ratings survey page (click the link for a survey in the Content Ratings pagelet).

Note. The actual page name and question depend on the survey.



Content ratings survey page

Each content ratings survey consists of a single question. The question can be in the form of multiple choice, ranking list, or a yes/no question.

Comments

Enter free-form text in this field to add any comments that you have regarding the survey.

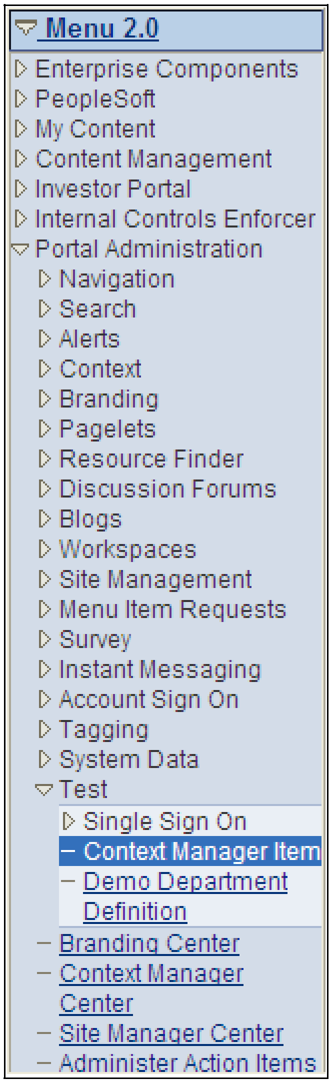
Submit

Click to submit your response. A confirmation page is displayed.

Note. From the confirmation page, click theView Results button to view the current results of the survey.

Working With the Menu 2.0 Pagelet

The Menu 2.0 pagelet replicates the menu items of the drop-down Main Menu and the Enterprise Menu pagelet. The Menu 2.0 pagelet provides you with access to all of your menu items in the Context Manager frame.



Menu 2.0 pagelet

Note. The current menu item is highlighted in the Menu 2.0 pagelet.

Chapter 21

Managing Content Ratings and iTracker

This chapter provides an overview of Content Ratings and discusses how to:

- Manage content ratings.
- View content ratings results.
- Deploy iTracker.
- View iTracker usage results.

Understanding Content Ratings

Reaction to portal content can be monitored through the following actions:

- Giving users an opportunity to express their opinions.
- Tracking which pages users access.

PeopleSoft Enterprise Portal includes a content ratings feature to manage user feedback and an iTracker to track usage. To use these features, the monitored content must use the Context Manager and the Dynamic Content template (PTCXM_DYNAMIC_CON_TEMPLATE). The Dynamic Content template should be configured to include the Content Ratings pagelet (PAPP_SURVEY_LINKS_SCR). You then need to associate the menu item to the poll using the Manage Content Ratings component.

Note. If you specify an Context Manager configuration for specific menu items, and you want to deploy a content rating poll to these menu items, you should also assign the Content Ratings pagelet to those menu items in the Context Manager.

Rating Portal Content

The content ratings feature enables you to:

- Configure single-question polls.
- Assign questions to a menu item or a portal-hosted unregistered URL.
- Monitor user feedback.

When users access a page that is being polled, the Content Ratings pagelet containing a link to the poll is displayed in the Context Manager frame. When the user clicks the poll link, the content ratings question appears in a new browser window. A user can answer each content ratings question only once for any given menu item or URL. However, if the poll is deployed to many different content items, the user can answer it again for each different menu item.

Content ratings administrators can associate multiple content ratings polls with any portal-hosted content, and the poll's question can be effective-dated to change over time.

The content ratings feature can also be used as a broader poll taker. For example, you can ask a range of questions of your users that are not necessarily tied to the content that they are viewing. In those circumstances, we recommend that you deploy a poll to one heavily trafficked menu item or portal-hosted URL. That way, results that you see on the Poll page and Results pages will be grouped properly for non-content related questions, as opposed to being spread out over multiple content items.

Results are accessible to poll respondents on the Content Ratings page when navigating from the Content Ratings pagelet. They are also accessible on the more advanced results pages available to content ratings managers and administrators. Results pages display data by menu item or URL.

Oracle delivers a preconfigured content ratings poll named CONTENTRATINGS. This poll asks the user to rate the effectiveness of a page on a scale of one to five, with one being the low rating. The results for the CONTENTRATINGS poll are accessible by the portal search feature, which means that search takes these results into account when it returns and ranks search results. While you can configure additional content ratings or general polls, they are not automatically considered in the Portal Search results.

Important! You can customize the text of the CONTENTRATINGS poll's title or question, but you should not change the poll ID or the answer configuration.

Tracking Usage

The Invisible Usage Tracker (iTracker) is an invisible tracking system that monitors the pages a user accesses. An iScript stores the user ID, URL, and date and time information each time that a tracked page is accessed. This information can also be recorded when the tracked target page is refreshed or redrawn by the portal.

For registered portal content, the iTracker stores the PORTALCONTENTURL parameters, which is the portal URL less any parameter values. For unregistered URL tracking, the iTracker uses the PORTALACTUALURL parameter value, which is the portal URL plus any parameter values. However, if the PORTALACTUALURL parameter value exceeds 254 characters in length, the system will use the PORTALCONTENTURL parameter.

Data is stored in the EO_PE_SR_ITRACK table. Examples of how you can access this information are available through the View Content Ratings Results and View Usage Tracker Results pages.

You assign menu items or unregistered URLs to the iTracker in the same way that you specify which content you want to associate with the content ratings polls.

Managing Content Ratings

This section provides an overview of content rating management and discusses how to:

- Define a content ratings poll.
- Add a poll question.
- Assign polls to menu items.
- Assign content ratings result viewers.
- Associating polls to unregistered URLs.

Understanding Content Rating Management

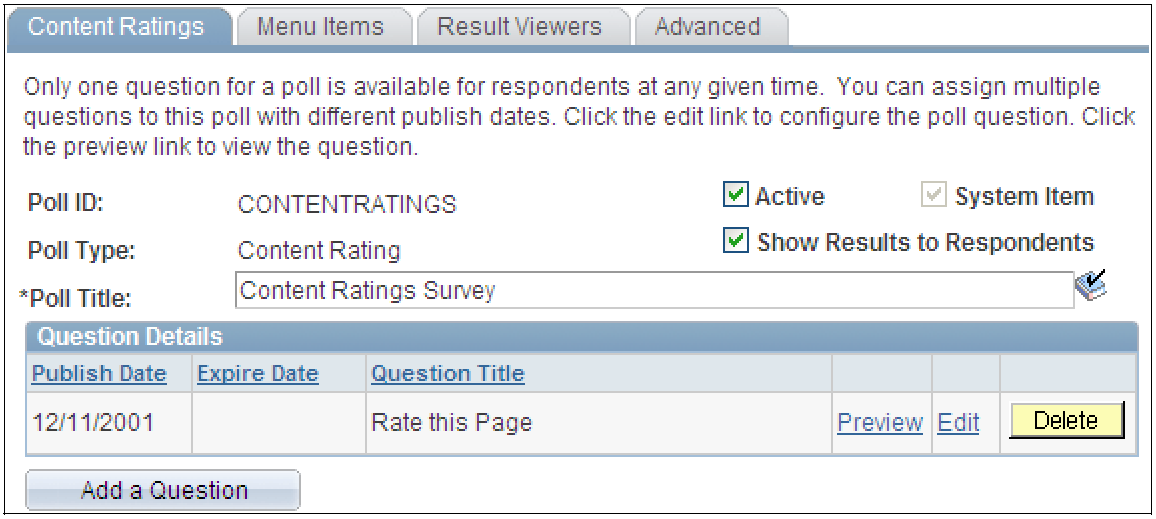
Access to the delivered content ratings configuration pages is granted by role. Content ratings managers can access the Content Ratings page and Menu Items page. The Result Viewers page and Advanced page can only be accessed by content ratings administrators as usage of these pages require a more technical understanding of the portal.

Pages Used to Manage Portal Content Ratings

Page Name	*Definition Name*	*Navigation*	*Usage*
Content Ratings	EO_PE_SR_SRV_SELCT	Portal Administration, Context, Content Ratings, Maintain Content Ratings	Define high-level information, such as the poll ID and description. Add, edit, and delete poll questions.
Question Details	EO_PE_SR_SRV_CONFG	• Click the Add a Question button on the Content Ratings page. • Click the Edit button on the Content Ratings page.	Enter a poll question and possible responses.
Menu Items	EO_PE_SR_CONTENT	Portal Administration, Context, Content Ratings, Maintain Content Ratings, Menu Items	Assign a menu item to the poll ID.
Results Viewers	EO_PE_SR_SRV_USERS	Portal Administration, Context, Content Ratings, Maintain Content Ratings, Results Viewers	Grant user access to results for the poll ID. Access is granted on the View Results page.
Advanced	EO_PE_SR_ADVANCED	Portal Administration, Context, Content Ratings, Maintain Content Ratings, Advanced	Assign an unregistered URL to the poll ID. This page is intended for advanced users with an understanding of portal-hosted URL formats.

Defining a Content Ratings Poll

Access the Content Ratings page (Portal Administration, Context, Content Ratings, Maintain Content Ratings).



Content Ratings page

Poll ID

Displays the identifier for the poll.

Poll Type

Displays the default value of *Content Rating.*

Active

Select the check box to make the poll active on the Content Ratings pagelet. The poll will not be available on the Content Ratings pagelet unless this box is selected.

Show Results to Respondents

Select to enable respondents to view the poll results when they have completed the poll and each subsequent time they access the poll's menu item or URL.

Description

Enter a description of the poll.

Question Details

Publish Date

Displays the publish date entered on the Question Details page.

Expire Date

The value that appears is based on the publication date of subsequent questions. The current question is retired when the next question is published.

Question Title

Displays the value entered on the Question Details page. This value will appear as a link on the Content Ratings pagelet.

Preview Click to display the poll in a new browser window. A preview is available once information on the Question Details page has been completed and saved for the associated question.

Edit Click to access the Question Details page, where you can edit the associated question.

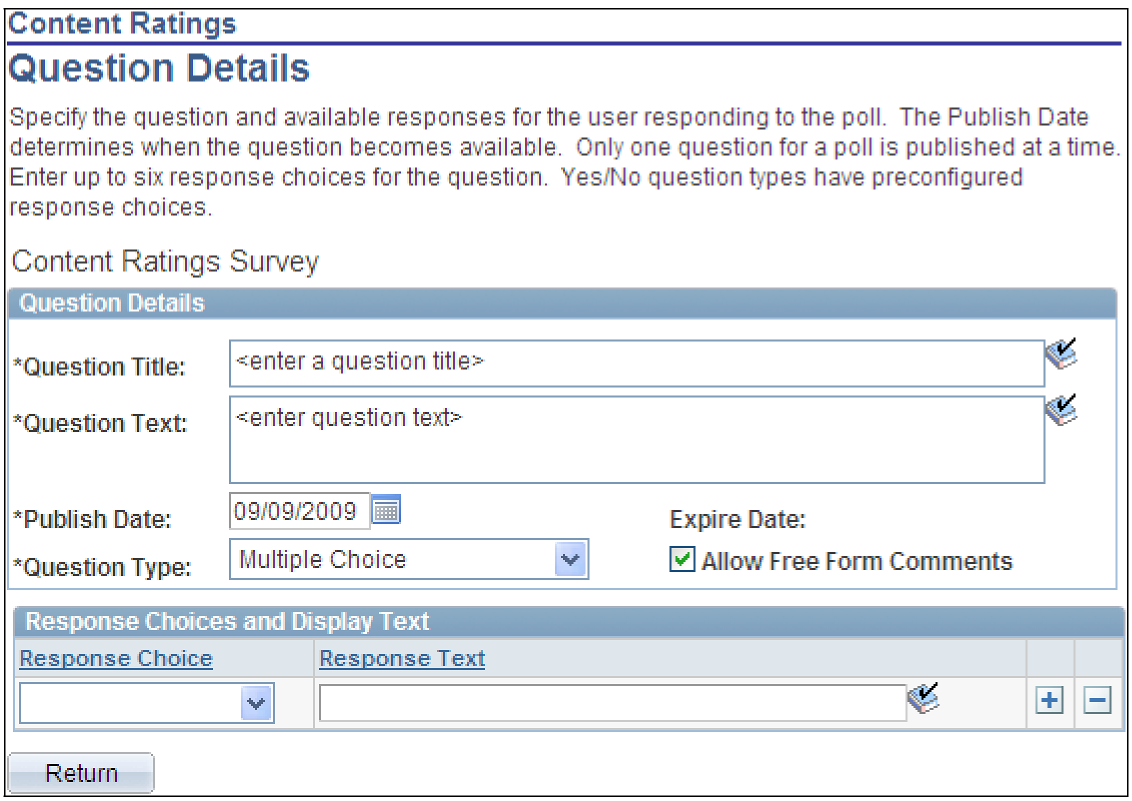
Delete Click to delete the associated question. You will be prompted to confirm your deletion.

Add a Question Click to access the Question Details page, where you can enter a poll question.

Delete this Poll Click to delete the poll. You will be prompted to confirm the deletion.

Adding a Poll Question

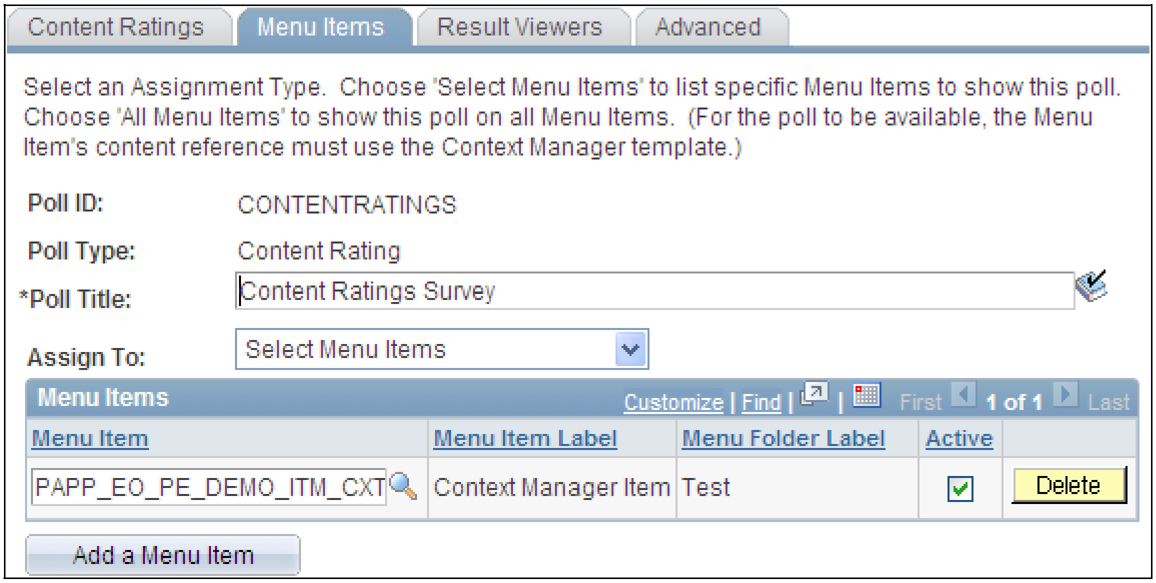
Access the Question Details page (click the Add a Question button on the Content Ratings page).



Question Details page

Assigning Polls to Menu Items

Access the Menu Items page (Portal Administration, Context, Content Ratings, Maintain Content Ratings, Menu Items).



Menu Items page

Important! This assignment is site-specific and defaults to the site that you are logged onto. If the same menu item is in multiple sites, you will need to make the assignment for each instance.

Assign To

Select the from the following values:

Select Menu Items. Select to be able to specify the menu items with which you want to associate the poll. The Menu Items scroll area displays.

All Menu Items. Select to associate all menu items to the poll.

Note. You must associate the menu item with the dynamic content template and the Content Ratings pagelet for the poll to appear on the Content Ratings pagelet for the menu item.

Menu Items

The Menu Items group box displays when the Assign To field value is set to *Select Menu Items.*.

Menu Item

Select the menu item you want to associate with the survey poll.

Menu Item Label

The link text that will appear for the menu item in the portal menu.

Menu Folder Label

The text that identifies the menu folder.

Active

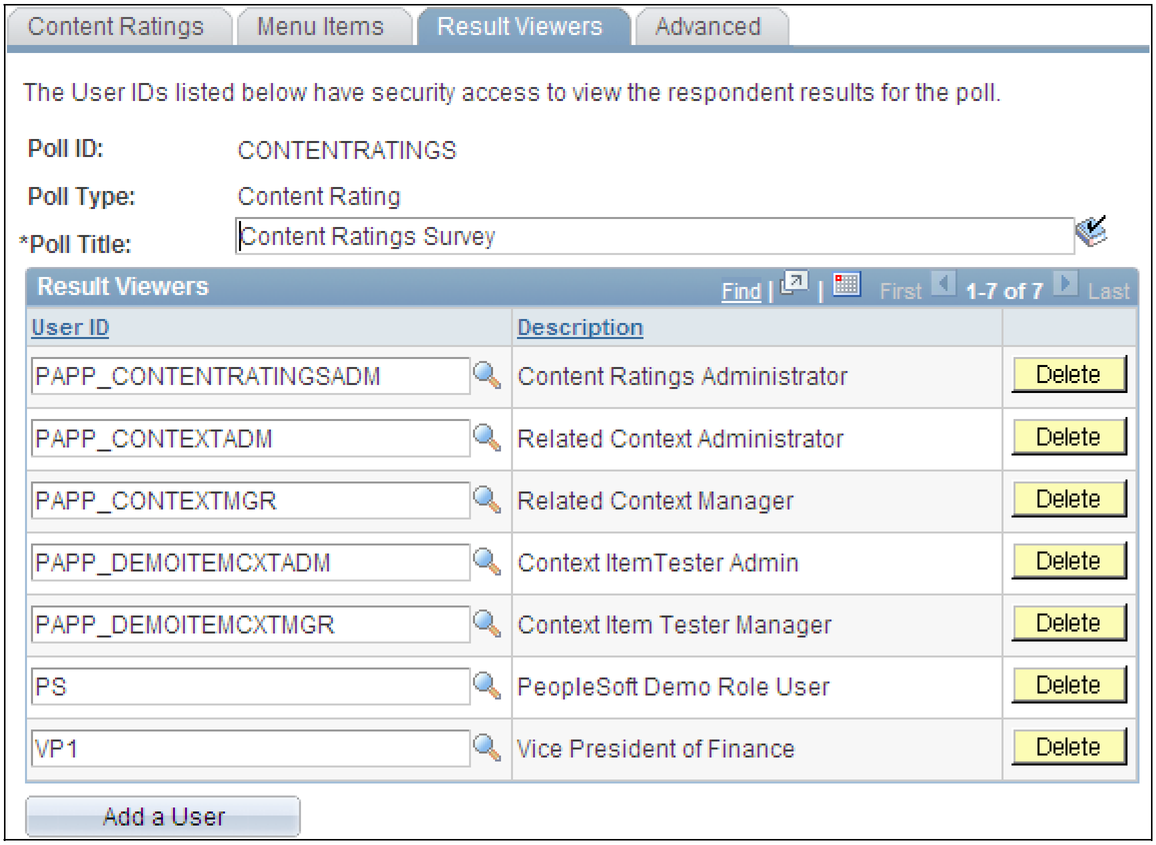
Select to activate the poll for the selected menu item. If clear, the link to the poll will not display on the Content Ratings pagelet.

Add Menu Item

Click to add a new menu item to the page.

Assigning Content Ratings Result Viewers

Access the Result Viewers page (Portal Administration, Context, Content Ratings, Maintain Content Ratings, Result Viewers).



Result Viewers page

Note. If the selected poll appears for multiple menu items (CREFs), security access is granted to users to view the results for all instances. You are not granting CREF-specific access.

User ID

Select the user you want to be able to view results for the selected poll.

Note. Selected user IDs must have security access to the View Content Ratings Results page and Usage Results by Menu Item pages in the portal registry.

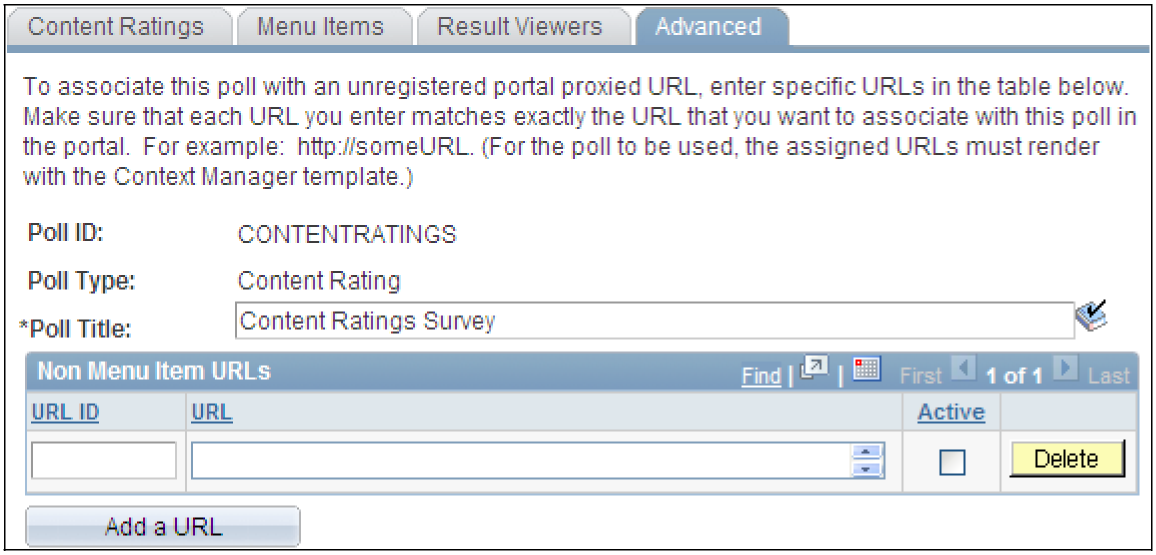
Add a User

Click to add another user to the list of result viewers.

See Chapter 21, "Managing Content Ratings and iTracker," Managing Content Ratings, page 404; Chapter 21, "Managing Content Ratings and iTracker," Viewing Content Ratings Results, page 411; Chapter 21, "Managing Content Ratings and iTracker," Viewing iTracker Usage Results, page 413 and Chapter 19, "Working With Context Manager in PeopleSoft Enterprise Portal," Assigning Topic Experts, page 363.

Associating Polls to Unregistered URLs

Access the Advanced page (Portal Administration, Context, Content Ratings, Maintain Content Ratings, Advanced).



Advanced page

You can associate a poll with an unregistered portal-proxied URL. For example, you can register a pagelet or page that contains links to articles or documents, such as External News, that you do not want to register separately. Use this page to associate a content ratings poll with the news articles or documents that are linked to from the registered page.

Note. Polls can only be associated with the first link off of a registered page. Any links that are accessed off of the unregistered pages cannot be associated with polls.

URL ID

Enter the name that you want to use to identify the URL. This name should be unique for each URL ID entry.

URL

Enter the URL to which you want to deploy the poll.

Oracle recommends that you navigate to the URL in the browser and copy the URL in the address bar into this field. The system converts this entry to uppercase text and resolves any HTML codes to the actual characters they represent.

Note. The URL cannot be longer than 254 characters.

Active

Select to display the poll ID for the URL. If this option is clear, the user will not see the poll ID link when accessing the URL.

Add a URL

Click to enter an additional URL.

Additional Conditions for Non-Menu Item URLs

For the poll to appear for a URL, the following conditions must be met:

- The portal must proxy the URL entered. As such, you must access the URL from a page or pagelet that is registered in the portal. For example, the URL could be to a news article referenced off of a portal home page.

  Note. The registered referring page on which the link to the unregistered URL appears should use an HTML template. If the referring page is a homepage pagelet, there are no special configuration considerations to take into account. If you are using a portal CREF as the referring page, make sure that the CREF has a template specified, and that it is an HTML template. If the survey does not appear on the URL when you access it, double-check to make sure that the referring CREF is not using the Context Manager template itself.

  See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,*"Working with Portal Servlets," Understanding Proxying

- The URLs to which you want to associate a poll must also use the dynamic content template to render the poll in the Context Manager frame. Since this is not a registered URL, you will need to specify that the dynamic content template is designated as the portal's default template. Making this setting change will have special implications for your portal installation.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Designing Portal Templates"

Viewing Content Ratings Results

This section discusses how to view content ratings results.

Page Used to View Content Ratings Results

Page Name	***Definition Name***	***Navigation***	***Usage***
Content Ratings Results	EO_PE_SR_SURVEY_VW	Portal Administration, Context, Content Ratings, Content Ratings Results	Access results of the active content ratings polls to which you have been granted access. Only users and roles that have been selected on the Result Viewers page for the poll ID can access information on this page. Click the View Results link to access the Results by Menu Item page, where you can access poll results broken down by menu item. The View Results link does not display if there are no results to view.

Page Name	*Definition Name*	*Navigation*	*Usage*
Results by Menu Item	EO_PE_SR_CRF_INQ	Click the View Results link on the View Content Ratings Results page.	View results of the selected poll for both active and inactive menu items broken down by menu item. Click the View Responses link to access the View Responses page, where you can view current responses for the selected menu item. The View Responses link does not display if there are no responses to view for the menu item.
View Responses	EO_PE_SR_VWRSLTS	Click the View Results link on the Results by Menu Item page.	View current responses for the selected menu item. Click the View Comments link to access the View Comments page, where you can view any comments entered for the selected response. If no comments are available, the View Comments link does not display.
View Comments	EO_PE_SR_VWCMTS	Click the View Comments link on the View Responses page.	View all comments entered for the selected response.

Deploying iTracker

This section discusses how to deploy iTracker.

Deploying the iTracker

iTracker is the only invisible usage tracker poll allowed by the portal. You cannot manipulate poll details, however you can define where the feature is deployed.

To assign the iTracker to portal content:

1. Access the Content Ratings page by selecting the *ITRACKER* poll ID value. The Question Summary group box that displays on the page for content ratings poll IDs does not display because iTracker does not require the entry of any questions.

   See Chapter 21, "Managing Content Ratings and iTracker," Defining a Content Ratings Poll, page 406.

2. Access the Menu Items page and assign iTracker to any menu items registered on the portal.

   Note. The Usage Results by Menu Item page can only display iTracker data for individual menu items selected by choosing the *Select Menu Items* value in the Assign Content Ratings field. The page does not display any data if you select the *All Menu Items* value

   ---

   See Chapter 21, "Managing Content Ratings and iTracker," Assigning Polls to Menu Items, page 407.

3. Access the Advanced page and assign the iTracker to any unregistered portal-hosted URLs.

   See Chapter 21, "Managing Content Ratings and iTracker," Associating Polls to Unregistered URLs, page 410.

Note. The Result Viewers page that displays for content ratings poll IDs does not display for iTracker. To control access to iTracker results, limit access to the View Usage Tracker Results page to only appropriate user IDs and roles using PeopleTools security.

Viewing iTracker Usage Results

This section discuses how to view iTracker usage results.

Page Used to View iTracker Usage Results

Page Name	***Definition Name***	***Navigation***	***Usage***
Usage Results by Menu Item	EO_PE_SR_USG_INQ	Portal Administration, Context, Content Ratings, View Usage Tracker Results	View a list of the menu items assigned to the iTracker. View the total number of visits and visitors to each menu item. **Note.** This page does not display any data if you selected the *All Menu Items* value in the Assign Content Ratings field on the Menu Items page for the ITRACKER poll ID. This page can only display data for individual menu items selected by choosing the *Select Menu Items* value.

Part 7

Related Content Services

Chapter 22

Understanding PeopleSoft Enterprise Portal-Delivered Related Content Services

This chapter provides an overview of the PeopleTools Related Content Framework and discusses the related content services delivered with Oracle's PeopleSoft Enterprise Portal.

Understanding the PeopleTools Related Content Framework

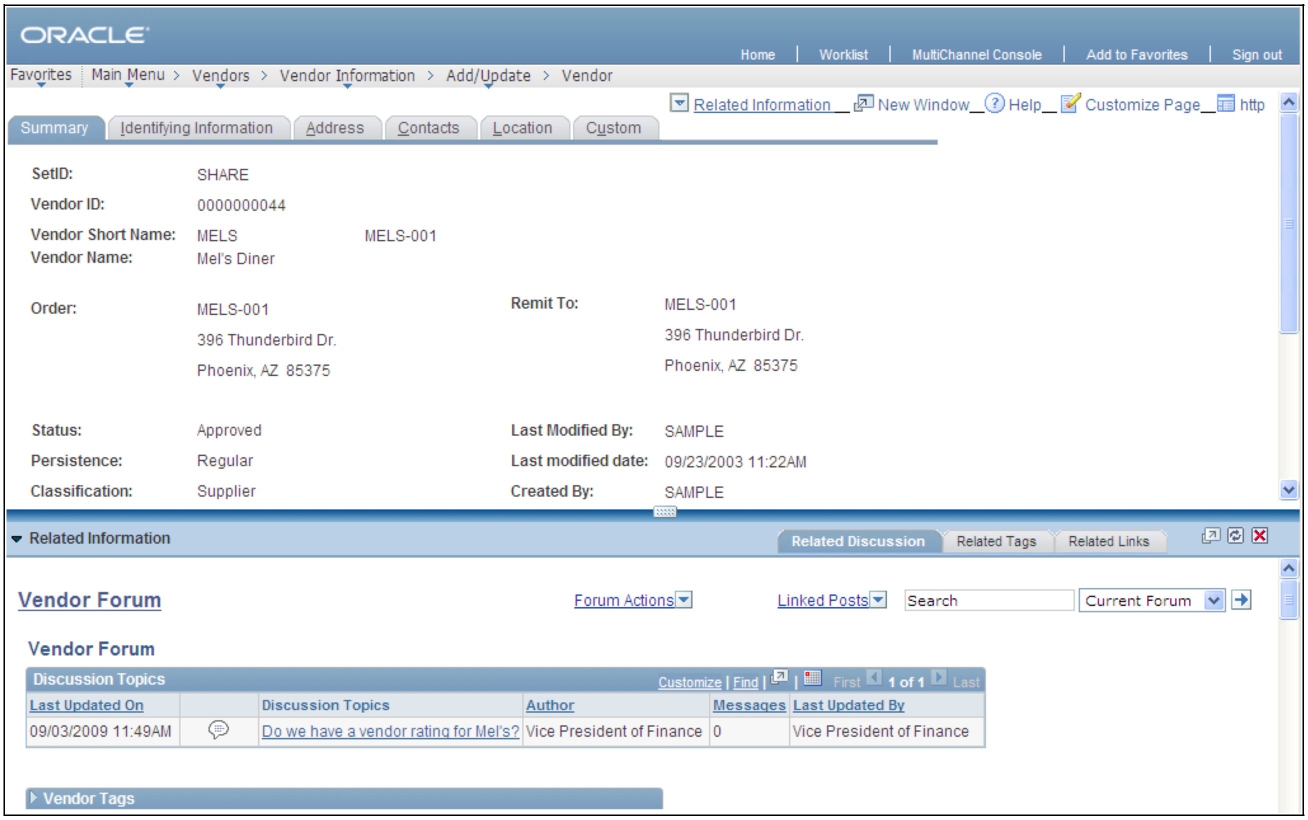
The PeopleTools Related Content Framework provides the tools for subject matter experts or portal administrators to contextually link application pages with collaborative content provided as *related content services.*

Related content services provide immediate access to relevant, contextual information for any activity without requiring any additional user effort. The PeopleTools Related Content Framework acts as an enterprise mashup, tying together all types of content such as PeopleSoft Enterprise Portal related content services, Oracle Business Intelligence Enterprise Edition (OBIEE) analytics, queries, or any relevant non-PeopleSoft data into a single location—PeopleSoft application pages.

The terms related content and related content service are synonymous. Related content can be any collaborative, analytical, or informational content that is useful for performing the business process. A related content service is content, such as, a discussion forum or a tagging capability, which is offered as a service to be consumed by other applications. Related content can be configured within the same database, among multiple PeopleSoft databases, and between a PeopleSoft application page and non-PeopleSoft data.

When users access application pages that are configured with related content, that content appears in the related content frame of the bottom of the application page. You can assign multiple services to entire components, individual pages in a component, or a combination of the two. If an application page has multiple services, each service appears as a tab in the related content frame. In addition to the related content frame at the bottom of the page, a Related Information drop-down list box appears in the navigation bar at the top of pages configured with related content services.

The following example shows the Vendor page from PeopleSoft FSCM with the related content frame. Three tabs appear in the frame, one for each of the PeopleSoft Enterprise Portal related content services: Related Discussion service, Related Tags service, and Related Links service.



Vendor page with the related content frame

Understanding Delivered Related Content Services

PeopleTools also 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 PeopleSoft Enterprise Portal features on PeopleSoft application pages. While the service definitions are provided in PeopleTools, an installed and configured PeopleSoft Enterprise Portal database is required to store and service the service data.

Related Discussion Service

Using the Related Discussion related content service, you can collaborate to share critical data about a transaction or a transaction instance. Similar to standalone forums in Oracle's PeopleSoft Enterprise Portal, forums in the Related Discussion service also 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. Discussion forums enable multiple relevant individuals to contribute to the review and resolution of a question.

See Chapter 24, "Working With the Related Discussion Service," page 433.

Related Links Service

The Related Links related content service allows you to associate links to relevant information for the current transaction instance or for all instances in a transaction. These links are available to all users of the transaction and assist in providing easy access to relevant information to execute the process. You can link to content residing in PeopleSoft Enterprise Portal—specifically, blogs, discussions, or collaborative workspaces—or external URLs. In addition, the Related Links service allows you to create a new workspace and to link that workspace to the transaction.

See Chapter 25, "Working With the Related Links Service," page 449.

Related Tags Service

The Related Tags related content service allows you to create user-specified tags for the current transaction instance. You can characterize and bookmark these transactional or business objects with terminology of your choosing, providing ease of access as well as collaborative classification of the transaction.

See Chapter 26, "Working With the Related Tags Service," page 455.

Chapter 23

Setting Up Related Content Services

This chapter provides an overview of the setup of related content services and discusses how to manage delivered related content services.

Understanding the Setup of Related Content Services

PeopleTools is delivered with three PeopleSoft Enterprise Portal related content services for use on PeopleSoft application systems:

- Related Discussion service
- Related Links service
- Related Tags service

Each of these services provides features native within PeopleSoft Enterprise Portal for use on PeopleSoft application transaction pages. In a multi-system setup such as this, the PeopleSoft Enterprise Portal system is known as the *producer* because it provides the services, and the PeopleSoft application system is known as the *consumer*.

For users to access a related content services on a transaction page, the following setup must be completed:

1. Configure Integration Broker on the producer and consumer systems to support inter-operation of the two systems.
2. Assign a related content service to a transaction page.
3. Map fields and select the security model for the specified service.

The remainder of this section provides the details on how to complete the setup for delivered related content services.

Managing Delivered Related Content Services

This section discusses how to:

- Configure Integration Broker for related content services.
- Review the definitions of delivered related content services.
- Assign a related content service to a transaction page.

- Map fields for the Related Discussion service.
- Map fields for the Related Links service.
- Map fields for the Related Tags service.
- Assign discussion forum roles to transaction users.

Pages Used to Manage Delivered Related Content Services

Page Name	***Definition Name***	***Navigation***	***Usage***
Define Related Content Service	PTCSSERVICES	• PeopleTools, Portal, Related Content Services, Define Related Content Service • On the Manage Related Content Service page, click the Create a New Related Content Service link.	Create or review the definition for a related content service.
Manage Related Content Configuration	PTCS_SRVCFG_SRCH	PeopleTools, Portal, Related Content Service, Manage Related Content Service	Review which content references have related content services assigned.
Select a Content Reference	PTCS_CRFURL_SELECT	On the Manage Related Content Service page, click the Assign Related Content to Application Pages link.	Select the content reference to which to assign related content services.
Assign Related Content	PTCS_SERVICECFG	• On the Select a Content Reference page, select a content reference. • On the Manage Related Content Service page, click the Edit Configuration button for a content reference in the list.	Assign related content services to a component or page.
Related Content Service - Map Fields	PTCS_FIELDMAPS_SEC	On the Assign Related Content page, click the Map Fields link for a service.	Map system variables, component and page values, and transaction keys to service parameters, which will differentiate one transaction instance from another. Select the security mode for the service.

Configuring Integration Broker for Related Content Services

You must configure Integration Broker for inter-operation of a PeopleSoft application system as a consumer of services produced by the PeopleSoft Enterprise Portal system.

In the following example, PSFT_PA is the default local node on the PeopleSoft Enterprise Portal (producer system) and WSDL_NODE is the remote node on the PeopleSoft application (consumer) system. In your environment, these nodes might be named differently. The following procedure provides an overview of the required configuration steps.

To configure Integration Broker for related content services:

1. Configure single sign-on (SSO) in *both* directions on both systems:

    a. In each system, configure the default local node and all other local nodes.

    b. In each system, configure the other system's default local node and all other local nodes as *remote nodes* with URI text pointing to the other system.

    c. In each system, list all of the local nodes, remote nodes, and the default local node as participating nodes in the SSO configuration.

    d. In each system, set the authentication domain.

    Note. The Related Content Framework also requires that the authentication domain be set on the consumer system.

    See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration,* "Implementing Single Signon," Implementing PeopleSoft-Only Single Signon.

2. Configure the integration gateway on both systems.

    See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration,* "Managing Integration Gateways," Administering Integration Gateways, Defining Integration Gateways.

3. Encrypt the secure keystore password in the integration gateway properties file on both systems.

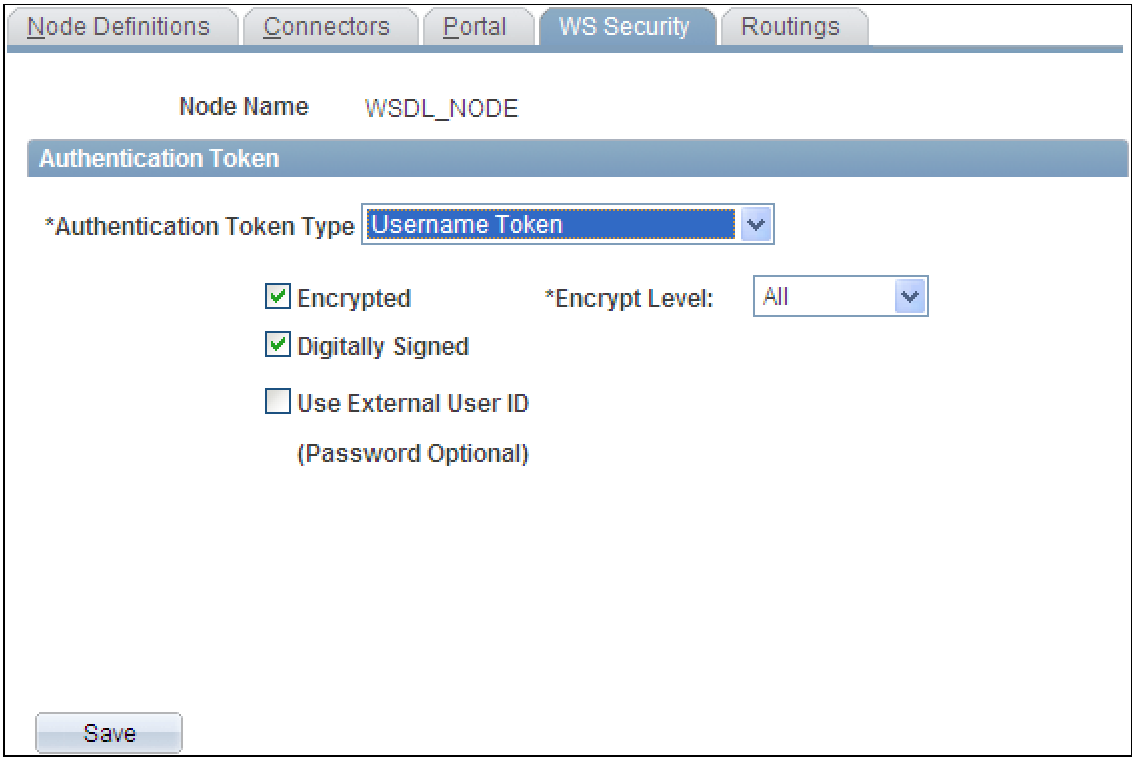
    See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration,* "Managing Integration Gateways," Using the integrationGateway.properties File.

    See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration,* "Managing Integration Gateways," Encrypting Passwords.

4. Configure WS-Security between the two systems:

   a. Configure the Node Definitions page for the WSDL_NODE node on both systems.

   b. On the WS Security page, select and configure an authentication scheme. The following example shows one such authentication scheme:



Authentication configured on the WS Security page

   c. Generate and install a new digital certificate if necessary.

   If you are using a set of nodes different from our example nodes (PSFT_PA as the default local node on the producer system and WSDL_NODE as the remote node on the consumer system), then you must generate and install new digital certificates.

   See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Configuring WS-Security For WSRP Consumption and Production," Setting Up WSRP Security Options, Installing Certificates For Encryption and Signature.

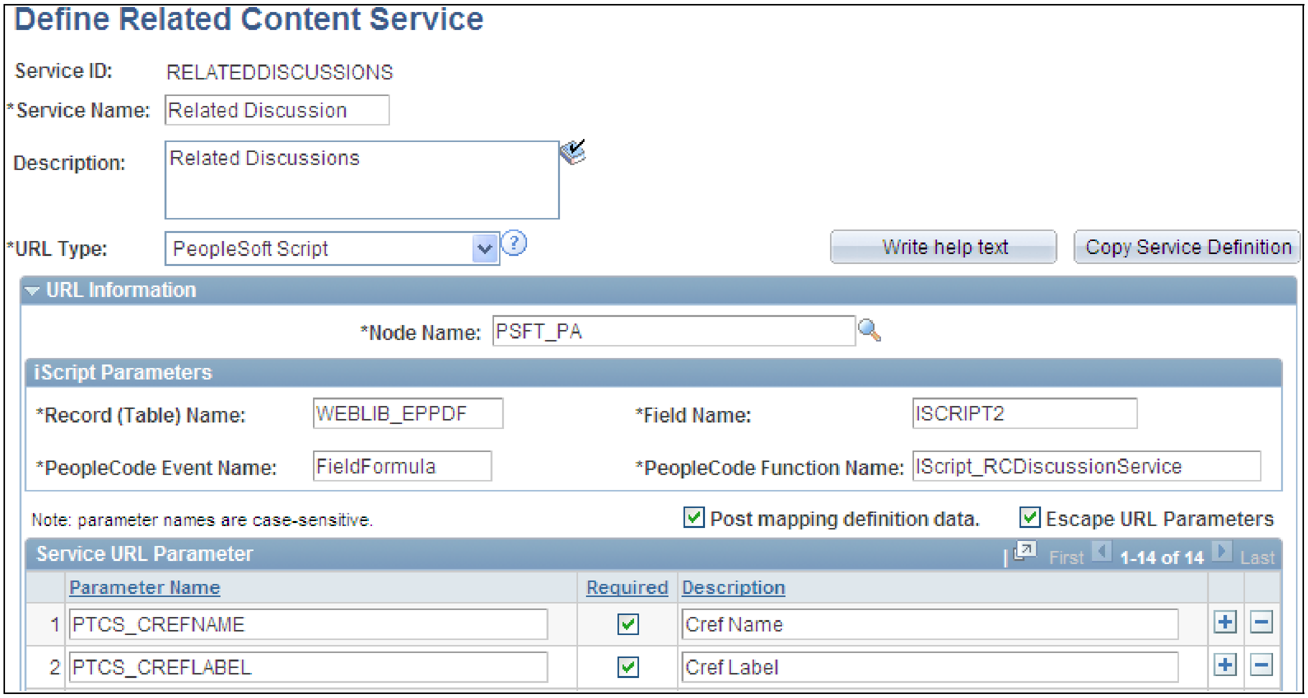
   However, if PSFT_PA is the default local node on the producer system and WSDL_NODE is the remote node on the consumer system, then you do not need to install a new digital certificate on either system. The interop.jks file included with PeopleTools on both systems provides the required encryption and signature certificates for this routing.

5. Set up user profile configuration between the two systems.

   See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*, "Working with User Profiles Across Multiple PeopleSoft Databases."

Reviewing the Definitions of Delivered Related Content Services

Access the Define Related Content Service page (PeopleTools, Portal, Related Content Services, Define Related Content Service).



Example of the Define Related Content Service page (a portion of the Related Discussion service definition)

Use the Define Related Content Service page to review related content service definitions delivered for PeopleSoft Enterprise Portal or to create your own service definitions.

The three delivered related content service definitions delivered use *PSFT_PA* as the node name for the default local node on the PeopleSoft Enterprise Portal system. If your PeopleSoft Enterprise Portal system uses a different default local node, then change the Node Name field in each service definition.

Important! To ensure that the related content services operate as delivered, do not change any other values on the Define Related Content Service page.

The PeopleTools PeopleBooks provide more information on the Define Related Content Service page including how to create a service definition.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology,* "Working with Related Content Services," Defining Related Content Services.

Assigning a Related Content Service to a Transaction Page

To assign a related content service to a transaction page:

1. Select PeopleTools, Portal, Related Content Service, Manage Related Content Service.

   The Manage Related Content Configuration page appears.

2. Click the Assign Related Content to Application Pages link.

   The Select a Content Reference page appears.

3. Navigate through the tree hierarchy of content references.

4. Select the content reference to which to assign related content references.

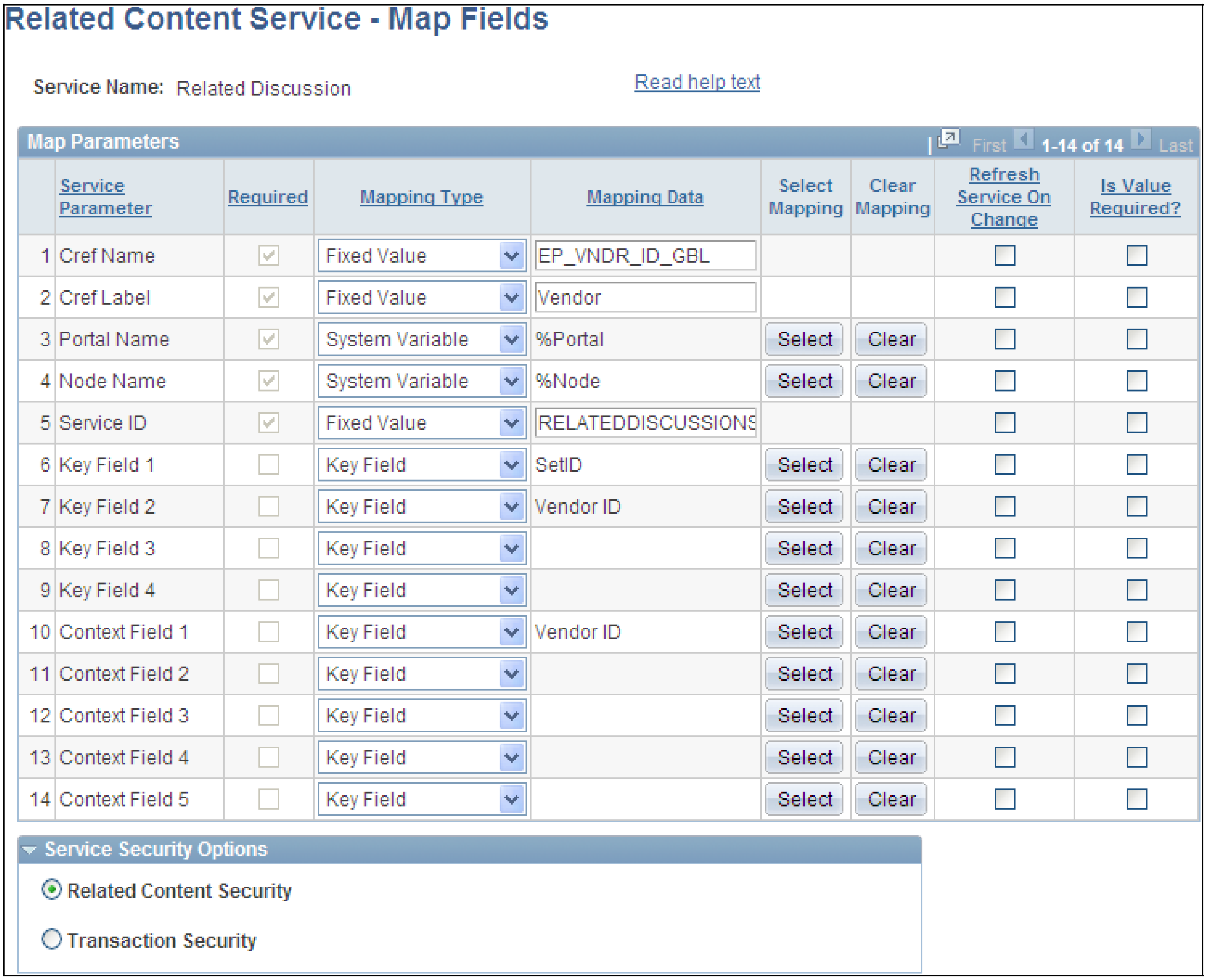
   The Assign Related Content page appears.

5. Select and assign a related content service by service ID.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*, "Working with Related Content Services," Assigning and Managing Related Content Services, Assigning Related Content Services to Application Pages.

Mapping Fields for the Related Discussion Service

Access the Related Content Service - Map Fields page (click the Map Fields link for the Related Discussion service on the Assign Related Content page).



	Service Parameter	Required	Mapping Type	Mapping Data	Select Mapping	Clear Mapping	Refresh Service On Change	Is Value Required?
1	Cref Name	☑	Fixed Value	EP_VNDR_ID_GBL			☐	☐
2	Cref Label	☑	Fixed Value	Vendor			☐	☐
3	Portal Name	☑	System Variable	%Portal	Select	Clear	☐	☐
4	Node Name	☑	System Variable	%Node	Select	Clear	☐	☐
5	Service ID	☑	Fixed Value	RELATEDDISCUSSIONS			☐	☐
6	Key Field 1	☐	Key Field	SetID	Select	Clear	☐	☐
7	Key Field 2	☐	Key Field	Vendor ID	Select	Clear	☐	☐
8	Key Field 3	☐	Key Field		Select	Clear	☐	☐
9	Key Field 4	☐	Key Field		Select	Clear	☐	☐
10	Context Field 1	☐	Key Field	Vendor ID	Select	Clear	☐	☐
11	Context Field 2	☐	Key Field		Select	Clear	☐	☐
12	Context Field 3	☐	Key Field		Select	Clear	☐	☐
13	Context Field 4	☐	Key Field		Select	Clear	☐	☐
14	Context Field 5	☐	Key Field		Select	Clear	☐	☐

Related Content Service - Map Fields page (Related Discussion service)

Use the Related Content Service - Map Fields page to review the mapping of system variables, component and page values, and transaction keys to service parameters. Also, use this page to select the security mode for the service.

The key field parameters map to the transaction keys and are used to differentiate one transaction instance from another. These are auto-populated with the keys defined for the transaction. It is recommended that you leave all parameter values with the defaults as populated by the system.

To complete the mapping of the Related Discussion service for a transaction page:

1. If the service has been assigned at the page level rather than at the component level and if additional context information is desired for contextual searches, then map context fields to page fields or key fields so that each post stores additional contextual information related to the transaction instance. This additional context information is then searchable and can be displayed in the search results.

   See Chapter 24, "Working With the Related Discussion Service," Searching for Contextual Information in Related Forums, page 446.

2. Select one of the following security modes:

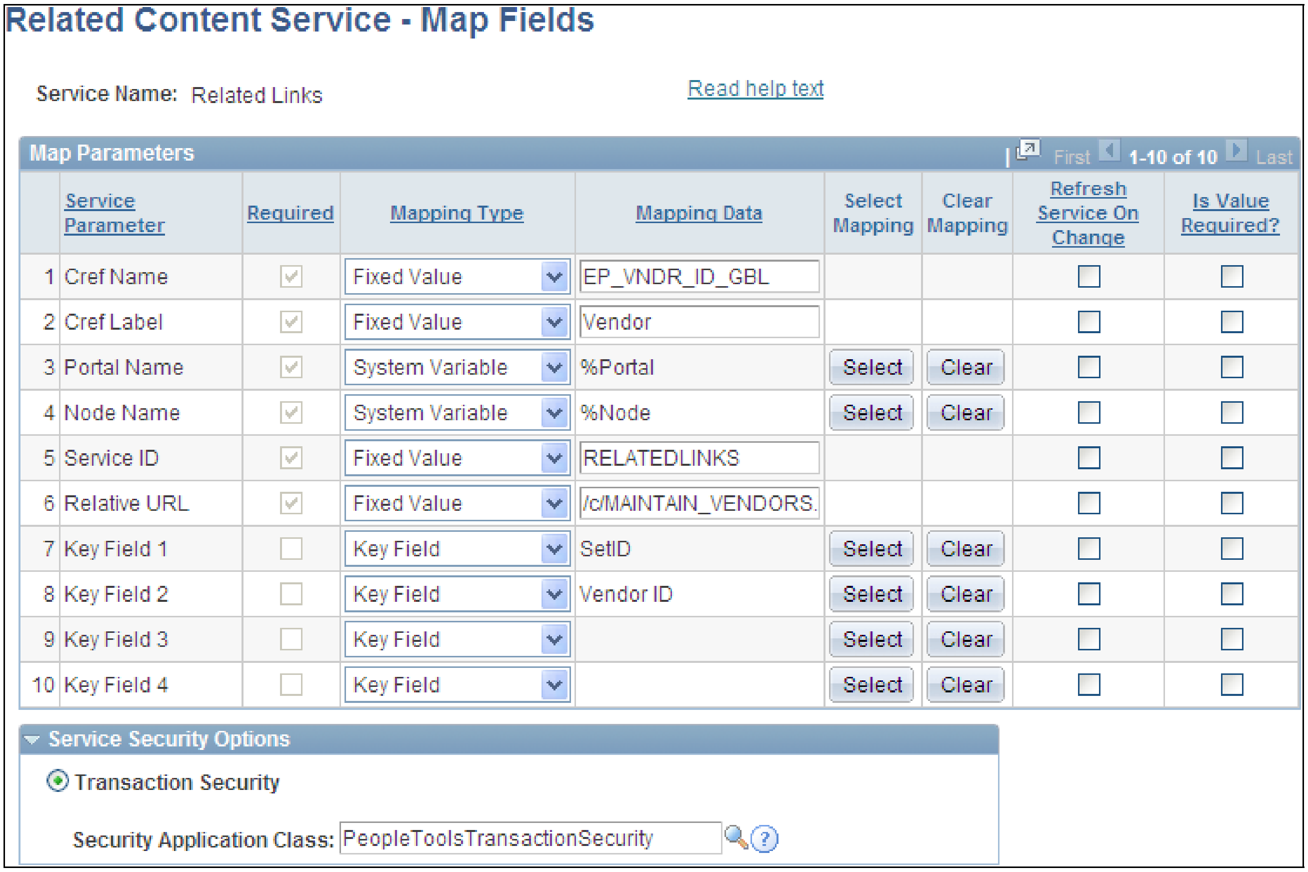
   - *Related Content Security* **—** Select this option to use the security model of PeopleSoft Enterprise Portal's discussion forums. The forum moderator is responsible for adding members and privileges for access to the forum. The first user to access the transaction after the service has been assigned creates the forum by default and becomes the forum moderator. In addition, the PAPP_DISCUSSIONS_ADMIN role is added as a forum moderator, and the PAPP_DISCUSSIONS_CONTRIBUTOR role is added as a forum contributor.

   - *Transaction Security* **—** When transaction security has been selected, select a delivered or custom application class to provide the security model. Enter the application class in the Security Application Class field.

     PeopleTools delivers the PeopleToolsTransactionSecurity application class, which provides basic PeopleTools transaction security via the user-role-permission list model. In this model, there is no row-level security. All other users who have been granted access to the component via a permission list get access to all data in the component**—**including related content services**—**unless self-service security has been added in PeopleCode.

Mapping Fields for the Related Links Service

Access the Related Content Service - Map Fields page (click the Map Fields link for the Related Links service on the Assign Related Content page).



Related Content Service - Map Fields page (Related Links service)

Use the Related Content Service - Map Fields page to review the mapping of system variables, component and page values, and transaction keys to service parameters. Also, use this page to select the security mode for the service.

The key field parameters map to the transaction keys and are used to differentiate one transaction instance from another. These are auto-populated with the keys defined for the transaction. It is recommended that you leave all parameter values with the defaults as populated by the system.

Important! It is essential that you leave the key field auto-population unmodified because these key fields are used by the Related Links service to create a link to the transaction instance.

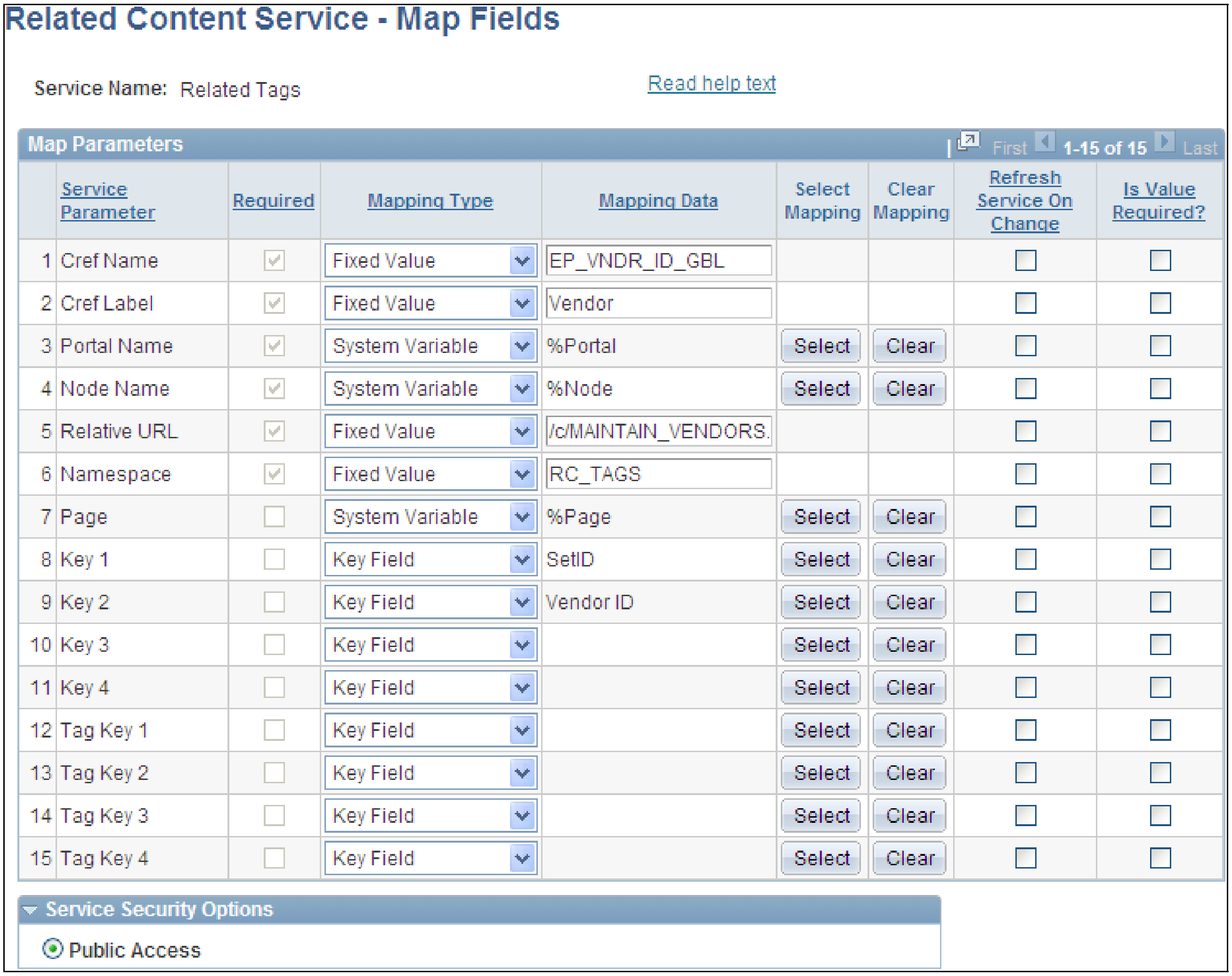
To complete the mapping of the Related Links service for a transaction page, select the following security mode: *Transaction Security.*

When transaction security has been selected, select a delivered or custom application class to provide the security model. Enter the application class in the Security Application Class field.

PeopleTools delivers the PeopleToolsTransactionSecurity application class, which provides basic PeopleTools transaction security via the user-role-permission list model. In this model, there is no row-level security. All other users who have been granted access to the component via a permission list get access to all data in the component—including related content services—unless self-service security has been added in PeopleCode.

Mapping Fields for the Related Tags Service

Access the Related Content Service - Map Fields page (click the Map Fields link for the Related Tags service on the Assign Related Content page).



Related Content Service - Map Fields

Service Name: Related Tags   Read help text

Map Parameters   First 1-15 of 15 Last

	Service Parameter	Required	Mapping Type	Mapping Data	Select Mapping	Clear Mapping	Refresh Service On Change	Is Value Required?
1	Cref Name	☑	Fixed Value	EP_VNDR_ID_GBL			☐	☐
2	Cref Label	☑	Fixed Value	Vendor			☐	☐
3	Portal Name	☑	System Variable	%Portal	Select	Clear	☐	☐
4	Node Name	☑	System Variable	%Node	Select	Clear	☐	☐
5	Relative URL	☑	Fixed Value	/c/MAINTAIN_VENDORS.			☐	☐
6	Namespace	☑	Fixed Value	RC_TAGS			☐	☐
7	Page	☐	System Variable	%Page	Select	Clear	☐	☐
8	Key 1	☐	Key Field	SetID	Select	Clear	☐	☐
9	Key 2	☐	Key Field	Vendor ID	Select	Clear	☐	☐
10	Key 3	☐	Key Field		Select	Clear	☐	☐
11	Key 4	☐	Key Field		Select	Clear	☐	☐
12	Tag Key 1	☐	Key Field		Select	Clear	☐	☐
13	Tag Key 2	☐	Key Field		Select	Clear	☐	☐
14	Tag Key 3	☐	Key Field		Select	Clear	☐	☐
15	Tag Key 4	☐	Key Field		Select	Clear	☐	☐

Service Security Options

Public Access

Related Content Service - Map Fields page (Related Tags service)

Use the Related Content Service - Map Fields page to review the mapping of system variables, component and page values, and transaction keys to service parameters. Also, use this page to select the security mode for the service.

The key field parameters map to the transaction keys and are used to differentiate one transaction instance from another. These are auto-populated with the keys defined for the transaction. It is recommended that you leave all parameter values with the defaults as populated by the system.

To complete the mapping of the Related Tags service for a transaction page:

1. For the Namespace parameter:

   Important! The namespace parameter value must be 20 characters or less.

   - To create a shared tag namespace for more than one instance of the Related Tags service, set the Namespace parameter to a fixed value and use the same name for each instance—for example: *RC_TAGS.*

     Each instance must also share the same Tag Key values.

   - To create a unique tag namespace for each instance of the Related Tags service, set the Namespace parameter to a fixed value and use a unique name for each instance—for example: use a derivative of the CREF name, *RC_VNDR_ID.*

2. Select the following security mode: *Public Access.*

   Select public access to make the Related Content visible to anyone who accesses the transaction page.

Assigning Discussion Forum Roles to Transaction Users

To assign discussion forum roles to transaction users:

1. In the PeopleSoft application system, make note of the users who have access to each transaction that has been assigned the Related Discussions service.
2. Determine which users require moderator privileges and which require contributor privileges.
3. In the PeopleSoft Enterprise Portal system, assign the PAPP_DISCUSSIONS_ADMIN privilege to the user IDs identified as forum moderators.
4. In the PeopleSoft Enterprise Portal system, assign the PAPP_DISCUSSIONS_CONTRIBUTOR privilege to the user IDs identified as contributors.

Chapter 24

Working With the Related Discussion Service

This chapter provides an overview of the Related Discussion related content service and discusses how to:

- Manage a discussion forum in the Related Discussion service.
- Participate in a discussion forum in the Related Discussion service.

Understanding the Related Discussion Service

Using the Related Discussion related content service, you can collaborate to share critical data about a transaction or a transaction instance. Similar to standalone forums in Oracle's PeopleSoft Enterprise Portal, forums in the Related Discussion service also 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. Discussion forums enable multiple relevant individuals to contribute to the review and resolution of a question.

For example, on a purchase requisition process page, you can discuss all vendors or a specific vendor. In this example, the vendor name or ID could serve as the context of the discussion, meaning that as the you navigate to other POs raised to that vendor, all the discussions pertinent to the vendor can be discovered through a search. The discussion postings can also be discovered through search whenever you choose to create a new requisition for this specific vendor. In this example, the information helps buyers benefit from the collective intelligence gathered on this vendor—in the context of the business process—when and where they need it the most.

Managing Discussion Forums in the Related Discussion Service

This section provides an overview of how a discussion forum is created in the Related Discussion and discusses how to:

- Manage a discussion forum.
- Assign discussion forum participants and privileges.
- Create a discussion forum policy statement.
- Manage linked posts.

Understanding the Creation of Discussion Forums in the Related Discussion Service

Depending on the security model, discussion forums in the Related Discussion service are created in different manners with different moderators:

- Related content security — The first user to access the transaction after the service has been assigned creates the forum by default and becomes the forum moderator. In addition, the PAPP_DISCUSSIONS_ADMIN role is added as a forum moderator, and the PAPP_DISCUSSIONS_CONTRIBUTOR role is added as a forum contributor.

  After the default user and roles are created, the forum moderator is responsible for adding additional members and privileges for access to the forum.

- Transaction security — The first user to access the transaction after the service has been assigned creates the forum by default and becomes the forum moderator. In addition, the PAPP_DISCUSSIONS_ADMIN role is added as a forum moderator, and the PAPP_DISCUSSIONS_CONTRIBUTOR role is added as a forum contributor.

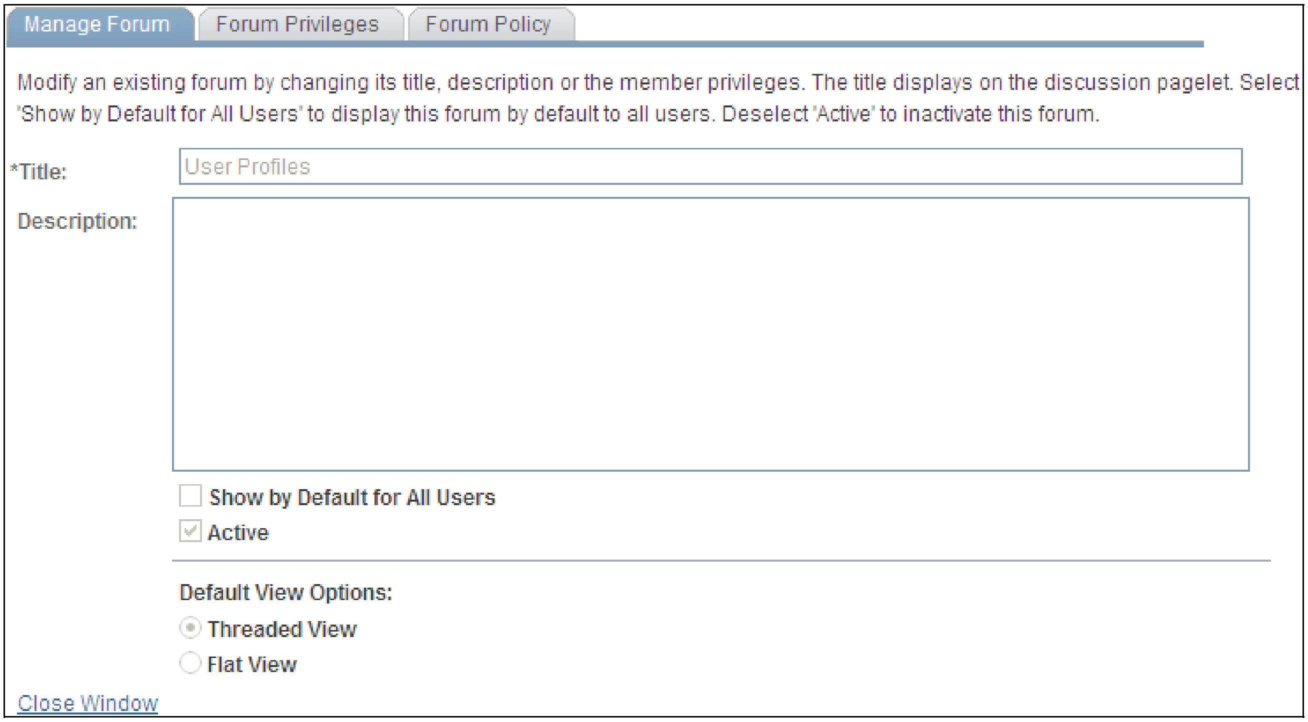
  If the PeopleToolsTransactionSecurity application class is used to provide the transaction security via the user-role-permission list model, then no additional members need to be added to the forum. All other users who have been granted access to the component via a permission list get access to the discussion forum as a contributor.

Pages Used to Manage Discussion Forums

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Forum	EPPDF_FORUM_MANAGE	On the Forum Privileges page, select the Manage Forum page.	View the properties for a Related Discussion service discussion forum.
Forum Privileges	EPPDF_FORUM_PRIV	In the Related Discussion service, select Forum Actions, Manage Forum.	Assign discussion forum participants for the Related Discussion service by user or role. Assign privileges to the participants.
Forum Policy	EPPDF_FORUM_POLICY	On the Forum Privileges page, select the Forum Policy page.	Enter a policy statement for the Related Discussion service discussion forum.
Manage Linked Posts	EPPDF_LINKEDPOSTS	In the Related Discussion service, select Linked Posts, Manage Linked Posts.	Access or delete linked posts.

Managing a Discussion Forum

Access the Manage Forum page (on the Forum Privileges page, select the Manage Forum page).



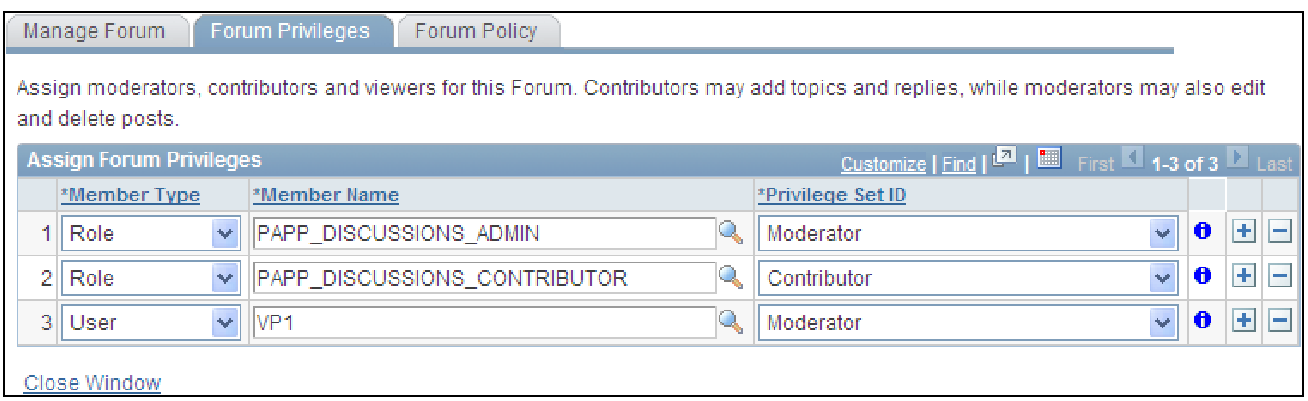
Manage Forum page (Related Discussion service)

Use the Manage Forum page to view the properties for a Related Discussion service discussion forum. You cannot change properties once a forum has been created.

Close Window Click this link to close the Discussion Forum window.

Assigning Discussion Forum Participants and Privileges

Access the Forum Privileges page (in the Related Discussion service, select Forum Actions, Manage Forum).



Forum Privileges page (Related Discussion service)

Use the Forum Privileges page to ssign discussion forum participants for the Related Discussion service by user or role. When the forum is created, three members are added automatically:

- PAPP_DISCUSSIONS_ADMIN as a moderator by role.
- PAPP_DISCUSSIONS_CONTRIBUTOR as a contributor by role.
- The user who first accessed the forum as a moderator by user ID.

Member Type

Select the type of participant you want to add to the discussion forum:

Role — Select to add forum participants by role.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration,* "Setting Up Roles."

User Select to add forum participants by user ID.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration,* "Administering User Profiles."

Member Name

Select the role or user ID.

Privilege Set ID

Select the privilege level you want to assign to the member:

Moderator

Contributor

Note. At a minimum, every discussion forum requires a moderator.

Note. The viewer privilege is not valid for related discussion forums.

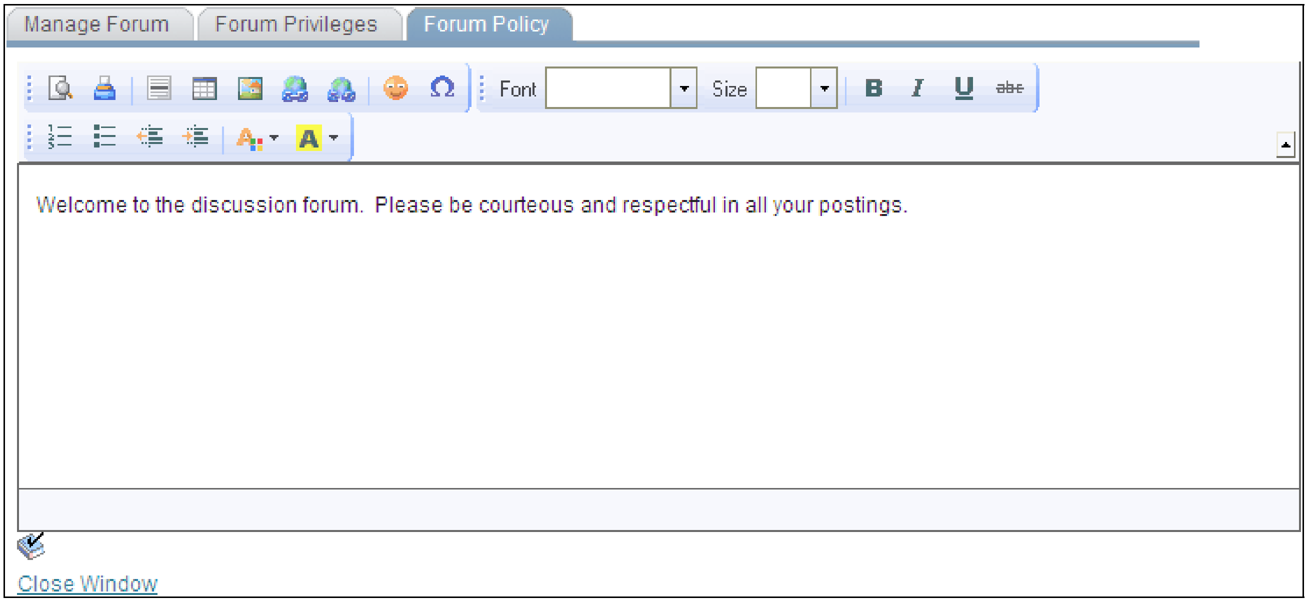
See Chapter 10, "Working With Discussion Forums," Understanding Discussion Forum Privileges, page 200.

Close Window

Click this link to close the Discussion Forum window.

Creating a Discussion Forum Policy Statement

Access the Forum Policy page (select Forum Policy on the Forum Privileges page).



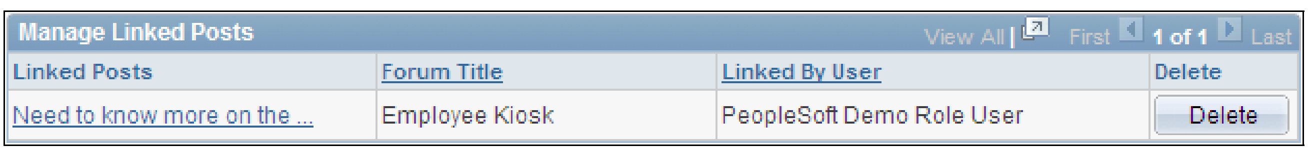
Forum Policy page (Related Discussion service)

Use the rich text editor to enter any policies that apply to the discussion forum.

Close Window Click this link to close the Discussion Forum window.

Managing Linked Posts

Access the Manage Linked Posts page (in the Related Discussion service, select Linked Posts, Manage Linked Posts).



Manage Linked Posts page

Use the Manage Linked Posts page to access or delete linked posts.

Linked Posts Click a linked post to open that discussion forum and post in the related content frame.

Delete Click the Delete button to delete a linked post.

Participating in Discussion Forums in the Related Discussion Service

This section discusses participating in discussion forums in the Related Discussion service and how to:

- Access discussion forums.
- Add or edit a discussion post.
- View a discussion post.
- Delete a post.
- Send email notifications to forum participants.
- Use tags in a discussion forum.
- Search in the Related Discussion service.
- Link posts from another discussion forum.

Pages Used to Participate in Discussion Forums

Page Name	*Definition Name*	*Navigation*	*Usage*
<Discussion Forum> homepage	EPPDF_FORUM	• On the transaction page, select Related Information. Select Related Discussion • In the related content frame, select the Related Discussion tab.	Serves as the homepage for a discussion forum listing all forum topics and providing features to participate in the forum.
Create New Topic	EPPDF_REPLY_TOPIC	Click the Forum Actions menu in the Related Discussion service. Click the Add Topic link.	Add a discussion topic to a discussion forum.
Add a Reply	EPPDF_REPLY_TOPIC	Click the Reply button on the post details page.	Add a reply to a discussion post (topic or reply). **Note.** The fields on this page are the same as those on the Create New Topic page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Discussion	EPPDF_REPLY_TOPIC	Click the Edit button on the post details page.	Edit a discussion post (topic or reply). **Note.** The fields on this page are the same as those on the Create New Topic page.
<Transaction Page> Forum Discussion Topics Detail (post details)	EPPDF_VIEW_TOPIC	Click the link for a topic on the discussion forum homepage.	View details of a discussion post (topic or reply).
Search Results	EPPDF_RCSEARCH	Click the Go button to execute a search of discussion forums.	Review search results and link to discussion posts.

Accessing Discussion Forums

To access a discussion forum in the Related Discussion service, do one of the following:

- On the transaction page, select Related Information. Then, select Related Discussion.
- In the related content frame, select the Related Discussion tab.

<Discussion Forum> homepage (Related Discussion service)

Use the discussion forum homepage to participate in the forum.

Note. Certain functions are available on this page only if you have been granted contributor or moderator privilege for this forum.

<Transaction Page> Forum Click the forum title to navigate to discussion forum homepage.

Forum Actions

After selecting this menu, select one of the following forum actions:

- Add Topic **—** Click to access the Create New Topic page.

  Note. This link appears only for contributors or moderators of the forum.

- Manage Forum **—** Click to access the Manage Forum page.

  Note. This link appears only if you are a moderator of the forum.

Linked Posts

After selecting this menu, select one of the following actions:

- Manage Linked Posts **—** Click to access the Manage Linked Posts page.

  Note. This link appears only for moderators of the forum.

- <Linked post title ...> **—** Click to open the discussion forum and linked post in the related content frame.

Search

Enter the search text. Use * as the wildcard character.

scope

Select from the following search scopes:

- *Related Forums* **—** Search in all discussion forums in the Related Discussion service.
- *Current Forum* **—** Search in this forum only.
- *EP Forums* **—** Search in all standalone discussion forums in PeopleSoft Enterprise Portal.

Click the Go button to execute the search and view the Search Results page.

Discussion Topics

Click the title of a topic to view the details page for that topic.

<Transaction Page> Tags

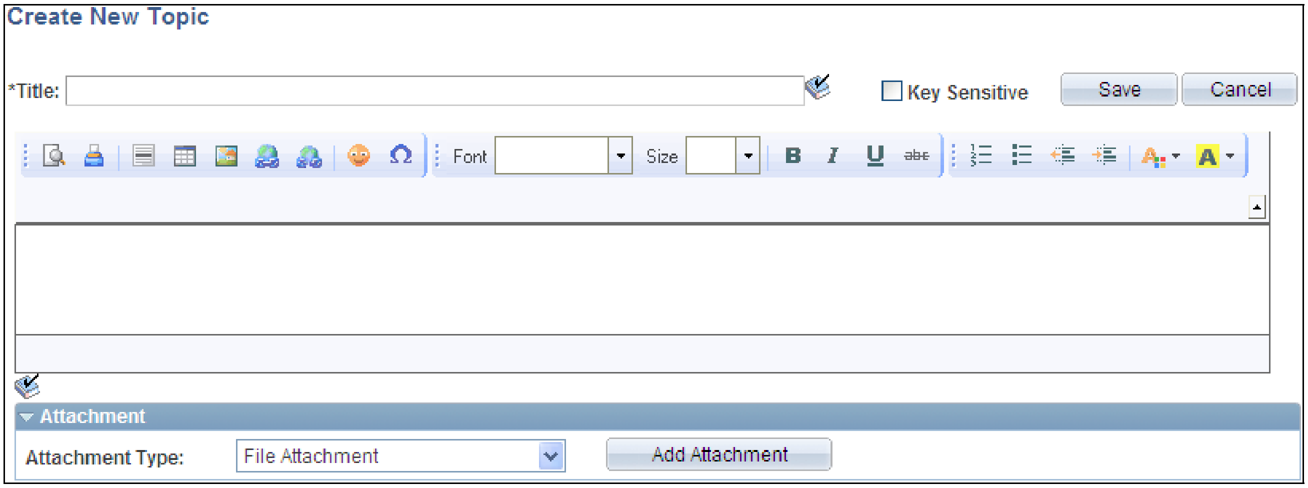
Click to view the Tags section for the discussion forum.

Adding or Editing a Discussion Post

Access the Create New Topic page (click the Forum Actions menu in the Related Discussion service; click the Add Topic link).

Access the Add a Reply page (click the Reply link on the post details page).

Access the Discussion page (click the Edit link on the post details page).



Create New Topic page (Related Discussion service)

Use the Create New Topic page to add a new discussion topic to a discussion forum.

Use the Add a Reply page to add a reply to any discussion post (topic or reply). The Add a Reply page has the same fields as the Create New Topic page.

Use the Discussion page to edit a discussion post (topic or reply). The Discussion page has the same fields as the Create New Topic page.

Title

Enter a title for your discussion post.

Key Sensitive

Select this option to make this post key sensitive—that is, the post is available for the specific transaction key (or keys) only.

Note. To make a post available across all transaction keys (and instances), clear this option.

<edit field>

Use the rich text editor to enter the text of the post.

See "PeopleSoft Enterprise Portal Preface," About the Rich Text Editor, page xxvi.

Attachment Type

Select the type of attachment to include with the post:

- *File Attachment* — Select to upload a local file.
- *Managed Content* — Select to attach a piece of managed content from the PeopleSoft Enterprise Portal content management system.

Add Attachment

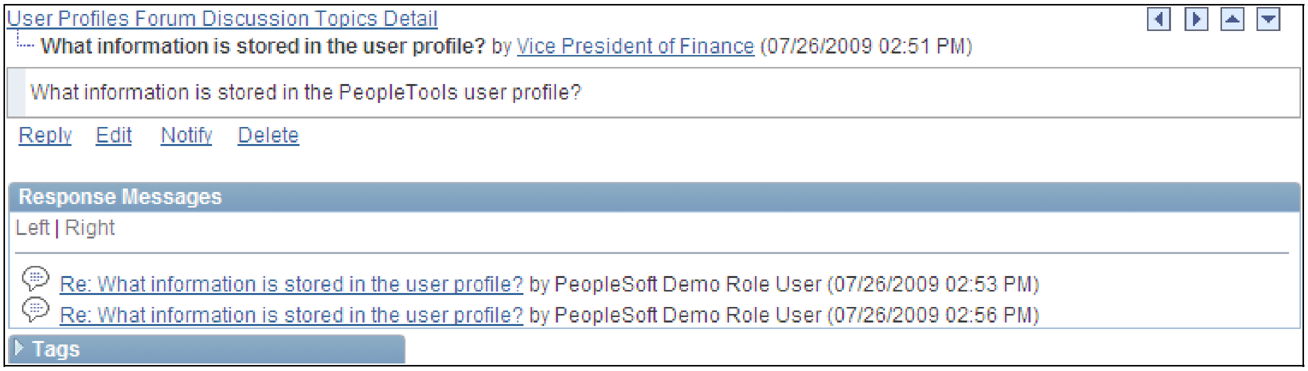
If you have selected the *File Attachment* attachment type, click to browse and select the file to upload.

Select Content

If you have selected the *Managed Content* attachment type, click to look up the items of managed content available in the content management system.

Viewing a Discussion Post

Access the post details page (click the link for a post on the discussion forum homepage or in the post details page).



Post Details page (Related Discussion service)

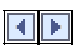
Use the post details page to view the details for a discussion post (topic or reply).

< Transaction Page> Forum Discussion Topics Detail or **<Post Title>**

Click to navigate to the discussion forum homepage or to a specific post.

<Author>

Click to view the member profile for the author of the current post.



Use the Previous Topic and Next Topic buttons to navigate to the previous or next topic in this forum.

Note. Each button is active only when there is a previous or next topic to navigate to.

Use the Previous Post and Next Post buttons to navigate up and down in the hierarchy of posts for this discussion topic.

Note. Each button is active only when there is a previous or next post to navigate to. When you are viewing the topic post, clicking Previous Post navigates to the discussion forum homepage.

Reply

Click to access the Add a Reply page to reply to this topic or reply.

Edit

Click to access the Discussion page to edit this post.

Notify

Click to access the Notify Members page to send a notification to forum participants.

Delete

Click to delete this post. Any replies to this post will also be deleted.

Tags	Click to view the Tags section for the discussion topic.

Deleting a Post

To delete a post from a discussion forum:

1. Go to the post details page for the post that you want to delete.

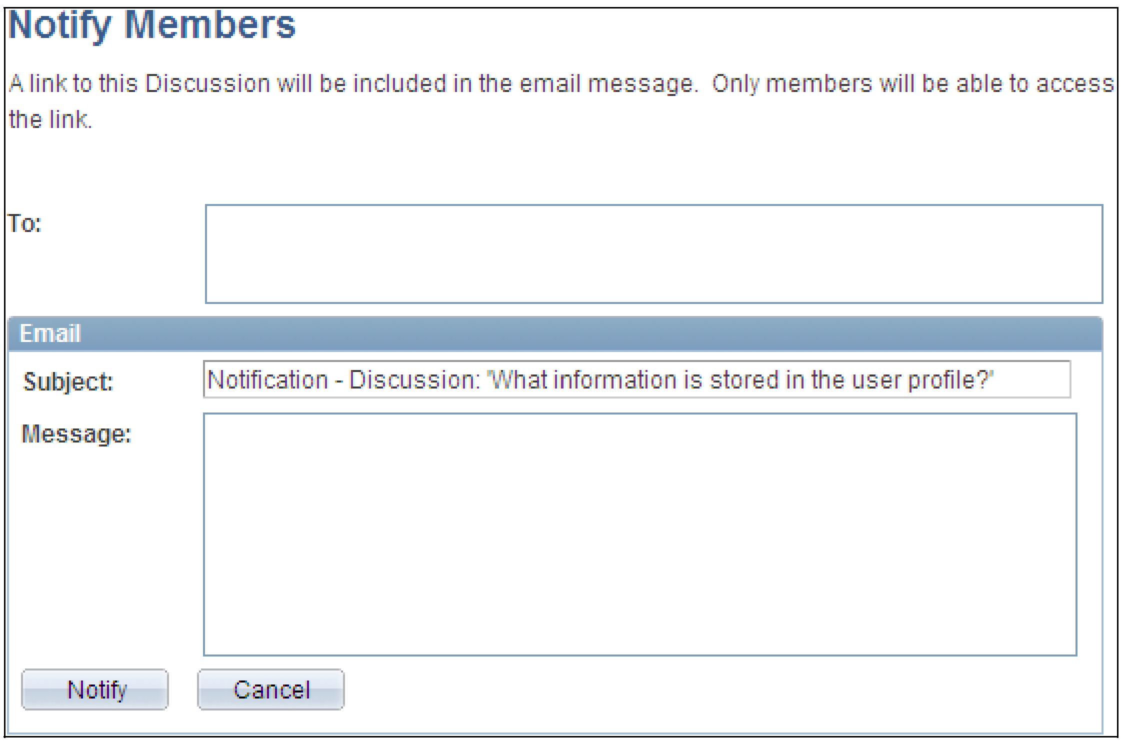
Note. If the post includes a reply, only the forum moderator can delete the post (and any associated replies). The contributor who added the original post will be unable to delete it.

---

2. Click the Delete link.
3. Click OK to confirm that you want to delete that post and any associated replies.

Sending Email Notifications to Forum Participants

Access the Notify Members page (click the Notify link on the post details page).



Notify Members page (Related Discussion service)

Use the Notify Members page to compose and send an email message to discussion forum participants. The To field is automatically populated with addresses for all members of the discussion forum who have defined an email address in their system profile.

Note. The email will contain a link to the discussion forum. Only members of the discussion forum will be able to access the forum through the link.

To	Enter additional email addresses for forum participants separated by commas.
Subject	Enter a subject for the email.
Message	Enter the message text for your email.
Notify	Click to send the notification.

Using Tags in a Discussion Forum

In a discussion forum, tags can be added and managed in the Tags section at two levels:

- At the forum level on the discussion forum homepage.
- At the topic level on the post details page.

In addition, the Tags section on the discussion forum homepage includes a tag cloud showing all tags (forum level and topic level) added to this discussion forum. The following example shows the Tags section from a discussion forum homepage:

A discussion forum homepage (Related Discussion service) showing the Tags section

In this example, *user profile* is a tag at the forum level. *password, user ID,* and *general tab* were added as tags at the topic level.

Creating, managing, and using tags is discussed in this PeopleBook.

See Chapter 12, "Working With Tags," page 263.

Searching in the Related Discussion Service

In the Related Discussion service, you can perform three types of searches:

- *Related Forums* — Search in all discussion forums in the Related Discussion service.
- *Current Forum* — Search in this forum only.
- *EP Forums* — Search in all standalone discussion forums in PeopleSoft Enterprise Portal.

This section discusses how to:

- Search in Enterprise Portal forums.
- Search for contextual information in related forums.

Searching in Enterprise Portal Forums

To search in Enterprise Portal forums:

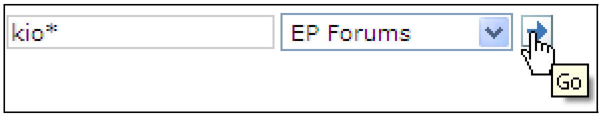
1. Enter the search text in the Search field in the Related Discussion service.

   Use * as the wildcard character.

2. Select the *EP Forums* scope.

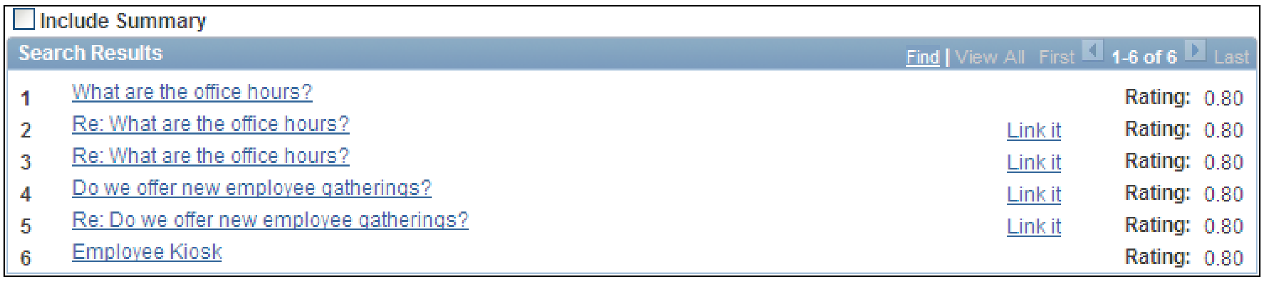
3. Click the Go button.

   The following shows an example of search text and scope with the cursor over the Go button:



Example search in the Related Discussion service

The Search Results page is displayed. The following shows the results of this example search:



Search Results page (EP Forums search scope)

Use the Search Results page to review search results, to access other posts and forums, and to link to discussion posts.

Include Summary	Select this option to show summaries in the search results.
Search Results	Click a link to view that discussion forum and post in the related content frame.
Link It	**Important!** Link It links appear for a search type of EP Forums only. Click a Link It link to link the selected post to this discussion forum. **Note.** A Link It link does not appear for a post that has already been linked to this discussion forum or for the titles of other discussion forums.

Searching for Contextual Information in Related Forums

To search for contextual information, context fields must be mapped when the Related Discussion service is assigned to the transaction instance.

See Chapter 23, "Setting Up Related Content Services," Mapping Fields for the Related Discussion Service, page 426.

To search for contextual information in related forums:

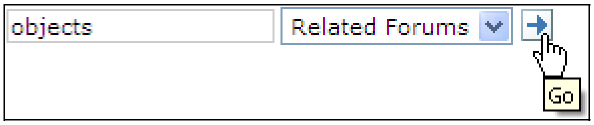
1. Enter the search text in the Search field in the Related Discussion service.

   Use * as the wildcard character.

2. Select the *Related Forums* scope.

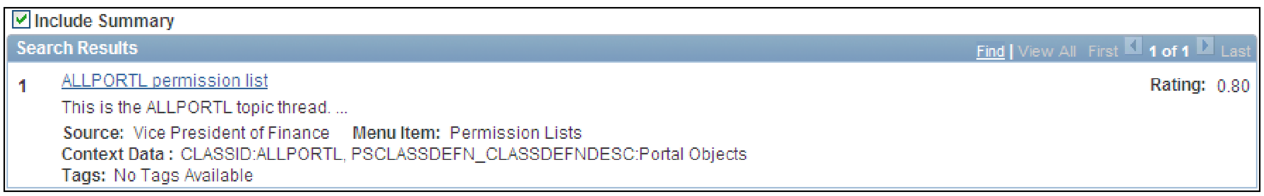
3. Click the Go button.

   The following shows an example of search text and scope with the cursor over the Go button. In this example, the search term is *objects,* data that does not occur in the discussion topic title or summary, or in the key field for the transaction.



Example contextual search in the Related Discussion service

The Search Results page is displayed. The following shows the results of this example search. The results include summary information that displays the topic title, topic summary, and context data such as the key field and additional context fields. The search term *objects* occurs in the description field only, which was added as a context field for this transaction.



Search Results page showing contextual data

Use the Search Results page to review search results, to access other posts and forums, and to link to discussion posts.

Include Summary	Select this option to show summaries in the search results.
Search Results	Click a link to view that discussion forum and post in the related content frame.

Linking Posts from Another Discussion Forum

To link to a post from an Enterprise Portal discussion forum:

1. Access the Search Results page by performing a search in the Related Discussion service.

   Note. Select a search scope of *EP Forums* to access posts that can be linked in the Related Discussion service.

2. Click a Link It link to link the selected post to this discussion forum.

Viewing the Forum Policy Statement

Access the Forum Policy page (click the Forum Policy link on the discussion forum homepage). Use the Forum Policy page to review the policy statement for the discussion forum.

Chapter 25

Working With the Related Links Service

This chapter provides an overview of the Related Links related content service and describes how to create and use links with the Related Links service.

Understanding the Related Links Service

The Related Links related content service allows you to associate links to relevant content for the current transaction instance or for all instances in a transaction. These links are available to all users of the transaction and assist in providing easy access to relevant information to execute the process. You can link to content residing in PeopleSoft Enterprise Portal—specifically, blogs, discussions, or collaborative workspaces—or external URLs. In addition, the Related Links service allows you to create a new workspace and to link that workspace to the transaction. Linked workspaces can include links back to the transactions that are linked to these workspaces. This provides you with a two-way navigation mechanism between the linked workspaces and transaction data. Moreover, this service allows you to view the discussions created using the Related Discussion service in the linked workspaces.

Creating and Using Links with the Related Links Service

This section describes how to:

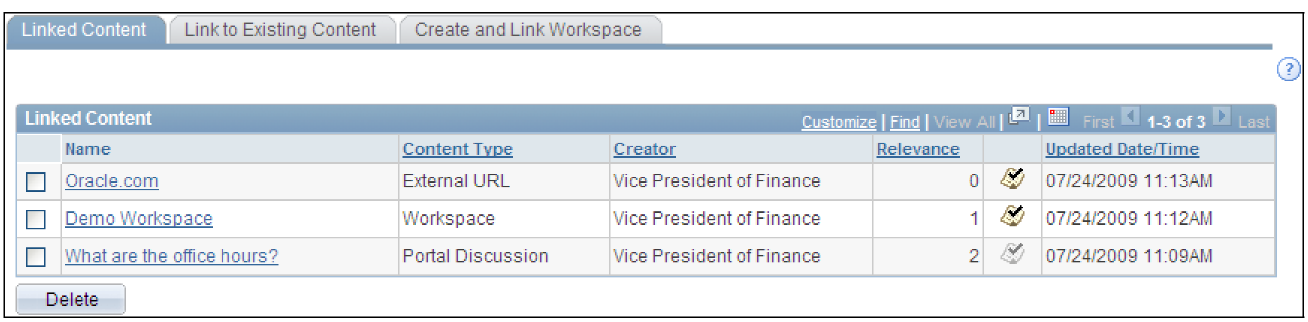
- View linked content.
- Create links to existing content.
- Create and link to a related workspace.

Pages Used to Create and Use Links with the Related Links Service

Page Name	*Definition Name*	*Navigation*	*Usage*
Linked Content	EPPRS_LINK_CNT	• On the transaction page, select Related Information. Select Related Links. • In the related content frame, select the Related Links tab. • On the Related Links tab, select Linked Content.	Navigate to linked content.
Link to Existing Content	EPPRS_ADD_LINK	On the Related Links tab, select Link to Existing Content.	Create links to existing PeopleSoft Enterprise Portal content and to external URLs.
Create and Link Workspace	EPPRS_WS_CREATE	On the Related Links tab, select Create and Link Workspace.	Create a collaborative workspace in PeopleSoft Enterprise Portal and link to this workspace.
Delete Confirmation	EPPRS_DEL_CONFIRM	Click the Delete button on the Linked Content page.	Confirm your deletion of a link.

Viewing Linked Content

Access the Linked Content page (in the related content frame, select the Related Links tab).



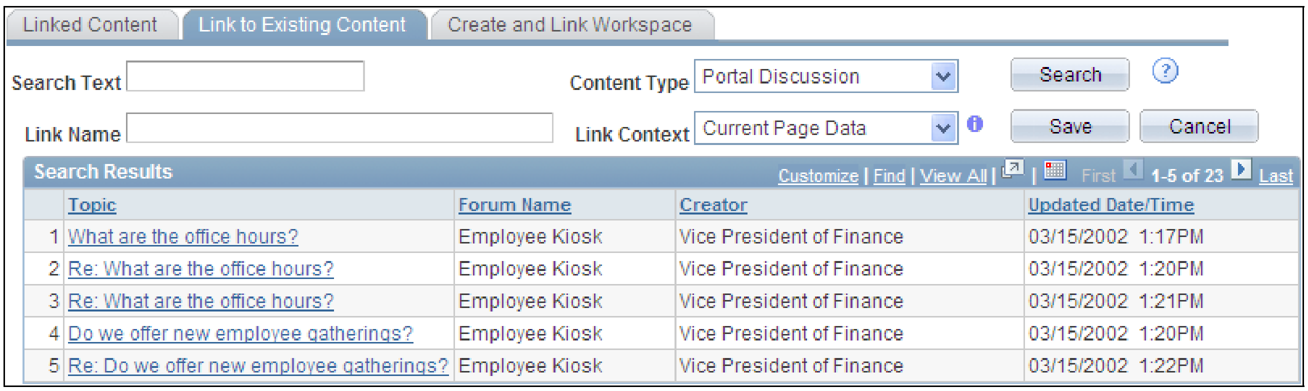
Linked Content page

Use the Linked Content page to navigate to the linked content. Clicking a link opens the link target in a separate browser window. You can also click the check mark to the right of the Relevance column to indicate whether you find a link relevant, which will add one to the current relevance score. Once you have marked a link as relevant, the check mark becomes disabled and you are unable to change your relevance rating for that link.

The links on this page are initially ordered by the date and time the link was created, in reverse chronological order. Similar to other PeopleSoft grids, you can resort the information by content type, relevance, creator, and so on.

Creating Links to Related Content

Access the Link to Existing Content page (on the Related Links tab, select Link to Existing Content).



Link to Existing Content page (showing search results for all discussion forums)

Use the Link to Existing Content page to create links to existing PeopleSoft Enterprise Portal content and to external URLs.

Search Text

Enter the search text.

Leave this field blank or use the * wildcard character to search for all instances of a given content type.

Content Type

Select the content type for the link:

Important! To search for blogs, discussions, and workspaces in the PeopleSoft Enterprise Portal database, search indexes for each of those scopes must be built and maintained in the PeopleSoft Enterprise Portal database.

- *External URL* **—** Select this option to create a link to an external URL.
- *Portal Blogs* **—** Select this option to search for postings to PeopleSoft Enterprise Portal blogs.
- *Portal Discussions* **—** Select this option to search for postings to PeopleSoft Enterprise Portal discussion forums including standalone discussion forums, discussions within linked workspaces, and Context Manager related discussions.
- *Workspaces* **—** Select this option to search for PeopleSoft Enterprise Portal collaborative workspaces.

Search

Click to perform the search.

Note. To search for blogs, discussion forums, or workspaces, the appropriate search indexes must have be built and maintained by the portal administrator.

See *PeopleSoft Enterprise Portal 9.1 PeopleBook: Portal and Site Administration*, "Building Search Indexes," Building Search Indexes.

Link Name

Provides the link name on the Linked Content page. This field defaults to the name of the item selected in the search results; you can override this default link name. You must enter a name for an external URL.

Link Context

Select the context for the link:

- *Current Page Data* **—** Indicates that the link is unique to the current transaction instance.
- *Current Application Data* **—** Indicates that the link is available to all instances of this transaction.

Save

Click the Save button to save the link and return to the Linked Content page.

Note. Select a link in the search results prior to clicking the Save button; otherwise, an error message or an invalid link will result.

Cancel

Click return to the Linked Content page without creating a link.

Include Related Discussions to the Workspace

Note. This option is available only when *Workspaces* is selected as the content type.

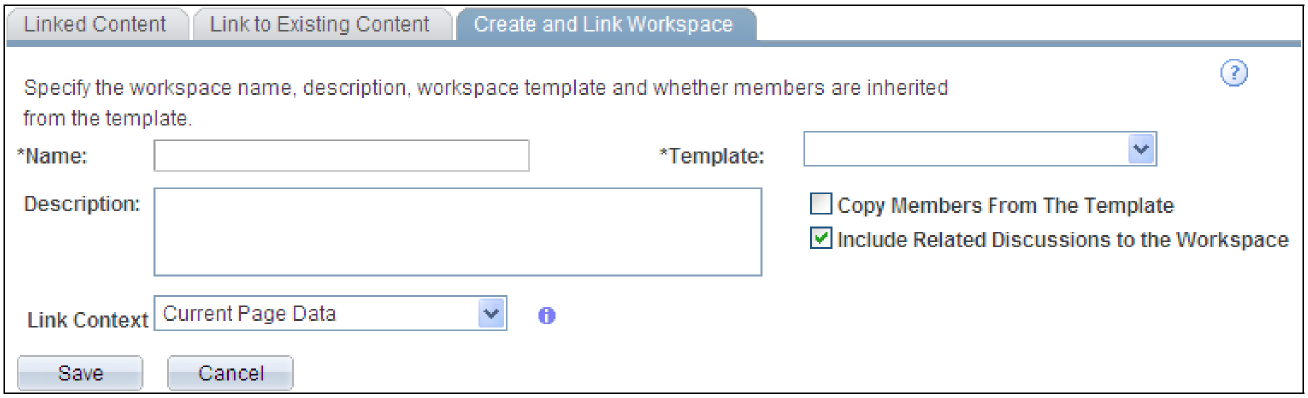
Select this option to include any related discussions associated with this transaction in the workspace.

Search Results

Select an item from the search results to be the target of the link.

Creating and Linking to a Related Workspace

Access the Create and Link Workspace page (on the Related Links tab, select Create and Link Workspace).



Create and Link Workspace page

Use the Create and Link Workspace page to create a new workspace and to create a link to that workspace from the current transaction or transaction instance.

Name

Enter a name for the workspace. The name of the workspace appears in the header on the workspace homepage, at the top of the workspace menu, and anywhere workspaces are listed—for example, on pages to search for or manage workspaces, in pagelets, in search results, and so on.

Template

Select the template on which you want to base your linked workspace.

Note. If the transaction has been registered with a template in PeopleSoft Enterprise Portal, then that template is automatically be selected.

Description

Enter an optional description for the workspace.

This description also becomes the default welcome text, which is displayed in the Welcome module if that module is configured for this workspace.

Copy Members From the Template

Check this option to copy the members and privileges from the workspace template.

Include Related Discussions to the Workspace

Select this option to include any related discussions associated with this transaction in the workspace.

Save

Click the Save button to create the workspace.

The linked workspace opens in a new window with the Administration - Properties page displayed

Cancel	Click return to the Linked Content page without creating a workspace.

Chapter 26

Working With the Related Tags Service

This chapter provides an overview of the Related Tags related content service and describes how to create and use tags with the Related Tags service.

Understanding the Related Tags Service

The Related Tags related content service allows you to create user-specified tags for the current transaction instance. You can characterize and bookmark these transactional or business objects with terminology of your choosing, providing ease of access as well as collaborative classification of the transaction. For example, a specific vendor ID might be tagged by buyers to identify certain characteristics of the vendor. A benefits clerk, might tag a specific employee's benefits record to bookmark it for easy access later.

Creating and Using Tags in the Related Tags Service

This section describes how to:

- View and create tags in the Related Tags service.
- Search for tags in the Related Tags service.

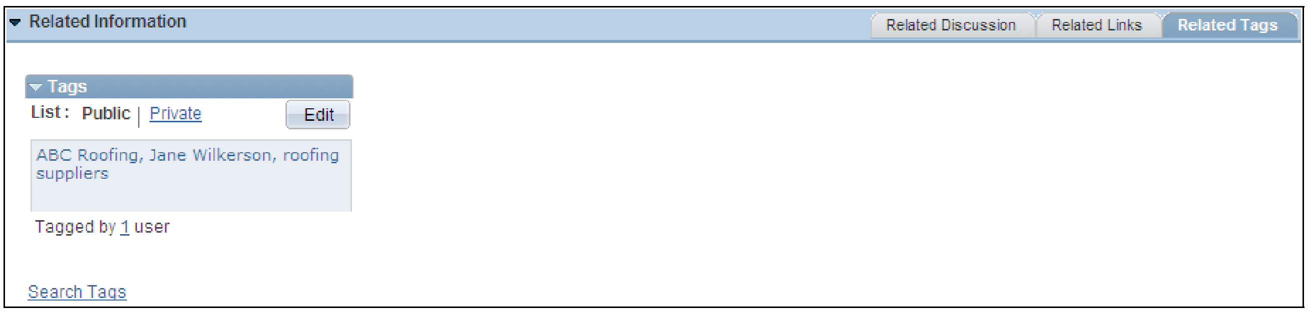
Pages Used to Create and Use Tags in the Related Tags Service

Page Name	*Definition Name*	*Navigation*	*Usage*
Related Tags	EPPTG_RC_TAGGING	• On the transaction page, select Related Information. Select Related Tags. • In the related content frame, select the Related Tags tab.	Create and view tags for this transaction instance.

Page Name	*Definition Name*	*Navigation*	*Usage*
Search Tags	EPPTG_TAG_BROWSE	• Click a tag in the Tags section. • Click the Search Tags link.	Search for tags.

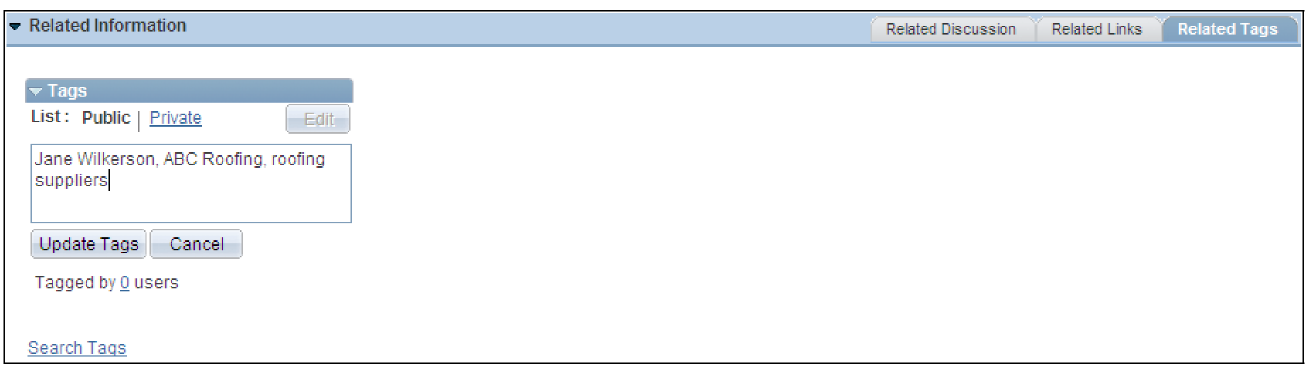
Viewing and Creating Tags in the Related Tags Service

Access the Tags section (in the related content frame, select the Related Tags tab).



Related Tags service, Tags section (view mode)

Use the Related Tags service, Tags section to view and create tags for a transaction instance. In view mode, the Edit button is active. In update mode, the Update Tags and Cancel buttons are active.



Related Tags service, Tags section (update mode)

	Click the Collapse section button to hide the content in the Tags section; click the Expand section button to reveal the content in the Tags section.
Public	Click this link to view or edit your public tags for this transaction instance.
Private	Click this link to view or edit your private tags for this transaction instance.
Edit	Click this button to create tags or update tags for this transaction instance.

<edit box>	In view mode, click a tag link to open the Search Tags page in a new browser window searching on this tag. In update mode, enter tags here separated by commas. **Important!** We recommend that you avoid special characters in tags. See Chapter 12, "Working With Tags," Special Characters and Tag Searches, page 266.
Update Tags	Click to save any changes and return to view mode.
Cancel	Click to cancel any changes and return to view mode
Tagged by # users	Mouse over the number link to view which users have tagged this item.
Search Tags	Click this link to open the Search Tags page in a new browser window without a search tag defined.

Searching for Tags in the Related Tags Service

Access the Search Tags page (click a tag in the Tags section or click the Search Tags link).

Use the Search Tags page to search for tags. On this page, you can type the tag text or click a tag link in the Tag Cloud frame. You can specify the tag namespace in which to search, as well as indicate whether to search for your public or private tags.

The use of the Search Tags page is covered this PeopleBook.

See Chapter 12, "Working With Tags," Performing Searches for Tags, page 272.

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