**Oracle® On Track Communication**

Administrator's Guide

Release 1 (1.0)

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Oracle On Track Communication Administrator's Guide, Release 1 (1.0)

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# Preface

This book documents the processes and interfaces for administering Oracle On Track Communication, Release  1 (1.0).

## Audience

This document is intended for anyone who is responsible for managing and administering an Oracle On Track Communication deployment.

## Documentation Accessibility

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## Related Documents

For more information, see the following documents in the Oracle On Track Communication 1.0 documentation set:

- *Oracle On Track Communication Administration Console Help*

- *Oracle On Track Communication Installation Guide*

- *Oracle On Track Communication Security Guide*

- *Oracle On Track Communication Developer's Guide*

- *Oracle On Track Communication SDK Documentation*

- *Oracle On Track Communication Analytics Guide*

- *Oracle On Track Communication Licensing Information*

- *Oracle On Track Communication Release Notes*

## Conventions

The following text conventions are used in this document:

| Convention | Meaning |
| --- | --- |
| **boldface** | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary. |
| *italic* | Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values. |
| `monospace` | Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter. |

# 1

# Introduction to Administering Oracle On Track Communication

Oracle On Track Communication is an Oracle Web Logic Server (WLS) Fusion Middleware application. The application includes an On Track Communication Administration Console, which you can use to configure On Track, manage users and groups, deploy add-ons to the application (Gadgets and Features), set default policies and rules, and enable or disable the application for user access.

Every screen in the Oracle On Track Communication Administration Console includes a link to the *Oracle On Track Communication Administration Console Help*. Configuration tools provided in the console is described briefly in the help. You should use this administration guide to understand the purpose and context of administration procedures; use the help to find specific detail about console screens, buttons, fields, lists, and tools.

Where appropriate, this guide includes links directly to the relevant section or topic in the help.

> **See Also:** See the *Oracle On Track Communication Administration Console Help* for brief descriptions of administration tools provided in the Oracle On Track Administration Console.

Some aspects of On Track system configuration must be performed using WLS administration and configuration tools. This guide focuses on the administration tasks which are performed using the Administration Console. Where necessary, you will be directed to WLS documentation for tasks which must be performed using WLS.

Some configuration must be performed using Java Monitoring and Management Console (JConsole). This tool is available as part of the Java Developer Kit (JDK), installed as a prerequisite of On Track. This tool is typically located at the following path:

`$JDK_HOME/bin/jconsole.`

Oracle On Track Communication makes use of an Oracle Database for storage of both configuration and user data. Some configuration and maintenance tasks require access to the database. Where necessary, you will be directed to Oracle Database documentation for tasks which must be performed using SQL*Plus and other database tools.

> **See Also:** See the *Oracle On Track Communication Installation Guide* for details on how to use WLS for initial deployment and configuration of Oracle On Track Communication.

Oracle On Track Communication includes the ability to customize and deploy add-ons to the On Track Communication client. These add-ons are called Gadgets and Features.

# Oracle On Track Communication Deployment Scenarios

Oracle On Track Communication runs as an Oracle Web Logic Server (WLS) Fusion Middleware installation application within the Web Logic Server environment. You can have multiple instances on the same or separate machine. You can create multiple tablespaces in your Oracle Database, each for a separate instance of On Track. Any On Track instance can include an instance of the administration console.

If you have multiple On Track instances, they communicate with each other using SSL. For more information about configuring SSL, see the *Oracle On Track Communication Security Guide*.

For more information about how to configure Oracle On Track Communication to suit your organization's needs, see the *Oracle On Track Communication Installation Guide*.

# Oracle On Track Communication Administration Console

The Oracle On Track Communication Administration Console is your primary interface for configuring the On Track application, managing users and groups, deploying add-ons to the application (Gadgets and Features), setting default policies and rules, and enabling or disabling the application for user access.

## Connecting to Oracle On Track Server Instances with the Administration Console

You can use any instance of the administration console to connect to any On Track instance by entering the connection information on the login page.

You can access the console on any On Track server by navigating to the following URL on that server:

```
https://<server_name>.<domain>:<port>/ontrackAdmin/
```

The default server instance is defined in the web.xml file for the On Track Application running on the server you connect to. If the default server instance is the server you want to access, you can leave the **Override default connection with the following parameters:** section blank.

The following parameters in the web.xml file determine the default server connection used by the administration console login page:

- `server.connection.protocol`: The default value is `https`.

- `server.connection.host`: The default value is `https localhost`

- `server.connection.port`: The default value is `https 443`

> **See Also:** For step-by-step instructions on connecting to any On Track instance with the administration console, see "Connecting to an On Track Instance" in *Oracle On Track Communication Administration Console Help*.

# 2

# Configuring Oracle On Track Communication

This chapter describes how to configure Oracle On Track Communication, after you have completed all installation tasks detailed in the *Oracle On Track Communication Installation Guide*. It contains the following topics:

- Managing Administrator Accounts and Privileges
- Managing the Oracle On Track Application
- Configuring Realms
- Configuring Oracle On Track with Oracle Access Manager
- Managing Oracle Text
- Managing Conferences
- Enabling Frame Embedding in Oracle On Track Communication Client
- Configuring DNS Resolvable Host Names for CORS Support

## Managing Administrator Accounts and Privileges

Oracle On Track Communication allows you to assign administrator privileges to any user account. By default after installation, only the Admin account has administrator privileges. The Admin account exists in the default Database Realm.

Oracle recommends assigning administration privileges to administrators' user accounts (see "Granting Administrator Privileges to Additional Users" on page 2-2). This allows for greater accountability when administrators perform management activities in Oracle On Track.

If you are using an LDAP-based user directory, you can assign administration privileges to one or more LDAP-based users and then disable the database realm. By doing so, you prevent any user from creating an account in On Track unless that user has an account in the LDAP directory. Alternatively, you can leave the database realm enabled, but disable the **User Creation Enabled** attribute. This will allow you to continue to use the database realm default Admin account, but no new database realm accounts can be created. See "Configuring Realms" on page 2-5 for details on enabling and disabling these features.

Normal user accounts are allowed to sign in to the Oracle On Track Communication client and use the On Track plug-in for Microsoft Outlook. Users also have configurable access to various aspects of Oracle On Track. See Chapter 3, "Managing Users and Groups," for more information about user account-level privileges.

Oracle On Track provides the following set of additional privileges that you can add to any account:

- **Administrator**: A user with administrator privileges is allowed to perform administrative functions for the On Track server, including:
  - Logging in to the Administration Console
  - Managing users and groups
  - Managing realms, including enabling and disabling realms
  - Shutting down the On Track instance
  - Sending a message to all logged-in users
  - Configuring On Track Gadgets and Features
- **Developer**: A user with Developer privileges is allowed to perform specialized administrative functions. This privilege, and the actions it enables, should only be used when directed by Oracle support.
- **On Behalf Of**: This privilege allows a user to perform end-user functions on behalf of another user. This is typically used in integration scenarios, where an agent posts messages or uploads documents on behalf of another user. When this privilege is used, the message that is created will indicate both the user that performed the action, and the user on whose behalf it was performed.

## Managing the Admin User

During installation, you will have configured the default Admin account in the database realm. You initially set the Admin account password using an MBean.

After installation, you can manage the Admin account just like any other account in the database realm. From the Administration Console, click Users, and then search for the Admin account. Select the account and click Open Properties.

Do not disable the Admin account (by un-checking the **This user account is enabled** check box) unless you have added administration privileges to another account first. If you disable the only Admin account, you must use the manual MBean process to reset the account.

## Granting Administrator Privileges to Additional Users

Oracle recommends assigning administration privileges to administrators' user accounts. This allows for greater accountability when administrators perform management activities in Oracle On Track.

You can add the Administrator privilege to any user account in a Database Realm or LDAP Realm by using the administration console:

1. Log in to the Administration Console
2. Click **Users**
3. Search for a desired user account, or perform a search for % to return a list of all users
4. Select a user and click **Open Properties**, or double-click on a user
5. Check the **This user has Administrator** privilege check box to assign the privilege to the user
6. Click **Save**

# Managing the Oracle On Track Application

You can manage the Oracle On Track Application using the On Track Administration Console, Oracle Web Logic Server administration interfaces, and Java MBeans.

From the administration console, you can configure the application name, the time zone for the server, the host and port name, set up an external mail host, and configure OutsideIn, Ghostscript, voice recording, application sharing, and the location of the Microsoft Outlook client plug-in.

This section contains the following topics:

- Configuring Server Host and Port
- Configuring On Track with an External Mail Host
- Configuring Document Sharing with Oracle Outside In
- Configuring Document Viewing with Ghostscript
- Configuring Voice Conferencing and Recording
- Configuring On Track Real-Time Features Plug-In

## Configuring Server Host and Port

From the administration console, click **Application** to configure the On Track Application host and port. Only the host name(s), port, method (secure HTTPS) and server context path are configurable in the administration console.

> **See Also:**
>
> - For a description of each of these configuration fields, see "Applications" in the *Oracle On Track Communication Administration Console Help*.
>
> - To configure other aspects of the On Track Application using Web Logic Server tools, see

## Configuring On Track with an External Mail Host

Oracle On Track Communication can use an e-mail invitation method to provision new users in the database realm. You can invite a user from the administration console, or (if enabled) users can invite other users from within the On Track Communication client. On Track can also e-mail daily digests, password reset notices, and other end-user notifications.

To allow e-mail functionality you must configure On Track with an external mail host.

From the administration console, click **Application** to configure the On Track Application with an external mail host. Enter the mail host name and port, an e-mail address to use in the From field for invitation e-mails, and (if necessary) a username and password to authenticate with the e-mail server.

You can disable the use of external e-mail communications by changing **Mail** from **Enabled** to **Disabled**.

> **See Also:** For a description of each of these configuration fields, see "Applications" in the *Oracle On Track Communication Administration Console Help*.

## Configuring Document Sharing with Oracle Outside In

Oracle Outside In technology renders a viewable image of a variety of document formats in the On Track Communication client. It allows users to review and comment on documents without needing to download them or install a specific application for a given document type.

You can configure and enable document display using Oracle Outside In for Oracle On Track Communication.

> **Note:** Oracle Outside In is disabled by default after installation. You must set it to **Enabled** as a post-install configuration step.

From the administration console, click **Application** to configure the On Track Application to use Oracle Outside In.

> **See Also:**
>
> - For a description of the Oracle Outside In configuration fields, see "Applications" in the *Oracle On Track Communication Administration Console Help*.
>
> - For information and documentation of Oracle Outside In technology, see the following page on the Oracle Technology Network website:
>
>   http://www.oracle.com/technetwork/middleware/content-management/oit-all-085236.html

### Configuring Font Directories for Oracle Outside In

In order to generate thumbnail and page images of document pages, Outside In requires access to True Type fonts that match the fonts in uploaded documents. If you don't have appropriate fonts (for example, you upload a document with Japanese text but you don't have any Japanese fonts), characters will appear as asterisks (*).

You should ensure the On Track Application host system has appropriate fonts installed. On hosts running Microsoft Windows, the application locates the appropriate fonts automatically. On Linux and Solaris, you must set the font paths from the administration console:

1. From the administration console, click **Application** to configure the On Track Application

2. Enter one or more paths to folders containing fonts in the **OutsideIn Font Directory** field on your Linux or Solaris host. You can enter multiple paths, separated by the colon character (:). OutsideIn will not recursively descend font directories, so if you have subdirectories in a main font directory, you must specify each subdirectory separately.

   For example:

   ```
   /usr/share/fonts/ja/TrueType:/usr/share/fonts/zh_
   TW/TrueType:/usr/share/fonts/liberation
   ```

3. Click **Save** to save your configuration changes.

### Configuring Document Viewing with Ghostscript

You can configure and enable document viewing using Ghostscript for Oracle On Track Communication.

From the administration console, click **Application** to configure the On Track Application to use Ghostscript. You must indicate the Ghostscript executable location. On Linux and Solaris, you can find it using the following command:

```
$which gs
```

> **See Also:** For a description of the Ghostscript configuration fields, see "Applications" in the *Oracle On Track Communication Administration Console Help*.

### Configuring Voice Conferencing and Recording

You can configure and enable voice conferencing and recording using the voice conferencing feature of Oracle On Track Communication.

From the administration console, click **Application** to configure the On Track Application to use voice conferencing.

> **See Also:** For a description of the **Voice** configuration fields, see "Applications" in the *Oracle On Track Communication Administration Console Help*.

### Configuring On Track Real-Time Features Plug-In

The Oracle On Track Real-Time Features Plug-in application allows users to share the display of a desktop application using a Web browser. From Oracle On Track Communication, users can click a button on the bottom left of the screen to download and install the application sharing plug-in.

You can configure and enable application sharing for Oracle On Track Communication. Application sharing requires users to download a browser plug-in and a port to be opened for connections.

From the administration console, click **Application** to configure the On Track Application to use application sharing.

You can configure where on your network the application sharing plug-in installation files are located. From the administration console, click **Application**, and then enter a URL in the **Plug-In Distribution URL** field. The default location is:

```
HTTP[s]://<On Track host>:<On Track Port>/ontrack/plugin
```

> **See Also:** For a description of the application sharing configuration fields, see "Applications" in the *Oracle On Track Communication Administration Console Help*.

## Configuring Realms

In Oracle On Track, a realm represents one source for user accounts. On Track supports Database Realms and LDAP Realms. Database Realms control user accounts stored in the Oracle Database configured with your On Track deployment. LDAP Realms are external LDAP-based user directories configured to work with your On Track deployment. When a user that exists in your LDAP realm first authenticates with

Oracle On Track, a corresponding user object is created in On Track by querying the LDAP realm and synchronizing a subset of the user account information.

Realm configuration defines who can access your On Track instance, and it affects what privileges those users have. Some of those privileges are initially set for new users based on realm properties. For example, if a user is created in a realm that has **Can Discover Default** set to `true`, then that user will have the Can Discover privilege by default when the user account is created.

For more information about user priviliges, see "Reviewing and Modifying User Privileges" on page 3-2.

## Configuring Common Realm Properties

You can modify the following realm policy options, which are common to both LDAP and database realms, using the Administration Console:

- **User creation enabled**: Allows users to be created in this realm. You might disable this option on a database realm if all of your user accounts are in an LDAP Realm. Accounts already created in the realm (such as the default Admin account in the database realm) will still be enabled.

- **Group creation enabled**: Allows groups to be created in this realm.

- **Enable Self Signup from Login Page**: if **User creation enabled** is also enabled, any person who navigates to the On Track Communication login page can create an account and access the system. You can disable this option to only allow users that are explicitly invited to create an account.

- **Allow Password Reset**: Allows a user to reset a lost or forgotten password by using the reset function on the On Track Communication login page. An e-mail will be sent to the user containing a link they can use to set a new password.

- **Allow Password Change**: Allows a user to set a new password, but only if they enter the current password for the account.

- **Users can see public conversations by default**: Sets a default policy for users created in this realm, which determines whether the user can see public conversations. This option can be set on individual accounts as well, and changing this option does not affect the setting on already-created accounts.

- **Users can create new conversations by default**: Sets a default policy for users created in this realm, which determines whether the user can create new conversations. This option can be set on individual accounts as well, and changing this option does not affect the setting on already-created accounts.

- **Conversations are discoverable by default**: Sets a default policy for users created in this realm, which determines whether new conversations created by the user are discoverable to other users (as opposed to requiring an invitation to participate). This option can be set on individual accounts as well, and changing this option does not affect the setting on already-created accounts.

---

**Note:** The three 'by default' options set the default behavior for new user accounts. These policies can be modified on a per-user basis, and changing these options does not affect previously-created user accounts. Only the default policies for new accounts are controlled by these options.

---

## Configuring the Database Realm

Every On Track configuration includes one database realm. The default administrator account, 'Admin,' is created in this realm during installation.

> **See Also:**   You can configure the database realm using the Oracle On Track Administration Console. For step-by-step instructions, see: "Managing Database Realms" in the *Oracle On Track Communication Administration Console Help*.

This section contains the following topics:

- Enabling and Disabling the Database Realm
- Configuring Database Realm Password Policies

### Enabling and Disabling the Database Realm

The first option shown on the database realm management page  is **Database realm enabled**. This option is set to enabled by default. By deselecting this check box, you can disable all user accounts and groups stored in the database realm.

When the realm is enabled, the following functions are available:

- Users with accounts in the database realm can log in
- A search in the On Track application can return users in this realm
- New users can use the Self-Signup feature (if **Enable Self Signup from Login Page** is also enabled)
- Users can perform Group searches

You must always exercise caution when disabling the database realm because the default Admin account is stored in this realm. Disabling the realm disables your ability to log in to the On Track Administration Console with the default Admin account.

> **WARNING:**   Since the default Admin account is a database realm account, disabling the database realm also disables login to the console using the default Admin account. If this realm has the only account with the Administrator privilege, you will be unable to log in to the Administration Console after disabling the database realm.

If you disable the database realm and subsequently cannot log back in to re-enable it, you can perform the following steps to re-enable the database realm manually using the JConsole tool:

**Manually Enabling the Database Realm**

1. Run the Java Monitoring and Management Console (JConsole), available as part of the JDK, under `$JDK_HOME/bin/jconsole`

2. Browse **MBeans** and find the following:

   ```
   /base_
   domain/custom/OnTrack(1.0.0.0).Configuration/OnTrack(1.0.0.0)
   .Configuration:type=RealmInternal
   ```

3. Set **Enabled** to `true`

### Configuring Database Realm Password Policies

You can modify the following database realm password policies to control the minimum password security requirements for your On Track deployment:

**Password Policy Options:**

- **Minimum Password Length**: The system will reject new passwords of less than the specified length.

- **Maximum Password Length**: The system will reject new passwords of greater than the specified length.

- **Number of lower case letters included**: The system will reject new passwords containing fewer than the specified number of lower case letters (a-z).

- **Number of upper case letters included**: The system will reject new passwords containing fewer than the specified number of upper case letters (A-Z).

- **Number of digits included**: The system will reject new passwords containing fewer than the specified number of numerical digits (0-9).

- **Number of special characters included**: The system will reject new passwords containing fewer than the specified number of special characters.

- **Number of days to change the password**: The system will require users to create a new password after the specified number of days have passed since the last time the password was changed.

---

**Caution:** If the Admin account password expires, such as due to the password not being changed within the specified number of days, the account cannot log in to the administration console. You must then use WLST to reset the password.

---

- **Maximum Password History**: The system can prevent a user from re-using previously used passwords. This value determines the number of old passwords retained by the system to check for recently used passwords.

## Configuring LDAP Realms

Oracle On Track can connect to a third-party LDAP-based user directory. An LDAP Realm, if configured, delegates authentication of users in the realm to the LDAP directory. This allows LDAP users to use the password stored in the LDAP directory, rather than creating a new password specifically for On Track. It also provides an easy way to give a number of users access to On Track without requiring that those users go through an explicit provisioning or sign-up process.

**See Also:**

- For a detailed explanation of LDAP realm properties and step-by-step instructions on creating and managing LDAP realms, see: "Creating and Managing LDAP Realms" in the *Oracle On Track Communication Administration Console Help*

- For information about managing users whose accounts are mastered in an LDAP-based user directory, see "Managing LDAP-Based Users" on page 3-2.

### Enabling and Disabling the LDAP Realm

The first option shown on the LDAP realm properties list is **LDAP realm enabled**. This option is set to enabled by default. By deselecting this check box, you can disable all user accounts and groups stored in the LDAP realm.

When the LDAP realm is enabled, the following functions are available:

- Users with accounts in the LDAP realm can log in

- LDAP realm users can be found by other users using search from within the end-user clients.

- New users can use the Self-Signup feature (if **Enable Self Signup from Login Page** is also enabled) to create an On Track account using their LDAP-based credentials

- Users can perform Group searches

# Configuring Oracle On Track with Oracle Access Manager

On Track configuration with Oracle Access Manager (OAM) requires changes to be made to the deployment descriptors and a specific configuration of OAM polices. Contact Oracle Support for the steps needed for this integration.

# Managing Oracle Text

The On Track server uses Oracle Text for indexing the contents of messages and documents. Oracle Text index performance may benefit from periodic maintenance tasks, depending on your usage patterns. When content is added to On Track, the Oracle Text index is not updated immediately. By default, the index is updated once per minute. This allows newly added content to become searchable in a short amount of time. With frequent updates, however, the index can become fragmented, resulting in sub-optimal search performance. Oracle Text provides database administrators with the tools required to optimize this index. The specifics of how to optimize the index, and how frequently, will depend on your deployment's requirements and usage patterns.

If your deployment sees very frequent additions of content (documents or messages), and you are comfortable with a longer delay before that content is searchable, you can prevent some of the fragmentation issues by modifying the index to sync less frequently.

The name of the On Track text index is `XContentObjects$TI_01`.

You can use the procedures in the CTX_REPORT package to analyze the current status of the index.

For more information, see "The CTX REPORT Package" in Chapter 10, "Administering Oracle Text," of the *Oracle Text Application Developer's Guide*.

You can use the OPTIMIZE_INDEX procedure in the CTX_DDL package to optimize the index.

For more information, see "OPTIMIZE_INDEX" in Chapter 7, "CTX_DDL Package" of the *Oracle Text Reference*.

## Managing Conferences

Conferences are live meetings that users can set up to share applications and chat using a voice interface.

On Track conferences are always created from within the end user On Track client. From the On Track Administration Console, you can view details of currently-running conferences and, if necessary, end a conference.

When the Conferences page loads, any currently-running conferences are listed. Click **Refresh** to refresh the listing (it is not refreshed automatically).

You can force a running conference to end, disconnecting any users that are still connected. To end a conference, select it in the list and click **Stop**.

> **See Also:** For details on the fields shown on the Conferences page, see "Conferences" in the *Oracle On Track Communication Administration Console Help*.

## Enabling Frame Embedding in Oracle On Track Communication Client

To enable other applications to embed the Conversation Pane and Conversation List UI components of the On Track Web client as iFrames, you must enable frame embedding. Without this enabled, clients that make an iFrame call will have their web pages refreshed by On Track to show the referenced UI component in the full browser window: disabling the iFrame functionality.

To enable frame embedding, perform the following steps:

1.

- If you have deployed the application on admin server, then start the server by running the following:

   On Linux and Solaris: `<MIDDLEWARE HOME>/user_projects/domains/base_domain/startWebLogic.sh`

   On Windows: click **Start** | **All Programs** | **Oracle WebLogic** | **User projects** | <domain> | **Start Admin Server for Weblogic Server Domain**

   Where <domain> is the entry in the Windows Start menu for your domain.

- If you have deployed the application on a managed server, then ensure that the admin server is running and run the following command:

   ```
   ./startManagedWebLogic.sh OnTrackServer
   ```

2. Navigate to the `oracle_common/common/bin` directory in your Oracle WebLogic Server Home and run the following commands:

   On Linux and Solaris: run `wlst.sh`

   On Windows, navigate to the bin directory in your WebLogic Server home. For example:

   C:\Oracle\Middleware\oracle_common\common\bin

   Run: `wlst.cmd`

3. To connect to the managed server, run the `connect()` command and enter the following value when prompted:

   ```
   connect()
   username:
   password:
   ```

```
admin server url:
```

> **Note:** You must connect to the managed server hosting Oracle On Track. If you installed Oracle On Track in a managed server, then use the Managed Server `host:port` to connect.

**4.** Run the following commands to enable frame embedding:

```
ls();
cd('OnTrack(1.0.0.0).Configuration')
cd('OnTrack(1.0.0.0).Configuration:type=Build')
set('waggle.server.quipu.allow.frame.embedding','true');
exit();
```

# Configuring DNS Resolvable Host Names for CORS Support

For enterprises running browsers in addition to or except Microsoft Internet Explorer 8, Oracle recommends the install machine have two DNS-resolvable host names assigned to it.  Web browsers limit the number of connections that can be made to a single host name at once, so having at least two hosts doubles the number of simultaneous connections allowed to Oracle On Track.

Microsoft Internet Explorer 8 does not support the Cross-Origin Request Specification (CORS) and therefore IE8 users do not derive benefit from this action. For other browsers, using two or more DNS-resolvable host names allows for other modes of usage, such as support for more windowsor tabs being open at once without negatively impacting performance.

Not implementing this step could cause performance degradation if using multiple windows or tabs. Symptoms may include slow response times in the form of messages seeming to take longer than normal to appear when added to a conversation, presence not being updated in a timely manner, and so forth. All of these symptoms suggest connection contention, as the browser is trying to allocate more connections than are available in the default pool.

Property Name:  waggle.server.host.names (takes a comma separated list of host names (aliases)).

Ordering of the host names is significant. The first host name listed will be used for the front channel, and it will be the CORS Origin host name that is used in subsequent calls to the back channel.

# 3

# Managing Users and Groups

You can review and manage user accounts, and invite new users to access Oracle On Track Communication, using the On Track Administration Console.

This chapter contains the following topics:

- Searching for Users and Groups
- Managing Users in the Database Realm
- Managing LDAP-Based Users
- Reviewing and Modifying User Privileges
- Unlocking User Accounts
- Reviewing Groups

## Searching for Users and Groups

From the Users or Groups page, you can search for any On Track user or group, including those in the database or an LDAP realm. Enter all or part of the user's or group's name in the search field and click **Search**.

To return a list of all users or groups, leave the search field blank (or enter the wildcard character, %) and click **Search**. All user accounts or groups in On Track will be listed.

## Managing Users in the Database Realm

Every On Track deployment includes one database realm. User accounts are either created in the database realm, or created in an LDAP directory and then synchronized with an LDAP Realm. The default Admin account is always seeded in the database realm.

To manage users in the database realm, connect to the On Track Administration Console, and click **Users**. Perform a search and then double-click the user or select a user and click **Open Properties**

This section contains the following topics:

- Inviting a User

## Inviting a User

If the On Track Database Realm has **User Creation** enabled, you can invite a user from the administration console.

> **Note:** If **Enable Self Signup from Login Page** is also enabled, you do not need to individually invite users. Instead, you can publicize the URL for the Oracle On Track Communication end-user client login page, and users can then create their own accounts.

To invite a user, from the Users page, click **Create User**. Enter an e-mail address for the user and click **Create**. An invitation e-mail will be sent to the user containing a link which they can click to access their account, and an account will be created for them.

Once the user uses the link to log in, their account will be marked as **This user is verified** in the user properties.

Users invited in this manner are never added to an LDAP Realm. If you want to add users to an LDAP realm, see "Managing LDAP-Based Users" on page 3-2.

> **See Also:** To set user creation policies for your database realm, see "Configuring Realms" on page 2-5.

## Managing LDAP-Based Users

Oracle On Track Communication can be configured with an LDAP-based user directory by creating and configuring an LDAP Realm. Once communication with the LDAP directory is established, users that exist in the LDAP directory can be added as users of On Track.

You can configure an LDAP Realm to allow any user that exists in the LDAP directory to use self signup. If **Enable Self Signup from Login Page** is enabled for the LDAP Realm, you do not need to individually invite users. Instead, you can publicize the URL for the Oracle On Track Communication end-user client login page, and users can then log in to Oracle On track. The first time such a user authenticates, On Track creates a corresponding account for them in the LDAP Realm by synchronizing a subset of user data from the LDAP directory.

You can use LDAP Search configuration to confgure On Track to allow all or a subset of LDAP user accounts to authenticate and be synchronized with your On Track LDAP Realm.

LDAP Realm users are always authenticated directly with the LDAP directory. These users never configure a separate password for Oracle On Track.

To review an LDAP Realm user's account and configure their user properties, connect to the On Track Administration Console, and click **Users**. Perform a search and then double-click the user or select a user and click **Open Properties**.

### Configuring LDAP

For information about configuring Oracle On Track to use an LDAP-based user directory, see "Configuring LDAP Realms" on page 2-8.

### Reviewing and Modifying User Privileges

When a user account is created in Oracle On Track, it is granted a set of privileges based on the default privileges for the user's realm. Subsequently, you can alter user privileges individually.

The following privileges are available:

- **Verified**: Existence of the user account has been verified by On Track, by one of two mechanisms:

    - The user was located in an LDAP directory, as defined by an LDAP realm.

    - An e-mail was sent to the user, and the user clicked on the link in that e-mail to verify their identity.

- **Enabled**: Determines whether the user can log in. If this privilege is not enabled, the user can not log in to On Track.

- **Admin**: user is allowed to perform administrative functions for the On Track server. For example, a user with Admin privileges can:

    - Manage users and groups

    - Manage realms

    - Shut down the On Track application instance

    - Send a message to all logged in users

- **Act on Behalf Of**: The user is allowed to perform end-user functions on behalf of another user. This is typically used in integration scenarios, where an agent posts messages or uploads documents on behalf of another user. When this privilege is used, the message that is created will indicate both the user that performed the action, and the user on whose behalf it was performed.

- **Developer**: The user is allowed to perform specialized administrative functions. This privilege, and the actions it enables, should only be used when directed by Oracle support.

- **Can Discover**: The user can see Public conversations, even if the user is not a member of that conversation.

- **Can Create Conversation**: The user can create new conversations.

- **Conversation Discoverable by Default**: Whether new conversations that are created by this user are public by default.

    > **See Also:** The default settings for Discover, Create Conversation, and Conversation Discoverable are set by realm configuration properties. You can then modify the settings on a per-user basis using the above user account settings.
    >
    > For more information on configuring realm properties, see: "Configuring Realms" on page 2-5

### Discoverability Privileges

Discoverability privileges are typically used in a scenario where an On Track instance is used by both employees and guests or outside workers (such as consultants, vendors, or customers). You might want your employees to create public conversations that can be seen by other employees, but not by guests. In this case, employees would have "Can Discover" set to true, and guests would have it set to false. Furthermore, you might not want outsiders to create private conversations; if they did, they would be using On Track resources with no benefit to the corporation. In this case, outsiders would have "Conversation Discoverable Default" set to true, so that new conversations that they create will be public (and therefore can be seen by employees who have "Can Discover" set to true.)

## Unlocking User Accounts

If a user attempts to log in to Oracle On Track Communication but provides incorrect authentication credentials five times, the user account will be temporarily locked. When you search for users in the Users page of the On Track Administration Console, locked users have a lock icon in the lock column.

You can manually unlock an account by selecting the user and clicking the **Unlock User** button.

If you do not manually unlock a user account, it will be unlocked automatically after 20 minutes.

## Reviewing Groups

In Oracle On Track Communication, groups are created in two ways:

- Users can create groups from within the On Track Communication client
- Groups that exist in an LDAP-based user directory can be synchronized with an On Track LDAP Realm

You can use the On Track Administration Console to review the properties of these groups.

To review groups, connect to the On Track Administration Console, and click **Groups**. Perform a search and then double-click the group or select a group and click **Open Properties**.

> **See Also:** For a description of group properties, see "Managing Groups" in the *Oracle On Track Communication Administration Console Help*.

# 4

## Managing Gadgets and Features

Oracle On Track Communication allows you to add plug-ins to the end user interface. These plug-ins are called Gadgets and Features.

> **See Also:** For sample code and reference material to assist in the development of gadgets and features, see: *Oracle On Track Communication Developer's Guide*.

This section contains the following topics:

- Adding and Configuring Oracle On Track Gadgets
- Adding and Configuring Oracle On Track Features

## Adding and Configuring Oracle On Track Gadgets

A Gadget is a plug-in that provides functionality in an On Track conversation, such as a map tool, polling, or access to an external site. The *Oracle On Track Communication Developer's Guide* includes sample gadget code.

Oracle On Track comes with two gadgets which are enabled by default:

- On Track External Site Gadget
- On Track Poll Gadget

From the On Track Administration Console, you can manage gadgets on the Gadgets page.

> **See Also:** For sample code and reference material to assist in the development of gadgets, see: *Oracle On Track Communication Developer's Guide*.

### Managing Gadgets

The On Track External Site Gadget enables users to link to content stored on external sites from within a Conversation. The On Track Poll Gadget allows users to create a voting poll in a conversation.

You can manage the availability of these gadgets supplied with On Track, as well as any custom gadgets you have deployed, using the On Track Administration Console.

Log in to the administration console and click **Gadgets**. Select a gadget in the list and click **Open Properties**. From the gadget properties page, you can rename the gadget, update the gadget definition file, enable or disable a gadget, and make a gadget available or unavailable.

> **See Also:** For descriptions of the gadget configuration properties, see "Managing Gadgets" in the *Oracle On Track Communication Administration Console Help*.

## Deploying a Custom Gadget

To deploy a custom gadget, you must first create a gadget definition file. Then, you can upload the file to the Oracle On Track server.

> **See Also:**
>
> For sample code and reference material to assist in the development of custom gadgets, see: *Oracle On Track Communication Developer's Guide*
>
> For step by step instructions on how to upload a gadget definition file, see "Adding a Gadget" in the *Oracle On Track Communication Administration Console Help*.

# Adding and Configuring Oracle On Track Features

A Feature is a set of javascript files that provide the major features of the client. The *Oracle On Track Communication Developer's Guide* includes a javadoc that documents the Feature API. Oracle On Track Communication comes configured with six features:

- Core
- Dynamic-Height
- Ontrack
- RPC
- Setprefs
- Settitle

You should not modify or disable any of these default features unless advised to do so by Oracle Support. Doing so may disable critical functions of Oracle On Track Communication.

> **See Also:** For sample code and reference material to assist in the development of features, see: *Oracle On Track Communication Developer's Guide*.

## Managing Custom Features

You can manage any custom features you have added to Oracle On Track using the Oracle On Track Administration Console. Log in to the administration console and click **Features**. Select a feature in the list and click **Open Properties**. From the feature properties page, you can alter the feature's name, version number, and manage the javascript files that are used to define the feature.

To manage a feature file, select the file in the **Feature File Properties** list and click **Open Properties**. From the file properties page, you can change the file name, and upload a new file to replace the current one.

The order of feature javascript files is significant. You can change the order of the javascript files for a feature. Select a file in the **Feature File Properties** list and click **Move Up** or **Move Down** to move it up or down in the list of files.

> **Caution:** Do not make changes to the default features that come with Oracle On Track Communication unless advised to do so by Oracle Support. Doing so may disable critical functions of Oracle On Track Communication.

## Deploying a Custom Feature

To deploy a custom feature, you must first create the feature using javascript and the Oracle On Track feature API. Then, you can upload the javascript files to the Oracle On Track server.

> **See Also:**
>
> For sample code and reference material to assist in the development of custom features, see: *Oracle On Track Communication Developer's Guide*
>
> For step by step instructions on how to upload a feature, see "Adding a Feature" in the *Oracle On Track Communication Administration Console Help*.