

Oracle® Fusion Middleware

Tutorial for Oracle WebCenter Portal: Spaces

11g Release 1 (11.1.1.6.0)

E10277-04

November 2011

Oracle Fusion Middleware Tutorial for Oracle WebCenter Portal: Spaces, 11g Release 1 (11.1.1.6.0)

E10277-04

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Primary Author: Promila Chitkara

Contributor: Marcie Caccamo, Pankaj Mittal, Vihang Pathak

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Preface

This tutorial introduces you to Oracle WebCenter Portal: Spaces, a powerful platform for self-service portal creation and management as well as social collaboration. Developed using the Framework and services in Oracle WebCenter Portal, Spaces allows you to quickly and easily build a custom application that supports business users in all their daily tasks: collaborating with people, sharing knowledge via documents, messaging, organizing groups, scheduling events via calendar, and so on. In addition, this document explains how to use Spaces to operate within a *space*, a key offering designed to help small groups share information and interact in a collaborative setting.

Audience

This document is intended for users wishing to familiarize themselves with Oracle WebCenter Portal: Spaces. While the bulk of the tutorial is geared toward business users, there are some set-up tasks that must be completed by an administrator so that users can work through the tutorial successfully. These steps are documented in [Chapter 1, "Preparing for the Tutorial."](#)

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Related Documents

For more information, see the following documents in the Oracle WebCenter Portal and Oracle Fusion Middleware documentation sets:

- *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*
- *Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces*
- *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*

- *Oracle Fusion Middleware Installation Guide for Oracle WebCenter Portal*

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values, as well as terms defined in text or the glossary.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, or text that you enter.

Preparing for the Tutorial

This chapter describes the steps that must be completed before users can successfully work through this tutorial.

Step 1 and Step 3 must be performed by a WebCenter Portal administrator; Step 2 need not be.

- [Step 1: Configure Oracle WebCenter Portal: Spaces](#)
- [Step 2: Make the Necessary Information Available](#)
- [Step 3: Upload the Page Template](#)

Step 1: Configure Oracle WebCenter Portal: Spaces

To allow others to work through this tutorial successfully, you must first complete all steps in "Setting Up Oracle WebCenter Portal: Spaces for the First Time (Roadmap)" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Users will use the following services while they step through this tutorial:

- Announcements
- Discussions
- Documents
- Events
- People Connections

Step 2: Make the Necessary Information Available

Your users will need several documents to populate their WebCenter Portal's pages with meaningful content. This content has been zipped into a file and placed on OTN so that you can download it to a server that is accessible to your users.

To make the necessary files available:

1. Download `spacestutorialps3.zip` from <http://www.oracle.com/technetwork/middleware/webcenter/documentation/spacestutorialps3-308908.zip> and extract the files to a centrally accessible server. The files are:
 - `ElPijuPgTemplate.ear`
 - `elpiju_logo.jpg`
 - `greenbanner.jpg`

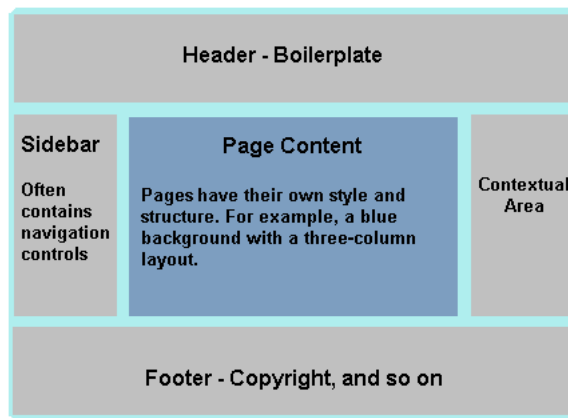
- construction.txt
- greenbuilding.htm
- grbuilding_image1.jpg
- grbuilding_image2.jpg
- grbuilding_image3.jpg
- Comparing Earthbag and Adobe.htm
- Making Wheat Paste.htm
- article.htm

Note that `ElPijuPgTemplate.ear` available in the ZIP is for use in the next section, though it need not be available to users on a server.

Step 3: Upload the Page Template

A *page template* is a type of WebCenter Portal resource that controls the appearance of some of the page's artifacts, irrespective of the actual content; in other words, what surrounds the content, rather than the content itself. [Figure 1–1](#), shows how things like a header, footer, and navigational aids may be built into a page template to frame the actual content. By applying a page template to a space, you can ensure that all pages within the space feature the same look and feel.

Figure 1–1 Anatomy of a Page



Spaces provides built-in resources—including page templates, navigations, skins, page styles and more—at both the application level and the space level. You cannot modify or download built-in resources, but you can make a copy of them and customize them any way you like. In this tutorial, users will modify the `ElPijuPgTemplate.ear` file, which is scoped at the application level, by first making a copy of it, then tailoring it so it can be applied to their space.

Note: Application-level resources are available to all spaces, unless a space has been specifically excluded.

The following procedure shows you how to upload `ElPijuPgTemplate.ear` to the application level so that users may access it later.

1. Click **Administration** in the banner.
2. Click the **Resources** tab.

3. Ensure that **Page Templates** is selected in the left navigation area.
4. Click **Upload**.
5. Use the **Browse** button to navigate to `ElPijuPgTemplate.ear`, select it, then click **Upload**.
6. From the **Edit** menu, choose **Show** to make this template visible.

El Piju should now appear in the list of page templates available throughout this Spaces installation. Only you, as WebCenter Portal administrator, can modify this page template permanently; with the proper permissions, other members can affect only copies.

Before You Begin

This chapter introduces you to Oracle WebCenter Portal: Spaces, then explains a bit about the scenarios you'll work through in this tutorial. Each scenario is designed to familiarize you with key features of Spaces, including navigation, resource management (such as page templates), and content integration with Oracle WebCenter Content. This tutorial will also help you explore features such as Oracle WebCenter Portal: Services, workflow, and other productivity tools.

This chapter includes the following sections:

- [What Is Oracle WebCenter Portal: Spaces?](#)
- [What Will This Tutorial Teach You?](#)

What Is Oracle WebCenter Portal: Spaces?

Spaces is a ready-to-use application that enables you to deliver team-based sites, along with enterprise and departmental portals. Spaces provides easy ways to connect with people, collaborate content and business objects, and deliver business communities. With Spaces, you can:

- Customize look-and-feel with page templates and skins
- Build a hierarchical site structure and define site navigation
- Create pages, add content, and customize views using Oracle WebCenter Portal's Composer
- Publish and directly edit content stored in Oracle WebCenter Content
- Create secure team sites to build community collaboration
- Manage tasks, content, projects, and people
- See recommendations on suggested documents, spaces, and connections
- ... and much more.

For a more in-depth look at Spaces, see:

<http://www.oracle.com/technetwork/middleware/webcenter/overview/spaces-090178.html>

By working through this tutorial, you will learn more about using Spaces to build a portal, plus you'll have a chance to experiment with some of its rich social networking tools. If you want more information on any aspect of Spaces you encounter in this tutorial, refer to *Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces*.

What Will This Tutorial Teach You?

This tutorial will help you build a portal site using some of the Spaces key features. It will also help you explore WebCenter Portal services that let you share knowledge, collaborate with people, and keep you up-to-date with what’s happening in the communities and groups you’re connected with.

Scenario 1: Build a Portal Site

In the first part of this tutorial, you will build a portal for El Piju, a fictitious construction company specializing in natural building. Natural building is all about achieving sustainability through the use of minimally-processed, plentiful, and renewable resources, as well as recycled or salvaged materials that produce healthy living environments.

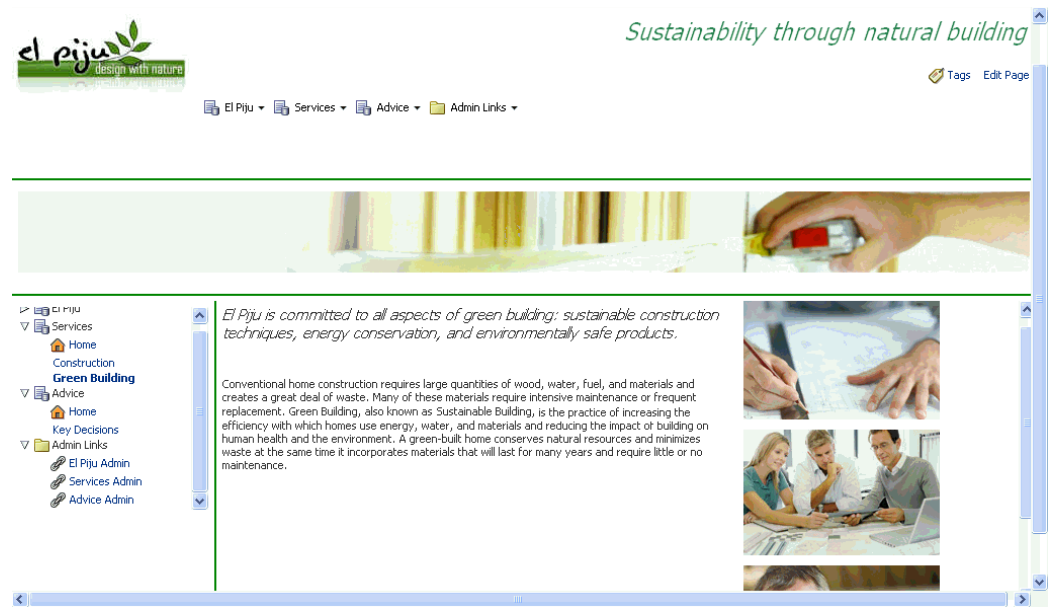
You’ll create a *space* with Portal Site features and develop it into the El Piju portal. A space is a framework scoped to serve as a portal, team site, and community, when an appropriate template is applied. You’ll create two subspaces in the space: one to carry the information about services provided by El Piju, the other to offer advice to El Piju customers. These subspaces will have all the features of a portal site to enable collaboration of people and content. In the course of accomplishing this scenario, you’ll work with built-in resources such as page template and navigation. You’ll use the Documents service to make the pre-supplied content available to the space and subspaces. Finally, you’ll use Content Presenter to publish the sample content in different layouts, and experiment with in-place editing.

The following table maps Spaces features with the components of El Piju portal that you’ll design using those features.

Use This Spaces Feature	To Create
Space	The main El Piju portal, which in turn will host two subspaces.
Subspaces	Two sites that will house information on El Piju.
WebCenter Portal resources: page template and navigation	Layout, look and feel, and access to the El Piju space and subspaces.
Documents service	Product and services information, as well as content to brand the portals.
Pages	Construction, Green Building, and Key Decisions pages.
Content Presenter	Interesting presentations of content.

Using a pre-supplied page template and content, you will build a portal that looks like this:

Figure 2–1 El Piju Portal



Scenario 2: Take a Tour of a Social Site

The second part of this tutorial exposes you to the social networking features provided by Spaces. In this scenario, you will create a team site, update your profile, examine your space preferences, upload a document, explore wikis and blogs, post a discussion topic, announcement, and event, as well as experiment with other key features such as the Activity Stream, workflow, and so on.

Note: Before you begin working through this tutorial, be sure your WebCenter Portal administrator has followed the steps described in [Preparing for the Tutorial](#), and that you know where the pre-supplied content and images reside. You'll need them to successfully populate your portal.

Part I

Building a Portal Site

In this part, you'll build a portal for the fictitious El Piju company through the following steps:

- [Building a Space](#)
- [Designing a Navigation Model](#)
- [Extending the Page Template](#)
- [Creating Pages](#)

Building a Space

In this step you will create a space to serve as the El Piju portal. El Piju is a fictitious construction company specializing in natural building. Natural building is all about achieving sustainability through the use of minimally-processed, plentiful, and renewable resources as well.

As you work through this step, you will configure the El Piju space to meet branding and content requirements of the El Piju building company, by adding the El Piju logo and uploading the company's banner image. You will also create two subspaces, through which you'll get a sense of how space hierarchies can be used to group and present relevant content to your users.

This chapter contains the following steps:

- [Step 1: Create a Space](#)
- [Step 2: Add the Logo to the El Piju Space](#)
- [Step 3: Make the Documents Page Available](#)
- [Step 4: Upload the Banner Image](#)
- [Step 5: Create Subspaces](#)
- [Step 6: Add the El Piju Logo to the Subspaces](#)
- [Summary](#)

Step 1: Create a Space

A space provides the framework for your portal that serves certain business functions for a specific division, department, project, or community. You can add subspaces, pages, and contents to a space while leveraging its built-in WebCenter Portal services that let groups interact and exchange information to accomplish varied business objectives. In this scenario, you'll add two subspaces to the El Piju space for sharing El Piju's services and construction advice with its customers.

To create the El Piju space:

1. Log in to Spaces.
2. Click **Spaces** in the banner, then choose **Create a Space**.

Figure 3–1 Spaces Menu - Create a Space

This displays the Create a Space dialog - Setup step.

3. In the **Name your Space** field, type `El Piju`.
4. In the **Write a description** field, enter a description if you like, and click **Next**.
5. In the **Access** step, in the **Enter the URL for your Space** field, type `elpiju` to complete the URL.

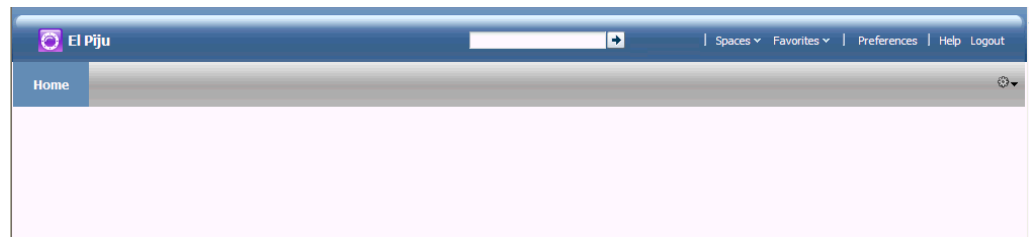
You will need this URL when you create the navigation for this space.

6. Under **Choose an access level for your Space**, choose **Public**, then click **Next**.
7. In the **Content** step, highlight the **Portal Site** template, as shown in [Figure 3–2](#), and click **Create**.

Figure 3–2 Portal Site Template

Each template pre-loads your portal with features and pages specifically chosen to support your portal's primary purpose. In this case, the Portal Site template provides all the features typically needed by an intra- or extranet portal, including discussion forums, a document library, and more.

The new El Piju space displays. Your screen should look something like [Figure 3–3](#):

Figure 3–3 Newly Created El Piju Space

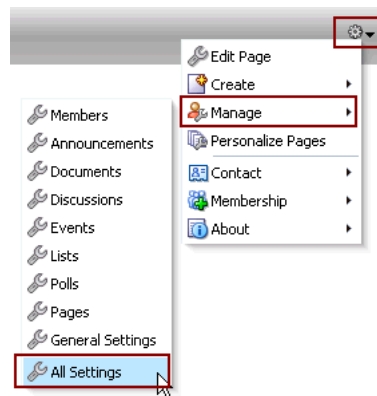
Let's start branding this site for El Piju by adding the company's logo.

Step 2: Add the Logo to the El Piju Space

By adding the El Piju company logo to each page within the space, the company's brand is reinforced to customers.

To add the El Piju logo:

1. While you are in the El Piju space, click the **Actions** icon, select **Manage**, and then **All Settings**.

Figure 3–4 Actions Menu

You should be on the **General** tab.

Tip: Because you created this space, you are the space's moderator, which means you have full control over the space and its membership. It's a good idea to limit the number of moderators you delegate for this or any site you create.

2. Under **Space Logo**, click **Browse** and select **elpiju_logo.jpg** from wherever your WebCenter Portal administrator placed the pre-supplied content.
3. Click **Apply**.

The El Piju logo displays in place of the default image, as shown in [Figure 3–5](#):

Figure 3–5 El Piju Logo



You have now applied the El Piju logo to the El Piju space. Next, we'll make the Documents system page available so you can populate El Piju with files and images.

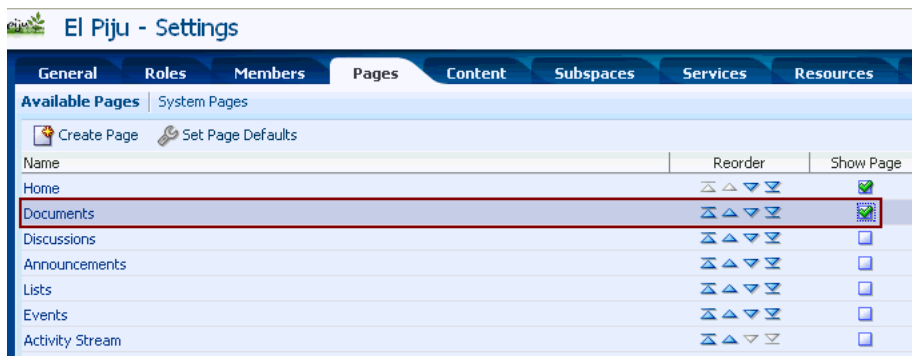
Step 3: Make the Documents Page Available

Assuming the Documents service is enabled for your WebCenter Portal installation, you can make it available to your space. By default, the Documents page is not shown, so let's do that now. Once the page is available, you can upload content in the form of documents, folders, and wiki pages. You can also share this content with users who are authorized to view and/or edit content in your space.

To make the Documents system page available to the El Piju space:

1. While in **El Piju - Settings**, click the **Pages** tab.
2. Under **Available Pages**, select the **Show Page** checkbox for **Documents**.

Figure 3–6 Documents - Show Page



Now that you have made the Documents page available, you can upload the banner image for the El Piju portal. Later in this tutorial you'll learn about many other features of the Documents service. Refer to *Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces* to learn how you can effectively leverage content through this service.

Step 4: Upload the Banner Image

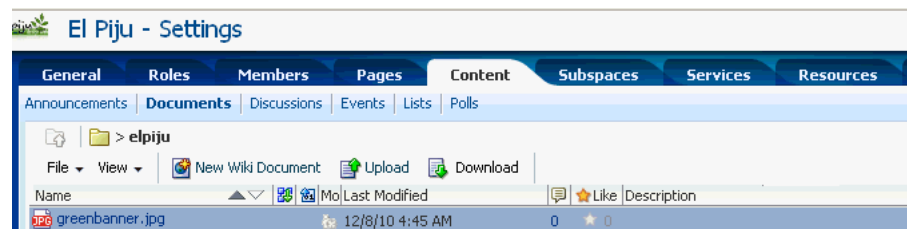
You will now upload the company's banner image to the El Piju space. You'll need this banner later, when you customize the page template so that all pages in the El Piju space and its subspaces have the same look and feel.

To upload the banner image:

1. While you are in **El Piju - Settings**, click the **Content** tab.
2. Click **Documents**.
3. Click **Upload**.
4. Under **Document to Upload**, click **Browse**, and select **greenbanner.jpg** from wherever your WebCenter Portal administrator placed the pre-supplied content.
5. Click **Upload**.

The image file appears under the elpiju root directory, as shown in [Figure 3-7](#):

Figure 3-7 Image Uploaded



6. Click the file name link to view the banner image, as shown in [Figure 3-8](#).

Notice the buttons to upload a new version and download the current version of the image, as well as the box to add comments. Explore the File menu and try out the options to email or check out this image for editing. If you like, you can explore the View menu options.

Figure 3-8 Banner Image



The banner image is now uploaded. When you edit the page template, you will apply this banner image so that all pages in the portal have the same appearance. Let's create two subspaces now.

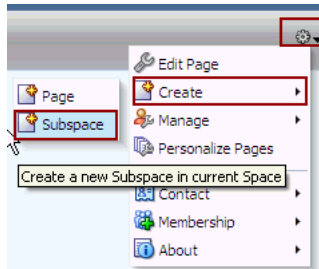
Step 5: Create Subspaces

In this step, you will create two subspaces: *Services* and *Advice*. The Services subspace will describe the programs El Piju offers for building natural structures with environment-friendly materials. The Advice subspace will educate homeowners and commercial clients about building natural structures with renewable resources and recycled materials, thereby minimizing the use of depletable resources.

To create the subspaces:

1. Go to the El Piju space by clicking **Back to Space**. If you navigated to another page, you can open the space by choosing **El Piju** from **Spaces** in the banner.
2. From the **Actions** menu, select **Create**, and then **Subspace**.

Figure 3–9 Actions Menu - Subspace Option



This displays the Create a Subspace dialog - Setup step.

3. In the **Name your Space** field, type *Services*.
4. In the **Write a description** field, enter a description if you like, and click **Next**.
5. In the **Access** step, in the **Enter the URL of your Space** field, type *services* to complete the URL, and click **Next**.
6. In the **Content** step, choose the **Portal Site** template from the box, and click **Create**.
7. Click **Spaces** in the banner, then click **El Piju**.
8. Repeat steps from 2 to 6 while ensuring the following:
 - On step 3, enter *Advice* as the name of the subspace.
 - On step 5, enter *advice* to complete the URL of the subspace.

Step 6: Add the El Piju Logo to the Subspaces

You've created the subspaces, but they still feature the default logo for all sites that use the Portal Site template. Let's change it so they display the same logo as El Piju, thus creating a consistent appearance throughout the entire space hierarchy.

To add the El Piju's company logo to the subspaces:

1. Go to the subspace (*Services* or *Advice*) by selecting **Spaces** in the banner, then choosing *subspace name*.
2. On the **General** tab, under **Space Logo**, click **Browse** and select **elpiju_logo.jpg** from wherever your WebCenter Portal administrator placed the pre-supplied content.
3. Click **Apply**.

Make sure that you complete the process for both the Advice and Services subspaces.

Summary

In this step, you created a space built on the Portal Site template, which is pre-populated with everything you need to build a rich, robust portal. You tailored the site for the El Piju company by applying the company logo, and exposed the Documents page so you could upload the company's banner image. Finally, you created two subspaces that will present El Piju services and expert advice to its existing and prospective customers.

In the next step, you'll learn how to build a navigation model for your portal so that people can access its pages quickly.

Designing a Navigation Model

Navigations enable users to see what your portal has to offer and to access those areas quickly. In Spaces, navigations consist of two components: a navigation model, which defines the content, structure, and metadata of the navigation, and a navigation visualization, which determines how the navigation appears on the pages of the portal. You can visualize your navigation as a menu, tree, or breadcrumb. In other words, think of the navigation model as *what* you want to include in your navigation, and the navigation visualization as *how* those items should appear to users. You'll learn more about modeling and visualizing navigations in the next step when you actually use them in the template.

Navigations are just one of the building blocks of portals called *resources*. WebCenter Portal resources fall into three categories: *Structure*, *Look and Layout*, and *Mashups*. While navigation, page templates, and resource catalogs help you create the structure of your portal, skins, page styles, and mashup styles let you alter your portal's look and feel. Similarly, Content Presenter enables you to publish content in various layouts. In some cases, you'll want a developer to create or extend a resource for you in JDeveloper, so you can import it into Spaces and add the finishing touches.

In this step, you will create a navigation model and associate the El Piju space and its subspaces with it. You'll also add admin links to the space and subspaces pages so that you, as the moderator, can access them.

- [Step 1: Create a Navigation Model](#)
- [Step 2: Add the Spaces Pages to the El Piju Navigation](#)
- [Step 3: Add Administration Links to the El Piju Space and Subspaces](#)
- [Summary](#)

Step 1: Create a Navigation Model

A well-planned navigation ensures that crucial information is easily navigable so that users can find it. A navigation model can include other resources such as spaces, pages, content, other navigation models, task flows, and so on.

To create a navigation model:

1. While you are in El Piju, from the **Actions** menu, choose **Manage**, then **All Settings**.
2. Click the **Resources** tab.
3. Under **Structure**, click **Navigations**.
4. Click **Create**.

This displays the Create New Navigation dialog.

5. In the **Name** field, enter **El Piju Navigation**, then click **Create**.

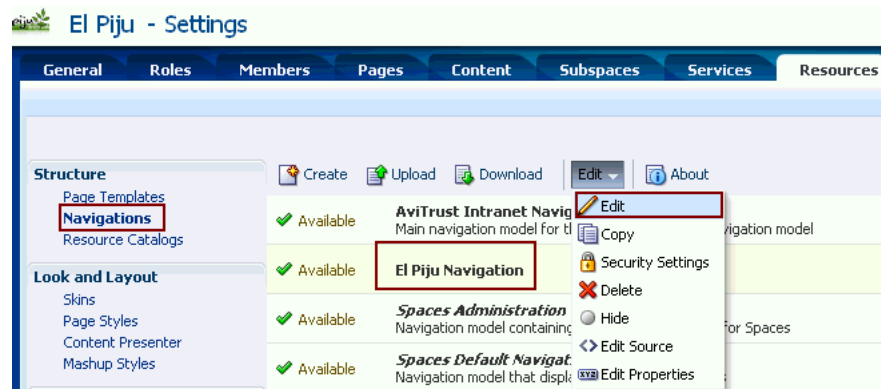
You've created the El Piju Navigation model, but now you need to populate that model with the pages in the El Piju space and subspaces.

Step 2: Add the Spaces Pages to the El Piju Navigation

To add the spaces pages to the El Piju navigation model:

1. While you are still on the **Resources** tab, with **El Piju Navigation** selected, choose **Edit** from the **Edit** menu, as shown in [Figure 4-1](#).

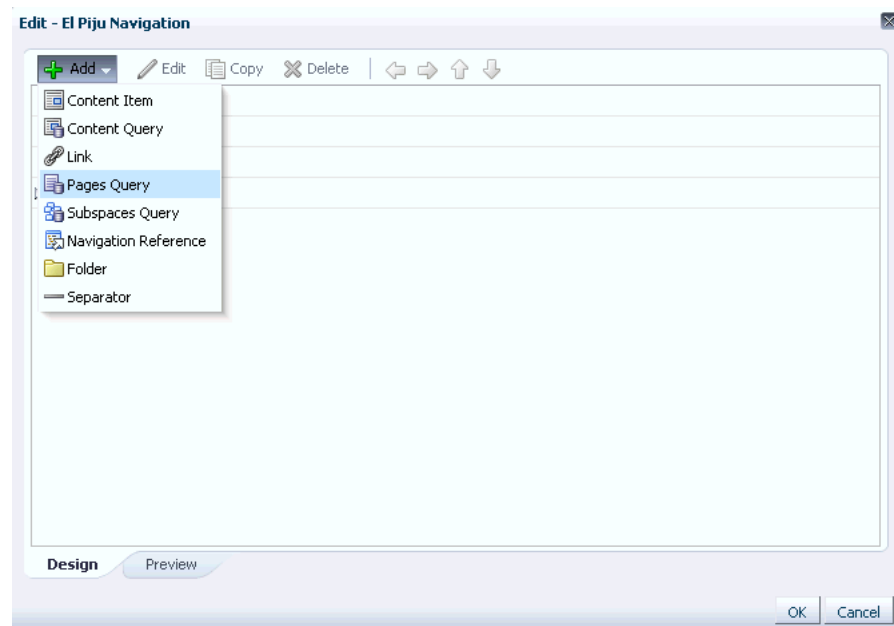
Figure 4-1 El Piju - Edit El Piju Navigation



This displays the Edit - El Piju Navigation dialog

2. From the **Add** menu, choose **Pages Query**, as shown in [Figure 4-2](#).

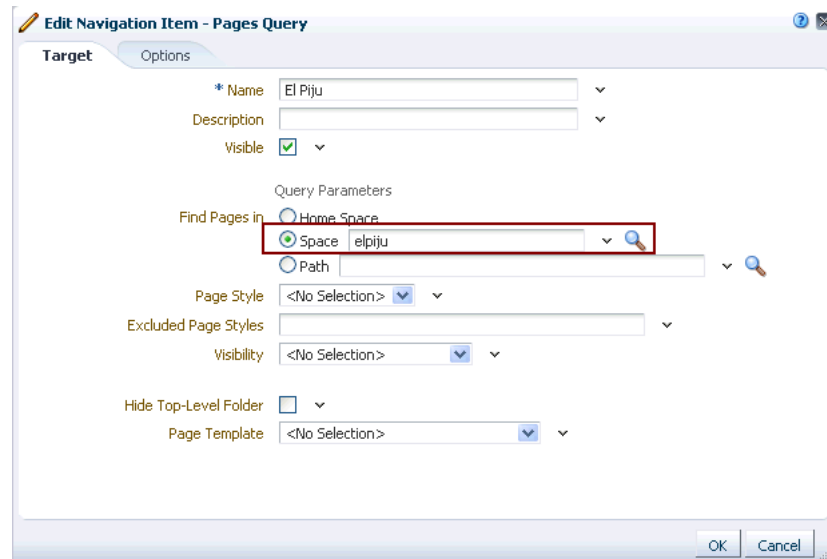
Figure 4-2 El Piju Navigation - Pages Query



The **Pages Query** option displays a collection of pages when navigation is applied to a page template. These could be all the pages in the Home space, all the pages in a space, or all pages in a subspace.

3. In the **Name** field, type `El Piju` so it matches the name of the space that will be displayed.
4. Under **Find Pages in**, note that the El Piju space has been selected by default. Click **OK**.

Figure 4–3 Space Selected By Default

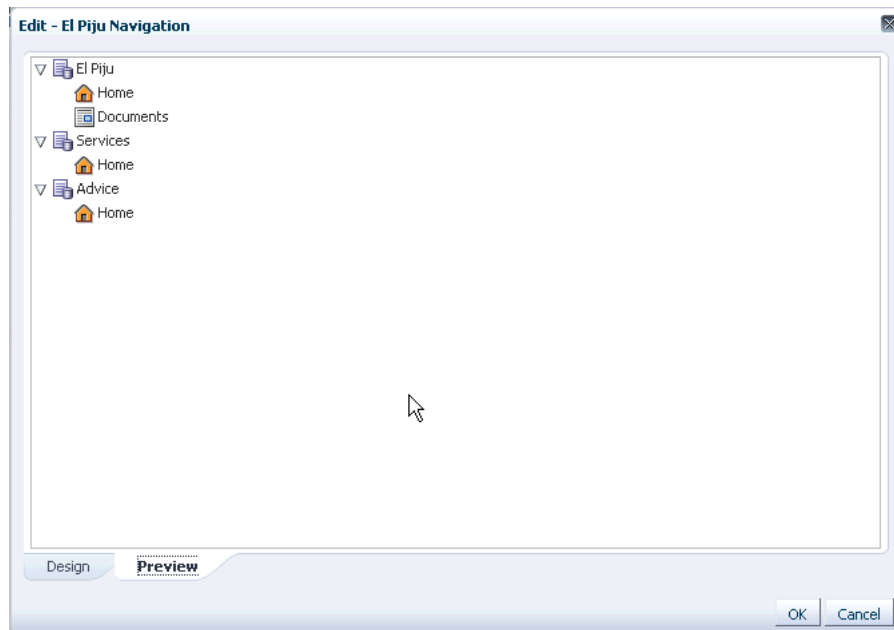


5. Follow steps 2 to 4 to add *Services* and *Advice* subspaces pages to the navigation model.

Be sure to use the **Name** field to reflect the name of each subspace, as this is the name that appears in the navigation model. Similarly, in the **Space** field, select the appropriate subspace using the **Select Space** (magnifying glass) icon.

6. Click the **Preview** tab at the bottom of the dialog.

Your screen should look like [Figure 4–4](#). Use the arrows to expand and collapse the different nodes for each space and subspace.

Figure 4–4 El Piju Space and Subspace Pages in the El Piju Navigation

As soon as you apply the page template to the El Piju space (which you will do in just a bit), you will no longer have a way to get to the *Settings* page, which you need in order to manage and control the operations of the space. In the next step, we'll solve this problem by creating an administration link that only you (and other moderators) can see.

Step 3: Add Administration Links to the El Piju Space and Subspaces

Now add an administration link to the El Piju space and its subspaces (Services and Advice). Each administration link will serve as a gateway to its respective space or subspace so you can customize their look and feel and content, as well as control users' access.

To create administration links:

1. In the Edit - El Piju Navigation dialog, click the **Design** tab.
2. From the **Add** menu, choose **Folder**.
3. On the **Target** tab, in the **Name** field, type Admin Links, then click **OK**.
4. From the **Add** menu, choose **Link**.

This displays the Edit Navigation Item - Link dialog.

5. In the **Name** field, type El Piju Admin, which will display the Settings tab set for El Piju.
6. In the **Path** field, enter the URL in the following format:

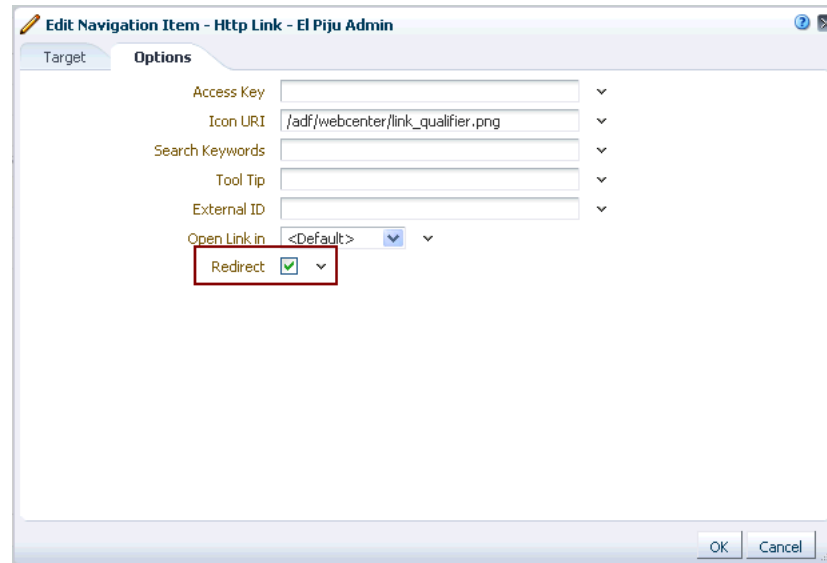
```
http://<host name>:<port number>/webcenter/spaces/<name of the space or subspace>/admin
```

where:

- <Host name>: Name or IP address of the server on which you created the El Piju space.

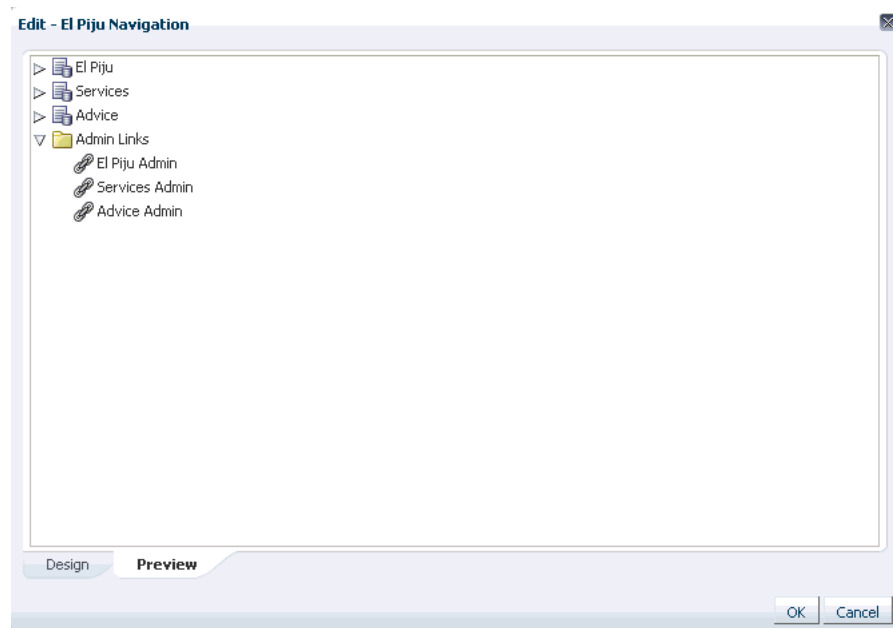
- <Port number>: Port number of the server on which you created the El Piju space.
 - <Name of the space or subspace>: The pretty URL of the space or subspace you created in [Building a Space](#). In this case, type `elpiju`.
 - `admin`: Pre-determined name of the page that displays the Settings tab set page for a space.
7. On the **Options** tab, select the **Redirect** checkbox, as shown in [Figure 4-5](#), so that **Settings** tab set is shown in the content area of the page template, then click **OK**.

Figure 4-5 Edit Navigation Item - Redirect Option



8. Click the **Preview** tab to verify if the administration link was added successfully. We also need a way to get back to the Services and Advice subspaces, so let's first add an administration link for the Services subspace.
9. On the **Design** tab, select **El Piju Admin**, then click **Copy**.
10. Select the copy of **El Piju Admin**, then click **Edit**.
11. On the **Target** tab, update Name (see step 5) and Path (see step 6) fields appropriately for the **Services Admin** link, then click **OK**.
12. Now create a copy of Services Admin and update the Name and Path fields for the **Advice Admin** link.

When you are finished, the **Preview** tab should look like [Figure 4-6](#):

Figure 4–6 Administration Links for the El Piju Space

Note: The Admin links will be visible to all users, however, non-moderators won't be able to access the **Settings** page when they click these links. A page with the message "You do not have access." will display.

13. Click **OK** to close the Edit - El Piju Navigation dialog.
14. On the **Resource** tab > **Navigations**, ensure that the newly created **El Piju Navigation** is selected, then choose **Show** from the **Edit** menu.

The new navigation model is now available to the El Piju space. If you kept this resource hidden, it would not appear to other people who may have access to El Piju's resources. The Hide option allows you to keep resources from being exposed while they are still in development.

The El Piju Navigation is ready to be used in a page template, which you'll soon design and apply to El Piju pages.

Summary

You created a navigation model for the El Piju portal that reflects the pages in the El Piju, Services, and Advice. You also added administration links to the navigation so that you can continue to manage the El Piju space, Services subspace, and Advice subspace for content, appearance, and users' accessibility.

Extending the Page Template

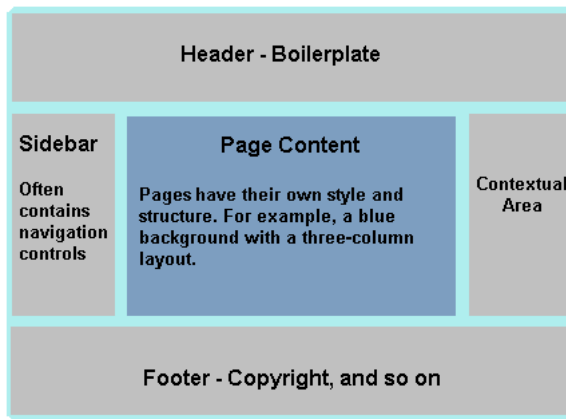
Oracle WebCenter Portal: Spaces comes packaged with a range of page templates that you can apply to your portal. You can also extend out-of-the-box page templates and create new ones to reflect your organization's corporate identity and business purpose.

In this chapter, you'll extend the El Piju page template that the administrator made available to you when they laid the groundwork for this tutorial. You'll hook up El Piju navigation to the page template through tree and menu navigations, and add the El Piju banner to the template to achieve El Piju's corporate look, feel, and layout. Finally, you'll apply the modified template to El Piju space and its subspaces.

- [Step 1: Create a Copy of the El Piju Page Template](#)
- [Step 2: Add a Tree Navigation to the Page Template](#)
- [Step 3: Apply a Menu Navigation to the Page Template](#)
- [Step 4: Add the El Piju Banner to the Page Template](#)
- [Step 5: Apply the Page Template to the El Piju Space](#)
- [Step 6: Apply the Page Template to the Subspaces](#)
- [Step 7: Test the Administration Link \(Optional\)](#)
- [Summary](#)

Step 1: Create a Copy of the El Piju Page Template

A *page template* is a type of WebCenter Portal resource that controls the appearance of some of the page's artifacts, irrespective of the actual content; in other words, what surrounds the content, rather than the content itself. [Figure 5-1](#), shows how things like a header, footer, and navigational aids may be built into a page template to frame the actual content. By applying a page template to a space, you can ensure that all pages within the space feature the same look and feel.

Figure 5–1 Anatomy of a Page

In this step, you'll modify the `ElPijuPgTemplate.ear` file, which is scoped at the application level. When a resource is scoped at the application level, it is available to all authorized users within the Spaces instance. However, users may not modify the resource itself; rather, they can make a copy of the resource and modify it to suit their requirements. Let's see how this is done for the El Piju space and its subspaces.

On the **El Piju - Settings** tab set page, on the **Resources** tab, **Page Templates** is selected by default in the panel on the left. To create a copy of the El Piju page template:

1. Click **Create**.

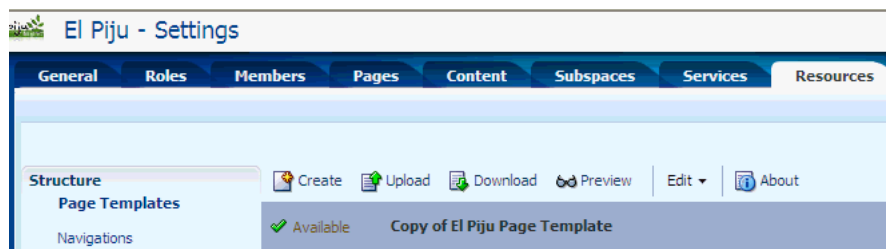
This displays the Create New Page Template dialog.

2. In the **Name** field, type `Copy of El Piju Template`.
3. From the **Copy from** dropdown list, choose **ElPiju**, then click **Create**.

The new template displays under the **Resources** tab.

4. While `Copy of El Piju Page Template` is highlighted, from the **Edit** menu, choose **Show**.

Your template is now available to the El Piju space, as shown in [Figure 5–2](#):

Figure 5–2 Copy of El Piju Page Template

Each resource serves as a building block for portals and has features to serve your business needs through WebCenter Portal's scalable and robust technology.

Step 2: Add a Tree Navigation to the Page Template

In this step we'll add a tree navigation to the page template, which tells the template *how* or in *what form* to display the navigation. Later, we'll hook up the tree navigation

to the El Piju navigation model we created in the last step, which tells the template *what* to display.

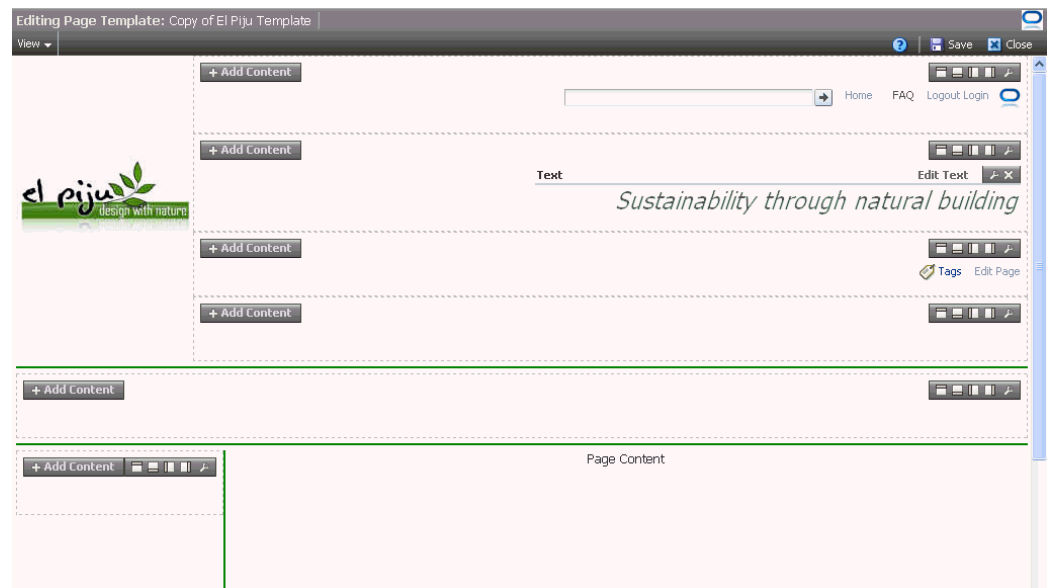
To add a tree navigation:

1. While Copy of El Piju Page Template is highlighted, from the **Edit** menu choose **Edit**.

This opens the page template in the WebCenter Portal's Composer, which allows you to add content through the Resource Catalogs available to you.

Your screen should look like this:

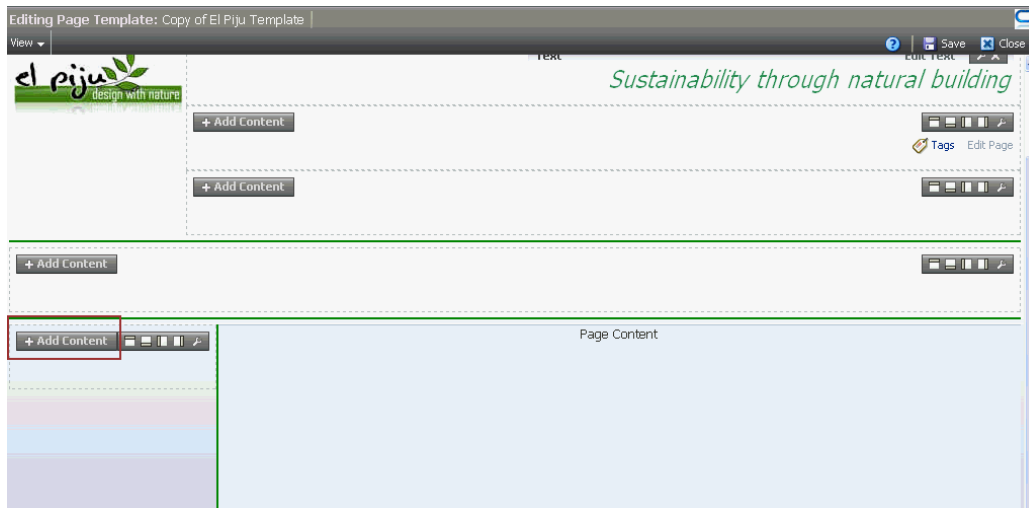
Figure 5–3 Copy of El Piju Page Template Opened in Composer



As you can see, the El Piju logo we added in [Step 2: Add the Logo to the El Piju Space](#) appears in the upper left corner. The page template designer specified that the logo should appear here, although you as the user were allowed to determine what that logo should be. The page template designer also added El Piju's slogan ("Sustainability through natural building"), a row of frequently used links along the top, and a couple of links in the middle of the page. Most important, the designer intentionally left certain regions of the template empty, so that you could add content appropriate to the portal you're building. In a real-life scenario, you would most likely work closely with the person designing your page template in JDeveloper to make sure you have the content areas you want and need.

2. In the region at the lower left corner, as shown in [Figure 5–4](#), click **Add Content**.

Figure 5-4 Add Content in the Region At the Lower Left Corner



The Resource Catalog displays.

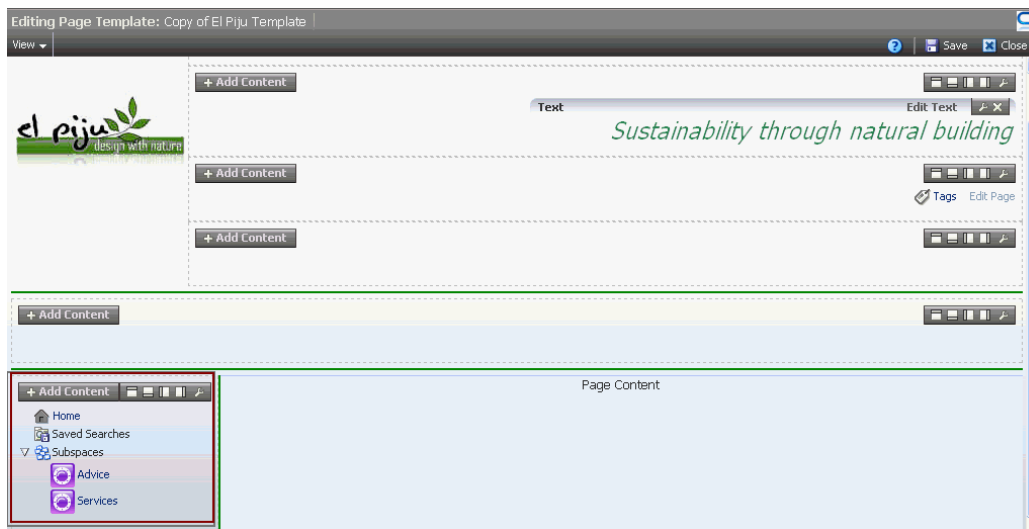
3. Next to **Template Development**, click **Open**.

Tip: You can skip steps 3 and 4, and type **Navigation Tree** in the **Search** field instead, to quickly display the **Navigation Tree** option.

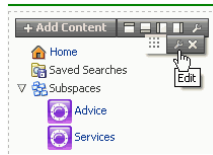
4. Next to **Navigations**, click **Open**.
5. Next to **Navigation Tree**, click **Add**, and then click **Close**.

The default tree navigation looks like [Figure 5-5](#):

Figure 5-5 Default Tree Navigation



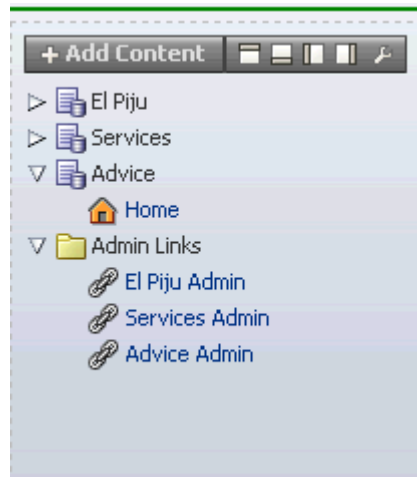
6. To associate this tree navigation with the El Piju navigation you created in [Designing a Navigation Model](#), hover the mouse below the **wrench** icon on the toolbar, and click the *second* **wrench** icon, as shown in [Figure 5-6](#).

Figure 5–6 Wrench Icon for Tree Navigation

By default, the tree navigation displays the navigation items for the space you're working in: pages, subspaces, and a folder for Saved Searches. Instead, we want this tree to display the pages in El Piju, Advice, and Services.

7. In the Component Properties: Navigation Tree dialog, click the **Parameters** tab.
8. From the **Navigation** dropdown list, select **El Piju Navigation**.
9. Click **Apply**, then **OK**.

We've now replaced the default navigation model with the one we created expressly for the El Piju portal. Your screen should look like [Figure 5–7](#):

Figure 5–7 Tree Navigation in Copy of El Piju Page Template

When you expand the nodes, you'll see a Home page each in the El Piju space and the two subspaces. Notice that the El Piju space also contains the Documents system page that you made available in [Step 3: Make the Documents Page Available](#). Soon you'll add more pages to the El Piju portal, each of which will appear here for easy accessibility.

10. In the upper right corner, click **Save** to save the changes in your template.

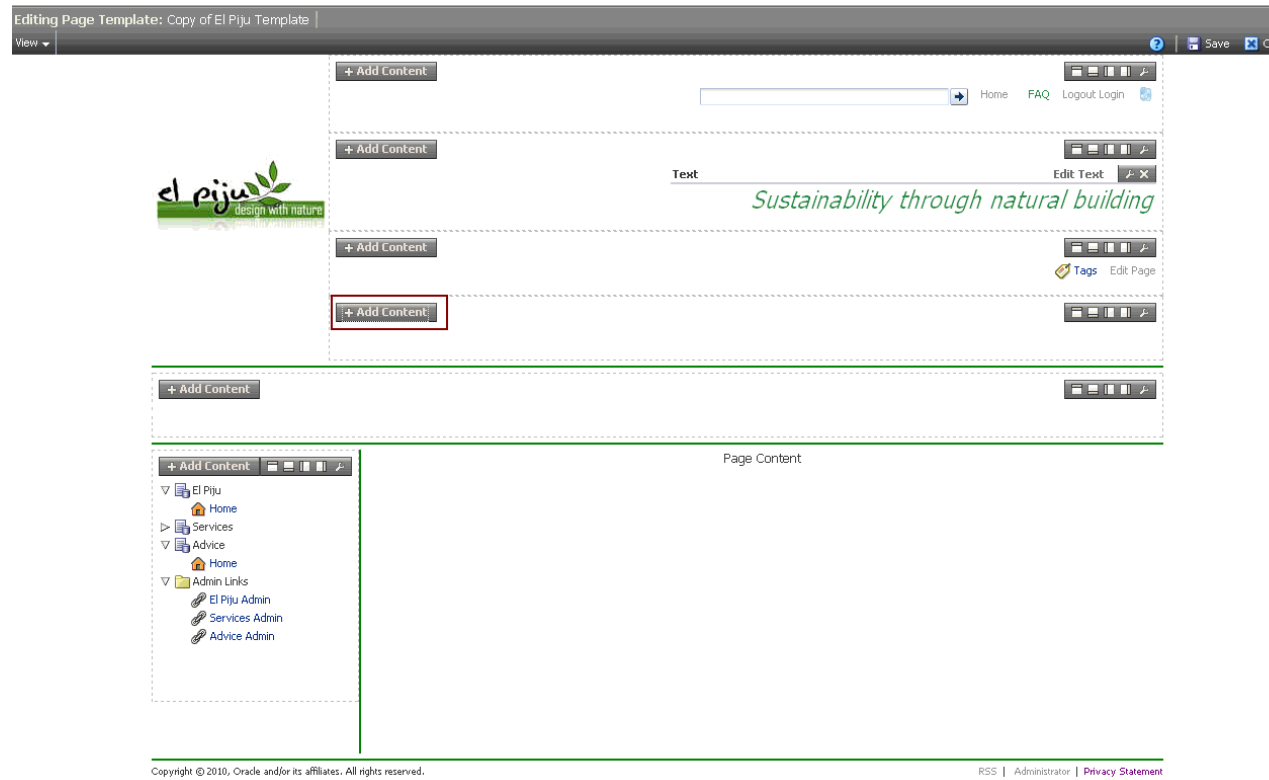
Step 3: Apply a Menu Navigation to the Page Template

Now let's add a different type of navigation visualization to your portal called a *menu*. Menus display navigational links as tabs, menus, bars, and buttons in a horizontal row. For that reason, menus are ideal for displaying relatively few top-level nodes, so they won't get truncated or cover the entire screen on a web page that uses a standard resolution.

You should still be editing Copy of El Piju Page Template.

1. Go to the fourth region from top, as shown in [Figure 5–8](#), and click **Add Content**.

Figure 5–8 Add Content in the Fourth Region

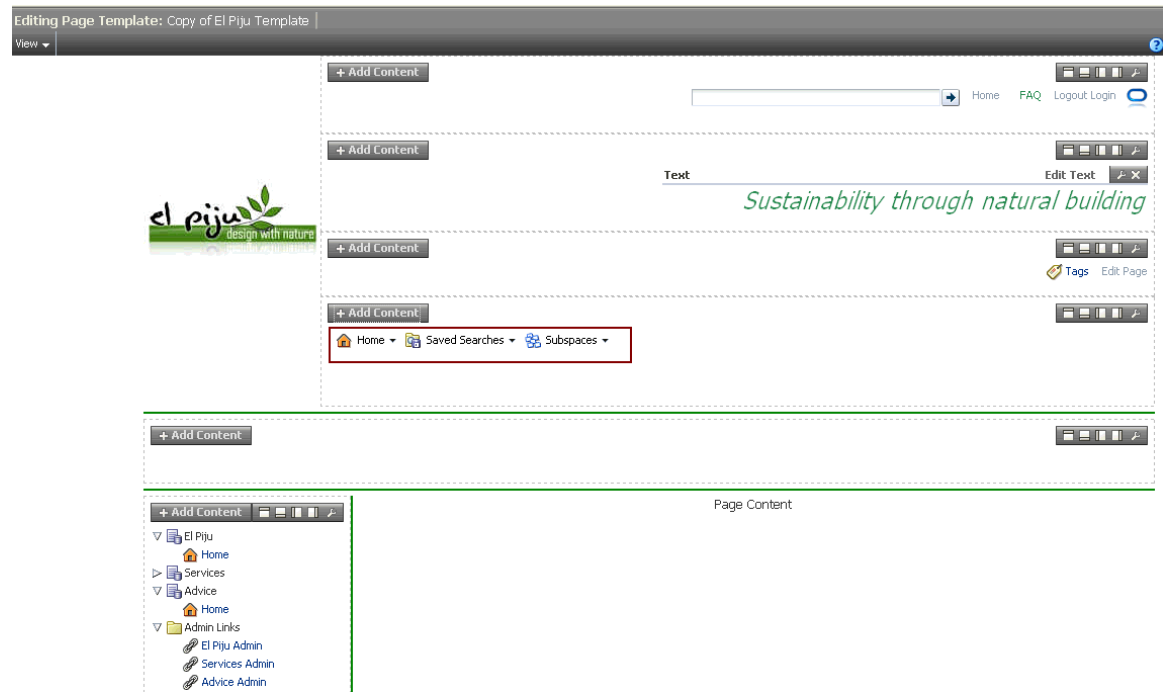


The Resource Catalog displays.

2. Next to **Navigation Menu**, click **Add**, and then click **Close**.

The default menu navigation looks like [Figure 5–9](#):

Figure 5–9 Default Menu Navigation



- To associate this menu navigation with the El Piju navigation you created in [Designing a Navigation Model](#), hover the mouse below the **wrench** icon on the toolbar for the menu navigation, as shown in [Figure 5–10](#), and click the *second* wrench icon.

Figure 5–10 Wrench Icon for Menu Navigation



- In the Component Properties: Navigation Menu dialog, click the **Parameters** tab.
- From the **Navigation** dropdown list, select **El Piju Navigation**.
- Click **Apply**, then **OK**.

Your screen should look like [Figure 5–11](#):

Figure 5–11 Menu Navigation Wired to El Piju Navigation



Using two different navigational models in a single template makes it that much easier for customers to access information in your portal.

- Save and close the template.

You're now familiar with tree and menu navigations. Spaces also offers breadcrumb navigation to display content items as a series of horizontal or vertical links so the

users know their current position in the navigation hierarchy. Breadcrumb navigation is recommended in scenarios where portals contain deep hierarchies (four levels or more) and users need to go back to pages they visited earlier in the same session. Steps for adding a breadcrumb navigation are the same as those for the tree and menu navigations.

Step 4: Add the El Piju Banner to the Page Template

Now we're going to add a banner image to the page template so that every page in the portal reflects El Piju's corporate look and feel. We'll use the image that you uploaded to the Documents system page in [Step 4: Upload the Banner Image](#).

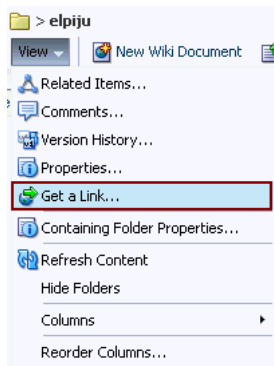
You should be on the **El Piju - Settings** page.

1. Go to **Content**, then click **Documents**.

This displays the `greenbanner.jpg` file you uploaded in [Step 4: Upload the Banner Image](#).

2. Select the row containing the `greenbanner.jpg` link.
3. From the **View** menu, choose **Get a Link**:

Figure 5–12 View - Get a Link



4. Use **Ctrl-C** to copy the Download URL path, which should be in the following format, and click **OK**.

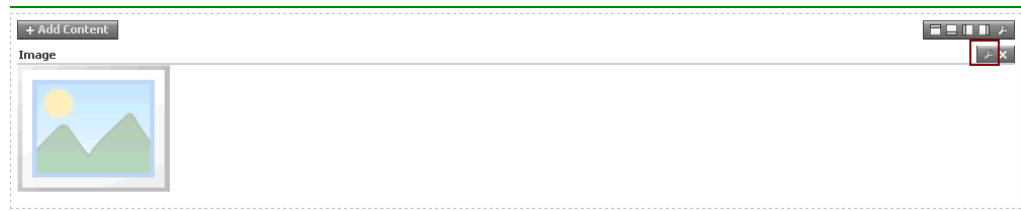
```
http://<host name>:<port number>/webcenter/content/conn/<content repository name>/path/doc/elpiju/greenbanner.jpg
```

5. Go back to the **Resources** tab.
6. Highlight **Copy of El Piju Navigation**, then from the **Edit** menu choose **Edit**.
This displays the template in edit mode.
7. In the fifth region from top, click **Add Content**.

Figure 5–13 Add Content in the Fifth Region

This displays the Resource Catalog.

8. Next to **Web Development**, click **Open**.
9. Next to **Image**, click **Add**.
10. Click **Close** in the Resource Catalog.
11. Click the *second* wrench icon in the fifth region:

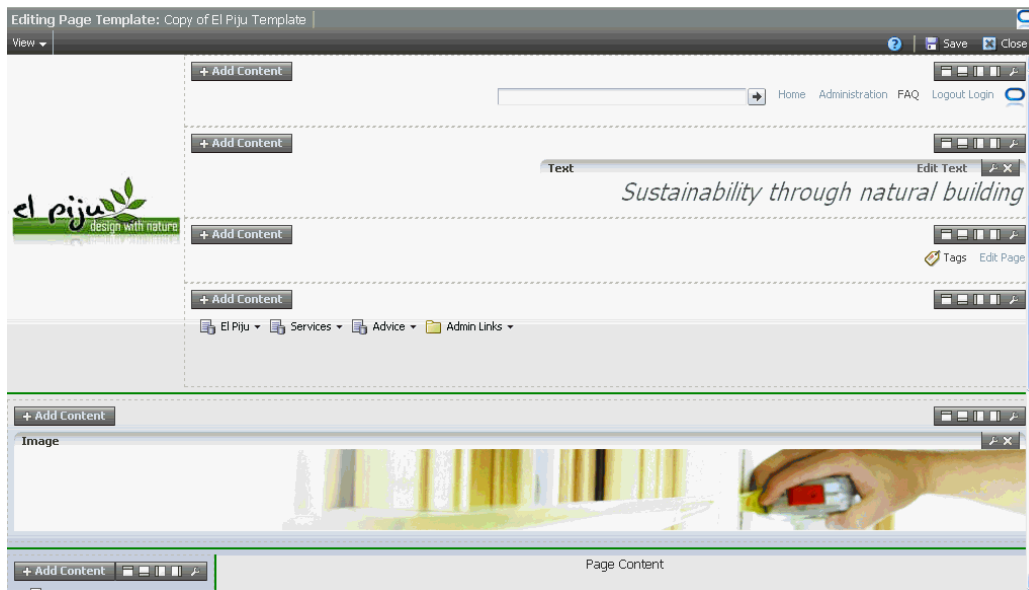
Figure 5–14 Second Wrench Icon in the Fifth Region

This displays the Component Properties: Image dialog.

12. On the **Display Options** tab, in the **Icon** field, replace the default URL with the URL you copied in step 4.
13. Click **Apply**, then **OK**.

The banner is now applied to the template, as shown in [Figure 5–15](#):

Figure 5–15 El Piju Banner Applied to the Page Template



14. Save and close the modified template.

The modified El Piju template is now ready to be applied to the portal pages!

Step 5: Apply the Page Template to the El Piju Space

To apply the modified template to the space:

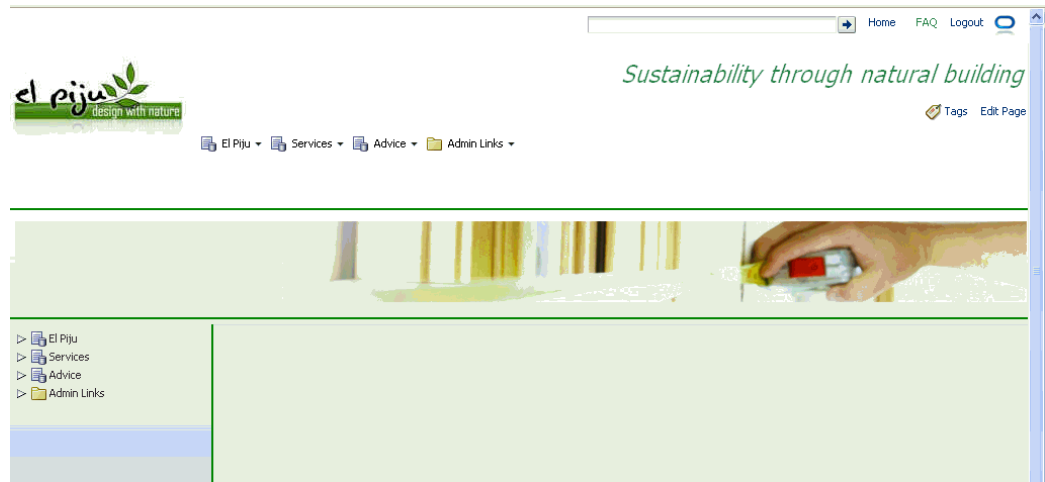
1. In the El Piju space, on the **Settings** page, click the **General** tab.
2. In the **Display Settings** section, from the **Page Template** dropdown list, choose **Copy of El Piju Template**, as shown in [Figure 5–16](#), then click **Apply**.

Figure 5–16 Display Settings - Page Template dropdown list



3. Click **Back to the Space**.

You can see that the page now has the template applied! Your El Piju space should look like [Figure 5–17](#):

Figure 5–17 El Piju Space After the Template is Applied

Take a tour around the template and visualize what other resources you would like to add to this template if you had more time (not just an hour), and how they would improve the portal from the mutual perspectives of El Piju's customers and the organization itself.

Step 6: Apply the Page Template to the Subspaces

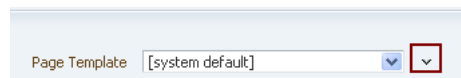
Let's apply the page template to Services and Advice subspaces.

To apply the modified template to subspaces:

1. In either the tree or menu navigation, expand **Admin Links**, then click **Services Admin**.

Although the resources created for a space are not automatically available to its subspaces, you can still use them. Let's find out how.

2. On the **General** tab, next to the **Page Template** field, click the **down** arrow, as shown in [Figure 5–18](#), then select **Expression Builder**.

Figure 5–18 Down Arrow to Display Expression Builder

This displays the Expression Editor.

3. In the **Type a value or expression** box enter:

```
#{srmContext.resourceScope['elpiju'].resourceType['siteTemplate'].displayName['Copy of El Piju Template'].singleResult.id}
```

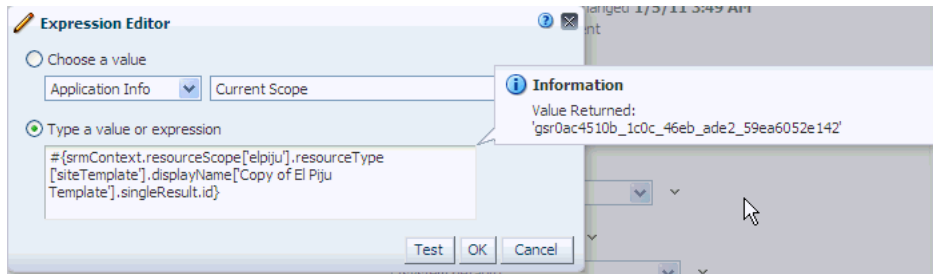
where:

- resourceScope is the pretty URL that you created in step 5 of [Step 1: Create a Space](#). In this scenario, it is elpiju.
- displayName is the name of the page template. This value must match the value you entered in step 2 of [Step 1: Create a Copy of the El Piju Page Template](#). In this scenario, it is Copy of El Piju Template.

4. Click **Test**.

This returns a value, as shown in [Figure 5–19](#):

Figure 5–19 Test Successful



If you get anything other than an Information message, that means you've made a typing or syntax mistake. Go back and make sure your expression exactly matches what's described in step 3.

5. Click **OK**.
6. On the **General** tab, click **Apply**.
7. Click **Back to the Space**.

You can see that the page now has the template applied!

8. Repeat steps 1 to 6 to apply Copy of El Piju Template to the Advice subspace. In step 1, make sure you click the **Advice Admin** link.

[Figure 5–20](#) shows how the Advice subspace looks when you've applied the template.

Figure 5–20 Advice Subspace After the Template is Applied



The basic framework of the El Piju portal is ready, so now you can start adding content.

Step 7: Test the Administration Link (Optional)

To ensure that the administration links display only to moderators, make one of your colleagues a member of El Piju, then have them log in to El Piju. They will see the administration links in the navigation bars of El Piju, Services, and Advice. However, clicking the links will display the message "You do not have access."

Figure 5-21 No Access to Non-Moderators



Summary

You created a new page template based on the El Piju page template, which is an application resource. You extended your copy of the El Piju page template to provide tree and menu navigations, and customized the template to include the El Piju banner. Finally, you applied the template to El Piju's space and subspaces. You're now ready to start adding content to the portal.

Creating Pages

El Piju offers construction services, as well as a design and construction of green dwellings. Let's create two pages in the Services subspace that describe these offerings. Before doing so, we have to upload the content you'll use to populate the new pages.

This step will show three methods for populating a page with content: first, a very simple example using the Rich Text Editor to work with a `.txt` document; then a simple Content Presenter example to display a single HTML file; then using Content Presenter to build a three-tabbed page.

- [Step 1: Create the Construction Page](#)
- [Step 2: Upload Content to the Services Subspace](#)
- [Step 3: Create the Green Building Page](#)
- [Step 4: Edit the Green Building Page at Runtime](#)
- [Step 5: Upload Content to the Advice Subspace](#)
- [Step 6: Create the Key Decisions Page](#)
- [Summary](#)

Step 1: Create the Construction Page

Let's create a page, add the pre-supplied text about El Piju's construction services, and experiment with changing the text style using the Rich Text Editor.

To create the Construction page:

1. Expand **Admin Links**, click **Services Admin**, then select the **Pages** tab.
2. Click **Create Page**.
This displays the Create Page dialog.
3. In the **Page Name** field, type `Construction`.
4. Ensure that Page Style is **Blank**, and click **Create**.

The page displays in edit mode, as shown in [Figure 6-1](#):

Figure 6–1 Construction Page



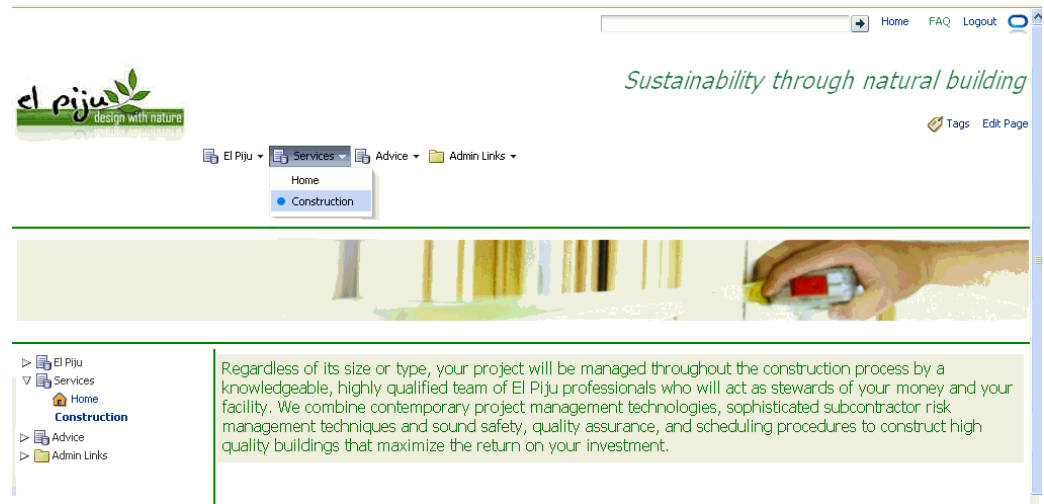
5. Click **Add Content**.
This displays the Resource Catalog.
6. Next to **Web Development**, click **Open**.
7. Next to **Text**, click **Add**, and then **Close**.
Your page should look like [Figure 6–2](#):

Figure 6–2 Text Element in the Construction Page



8. Open the `construction.txt` file from wherever your WebCenter Portal administrator placed the pre-supplied content.
9. Copy the text, and go back to Spaces.
10. Click **Edit Text** on the right side.
11. Under the **Text** box, select "Enter your text here" and paste the text you copied from the `construction.txt` file.
12. Make the text larger, change its color, and change its font using the editing tools offered by the Rich Text Editor. When you're finished, click **Done Editing**.
13. Click **Save**, then **Close**.
14. Verify that your new page was added to the **Services** node in the navigation models, both along the top and in the tree, as shown in [Figure 6–3](#):

Figure 6–3 Construction Page Accessible From Menu and Tree



You just created a simple page and added plain text that you edited for its style and color using the Rich Text Editor. Now you'll upload content and graphics to the Services subspace and use them to create a new page.

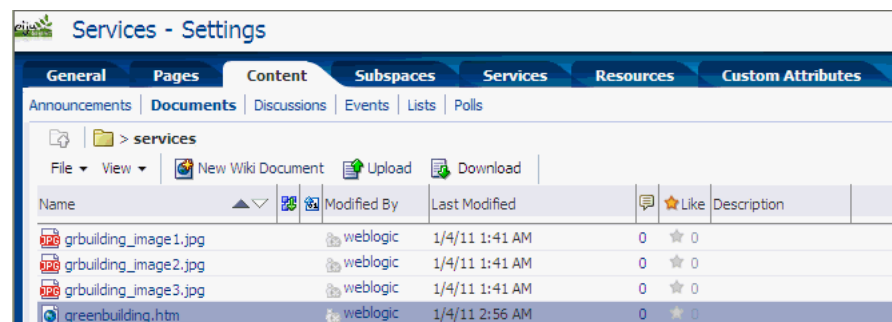
Step 2: Upload Content to the Services Subspace

You'll now upload the content for a new page, Green Building, which you'll create in just a moment.

1. Expand **Admin Links**, click **Services Admin**, then select the **Content** tab.
2. Click **Documents**.
This displays the root directory of the Services subspace.
3. Click **Upload**.
4. Under the **Document to Upload** section, click **Browse** and select `grbuilding_image1.jpg` from wherever your WebCenter Portal administrator placed the pre-supplied content.
5. Repeat step 4 to select `grbuilding_image2.jpg`, `grbuilding_image3.jpg`, and `greenbuilding.htm`, then click **Upload**.

The names of the uploaded files appear on the Documents page, as shown in Figure 6–4:

Figure 6–4 Green Building Images Uploaded



Now let's build the Green Building page with the content you just uploaded.

Step 3: Create the Green Building Page

You'll now design the Green Building page using the Content Presenter feature. With Content Presenter, you can select an Oracle WebCenter Content's Site Studio file, a single item of content, multiple content items, query for content, or select content based on the results of a WebCenter Portal's Personalization Conductor scenario, and then select a template to render the content on a page in a Spaces application. Don't worry if you're not familiar with all of these terms.

You should still be on the **Content** tab.

1. Click the **Pages** tab.
2. Click **Create Page**.
3. In the **Page Name** field, type `Green Building`.
4. In the **Page Style** section, select the **Right Narrow** option, then click **Create**.

This displays the Green Building page in edit mode.

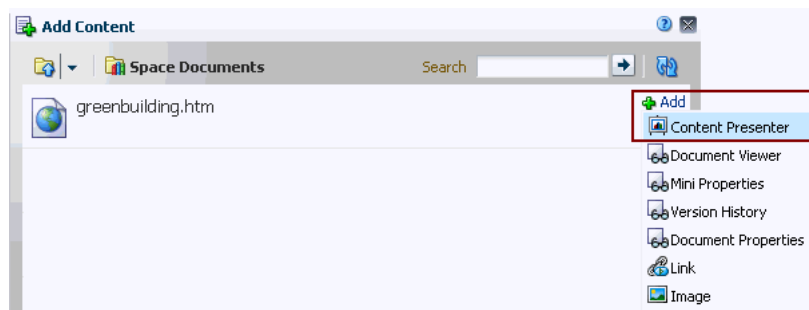
5. In the left region, click **Add Content**.
This displays the Resource Catalog.
6. Next to **Content Management**, click **Open**.
7. Next to **Space Documents**, click **Open**.

Tip: You can skip steps 6 and 7 and directly search for **Space Documents**.

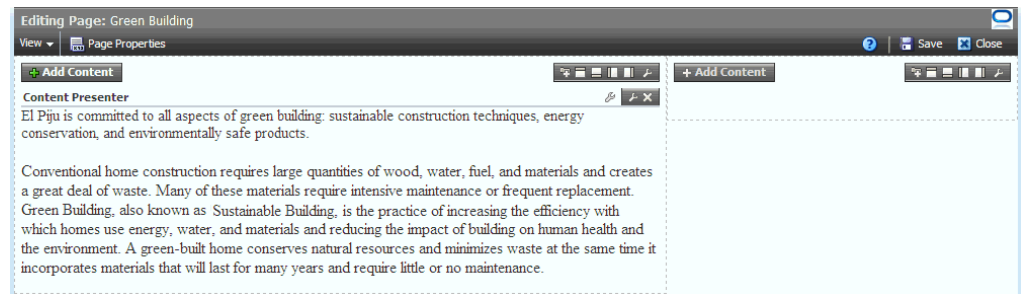
Space Documents provides access to all the documents that have been uploaded for the current space.

8. Next to `greenbuilding.htm`, click **Add**. From the pop-up menu, select **Content Presenter**, then click **Close**.

Figure 6–5 Resource Catalog - Add - Content Presenter



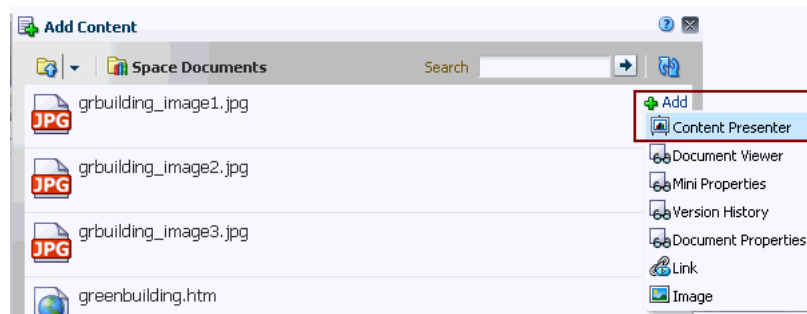
The text from the `greenbuilding.htm` file displays in the left region, as you can see in [Figure 6–6](#):

Figure 6–6 Green Building - Left Region Populated with Text

9. In the right region, click **Add Content**.

This displays the Resource Catalog.

10. Next to **grbuilding_image1.jpg**, click **Add**, then select **Content Presenter** from the pop-up menu:

Figure 6–7 Resource Catalog - Add - Content Presenter

11. Repeat step 10 to add **grbuilding_image2.jpg** and **grbuilding_image3.jpg**, then click **Close**.

The three images are added along the region to the right, while the content appears on the left. The Green Building page should now look like [Figure 6–8](#):

Figure 6–8 Green Building - Right Region Populated with Images



Let's see what this content looks like when surrounded by the page template.

12. Click Save, then Close.

Notice that the Green Building page is now accessible from both navigations: the Services menu and the Services tree, as shown in [Figure 6–9](#):

Figure 6–9 The Green Building Page



Your page is now ready. Since you created this page using Content Presenter task flows, it is editable at runtime. We'll see in a bit what this means to end users.

Step 4: Edit the Green Building Page at Runtime

Now let's see how your users can edit this page inline, assuming they have the appropriate privileges to do so. For end users, editing at runtime is made easy with Content Presenter.

1. While looking at the Green Building page, press **Ctrl-Shift-C**.

Each region containing content becomes outlined in blue; in a hashed border.

2. Click the **View and manage this document** icon in the region that contains text.

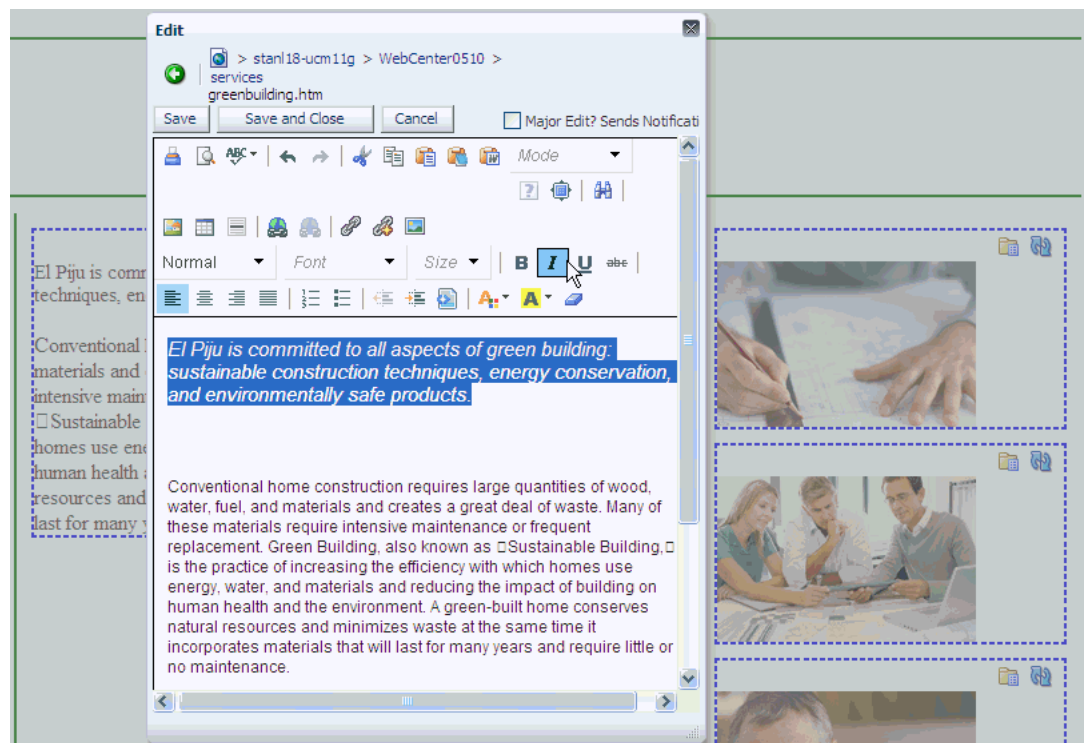
This displays the Edit dialog.

3. Click **Edit**.

4. Make some text changes; for example, italicize the first sentence, as shown in [Figure 6–10](#).

You're editing content directly in Spaces at runtime, this is also called in-context editing, a Content Presenter capability to empower users to manage online content.

Figure 6–10 Edit Dialog



At runtime, users will have access to the features that you explored while making the Documents page available in [Step 3: Make the Documents Page Available](#). They will be able to upload a new version of a document, check out the current version for editing, copy its download link using the View menu, and so on.

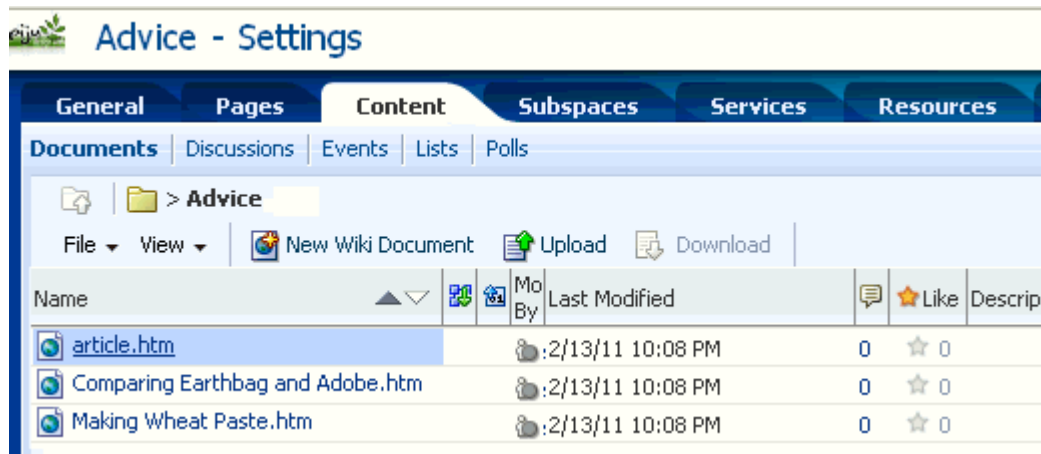
5. Click **Save and Close**.
6. Press **Ctrl-Shift-C** to make the hashed border disappear.

Step 5: Upload Content to the Advice Subspace

You'll now upload the content for a new page, *Key Decisions*, which you'll create in just a moment.

1. Expand **Admin Links**, click **Advice Admin**, then select the **Content** tab.
2. Click **Documents**.
This displays the root directory.
3. Click **Upload**.
4. Under the **Document to Upload** section, click **Browse**, then select *Comparing Earthbag and Adobe.htm* from wherever your WebCenter Portal administrator placed the pre-supplied content.
5. Repeat step 4 to select *Making Wheat Paste.htm* and *article.htm*, then click **Upload**.

Figure 6–11 Files Uploaded Appear As Links



Step 6: Create the Key Decisions Page

Now let's create a three-tabbed page in the Advice subspace. Once again you'll use the Content Presenter task flow, but this time with an extended functionality that lets you add content in a preconfigured Content Presenter format and template that you can choose from the available options.

You should be on the **Advice - Settings** page.

1. Select the **Pages** tab.
2. Click **Create Page**.
3. In the **Page Name** field, type *Key Decisions*.
4. Ensure that Page Style is **Blank**, and click **Create**.
This displays the Key Decisions page in edit mode.
5. Click **Add Content**.
This displays the Resource Catalog.
6. Next to **Content Management**, click **Open**.
7. Next to **Content Presenter**, click **Add**, then click **Close**.

The Content Presenter task flow is added. Because we have three pieces of content we want to display together in a particular format, we select Content Presenter first, rather than the content. When we were creating the Green Building page, we had three unrelated files to display, so we added them one at a time.

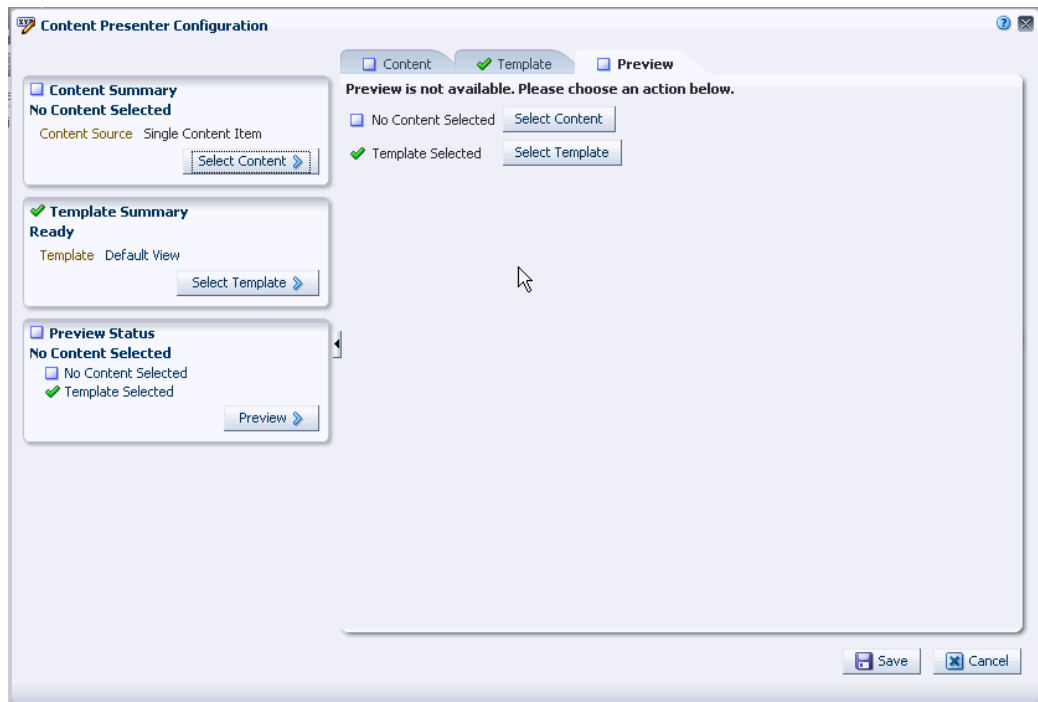
8. On the right side, click the *first* wrench icon, as shown in [Figure 6–12](#).

Figure 6–12 Wrench Icon in Content Presenter Task Flow



This displays the Content Presenter Configuration wizard, as shown in [Figure 6–13](#):

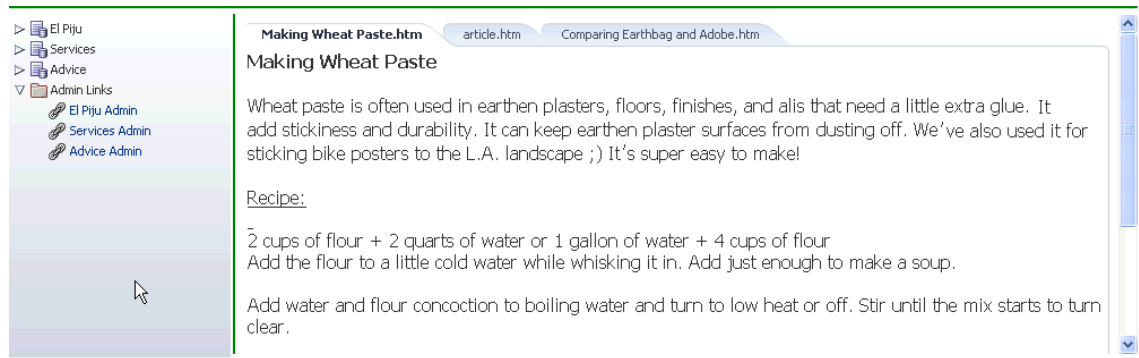
Figure 6–13 Content Presenter Configuration Wizard



9. On the **Content** tab, from the **Content Source** dropdown list, select **List of Items**.
10. Under **Select Items to Display**, click **Add**.

This displays the Select One or More Content Items dialog.

11. Highlight the three files you uploaded in [Step 5: Upload Content to the Advice Subspace](#), then click **Select**.
12. On the **Template** tab, from the **Template** dropdown list, select **Tabbed View**, then click **Save**.
13. Now save and close the page. Your screen should look like [Figure 6–14](#):

Figure 6–14 The Three-Tabbed Page in the Advice Subspace

14. Click each tab to view each article.

Summary

You created three pages in the subspaces to experience different page designing methods. First you created *Construction* using a simple layout with the Rich Text Editor. For *Green Building*, you chose the Right Narrow layout and displayed some content using Content Presenter. You also edited the Green Building page at runtime to experience Content Presenter's runtime editing capabilities. Finally, you designed a three-tabbed page, *Key Decisions*, by adding three articles and applying a preconfigured Content Presenter template. Content Presenter is a powerful tool that you can use to accomplish almost all possible content scenarios. *Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces* provides detailed information about what you can do with Content Presenter.

Part II

Using Social Site Features

In this part, you'll have a chance to explore commonly used social networking features in Oracle WebCenter Portal: Spaces.

This scenario contains the following steps:

- [Step 1: Create a Space](#)
- [Step 2: Explore the Activity Stream](#)
- [Step 3: Make a Document Available](#)
- [Step 4: Assign a Workflow to a Document Folder](#)
- [Step 5: Create a Wiki Document](#)
- [Step 6: Create a Blog Post](#)
- [Step 7: Post a Discussion Topic](#)
- [Step 8: Explore Your Profile](#)
- [Step 9: Examine Your Preferences](#)

Tour a Social Site

When you install Spaces, you get a host of WebCenter Portal: Services to provide the support you need to build both internal and external facing portals. For example, the Analytics service provides metrics to keep track of user traffic, while other services such as People Connections and Discussions help people keep in close contact with each other. In the next few steps, you'll take a closer look at some of the services that help you communicate with others on your team.

To introduce you to some of the most commonly used social site features based on Oracle WebCenter Portal: Services, in this chapter we will:

- [Step 1: Create a Space](#)
- [Step 2: Explore the Activity Stream](#)
- [Step 3: Make a Document Available](#)
- [Step 4: Assign a Workflow to a Document Folder](#)
- [Step 5: Create a Wiki Document](#)
- [Step 6: Create a Blog Post](#)
- [Step 7: Post a Discussion Topic](#)
- [Step 8: Explore Your Profile](#)
- [Step 9: Examine Your Preferences](#)

Step 1: Create a Space

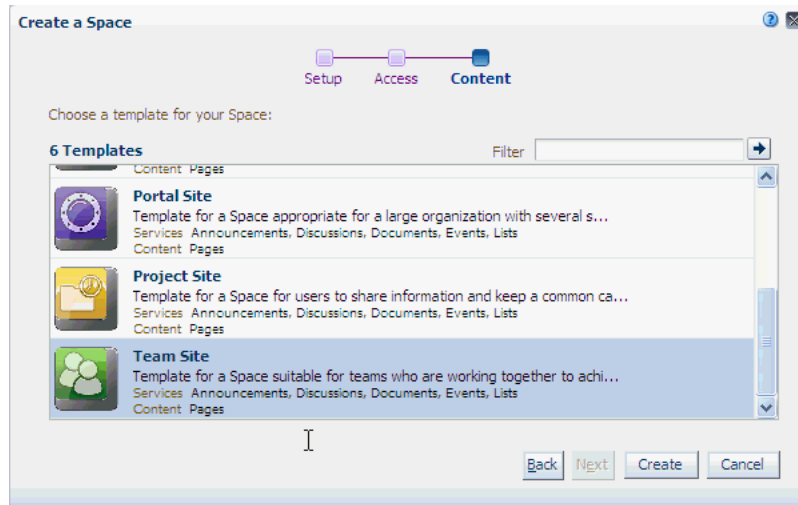
Communities with common interests, as well as teams with a common business goal or project, need to exchange information in the form of ideas, opinions, and organized content (such as, processes, policies, information about new services and facilities, and so on). To help these groups get and stay connected, Spaces provides different types of space templates that support the specific needs of project teams and communities.

While the El Piju site you created in the last scenario helped you explore ways to build a customer-facing portal, in this scenario you'll build a team site (internal portal) through which you'll experiment with Spaces' social networking capabilities.

1. Log in to Spaces.
2. Click **Spaces** in the banner, then choose **Create a Space**.
3. In the **Name your Space** field, type `Get Connected`.
4. In the **Write a description** field, enter a description if you like, and click **Next**.
5. In the **Access** step, in the **Enter the URL for your Space** field, type `getconnected` to complete the URL.

- Under **Choose an access level for your Space**, choose **Public**, then click **Next**.
- In the **Content** step, highlight the **Team Site** template, as shown in [Figure 7-1](#), then click **Create**.

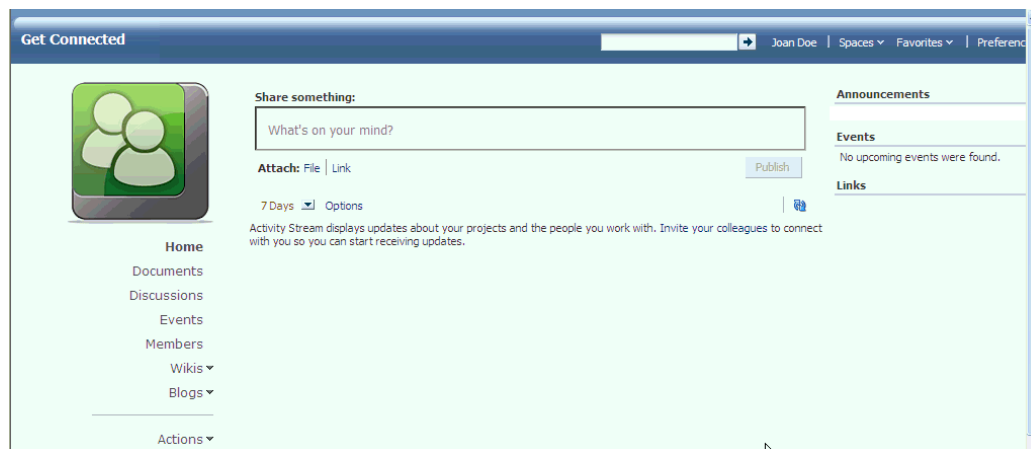
Figure 7-1 Team Site Template



While the Portal Site template, which we used in the previous scenario, is more appropriate for a portal site, the Team Site template has everything you need for teams who need to stay in close contact. Specifically, the Team Site template comes pre-seeded with a discussions forum, document library, wiki, blog, and more, all of which can be used to foster communication between and among disparate groups.

Your screen should look something like [Figure 7-2](#):

Figure 7-2 Newly Created Get Connected Space



Let's add a colleague as a member of the Get Connected space. You'll need your colleague to explore some of the features you'll experiment within this scenario.

Add a Colleague As a Member

Note: To experiment with Activity Stream, you'll need the name of a colleague at your site, preferably one with a Spaces account. If you don't have one, you can just follow along with the steps described here.

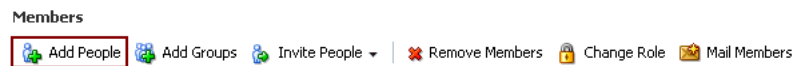
In this step, you'll add a colleague to the Get Connected space as a participant.

1. While you are in the Get Connected space, click **Members** in the left navigation panel, then click **Add** at the top of your screen.

This displays the **Members** tab in the **Settings** tab set. As the creator of this space, you are a moderator and can therefore control all aspects of the space, including membership.

2. Click the first icon, **Add People**.

Figure 7-3 Add People Icon



3. In the **Add People** field, type in your colleague's user ID, then click the arrow to search the directory.

Figure 7-4 Add People Field

The image shows a search field labeled 'Add People' containing the text 'joan.doe' and a search arrow. Below it is a table with three columns: 'Name', 'Mail', and 'User ID'. The table is currently empty. At the bottom right of the table area, there is a 'Select Role' dropdown menu set to 'Moderator', and two buttons labeled 'Add' and 'Done'.

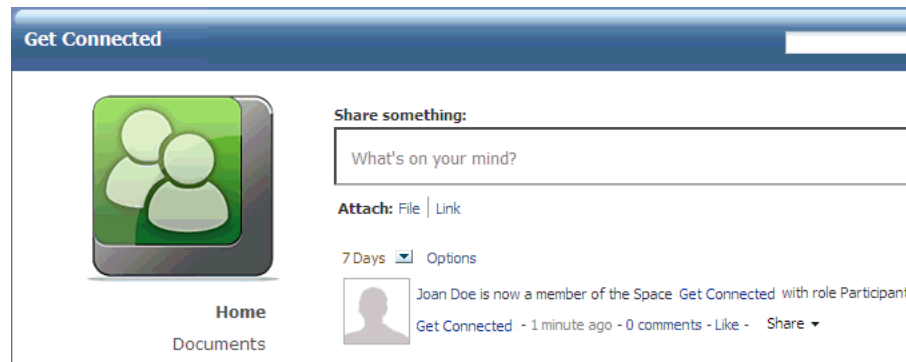
4. In the table below the **Add People** field, select the row with your colleague's user ID.
5. From the **Select Role** dropdown list, select **Participant**.
6. Click **Add**, then **Done**.

Notice that your colleague's name moves to the Members list as a participant.

7. Click **Back to the Space** in the banner.

Take a look at the Home page, as shown in [Figure 7-5](#), and notice that your colleague has been added to the space.

Figure 7-5 Activity Stream - New Member



You'll find that many of your activities, as well as those of other space participants and moderators, are reflected on the Activity Stream, providing an easy way for team members to scan through and see what changes have occurred since their last visit. We're now going to explore the Activity Stream feature a bit more.

Step 2: Explore the Activity Stream

In this step, you will work with Activity Stream to experience how it provides a streaming view of the actions you'll perform in the Get Connected space. For example, Activity Stream can note when you or a connection posts feedback, uploads a document, and creates or contributes to a discussion forum. You can also share a streamed activity and its attachments using the Share option, available on each streamed item.

Let's do the following:

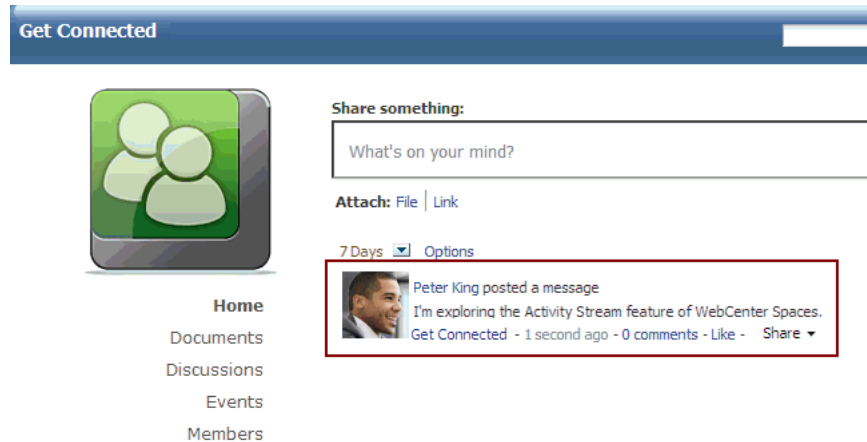
- [Share Ideas and Thoughts](#)
- [Create an Announcement](#)
- [Schedule an Event](#)

Share Ideas and Thoughts

You may already be quite used to sharing your ideas and thoughts through social networking sites such as Facebook, Twitter, MySpace, or Orkut. Let's explore a similar feature in Spaces by adding a quick note to let your colleague know that you're exploring Activity Stream features. Type a message in the **Share something** box, then click **Publish**.

Your message appears on the Home page immediately:

Figure 7-6 Share Something - Post a Message



The screenshot shows the 'Get Connected' page. On the left is a navigation menu with 'Home', 'Documents', 'Discussions', 'Events', and 'Members'. The main area features a 'Share something:' form with a text input field containing 'What's on your mind?'. Below the form are links for 'Attach: File | Link'. A dropdown menu is set to '7 Days' with an 'Options' link. A red box highlights a recent activity stream post by Peter King: 'Peter King posted a message. I'm exploring the Activity Stream feature of WebCenter Spaces. Get Connected - 1 second ago - 0 comments - Like - Share'.

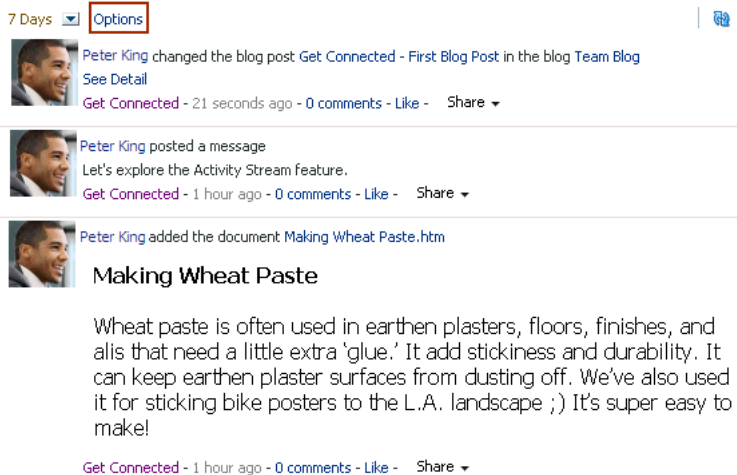
Next, share a document or a link with your colleague using the links provided for this purpose:



This close-up shows the 'Share something:' form with the text input field. Below the form, the 'Attach:' section has 'File' and 'Link' links circled in red. A 'Publish' button is visible to the right.

Notice that the Hide and Share dropdown menus appear next to what you've posted to allow you to email space members directly, or to hide the activity from their view.

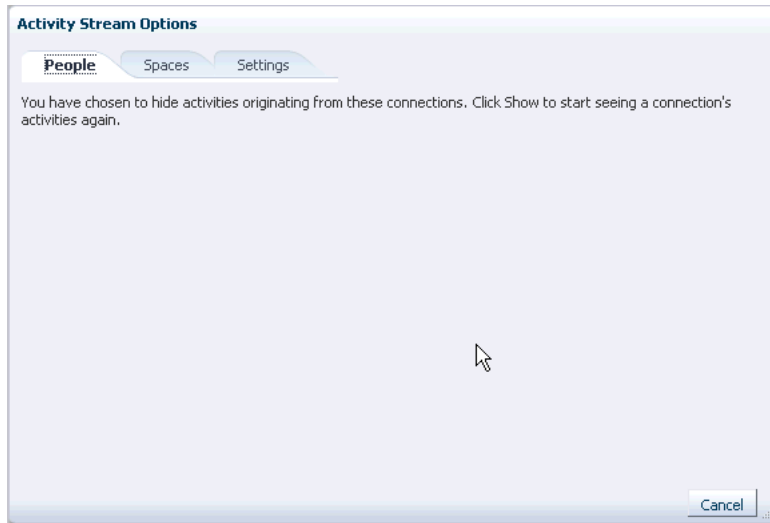
Click the **Options** link that appears on top of the Activity Stream.



The screenshot shows the Activity Stream with three posts. The top post is by Peter King: 'Peter King changed the blog post Get Connected - First Blog Post in the blog Team Blog. See Detail. Get Connected - 21 seconds ago - 0 comments - Like - Share'. The 'Options' link is highlighted with a red box. The second post is by Peter King: 'Peter King posted a message. Let's explore the Activity Stream feature. Get Connected - 1 hour ago - 0 comments - Like - Share'. The third post is by Peter King: 'Peter King added the document Making Wheat Paste.htm. Making Wheat Paste. Wheat paste is often used in earthen plasters, floors, finishes, and alis that need a little extra 'glue.' It add stickiness and durability. It can keep earthen plaster surfaces from dusting off. We've also used it for sticking bike posters to the L.A. landscape ;) It's super easy to make! Get Connected - 1 hour ago - 0 comments - Like - Share'.

- The **People** tab displays the connections whose activities you choose not to display in your Activity Stream. A Show button displays against each connection listed on this tab, which you can click if you change your mind. (This tab doesn't display any connections at this point, as shown in Figure 7-7, because you don't have a proper list of connections.)

Figure 7-7 Activity Stream Options - People Tab



- The **Spaces** tab shows the spaces whose activities you are not interested in. Once you have spaces listed on this tab, a Show button displays against each one so you can change your preference anytime you like.
- On the **Settings** tab, you can choose People, spaces, and WebCenter Portal services from which to stream activities in your own view of the Activity Stream. These settings follow you, in effect, so you'll see the same set of activities regardless of whether you're in your Home space or another space.

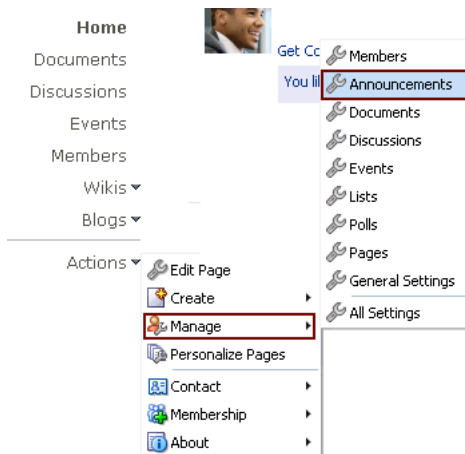
Click **Cancel** to exit the **Options** tab set.

Create an Announcement

Announcements are an effective way to notify all LOBs about upcoming events, such as product releases, training sessions, workshops, and so on. Let's announce the launch of the Get Connected space. Your colleague will see this announcement, as she is a member of this space.

1. From the **Actions** menu, choose **Manage**, then **Announcements**:

Figure 7-8 Actions - Manage - Announcements



This displays the Announcements page.

2. Click **Create**.
This displays the Create Announcement dialog.
3. In the **Subject** field, type what you plan to announce. For example, type Announcing the new Get Connected Space!.
4. In the Rich Text Editor, type a line or two about the announcement:

Figure 7–9 Create an Announcement

Notice that you can determine when this announcement becomes active, as well as set an expiration date if the material is time-sensitive.

5. Click **Create**.
The announcement is created and displays on the Announcements page, as shown in [Figure 7–10](#):

Figure 7–10 Announcements Page - New Announcement

6. Click **Home** on the left navigation panel.
Notice that the new announcement you just posted appears in your Activity Stream. In addition, the Home page for a Team Site contains the Announcements *task flow* in the upper right corner, so all announcements are published there as well for easy access. A task flow is a set of re-usable rules and controls that allow a user to complete a task. You can think of task flows as the building blocks that help construct your Spaces pages.

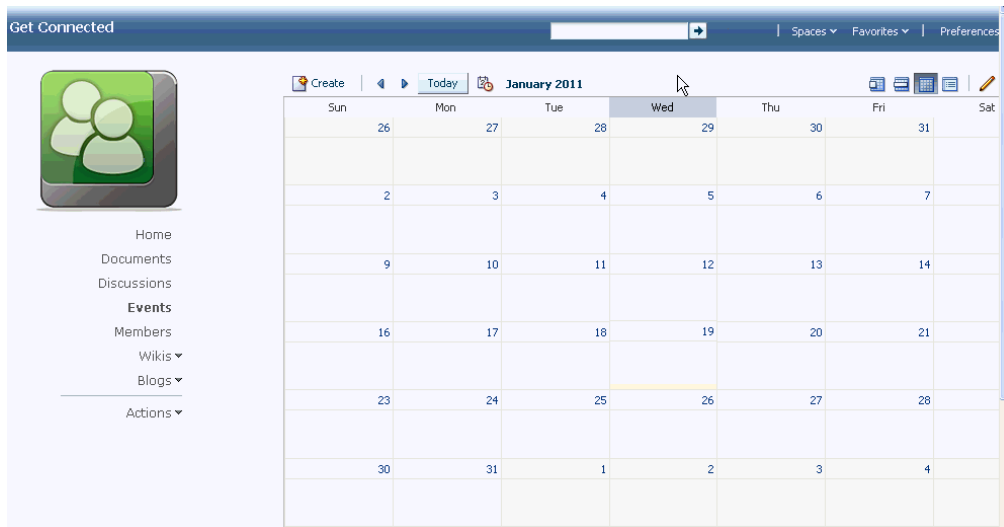
Schedule an Event

The Events task flow is useful for scheduling meetings, appointments, and any other type of occasion in your space's calendar so all the space members know about the event. Let's schedule a meeting with the Get Connected space members--in this case just your colleague--to discuss how we can make the Get Connected space more productive.

1. From the **Actions** menu, choose **Manage**, then **Events**.

Your screen should now look like this:

Figure 7-11 Events Calender



2. Click **Create**, located just above the calendar.
This displays the Create Event dialog.
3. In the **Title** field, type the title of the event you want to schedule. For instance, *Brainstorming Meeting*.
4. In the **Location** field, specify the location of this event.
5. In the **Time** section, select the start and end time of the event, as shown in [Figure 7-12](#):

Figure 7–12 Create an Event

Create Event

* Title: Brainstorming Meeting

Location: _____

Time

All Day Event

* Start Time: 1/19/11 12:00 PM

* End Time: 1/19/11 1:00 PM

Options

Priority: High

Category: Brainstorm Create Category...

Details: _____

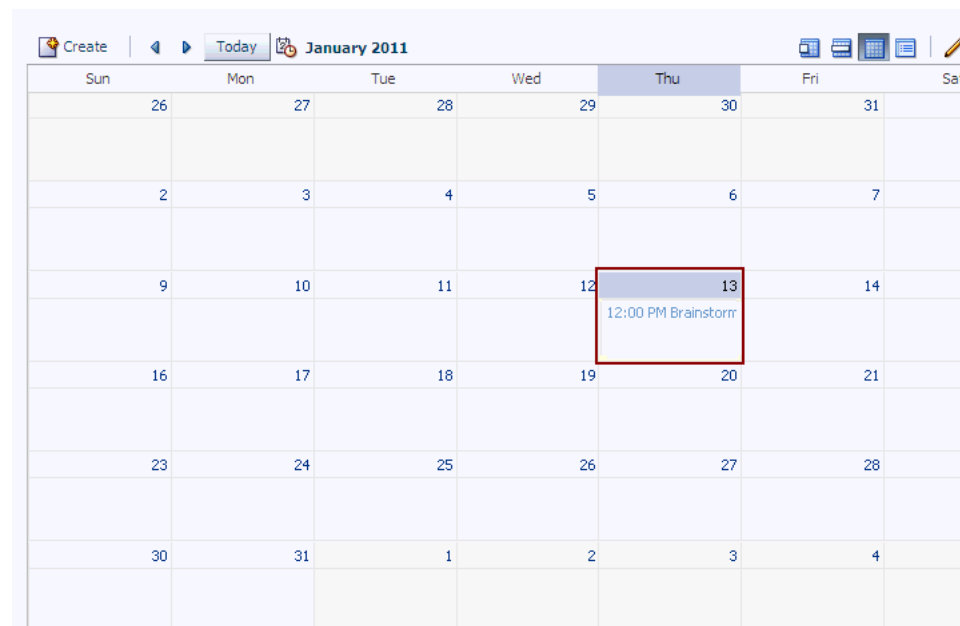
Create Cancel

Notice that in the **Options** section you can set the priority of the event and allocate it to a suitable category. These options are quite useful in an environment where several events take place every day, so space members can sort the events based on importance and context.

6. Click **Create**.

The event is created and displayed in the calendar for the specified date and time, as shown in [Figure 7–10](#):

Figure 7–13 Calendar - New Event



Step 3: Make a Document Available

Each space has its own documents folder provided by the Documents service. This folder is intended as a collaborative area in which all space members can keep content in the form of .doc, .html, .ppt, .xls, and so on, as well as a place in which users

can edit certain content in place. Versioning controls make it easy to keep track of a document's history.

Let's explore this feature a bit.

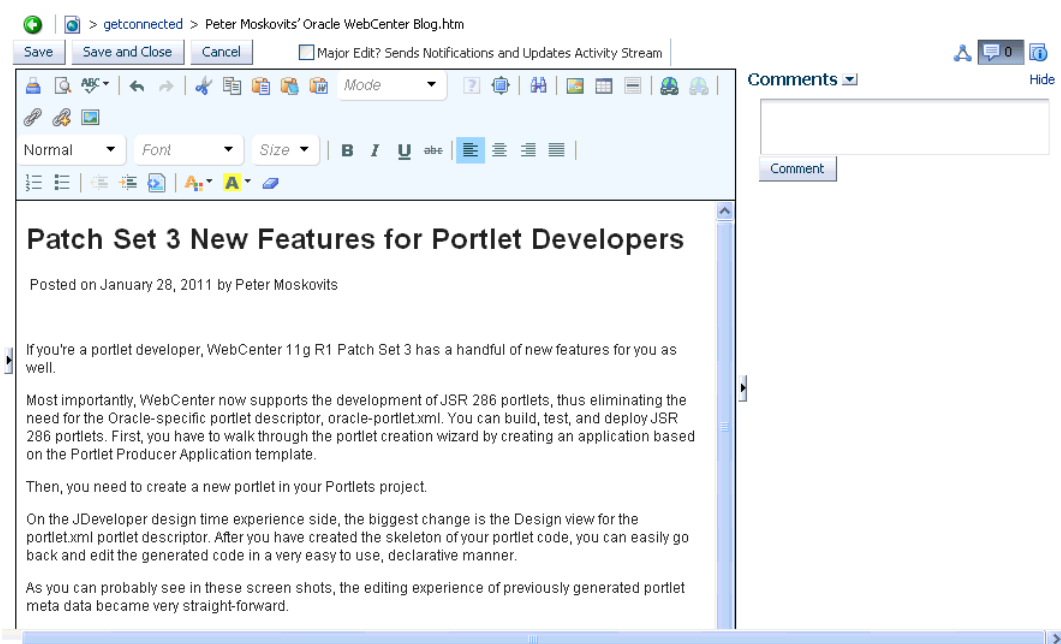
1. Click **Home** to go back to the Get Connected Home page, if you are not already there.
2. In the left navigation panel, click **Documents**.
3. Click **Upload** and upload any document to which you have access, using the same steps you used while building the El Piju space (for example, see [Step 5: Upload Content to the Advice Subspace](#)).

4. Click the document to display its content.

Notice that you can not only edit the document, but also comment on it, add tags, see the document's history, and so forth.

5. Click **Edit** on the toolbar to open the document in the Rich Text Editor, as shown in [Figure 7-14](#):

Figure 7-14 Document Open in the Rich Text Editor



Notice the **Major Edit? Sends Notifications and Updates Activity Stream** checkbox. Selecting this checkbox ensures that this document update is reflected in the Activity Stream. You can also use this feature to notify the subscribers about the changes you make to this document.

6. Click the **Back** arrow to return to the Documents page.
7. In the left navigation panel, click **Home**, and notice that the document upload is reflected in the space's Activity Stream, as shown in [Figure 7-15](#):

Figure 7–15 Activity Stream for a Newly Added Document

Notice that you can **Like** a document that you or someone uploads.

Step 4: Assign a Workflow to a Document Folder

Let's try out the Workflow feature of the Documents service by setting up a workflow on a folder.

You should still be on Get Connected's Documents page.

1. Create a folder by choosing **File > New Folder**.
2. In the **Folder Name** column, type a name, then click **Create**.

The new folder displays in the **getconnected** root directory. Don't upload any documents to it yet, because we haven't yet assigned a workflow to this folder.

3. Select the row with the folder name.
4. From the **View** menu, choose **Properties**.
This displays the Basic properties page of your folder.
5. From the **File** menu, choose **Workflow Settings**:

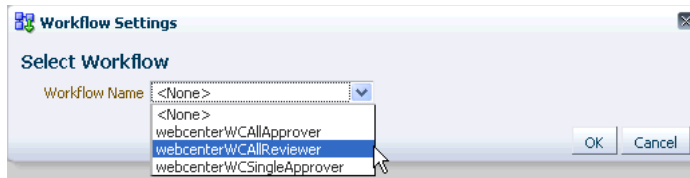
Figure 7–16 File - Workflow Settings

This displays the Workflow Settings dialog.

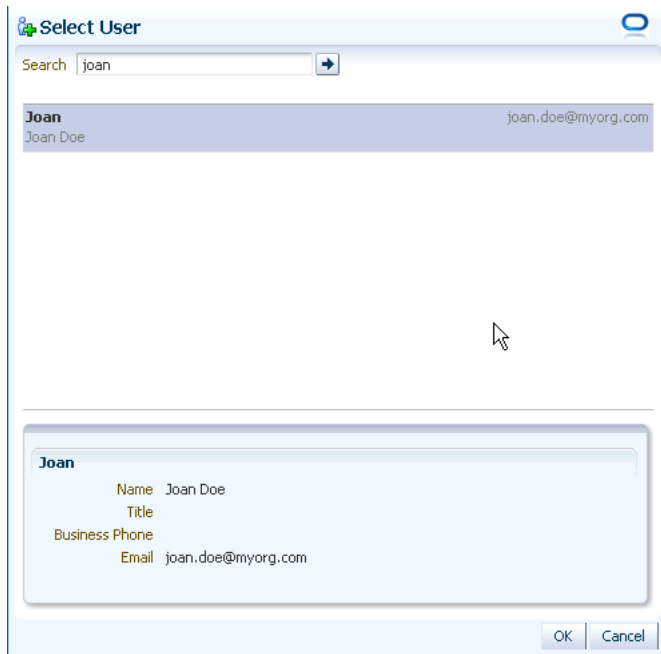
6. Choose **webcenterWCAIIRviewer** from the **Workflow Name** dropdown list, as shown in [Figure 7–17](#).

This workflow type lets approvers edit the content of the documents they are assigned to approve.

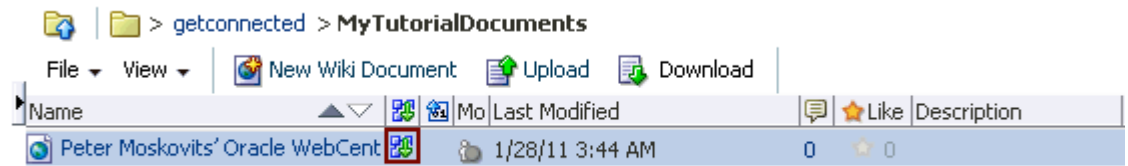
Figure 7–17 Workflow Settings Dialog



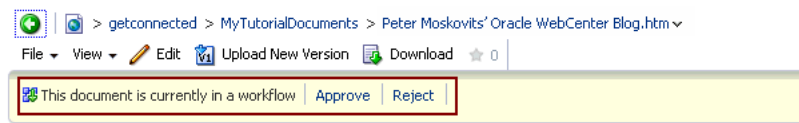
7. In the **Select Approvers** section, click **Add Approvers**.
The Select User page opens in a new browser.
8. In the **Search** field, type your colleague’s user ID, then click the **Search** button.
Your colleague’s user ID displays in the box below the **Search** field.



9. Select your colleague’s record, then click **OK**.
Your colleague is now assigned to this workflow.
10. In the **Workflow Settings** dialog, click **OK** to save the workflow.
Your colleague will receive an email notification that she has been assigned this workflow as a document approver.
11. Click the back (left Green arrow) button to go to the root directory.
12. Click the name of the folder you created.
13. Upload a document to your folder.
Now let’s check the workflow status of the document you uploaded. The **Workflow Status** icon next to the document name confirms that a workflow is assigned to this document:

Figure 7–18 Team Wiki - Workflow Status Column

Ask your colleague to visit her documents in the Get Connected space by clicking **Documents** in the left navigation panel. The folder you created will display for her too. When she clicks the document you uploaded, a message will display asking her to approve or reject it because the document is now in her workflow. She will be able to edit the content of your document before approving or rejecting it.



Patch Set 3 New Features for Portlet Developers

Posted on January 28, 2011 by Peter Moskovits

If you're a portlet developer, WebCenter 11g R1 Patch Set 3 has a handful of new features for you as well.

Most importantly, WebCenter now supports the development of JSR 286 portlets, thus

Let's spend a few minutes on the team wiki document to get a feel for how wikis work in Spaces.

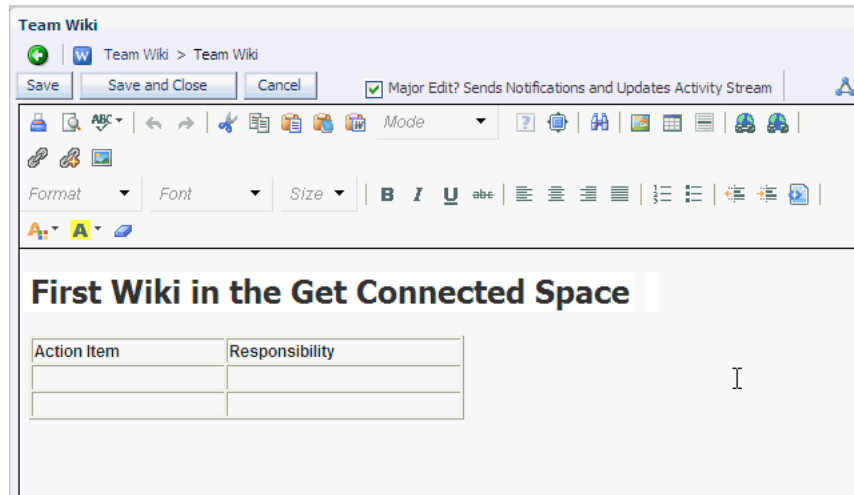
Step 5: Create a Wiki Document

Wikis have become popular within companies large and small as a means of sharing knowledge within organizations and with the world outside. Let's take a glance at how this powerful collaborative authoring tool works in Spaces.

1. On the left navigation panel, from the **Wikis** dropdown menu, choose **Team Wiki**.
This displays the default wiki page with the Welcome text. You can edit this wiki page to add whatever content you like.
2. Click **Edit**.
The wiki page opens in the Rich Text Editor.
3. Replace the default text with something about the Get Connected space, add a table if you like, and experiment with other options.
4. Now select the **Major Edit? Sends Notifications and Updates Activity Stream** checkbox, as shown in [Figure 7–19](#).

Activity Stream will reflect that this wiki has been updated. You can also use this feature to notify wiki subscribers about the changes you make to the wiki content.

Figure 7–19 Team Wiki

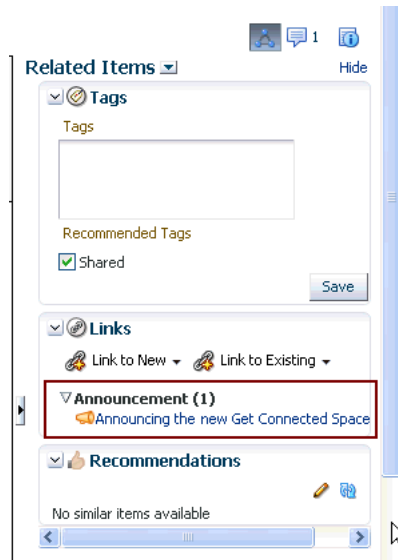


5. Click **Save and Close**.

Notice the **Comments** section on the right side and **Related Items** and **Comments** icons.

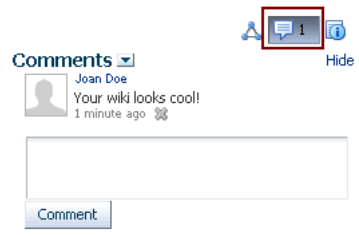
The **Related Items** icon lets you create:

- *Tags* - Add keywords related to the content of the wiki. You can use tags to make your wiki easily discoverable in search results.
- *Links* - Create links to a discussion topic, announcement, document, event, note, or URL. Experiment with this feature by creating some links using the **Link to New** menu. Or, just create a link to the announcement you posted earlier: from the **Link to Existing** menu, choose **Announcement**. In the Link to Existing Announcement dialog, select your announcement, then click **Link**.



- **Recommendations** - Suggest content for others to view, based on the current wiki topic.

Ask your colleague to add a comment to this wiki. The number of comments is reflected next to the **Comments** icon.



- On the left navigation panel, click **Home** to see that the wiki update is reflected in the Activity Stream, as shown in [Figure 7-20](#):

Figure 7-20 Wiki Update in Activity Stream



Let's move on to another widely used Web tool, blogs.

Step 6: Create a Blog Post

Through blogs you can promote new technologies, logistical changes, or organizational shifts. Like wikis, blogs are another widely used authoring tool for sharing information and receiving feedback. Let's create a simple blog post.

- On the left navigation panel, click **Blogs**, then select **Team Blog**.

This displays the Team Blog page.

- Create a new post by clicking **New Post**.

This opens a page in the Rich Text Editor.

- Enter a title, some text, then click **Create**.

The new post should look something like [Figure 7-21](#).

Figure 7-21 Team Blog



Notice **Archives** on the right side. Under Archives, posts are sorted by the year and month in which they were created.

Now let's explore another powerful information tool called *discussions*.

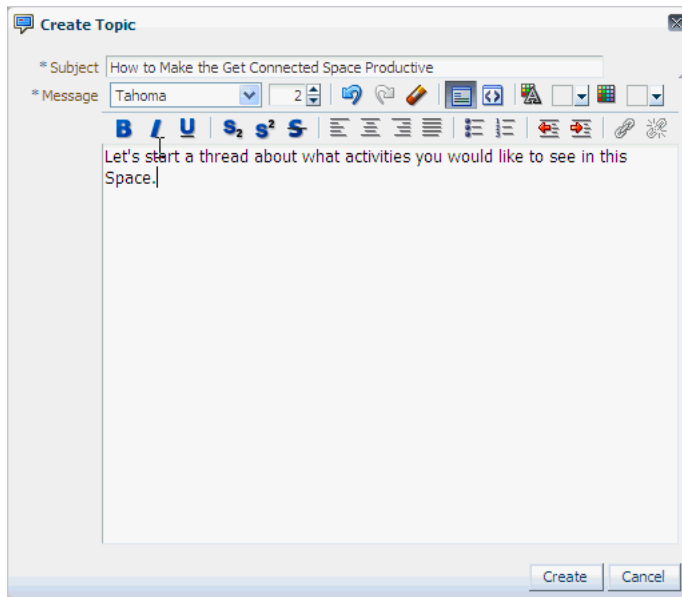
Step 7: Post a Discussion Topic

Creating a discussion topic is a great choice for people to discuss a feature or ideas, or for those who want to work together to resolve a problem.

Let's create a discussion topic now.

1. On the left navigation panel, click **Discussions**.
2. Click **Create Topic**.
This displays the Create Topic dialog.
3. In the **Subject** field, type a subject of your choice.
4. In the Rich Text Editor, type a topic on which you would like to start a discussion thread, as shown in [Figure 7-22](#):

Figure 7-22 New Discussion Topic



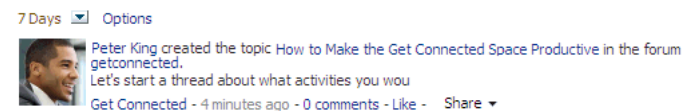
5. Click **Create**.
The topic is created and displays on the topic page, as shown in [Figure 7-23](#):

Figure 7-23 New Discussion Topic



You want to be notified each time someone posts a comment on this topic, so click **Watch Forum** on the toolbar. (*How* you'll be notified is another story, and something you'll learn about in Step 9.) Notice the RSS feed icon for subscribing to this topic's RSS feed. Just like all other activities, this activity also reflects in Activity Stream on the Home page, as shown in [Figure 7-24](#):

Figure 7-24 New Discussion Topic in the Activity Stream



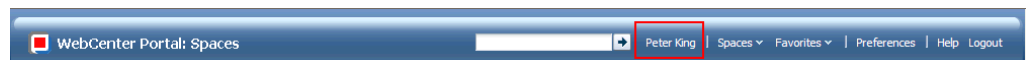
If you like, ask your colleague to respond to this topic so you can explore this functionality a bit more.

Step 8: Explore Your Profile

A profile makes it easy for other space members to know who you are; your role in the organization, how they can reach you, and so on. Let's take a look at each tab on the WebCenter Portal: Spaces profile page and see how you can customize it to reflect your position within the organization.

1. Click your name in the banner, as shown in [Figure 7–25](#).

Figure 7–25 Accessing Your Profile



This displays the **Activities** tab, which reflects all the actions you've performed so far. This provides an easy way for you to isolate your own activities from the space's Home page, which reflects the actions of all space members.

2. Click the **Connections** tab.

This tab displays a list of people you're connected to. You can invite other WebCenter Portal users to become your connection by clicking **Invite People**. If your list of connections grows unwieldy, use the **Organize** link to create logical categories and group your connections beneath them. You can also use the Show and Filter fields to control which connections appear on the Connections tab.

3. Click the **Documents** tab.

The Documents tab is your personal document library. It contains all the files you have uploaded or created within the entire WebCenter Portal instance.

4. Click the **Organization** tab.

The Organization tab displays a virtual business card, as shown in [Figure 7–26](#), with information such as your email, mobile, company, and so on. This card includes previous and next buttons so you can view all the information you've entered on the tabs. If you want, click these buttons to view how your details appear in the card.

Notice the **Go to Profile** link, which takes you back to the **Activities** tab.

Figure 7–26 Organization Tab

5. Click the **About** tab.

All the information along the right side of your profile is drawn from what you enter on the About tab. Take a few moments and add some details, if you wish.

Click **Edit** on top of the photo placeholder, then click **Change Photo** in the **Photo** section to add your picture, if you have one on your system.

The right margin of your display, as shown in [Figure 7–27](#), is fairly self-explanatory, with one exception: Recommended Connections. You may have a Recommendations task flow available to you in one of the many pages with which you interact, but if you don't, remember that your Profile always contains a list of recommended contacts, as well as a means of connecting with them.

Although the examples in this tutorial are fairly simple, in a real business environment you're likely to be active in many different spaces and have dozens, if not hundreds, of contacts. With so many people contributing content virtually non-stop within your WebCenter Portal instance, discovering new contacts and information that may be of value to you can be difficult. To help address this problem, the Activity Graph service analyzes metadata about your Spaces activities and, based on the results, actually suggests people, objects, and spaces you may want to connect to.

Figure 7-27 Recommended Connections

The screenshot shows a user profile page with several sections. At the top, there are tabs for 'Activities', 'Connections', 'Documents', 'Organization', and 'About'. The 'About' tab is selected. The main content area is divided into three sections: 'Summary', 'Employee', and 'Business Contact'. The 'Summary' section includes 'About Me' (I'm a Content Developer.), 'Display Name' (Peter King), 'Email' (peter.king@myorg.com), 'Department' (WebCenter), 'Designation' (Content Developer), 'Manager', 'Direct Reports', 'Phone', and 'Time Zone' (UTC-08:00 US Pacific Time). A photo of a man is shown to the right. The 'Employee' section includes 'Employee Type', 'Employee Number', 'Preferred Language', 'Organization', and 'Expertise' (Expertise not set.). The 'Business Contact' section includes 'Fax', 'Mobile', 'Pager', and 'Street'. On the right side, there is a 'Contact Information' section with 'Email' (peter.king@myorg.com), 'Work', and 'Mobile'. Below that is a 'Location' section with 'Address' and 'Local Time' (1:33 AM). At the bottom right, there is a 'Recommended Connections' section with a red border, containing the text 'No connections available' and two icons (a pencil and a refresh icon).

6. Once you've updated your profile, click **Save**.

Now that you've provided some information to help others understand your role within the organization, let's see how you can tailor the Spaces environment to suit your individual needs.

Step 9: Examine Your Preferences

In addition to changing your preferred language, account password, and configuring your IM details, there's a lot more you can do with the Preferences feature. For example, you can control your own Spaces experience by choosing who should or shouldn't be able to track your activities, as well as choose whose activities you would like to track. You can even decide how much access certain connections (users) should have to your posts, messages, and feedback. You can also subscribe to spaces that interest you so you can keep abreast of their activities. Although we'll take a quick look at this functionality in the context of this tutorial, you'll find it's much more useful when you start using it in an actual business environment, where there are multiple spaces and connections from which to choose.

1. On the banner, click **Preferences**.

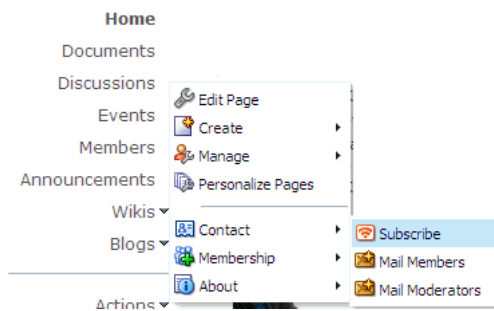
This displays the Preferences dialog - General Preferences page through which you can change your language preference, time and date formats, and so on.

2. Click the **Messaging** icon.

Spaces allows you to subscribe to application objects and spaces so that you can be notified anytime, anywhere, when changes occur. For example, you may want to know when a change is made to a hot topic in a discussion forum, or when a new version of a vital document is uploaded. Your mail address is your default messaging channel, so you'll receive an email each time a change occurs to something you've subscribed to. However, if you want to receive notifications over your phone, through your Worklist, or via an alternate mail address, the Message Preferences page is the place to make that happen. (However, you'll be able to set your preferences on this page only if you're authorized to do so.)

Tip: It's easy to subscribe to a space; just click **Actions**, choose **Contact**, then **Subscribe** in the space's navigation area. After you do, you'll receive notifications based on the filters you defined through your Messaging preferences--all space activities or just a subset.

Figure 7-28 Actions Menu - Subscribe Option



We won't take the time to go through the rest of the Preference icons here, so for now, just keep in mind that the Preference options help you fine-tune your Spaces experience. If you need help setting your preferences, *Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces* provides all the information required.