Oracle® Fusion Middleware

User's Guide for Oracle WebCenter Portal: Spaces

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Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces, 11*g* Release 1 (11.1.1.7.0)

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Contents

3 Leveraging Social and Collaborative Services

4 Accessing Spaces Administration Pages

Part II Designing a Portal or Community

5 Configuring Global Defaults

6 Configuring Services, Portlet Producers, and External Applications

7 Administering Portal Pages

11 Working with the Resources that Compose a Portal or Community

12 Working with Navigation

13 Working with Page Templates

14 Working with Skins

15 Working with Page Styles

16 Working with Resource Catalogs

Part V Working with Pages

17 Creating and Managing Pages

18 Editing a Page

19 Working with Web Development Components on a Page

Part VI Securing Your Portal

23 Understanding Security

24 Managing Users, Roles, and Permissions

25 Enabling Self-Registration

26 Securing Pages and Components

Part VII Working with Multilanguage Portals

27 Working with Multilanguage Portals

Part VIII Creating and Managing Portlets and Task Flows at Runtime

28 Understanding Portlet Basics

29 Creating Business Mashups

Part IX Organizing Your Collaborative and Social Networking Environment

32 Exploring the Home Space

33 Managing Your Profile

34 Creating Your Social Network

36 Posting and Managing Messages and Feedback

37 Liking, Commenting On, and Sharing Objects

38 Setting Your Personal Preferences

39 Setting Up Your Personal Subscriptions and Notifications

40 Creating and Managing Your Personal Favorites

Part X Working with Content

41 Introduction to Adding and Managing Content

42 Publishing Content Using Content Presenter

43 Working with the Documents Service Task Flows and Document Components

46 Creating and Managing Content at Runtime

47 Collaborating on Documents

48 Working with Microsoft Office and Explorer Integration

49 Working with Wiki Documents

50 Working with Blogs

Part XI Planning and Building a Space

51 Understanding Space Basics

52 Working with Space Templates

53 Managing a Space

54 Managing Space Members and Roles

55 Administering Spaces and Templates

56 Working with a Space Hierarchy

Part XII Analyzing and Monitoring Your Portal

57 Analyzing Usage and Performance Metrics

Part XIII Searching WebCenter and Other Sources

58 Working with the Search Service

59 Working with the Tags Service

Part XIV Gathering Intelligence Based on Activities

60 Working with the Activity Graph Service

Part XV Services: Announcements through Links

61 Working with the Announcements Service

62 Working with the Discussions Service

63 Working with the Events Service

64 Working with the Instant Messaging and Presence Service (IMP)

65 Working with the Links Service

Part XVI Services: Lists through Worklist

66 Working with the Lists Service

67 Working with the Mail Service

68 Working with the Notes Service

71 Working with the Recent Activities Service

72 Working with the Worklist Service

Part XVII Appendices

A Spaces User Interface URLs

B Expression Language (EL) Expressions

C Business Mashup Examples

Preface

Welcome to Oracle Fusion Middleware User's Guide for Oracle WebCenter Portal: Spaces. This guide describes the runtime behavior of the Spaces application. Much of this information also applies to WebCenter Portal: Framework applications, though it is written with Spaces application users in mind. (For information about WebCenter Portal: Framework applications, see *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.)

This guide provides instructions for such tasks as creating a company, team, or departmental portal; creating, populating, and managing portal pages; and working with services and portlets.

> **Note:** This guide depicts the application user interface (UI) in screenshots. Users can apply different templates to the application UI to adjust its look and feel; therefore, your view of the application may differ somewhat from the views depicted in screenshots.

Audience

This document is intended for WebCenter Portal: Spaces application users who are interested in creating online communities centering around a group project or a shared area of interest. It is also intended for business developers interested in creating enterprise mashups through runtime component wiring.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc`.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info` or visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs` if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Fusion Middleware 11*g* Release 1 (11.1.1.7.0) documentation set:

- *Oracle Fusion Middleware Tutorial for Oracle WebCenter Spaces Users*
- *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*
- *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*

Conventions

We use the following text conventions in this document:

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

What's New

What's new in Release 11.1.1.7.0? There are four major new features—Apple iPad® support, improved accessibility, performance metrics enhancements, and Pagelet Producer. Read this quick-reference page for a concise summary of what's new in this release and for pointers to more detailed information.

Note: Release 11.1.1.7.0 is part of a *patch set*. A patch set is a single-installation collection of patches that are designed to be applied together. You must apply patches to Oracle WebCenter Portal as well as all associated product dependencies (such as WebCenter Content). Patching involves copying a small collection of files over an existing installation.

A patch is normally associated with a particular version of an Oracle product and involves updating from one minor version of the product to a newer minor version of the same product (for example, from Release 11.1.1.6.0 to Release 11.1.1.7.0).

You must install the Release 11.1.1.7.0 patch set for continued support.

New Features and Enhancements for Release 11.1.1.7.0

The following table lists and describes new features and enhancements in this release and provides links to more detailed information in our guides.

Feature	Description	For More Information, See...
Accessibility	■ High contrast and large font support	■ Section 38.4, "Setting Your Accessibility Options"
Apple iPad® support	■ Oracle WebCenter Portal's out of the box-applications and templates that are now supported on iPad®: Admin UI, Composer, Spaces Template. ■ ADF components render on iPad®.	■ Section 13.1.1, "Out-of-the-Box Page Templates" ■ *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*
Blogs	■ Improved documentation on blog comments ■ Improved documentation on linking to blogs	■ Section 50.2.2, "Understanding the Blog Page Style" ■ Section 50.7.6, "Managing Blog Posts"

Feature	Description	For More Information, See…
Documents	▪ New Java system property to change view of Upload Document pane: either add multiple files at once, optionally providing a single description that applies to all files, or add files one at a time, optionally providing a description for each file. ▪ Improved documentation on uploading files without and with a content profile ▪ Improved documentation on working with tables in Rich Text Editor	▪ Section 43.8.1, "Uploading Files" ▪ "Modifying the Upload Document Pane" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal* ▪ Section 43.11.3, "Working with Tables in the Rich Text Editor"
Look and feel	▪ Guidance on how to use HTML, CSS, JavaScript, menus, page templates, styles, and skins together to define the look and feel for your application	▪ Chapter 10, "Creating a Look and Feel"
Multilanguage portals	▪ Improved language support documentation	▪ Section 27.1, "What You Should Know About Languages in Spaces"
Pagelet Producer	▪ Support for WebCenter Sites ▪ Portal integration, leveraging Pagelet Producer ▪ Added information about Pagelet Producer lifecycle	▪ "Creating Pagelets with Oracle WebCenter Portal's Pagelet Producer" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal* ▪ "Managing Oracle WebCenter Portal's Pagelet Producer" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*

Feature	Description	For More Information, See…
Performance Metrics and Troubleshooting	■ New look for home page and additional menus in Fusion Middleware to help you monitor performance and help diagnose issues with WebCenter Portal applications. ■ Warning thresholds for key performance metrics that you can customize for your system. This feature immediately alerts you if an issue starts to impact the performance of pages, portlets, or documents in your application. You can also set warning thresholds for important Oracle WebLogic Server performance indicators, such as CPU usage, memory usage, thread activity, JDBC resources, and more. ■ Guidance on how to use the new features to analyze and help you diagnose issues with WebCenter Portal system health. ■ Troubleshooting appendix to help administrators diagnose and resolve performance and configuration issues. ■ Support for logging DFW (diagnostic framework) incidents.	■ "Monitoring Oracle WebCenter Portal Performance" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal* ■ "Troubleshooting WebCenter Portal" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*
Profiles	■ Synchronize profile information from LDAP to database	■ "Synchronizing Profiles with the Identity Store" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*

Part I

Getting Started with WebCenter Portal: Spaces

Part I of the User's Guide introduces WebCenter Portal: Spaces portals and communities and describes the features that are readily available to assist you in their creation.

Part I includes the following chapters:

1

Introducing WebCenter Portal: Spaces

Welcome to Oracle WebCenter Portal: Spaces! The Spaces application furnishes all the tools you require to rapidly create portals, communities, and social networking sites capable of accommodating thousands of users and encompassing diverse populations with differing language requirements.

This chapter defines a few useful terms and provides a sampling of some of the types of portals, communities, and social networking sites you can create using the Spaces application. It also supplies a table of references to details about the resources discussed in this chapter.

This chapter includes the following sections:

- Section 1.1, "Understanding Portals, Communities, and Social Networking Sites"
- Section 1.2, "Planning Your Portals, Communities, and Social Networking Sites"
- Section 1.3, "Where to Look for More Information"

> **Learn More:** For more detailed information about Spaces application features that support social networking, see Chapter 3, "Leveraging Social and Collaborative Services."

1.1 Understanding Portals, Communities, and Social Networking Sites

Your decision about what to build naturally falls in line with what you plan to accomplish. This section assists you in that decision by clarifying what is meant by *portals*, *communities*, and *social networking sites*. It includes the following subsections:

- Section 1.1.1, "What Is a Portal?"
- Section 1.1.2, "What Is a Community?"
- Section 1.1.3, "What Is a Social Networking Site?"

1.1.1 What Is a Portal?

A portal is a web destination that presents information and resources that are diverse in location, technology, and derivation, through a single point of entry. Content and technology that originate from widespread sources appear to your users as a cohesive set of information and services that are easily available from one location.

For example, in a Spaces portal, a user can look at all the Worklist items coming from their organization's eBusiness Suite, the detailed customer information coming from a CRM suite, and the latest sales figure charts coming from a Business Intelligence tool. Despite these multiple sources, to your user, all of this content is available in one place and appears to be coming from a single source.

Portals offer solutions for aggregating disparate content into one or multiple libraries. Authorized users are provided with controls for uploading and managing such content so that consumers have easy access to what appears to be a cohesive body of knowledge available in one location.

Applications from multiple sources can appear as a family of applications, once again, available from a single source: the portal. Through their portals, users have a go-to destination for all of their self-service applications, such as expense and time reporting, no matter the multiple points of origin. The portal provides an efficient delivery platform that saves users time and effort and creates a positive experience between the enterprise and its employees.

Also contributing to that positive experience, portals deliver personalization capabilities. Personalization provides a means of leveraging the information in a user's Profile to tailor the user's experience of the portal. For example, Mary the manager logs in and sees department-wide results information and links to reporting applications, while Sal the salesman logs in and sees his reports on his own results and links to leads.

Spaces portals provide two arenas for the presentation of resources and information: a *space* and the *Home space*.

Spaces are typically used to create portals and communities that are scoped to a specific audience, for example, a specific division, department, project, or community. Subspaces, which are hierarchically lower than their parent spaces, enable you to set up, for example, a divisional portal (the space), with child portals for each subdivision (subspaces).

You can use the Home space to address all of your company's employees. In addition to its inherent broad appeal—by default, the Home space is accessible to all authenticated users—the Home space can be set up to provide a personal experience for each user. For example, each user can have a dashboard of all the information they require for starting their daily work. That is, a portal just for them.

1.1.2 What Is a Community?

A community is a group of individuals gathered together to accomplish a common goal or share a common interest. Communities can be used in conjunction with portals as well as social networks—they are not mutually exclusive.

In the Spaces application, the idea of community is realized in the development of spaces that are designed to support collaboration among space members. A space provides a dedicated and readily accessible area for relevant services, pages, and content.

A space supports the assembly of team and community members through direct addition, invitation, and self-registration. It supports internal hierarchies through the assignment of permissions and roles, which offer differing levels of access to space features and resources. It supports structural hierarchies through the creation of subspaces, the management of which can be delegated to subteams or different lines of business (LOBs).

A space brings people together in a virtual environment for ongoing interaction and information sharing.

Learn More: For more detailed information about spaces, see Part XI, "Planning and Building a Space".

1.1.3 What Is a Social Networking Site?

Any number of social networking sites, such as Facebook and MySpace, may have already given you a strong understanding of web-based social networking. Users forge connections to each other. That connection provides a free pass to information about each other's activities and the resulting content. That is, links to sites of interest, photo slide shows, and statements reflecting a user's current state of mind. A connection between two people increases exponentially as each user's connections introduce themselves through recommendations and by commenting and liking streamed posts and links.

The Spaces application does not reimagine social networking, but rather focuses it on the more purposeful environment of your enterprise. Users with common interests and goals can forge connections that expose them to content of interest and enable them to follow and benefit from each other's activities.

The Home space is an excellent venue for setting up a site that is focussed on social networking. The Home space is accessible to all employees, provided they are logged in, making it the best foundation for a broad social network.

In the Home space, social networking capability is greatly enhanced by the People Connections service. This service provides features for forging connections to other users, viewing and customizing personal profile information, viewing the activities of other users, and sharing such activities, as well as files and links, with a broader audience.

The Home space may include a set of pages that are created by application administrators and pushed to targeted users. Such pages are called *business role pages*. Business role pages can provide content of interest to a specific group of users, such as the Sales team, and prevent uninterested users from seeing it.

Provided they are enabled to do so, users may have the ability to create and customize pages in the Home space for their eyes only. They can add or upload content of interest specifically to them, and share that content with whomever they choose.

> **Learn More:** For more detailed information about Spaces application social network capabilities, see Chapter 3, "Leveraging Social and Collaborative Services."

1.2 Planning Your Portals, Communities, and Social Networking Sites

This section provides an overview of the types of portals, communities, and social networking sites you can build and describes the resources and roles you would need to build them. It also supplies pointers to relevant information in the rest of the guide. This section includes the following subsections:

- Section 1.2.1, "Planning a Home Space to Serve All Users"
- Section 1.2.2, "Planning Multiple Portals Serving All LOBs"
- Section 1.2.3, "Planning a Department Portal"
- Section 1.2.4, "Planning a Department Portal with Diverse Collaborative Teams and Communities"
- Section 1.2.5, "Planning a Division Portal with Teams, Communities, and Social Networks"

1.2.1 Planning a Home Space to Serve All Users

Requirement

Build a highly controlled, secure, and performant corporate portal that focusses on social networking among thousands of users.

Who Will It Serve?

This corporate portal is intended to serve all internal users. Its purpose is to disseminate information about corporate events, accomplishments, and initiatives, and to provide access to corporate resources, such as Payroll, Human Resources, Purchasing, and the like. Additionally, it is meant to enable employees to connect with each other and share all kinds of information about themselves and their endeavors.

To a limited degree, this portal confines access to targeted information to specific audiences. For example, only the sales people see a link to the Sales Manager's blog; only the decision makers see a link to the Purchasing page. All users see the link to the page *From the CEO*. In some ways, this is like the corporate "family" site. It might replace and improve upon the traditional corporate newsletter as well as provide links to resources that are available to all employees.

What Type of Access Should Users Have?

A small group of people are responsible for creating and managing pages and managing the site's look and feel. Authenticated users—that is, users who are logged in—can interact with social networking services, such as People Connections and they can set personal Preferences. But they cannot create Personal pages nor perform page management tasks.

What Types of Resources Should Be in Place?

Portal builders require access to site resources, such as application Skins and Navigation, Page templates and Styles, and so on. They require access to application Administration pages where they can specify which resources to apply. They are also likely interested in analyzing Usage and Performance Metrics to determine heavy traffic areas and possible bottlenecks. The Analytics service will be useful to this end.

Within the small set of users who are tasked with building and maintaining the portal, a subset of users should be given the responsibility of establishing and maintaining site Security through the creation and assignment of application roles and permissions.

Such a portal could be based on the Home space, with its application-wide scope. Basing the portal on a Home space would simplify and centralize site resource management, and call for a security model with a fairly simple structure.

This type of portal will also make use of a few System pages and Business role pages. System pages are prebuilt utility pages, such as the application login page, that authorized users can customize in terms of content and look and feel. Business role pages are pages targeted to a specific business role, such as a salesperson, an HR representative, a Corporate Trainer, and so on. Each business role page is pushed into the Home space views of its target audience.

The Documents service, which encompasses files, Blogs, and Wikis, should be made available to the limited set of users who are allowed to provide content to the portal. The People Connections service should be made available to all authenticated users to enable them to interact with social networking features, such as Profile, Activity Stream, and Connections.

Connections and Activity Stream are a particularly essential components of a robust social network. Connections enable users to create the network. Within the Home space, Activity Stream streams the activities of each user's connections. Within a space, it streams the activities of each space member.

Liking, Commenting, and Sharing should be available on the Activity Stream to enable users to interact with each other by expressing approval for and commenting on streamed activities and for sharing objects of interest and useful links.

The Activity Graph service will also be of great use. It provides a means of enlarging your users' spheres of interest in the Spaces application by offering recommendations for new connections, suitable items, and relevant spaces.

You might include the Polls service to provide a means of administering simple polls to the entire corporate population regarding issues, ideas, and events of interest to all.

1.2.2 Planning Multiple Portals Serving All LOBs

Requirement

Build highly controlled, secure, and performant portals to be accessed by thousands of users. Each portal is targeted to a particular LOB. All portals must have consistent branding that is controlled by a limited set of users. The content of each portal is maintained by specific roles within each LOB.

Who Will It Serve?

This portal provides a central landing place for all LOBs with the intention of directing each LOB to its own dedicated portal. Each LOB portal in turn offers information of specific interest to that LOB as well as access to External Applications aimed at the LOB's reporting requirements (status, expense, results, and the like).

What Type of Access Should Users Have?

All users have access to the central landing page, which might be the Home space or the parent space in a set of Hierarchical spaces. There are advantages to both. For example, basing the landing page on the Home space simplifies the security model, at least for that page. Basing it on a parent space in a hierarchy enables you to take advantage of inheritance of configuration settings, simplifying the task of maintaining consistent branding across portals.

Security would likely be set up in a steeper hierarchy than discussed with the first model. Like the first model, a small set of users control the site resources for all portals, such as the templates, skins, and Resource Catalogs (these provide access to the components one adds to a page). In this multiportal environment, however, management of each portal is delegated to a few people from each LOB, each controlling access, Content management, and maintenance of their specific sites.

What Types of Resources Should Be in Place?

In addition to portal resources, such as Skins, Navigation, Page templates, and the like, LOB portals would find Announcements useful for spreading information of interest to a like-minded group, immediately or on a selected date and time. The Activity Graph service would be useful for providing recommendations for pages and documents of interest based on an analysis of user activity. The Instant Messaging and Presence service (IMP), would keep department members alert to each others' online status and provide options for contacting another user on the spot. Finally, the Worklist service would be useful for keeping track of workflow notifications and messages channeled through the User Messaging Service (UMS).

1.2.3 Planning a Department Portal

Requirement

Enable each department to build multiple portals in one environment. These portals serve as information-sharing vehicles for their users.

Who Will It Serve?

Each of these portals serves a very large department with internal subdivisions. For example, imagine a large manufacturing corporation that is primarily divided into Marketing, Sales, Accounting, Manufacturing, Fulfillment, and Distribution. Every employee will likely fit under one of those umbrellas, but under a given umbrella there are subdivisions. Accounting will have at least two: one for Accounts Payable and one for Accounts Receivable. They may also handle Budgets, Collections, and Payroll.

Each of these departments has a portal based on a parent space, such as the Accounting home page, with a hierarchy of subspaces, each purposed with addressing the information requirements of a given subdivision (Accounts Receivable, Accounts Payable, and so on).

What Type of Access Should Users Have?

All department members have access to the parent space, which is the landing page for the department. Limited access is provided for subspaces: users belonging to a subdivision have access to the subdivision's dedicated subspace in a group of Hierarchical spaces.

A limited set of users would manage the portal's Resources. These users might control resources for all portals, or there might be a like group of resource managers for each portal, and possibly for each child portal. A limited set of users would handle Content management. It is likely that each portal would have its own team handling Security, and subdivisions may also handle their own.

What Types of Resources Should Be in Place?

Portal Resources and Security are useful to all portals. Hierarchical spaces are of particular importance in this model. They provide a number of relevant benefits, such as grouping of related content under a given space; logical navigation for drilling down into required areas for more information; delegated administration; inherited membership; and a flexible security model, where you can configure access to be identical to the parent space, or allow it to be completely overridden by the administrator of the subspace.

Services in support of information dissemination, such as the Documents service, the Announcements service, and the Activity Graph service, will likely come into play. Polls scoped to the department or to a subdivision could also prove useful.

1.2.4 Planning a Department Portal with Diverse Collaborative Teams and Communities

Requirement

Enable a controlled set of users to build portal sites, while the rest of the users can build team sites.

Who Will It Serve?

This is another type of departmental portal that provides information of interest to all department members as well as access to spaces serving project-focussed teams and communities of interest.

What Type of Access Should Users Have?

All users have view access to the department portal. A small set of users serve as portal administrators, who control the look and feel and content of the main site and delegate responsibilities to managers of teams and communities. A larger pool of users are assigned space moderator roles, to enable them to manage and monitor their team and community spaces.

What Types of Resources Should Be in Place?

In addition to all the portal-building Resources mentioned in other models, many collaborative tools will come into play. For example, the Lists service will provide useful features for creating things like project issues lists, milestones lists, and lists of deliverables. Project teams can leverage the Events service for meeting planning and event scheduling. The Members task flow is vital for keeping track of who is on the team or who belongs to the community. Team member can use Wikis for preserving meeting agendas and note taking. Teams and Communities can use Blogs for evangelizing technologies and ideas and disseminating expertise.

It will serve the users of this portal to provide the Links service to enable the creation of connections between relevant application objects, for example, from a list of project milestones to project design documents and functional specifications. Naturally, the Documents service will frequently come into play.

The Discussions service will be essential for enabling the creation and capture of discussions among colleagues. This is particularly useful for retaining a record of such exchanges and for enabling a widely distributed workforce to participate in their own time.

1.2.5 Planning a Division Portal with Teams, Communities, and Social Networks

Requirement

Enable a controlled set of users to build portal sites, while the rest of the users can build team sites and socialize using social networking features.

Who Will It Serve?

This portal will be lively and robust and serve a corporate division with a fairly open policy toward internal collaboration and communication.

What Type of Access Should Users Have?

All users will have access to the Home space and may have permission to create their own Personal pages in their view of it. Users belonging to a subdivision will have access to the portal dedicated to that subdivision. A small team of users will control division and subdivision home pages, including Security and Content management, but control of team sites and communities will be delegated to key members of those teams and communities. All users should have permission to update People Connections data, which would enable them to make connections, update their profiles, view the activities of their connections, and share resources.

What Types of Resources Should Be in Place?

Resources for building portals and managing portal Security should be readily available to the small set of users administering the division and subdivision portals. Resources for securing spaces, creating space pages, and managing services within the space scope should be available to users tasked with such activities. A collaborative environment, either teams or communities, will benefit tremendously from the availability of the Discussions service. The Search service will be useful for searching a large set of portals with a large volume of content. The Tags service will enable users to add their own personally meaningful search terms and share them with other users. Naturally, you will want Content management, People Connections, Lists, and Events services to support the capture, delivery, and preservation of schedules, ideas, goals, and headway. Polls will be useful across the board for taking stock. The Links service will enable users to provide links from one location to another or from a location to an application object, such as a document, a note, an event, and so on.

Connections and Activity Stream are a particularly essential components of a robust social network. Connections enable users to create the network. Within a Home space, Activity Stream streams the activities of each user's connections. Within a space, it streams the activities of each space member.

Liking, Commenting, and Sharing should be available on the Activity Stream to enable users to interact with each other by expressing approval for and commenting on streamed activities and for sharing objects of interest and useful links.

The Activity Graph service will also be of great use. It provides a means of enlarging your users' spheres of interest in the Spaces application by offering recommendations for new connections, suitable items, and relevant spaces.

You might include the Polls service to provide a means of administering simple polls to the entire corporate population regarding issues, ideas, and events of interest to all.

To assist your users in keeping informed of changes to their connections and to spaces and application objects of interest, you can incorporate Notifications into these portals. This gives users a means of subscribing to be notified over selected messaging channels when their subscribed objects change.

1.3 Where to Look for More Information

Table 1–1 provides links to information about all the resources discussed in this chapter.

Table 1–1 Where to Look for More Information

Resource	Where to Look
Activity Graph	Section 60, "Working with the Activity Graph Service"
Administration pages	■ Part II, "Designing a Portal or Community" ■ Section 4, "Accessing Spaces Administration Pages"
Analytics	Chapter 57, "Analyzing Usage and Performance Metrics"
Announcements	Chapter 61, "Working with the Announcements Service"
Blogs	Chapter 50, "Working with Blogs"
Business role pages	Section 7.1, "Working with Business Role Pages"
Content management	Part X, "Working with Content"
Discussions	Chapter 62, "Working with the Discussions Service"
Documents	Chapter 41, "Introduction to Adding and Managing Content"

Table 1–1 (Cont.) Where to Look for More Information

Resource	Where to Look
Events	Chapter 63, "Working with the Events Service"
External Applications	Chapter 6, "Configuring Services, Portlet Producers, and External Applications"
Hierarchical spaces	Chapter 56, "Working with a Space Hierarchy"
Home space	■ Section 7.2, "Working with Personal Pages" ■ Chapter 32, "Exploring the Home Space"
Instant Messaging and Presence	Chapter 64, "Working with the Instant Messaging and Presence Service (IMP)"
Languages	Chapter 27, "Working with Multilanguage Portals"
Liking, Commenting, and Sharing	Chapter 37, "Liking, Commenting On, and Sharing Objects"
Links	Chapter 65, "Working with the Links Service"
Lists	Chapter 66, "Working with the Lists Service"
Members task flow	Section 54.4, "Working with the Members Task Flow"
Navigation	Chapter 12, "Working with Navigation"
Notifications	Chapter 39, "Setting Up Your Personal Subscriptions and Notifications"
Page templates	■ Chapter 13, "Working with Page Templates" ■ Chapter 21, "Adding Spaces Components to a Page or Page Template"
People Connections ■ Connections ■ Activity Stream ■ Profile ■ Message Board ■ Feedback	■ Chapter 33, "Managing Your Profile" ■ Chapter 34, "Creating Your Social Network" ■ Chapter 35, "Tracking Your Connections' Activities" ■ Chapter 36, "Posting and Managing Messages and Feedback" ■ Section 37.3.3.1, "What You Should Know About the Publisher Task Flow"
Personal pages	■ Section 7.2, "Working with Personal Pages" ■ Chapter 32.4, "Working with Pages in the Home Space"
Polls	Chapter 69, "Working with the Polls Service"
Preferences	Chapter 38, "Setting Your Personal Preferences"
Resource Catalogs	Chapter 16, "Working with Resource Catalogs"
Resources	Chapter 11, "Working with the Resources that Compose a Portal or Community"
Search	Chapter 58, "Working with the Search Service"
Security	Part VI, "Securing Your Portal"
Skins	Chapter 14, "Working with Skins"
Styles	Chapter 15, "Working with Page Styles"
System pages	Section 7.3, "Working with System Pages"
Tags	Chapter 59, "Working with the Tags Service"
Usage and Performance Metrics	Chapter 57, "Analyzing Usage and Performance Metrics"
Wikis	Chapter 49, "Working with Wiki Documents"
Worklist	Chapter 72, "Working with the Worklist Service"

2

Leveraging Content Management

The Documents service and the flexibility of Content Presenter are available to you in WebCenter Portal: Spaces for including content from connected content repositories.

In addition to selecting and displaying content on a page in a Spaces application, you can define workflows on content in a space, create and edit content at runtime, collaborate on documents, integrate with Microsoft Office and Explorer, and add wikis and blogs to an application.

This chapter provides a survey of content management features and offers pointers to the information that will assist you in implementing them. It includes the following sections:

- Section 2.1, "What Is Content Management?"
- Section 2.2, "Leveraging Content Management Features"

Audience

This chapter is intended for Spaces users interested in leveraging content management features to manage and provide access to content in connected content repositories using Spaces.

2.1 What Is Content Management?

Content management refers to the functionality available in Spaces to add content from one or more connected content repositories to an application, enabling application developers and end users with appropriate permissions to manipulate and display that content in a variety of ways:

- **Content Presenter**. Enables you to precisely customize the selection and presentation of content in a Spaces application. The Content Presenter task flow is available only when the connected content repository is Content Server and your Spaces administrator has completed the prerequisite configuration. With Content Presenter, you can select an Oracle Site Studio file, a single item of content, multiple content items, query for content, or select content based on the results of a Personalization Conductor scenario, and then select a template to render the content on a page in a Spaces application. Content Presenter has no dependency on the Documents service for adding or managing the content it displays.

  Learn More: For more information about Content Presenter, see Chapter 42, "Publishing Content Using Content Presenter."

- **Documents service task flows**. Provide a variety of formats to display folders and files, including wikis and blogs, on a page in a Spaces application. You can choose the task flows appropriate for your application to provide features for accessing, adding, and managing folders and files; configuring and viewing file and folder properties; and searching file and folder content in the connected content repositories. The Documents service task flows enable you to manage content in Content Server, Oracle Portal, or SharePoint, when your Spaces administrator has completed the prerequisite configuration.

> **Learn More:** For information about the Documents Service task flows available in Spaces, and the unique characteristics of each task flow, see Section 43.1, "What You Should Know About the Documents Service Task Flows."

- **Document components**. Display an individual file on a page as a linked document, an inline preview, or an image.

> **Learn More:** For information about document components you can add to a page in a Spaces application, see Section 43.2, "What You Should Know About Document Components."

- **Wikis**. Enable multiple users to create and edit content that is relevant, useful, and up-to-date.

> **Learn More:** For information about including wikis in a Spaces application, see Chapter 49, "Working with Wiki Documents."

- **Blogs**. Enable users to create, edit, and manage personal blogs to record experiences and opinions, and group related blog posts.

> **Learn More:** For information about including blogs in a Spaces application, see Chapter 50, "Working with Blogs."

2.2 Leveraging Content Management Features

Content is the backbone of any Web-based project. This section provides a summary of the full scope of content management functionality available to you in Spaces. It includes the following subsections:

- Section 2.2.1, "Displaying Individual Files"
- Section 2.2.2, "Displaying and Managing the Contents of a Folder"
- Section 2.2.3, "Adding and Managing Document Workflows"
- Section 2.2.4, "Collaborating on Documents"
- Section 2.2.5, "Integrating with Microsoft Office and Explorer"
- Section 2.2.6, "Adding and Managing Wikis"
- Section 2.2.7, "Adding and Managing Blogs"

2.2.1 Displaying Individual Files

You can add dynamic previews of individual files using document components (link, image, and inline frame), a Content Presenter task flow, or a Documents service task flow:

- Document components:

- A **Link** displays the name of a selected file as a link, which you can click to display the file content in its native application.
- An **Inline Frame** displays the content of a selected file as a preview.
- An **Image** displays a selected file as an image.

- A **Content Presenter task flow** displays a selected file in the default display template for its file type. For information about the out-of-the-box display templates, see Section 42.5, "Selecting a Display Template."
- Documents service task flows:
  - A **Document Viewer task flow** displays a preview of a file, or file properties for files that do not support a preview.
  - A **Document Mini Properties task flow** displays the Basic properties of a file in a read-only view.
  - A **Document Properties task flow** displays both Basic and Advanced properties of a file, along with an **Edit** button to allow you to modify property values.
  - A **Document Version History task flow** displays a list of versions of a file, allowing for deletion of a selected version.

Learn More: For more information, see:

- Chapter 42, "Publishing Content Using Content Presenter"
- Section 43.1, "What You Should Know About the Documents Service Task Flows"
- Section 43.2, "What You Should Know About Document Components"
- Section 43.3, "Adding a Selected Folder or File to a Page"
- Section 43.4, "Adding a Documents Service Task Flow to a Page"
- Section 43.5, "Understanding the Documents Service Task Flow Menus and Actions"

2.2.2 Displaying and Managing the Contents of a Folder

The content task flows available in Spaces provide flexibility in how content displays on a page. You can display and manage the contents of a folder using the Content Presenter task flow to precisely customize the selection and presentation of content, or you can use one of the Documents service task flows that suits your purposes for presenting content management functionality:

- A **Content Presenter task flow** displays a selected folder in the default display template for folder content: List View. For information about the out-of-the-box display templates, see Section 42.5, "Selecting a Display Template" (Table 42–2 and Table 42–3).
- Documents service task flows:
  - A **Document Explorer task flow** displays folders and files in two panes, combining the functionality of the Document Navigator and Folder Viewer task flows. It provides in-place previewing and editing, and robust management capabilities.

- A **Document List Viewer task flow** displays folders and files in a single pane as a flat listing. It provides preview and editing in a separate window, and some management capabilities.
- A **Document Manager task flow** displays folders and files as specified by its `Layout` property: `Explorer`, `Table`, or `Tree Table`.
- A **Document Navigator task flow** displays a simple listing of folders and files in a single pane, providing expand/collapse on folders to show the full hierarchy.
- A **Folder Viewer task flow** displays the contents of a folder in a single pane as a flat listing, providing in-place preview and editing, and robust management capabilities.

Learn More: For more information, see:

- Chapter 42, "Publishing Content Using Content Presenter"
- Section 43.1, "What You Should Know About the Documents Service Task Flows"
- Section 43.3, "Adding a Selected Folder or File to a Page"
- Section 43.4, "Adding a Documents Service Task Flow to a Page"
- Section 43.5, "Understanding the Documents Service Task Flow Menus and Actions"

2.2.3 Adding and Managing Document Workflows

From Spaces, you can define workflows on space folders that reside in Content Server. When a folder is assigned a workflow, any file (including wiki documents and blog posts) checked in or uploaded to that folder must be approved or rejected by one or more assigned approvers. Documents service task flows, Content Presenter, and the Oracle Workflow Queue portlet from the Universal Content Management Portlet Suite provide access to the workflow-enabled content. Additionally, Content Presenter provides support for managing workflow when it displays a file that is assigned a workflow.

Learn More: Chapter 45, "Working with Workflow-Enabled Content"

2.2.4 Collaborating on Documents

Almost every enterprise spends a lot of time collaborating on documents. This includes joint authoring, sharing, reviewing, approving, editing, and so on. Spaces provides several ways to collaborate on documents, both during the development of a document, or when a document is available to all users of a Spaces application. You can collaborate on documents using the features available through the Documents service, through workflows, and using Oracle AutoVue.

Learn More: Chapter 47, "Collaborating on Documents"

2.2.5 Integrating with Microsoft Office and Explorer

Spaces integrates with Microsoft Office and Windows Explorer to provide you with flexibility in managing files in a space when the content repository is Content Server:

- Using the Microsoft Office shared document management functionality, you can work with Word, PowerPoint, or Excel files in any space, including the Home space.

- If you use Microsoft Office Outlook as your mail client, you can interact with your favorite spaces right from the familiar Outlook interface. From Outlook, you can access your activities, manage your mail attachments, and track the discussions in your spaces. Additionally, you can create a new space based on a mail message to kick-start a collaborative project, automatically adding the mail recipients as space members, mail attachments as documents, and mail content as discussion topics.
- In Windows Explorer, you can manage the folders and files in a space. To use this functionality, you create a network place in Windows Explorer for the space documents

Learn More: Chapter 48, "Working with Microsoft Office and Explorer Integration"

2.2.6 Adding and Managing Wikis

Spaces enables you to create wiki documents, which multiple users can use to create and edit content that is relevant, useful, and up-to-date.

Learn More: ■Chapter 49, "Working with Wiki Documents"

2.2.7 Adding and Managing Blogs

Spaces enables you to create and manage personal blogs to record experiences and opinions, and group related blog posts.

Learn More: ■Chapter 50, "Working with Blogs"

3 Leveraging Social and Collaborative Services

Today no modern portal deployment is complete without some notion of social interaction—whether it's blogs or discussions or integration with social media (such as Facebook or Twitter). Your CEO may blog about product direction, your product teams may initiate discussions in online forums. All of these activities, once exotic, are now fundamental. Support must be available for virtual team sites, where representatives from different lines of business, or even different enterprises—such as your partners and suppliers—can communicate, collaborate, and socialize on a specific business task.

A powerful and easy-to-master array of services and features are available in WebCenter Portal: Spaces for integrating social networking application-wide and enhancing communication and collaboration within communities and teams.

This chapter provides a survey of these features and offers pointers to the information that will assist you in implementing them.

This chapter includes the following sections:

- Section 3.1, "What Is Social Networking?"
- Section 3.2, "What Are Communities and Teams?"
- Section 3.3, "Leveraging Social and Collaborative Features and Services"

Audience

This chapter is intended for application administrators interested in leveraging social networking features to build highly collaborative communities using WebCenter Portal: Spaces.

3.1 What Is Social Networking?

Any number of social networking sites, such as Facebook and MySpace, may have already given you a strong understanding of web-based social networking. Users forge connections to each other. That connection provides a free pass to information about each other's activities and the resulting content. That is, links to sites of interest, photo slide shows, and statements reflecting the connection's current state of mind. A connection between two people increases exponentially as each user's connections introduce themselves through recommendations and by commenting and liking streamed posts and links.

The Spaces application does not reimagine social networking, but rather focuses it on the more purposeful environment of your enterprise. Users with common interests and goals can forge connections that expose them to content of interest and enable them to follow and benefit from each other's activities.

Example: John and Mary

For example, Mary is the Manager of Financial Applications at myCorp. She meets John, the myCorp Director of Accounting, at a company-sponsored seminar. They forge a connection. In his Activity Stream, John sees that Mary has published a white paper on Financial Application Futures. John reads it and realizes that one of the innovations Mary hypothesizes would introduce valuable efficiencies into his own operation. John gives the paper a thumbs up (through Liking) and comments on the streamed item. In his comment, John tells Mary that he sees an immediate and beneficial application of her ideas and suggests a meeting. Out of that meeting, the *Internal Accounting Refit* community is born.

3.2 What Are Communities and Teams?

Communities and teams are groups of people gathered together to accomplish a common goal or share a common interest. In the Spaces application, the idea of communities and teams is realized in a *space*.

Spaces support the formation and collaboration of project teams and communities of interest by providing a dedicated and readily accessible area for relevant services, pages, and content. Spaces support the assembly of team and community members through direct addition, invitation, and self-registration. They support internal hierarchies through the assignment of permissions and roles, which offer differing levels of access to space features and resources. They support structural hierarchies through the creation of subspaces, the management of which can be delegated to subteams or different lines of business (LOBs).

Spaces bring people together in a virtual environment for ongoing interaction and information sharing. In essence, spaces enable the formation and support of social networks.

Example: Internal Accounting Refit Project

For example, the space that John created, *Internal Accounting Refit*, supports the goal of customizing, deploying, and training for the department's accounting software. John assembles a team from many LOBs to accomplish this goal. He starts by creating space roles and assigning them various levels of permissions. He adds team members to the space and assigns them roles according to the level of access he intends each to have. He creates a shallow space hierarchy by adding a subspace for each LOB. Then he delegates the moderation of each subspace to each LOB lead. He enables and configures useful services to ensure all members have access to the collaborative tools that will promote project success.

> **Learn More:** For information about creating and managing spaces and subspaces, see Part XI, "Planning and Building a Space".

3.3 Leveraging Social and Collaborative Features and Services

A significant number of space services and features support the formation and success of project- and interest-based communities.

This section offers an overview of these services and features and provides a view of them through the lens of accomplishing John's goals. It includes the following subsections:

3.3.1 What Are Social Networking and Collaborative Services?

Table 3–1 provides a high-level overview of the social and collaborative services and features offered through the Spaces application. Each description includes a link to more information.

Table 3–1 Social and Collaborative Services and Features in WebCenter Portal: Spaces

Service or Feature	Description
Activity Graph service	Provides recommendations of people with whom a user may be interested in connecting, based on existing connections and shared interaction with objects in the application. It also directs users to spaces or items that may be of interest, based on similar interactions with those spaces or items the user is currently viewing. For more information, see Chapter 60, "Working with the Activity Graph Service."
Announcements service	Provides a quick, convenient way to create and distribute messages to all users within the current space, instantly or at a specified date and time. For more information, see Chapter 61, "Working with the Announcements Service."
Blogs	An offering of the Documents service, blogs provide a means of producing an online, open diary for recording thoughts and opinions that, in a business setting, evangelize technologies, share expertise, and ruminate about future directions. For more information, see Chapter 50, "Working with Blogs."
Commenting	Provides a means of adding your thoughts, opinions, and questions directly to a given application object. For more information, see Chapter 37, "Liking, Commenting On, and Sharing Objects."
Discussions service	Provides text-based discussions with other members of a space. Use Discussions service task flows to create forums, post questions, and search for answers. Discussion forums additionally provide the means to preserve and revisit discussions. For more information, see Chapter 62, "Working with the Discussions Service."
Events service	Provides calendars for scheduling meetings, appointments, and any other type of occasion on view for all members of a given space. Also provides users with a means of viewing their personal Microsoft Exchange calendar within the Home space and overlaying space calendars on top of the personal calendar to view a full schedule in a single calendar. For more information, see Chapter 63, "Working with the Events Service."
Instant Messaging and Presence service	Provides a means of viewing the presence status of other authenticated users and offers on-the-spot access to instant messaging and mail. Additionally, when users travel, they can connect to a 3rd-party network presence service, such as Yahoo! Messenger. For more information, see Chapter 64, "Working with the Instant Messaging and Presence Service (IMP)."

Table 3–1 (Cont.) Social and Collaborative Services and Features in WebCenter Portal: Spaces

Service or Feature	Description
Liking	Provides an accumulative rating system that enables you to see at a glance which objects are viewed most favorably by you and other users. A counter keeps track of the number of users who like the object. In a group of objects, you can determine the most favored by its number of likes. For more information, see Chapter 37, "Liking, Commenting On, and Sharing Objects."
Links service	Provides a means of explicitly associating two objects with each other through easy-access reference points, called *links*. The Links service assists with setting up these links from one application object to another. For example, you can associate a project plan document with a list of project issues. When users access the list, they can also immediately access the project plan by clicking a link that appears on the list. The Links service also provides a quick way to create new objects when establishing a link. For more information, see Chapter 65, "Working with the Links Service."
Lists service	Provides tools for creating, publishing, and managing lists. Users can create lists from Excel spreadsheets, from prebuilt templates, or from scratch. As lists are developed, they become available in the Resource Catalog. Users can add lists from the catalog to any page in the space in which they were created. For more information, see Chapter 66, "Working with the Lists Service."
People Connections service	The real workhorse of social networking in WebCenter Portal: Spaces, the People Connections service, provides a means of forging connections between users and, as a result, partaking of the fruits of this service's other features. View connections' activities in the Activity Stream. Access their Profiles. Send them messages with attachments, such as files and links through the Publisher task flow or Message Board. Post remarks on their efforts through Feedback. For more information, see: ■ Chapter 33, "Managing Your Profile" ■ Chapter 34, "Creating Your Social Network" ■ Chapter 35, "Tracking Your Connections' Activities" ■ Chapter 36, "Posting and Managing Messages and Feedback" ■ Section 37.3.3.1, "What You Should Know About the Publisher Task Flow"
Polls service	Provides tools for creating, administering, and taking online polls. Use polls to survey your audience, check their recall of important information, gather feedback on the efficacy of presentations—that is, solicit responses on anything that promotes the excellence of the team. For more information, see Chapter 69, "Working with the Polls Service."
Sharing	Provides on-the-spot distribution of items, files, and URLs of particular interest to a selected audience. For more information, see Chapter 37, "Liking, Commenting On, and Sharing Objects."
Tags service	Provides a means of associating a personally meaningful search term to an application object, making that object easy to find through search results. Classifying an item with a tag enables you to gather disparate items into a cohesive body of knowledge and share that knowledge with others. For more information, see Chapter 59, "Working with the Tags Service."
Wikis	Epitomizes the concepts of community and collaboration by allowing all authorized community members to contribute their information to the greater body of knowledge through the wiki. For more information, see Chapter 49, "Working with Wiki Documents."

3.3.2 Leveraging People Connections

The People Connections service delivers core social networking functionality through such features as Connections, Activity Stream, Profile, Message Board, and Feedback.

Connections furnishes the means of forging connections between Spaces application users. When one user connects to another, it opens each to a flow of information about the other's activities and provides instant access to other social networking capabilities through People Connections.

Activity Stream provides a continuous stream of information about your own and other users' activities. The files your connections upload are available in the stream as are status messages, links, and notifications about specific types of activities. Such activities can include:

- `John is now connected to Mary`
- `Mary revised the document financialApplicationFutures.docx`
- `John created the space Internal Accounting Refit`
- And so on

Each streamed item that alludes to an object provides a link to that object, and, in some cases, a preview of the object itself.

Profile offers a window onto information about a given connection, most of which comes from your company's LDAP identity store. A user's connections can view authorized sections of his Profile for such useful information as his contact numbers, his department, his job title, his management chain, and the like.

Message Board and Feedback supply features for entering and viewing messages between connections or posting feedback.

You can configure an instance of the Activity Stream task flow to stream only those activities occurring in the scope of a named space.

Example: Internal Accounting Refit Project

And that's what John has done. He recognizes the value of streaming the activities of his community. After all, seeing the streamed item about Mary's white paper is what got him started on this project. He appreciates that all members of the Internal Accounting Refit space will automatically see the space-related activities of other members in the scoped Activity Stream. To alert team members to this feature, he places an Announcement task flow on the space home page and posts the following announcement:

```
Keep your eye on the stream! You can view all space-related activities streaming
from every space member. Watch for activities, documents, and links of interest.
```

Learn More: For information about the many features of the People Connections service, see:

- Chapter 33, "Managing Your Profile"
- Chapter 34, "Creating Your Social Network"
- Chapter 35, "Tracking Your Connections' Activities"
- Chapter 36, "Posting and Managing Messages and Feedback"

3.3.3 Leveraging Announcements, Discussions, and Events

The Announcements service offers a means of broadcasting an announcement instantly or at a time you choose to all members of a given space.

While announcements offer effective one-way communication, the Discussions service supplies an excellent instrument for creating and managing discussion forums and topics. Members can add to the community's knowledge base by asking or answering questions that are relevant to the current effort and preserving that information for others to reference or challenge. Discussions provides a virtual meeting place where community members can deliberate, discuss, and collaborate, each according to the restrictions of his or her own schedule.

But when common scheduling times can be orchestrated, meetings and events can be arranged easily through the Events service. The Events service provides a community calendar, which can be used to schedule and post project and community meetings and events. The Events calendar is scoped to its current space, preventing clutter and noise from other teams.

Example: Internal Accounting Refit Project

John schedules a meeting with all LOB leads using the Events calendar. His agenda is to open the question of the best technology to use going forward. He captures meeting minutes on the *LOB Meeting Minutes* wiki that he created for this purpose in his team's space. The LOBs are able to narrow the list down to three brands. John opens the discussion to the entire team through the *Technology* discussion forum. On this, John solicits the teams' opinions on each potential selection. Alok provides insight into one of the options, pointing out a weakness the LOB leads hadn't considered. Fifteen team members express agreement with Alok's reservations by liking his topic reply. This seems to be a very strong endorsement for omitting this option and selecting from the other two.

Learn More: For information about Announcements, Discussions, and Events, see:

- Chapter 61, "Working with the Announcements Service"
- Chapter 62, "Working with the Discussions Service"
- Chapter 63, "Working with the Events Service"

3.3.4 Leveraging Liking, Commenting, and Sharing

Liking, commenting, and sharing are integrated with many WebCenter Portal services right out of the box. They furnish the opportunity to team members to share, comment on, and express approval for a document, a topic reply, a streamed item, a wiki, and a blog.

You can view Liking as a type of quick poll that captures and returns on-the-spot information about the relative popularity of an application object.

You can find more verbose opinions about application objects in Comments. Wherever there is liking, there is commenting, where users can enter suggestions, opinions, questions, and other relevant communication directly on the objects to which they apply.

Sharing provides a means of sending links to content of interest to a selected audience.

Example: Internal Accounting Refit Project

John shares frequently. As information that is relevant to his project streams in from his other space memberships, he shares slide presentations, charts, technology updates, and the like with his project team. Today, he sent a paper to Alok that supports Alok's reservations about the candidate technology.

Alok is pleased that John shared this document. He expresses his liking for the document, clicks the link to read the document, and then clicks John's name on the document to open an instant dialog with him.

Learn More: For more information, see Chapter 37, "Liking, Commenting On, and Sharing Objects."

3.3.5 Leveraging Instant Messaging and Presence

The Instant Messaging and Presence (IMP) service provides a means of observing the presence status of other authenticated users (for online, busy, away, and offline) and delivers interaction options, such as instant messaging and mail.

When Instant Messaging and Presence is available, every application object that publishes a user name with a presence icon becomes a conduit to different forms of instant communication. Any WebCenter service that exposes a user name can integrate with the IMP service. Such services include Discussions, Documents, Mail, and Lists.

Example: Internal Accounting Refit Project

Once Alok has read the document, he notices that John's presence status is *Online*. He clicks John's name on the technology article, and a context menu opens with options for contacting John. Alok selects instant messaging and starts a conversation. Here is a portion of this exchange:

```
...
ALOK: will do! :) ... btw, is there a code name for this project?
JOHN: no, why?
ALOK: internal acct'ng refit is a mouthful.
JOHN: true
ALOK: how about AIR
JOHN: accounting internal refit? i like air, but
ALOK: right ... was discussing with team
ALOK: popular selections were zip, freeway, and bux (air was mine)
JOHN: if team is interested, let's run a poll
JOHN: i'm ok with any of these
ALOK: i'm on it!
```

Learn More: For more information about IMP, see Chapter 64, "Working with the Instant Messaging and Presence Service (IMP)."

3.3.6 Leveraging Polls and Activity Graph

The Polls service provides tools for creating, administering, and taking online polls. Use polls to survey your audience, check their recall of important information, gather feedback on the efficacy of presentations—that is, solicit responses on anything that promotes the excellence of the team.

While polls solicit the opinions of others, the Activity Graph service gathers intelligence behind the scene to generate opinions tailored to individual users.

The Activity Graph service provides a means of enlarging a user's sphere of interest in the Spaces application by offering recommendations for new connections, suitable items, and relevant spaces. It does this by tracking each user's application activity in an *activity graph*. The Activity Graph engine provides a central repository for actions that are collected by enterprise applications. Activities are analyzed and returned as specific recommendations for individual users. The Activity Graph service is also extensible by allowing customers to track their custom events and recommend their own business objects.

Example: Bux Project

In John's research on his technology options, he accesses a number of articles that discuss the pros and cons of each selection. As a result, he finds recommendations for similar articles in his personal view of an Activity Graph task flow. He tags one of these `bux` so he can easily find it in a Search, and adds a link to it from the page he creates to make his case to Finance and Operations.

> **Learn More:** For more information about Polls and Activity Graph, see:
>
> - Chapter 69, "Working with the Polls Service"
> - Chapter 60, "Working with the Activity Graph Service"

3.3.7 Leveraging Tagging and Linking

Tagging provides a means of associating a personally meaningful search term to an application object, making that object easy to find through search results. Your tags provide a higher level of relevance from search results for yourself and others by augmenting results with additional items that you or others have tagged. Classifying an item with a tag enables you to gather disparate items into a cohesive body of knowledge and share that knowledge with others through the Tag Center or a shared saved search.

Linking offers a mechanism for creating a form of ad hoc navigation by enabling you to associate a relevant and useful object with the current context. For example, you can link from a page to a document, a list to a discussion, a list row to an event. You can link to an existing object or create the target object on the spot.

Example: Bux Project

John and Mary have collaborated on a list of project milestones. The first planned milestone is the project kickoff meeting. From the milestones list, Mary creates a link to an Event using the *Link to New* option. A dialog opens where she is able to schedule a date and time for the meeting and provide location details. The entire team can refresh their memories anytime they need to by clicking the link on the milestones list or referring to the community calendar.

Mary creates the blog *buxBashBlog*, to track the progress of the upcoming kickoff and generate buzz. Eighty percent of the team expresses approval or comments on different blog posts. The air is buzzing with excited anticipation.

> **Learn More:** For more information about tagging and linking, see:
>
> - Chapter 59, "Working with the Tags Service"
> - Chapter 65, "Working with the Links Service"

3.3.8 Leveraging Wikis and Blogs

In the Spaces application, the creation of blogs and wikis has been vastly simplified. All you must do is select a blog or wiki option from the Create Page dialog. No additional configuration is required.

Blogs provide an excellent medium for evangelizing selected technologies, logistical changes, and any other organizational shifts you are eager to promote.

Wikis epitomize the concepts of community and collaboration by enabling all authorized community members to contribute their information to a greater body of knowledge. Wiki pages are web pages that offer in-place editing using HTML or a simple mark-up language. Users with sufficient permissions on a wiki page can add, revise, or delete content.

Wikipedia is a prime example of a wiki (`http://www.wikipedia.com`). Users from all over the world collaborate to create and edit Wikipedia pages, resulting in a rich, dynamic knowledge base for everyone's benefit.

Example: Bux Project

Alok and his team have mapped out the logical flow of information for the upcoming customization. They collaborate on a wiki that captures each decision point in a table and describes the conditions that influence the options available at each point. Tina, the training LOB lead, adds a column to the table and makes suggestions or asks questions about each point.

Alok, IMs Doris with a link to the wiki, asking her to address Tina's questions. Doris edits the wiki, as requested. Then she IMs Tina, suggesting a follow-up meeting to ensure all is clear. Tina schedules the meeting on the community Calendar. She navigates to the *Training Project Issues* list in her LOB's subspace and checks off the issues, *clarify project details* and *identify subject matter expert*, entering Doris' name in the list's *Contacts* column. She adds a link to the scheduled meeting on the second row.

Learn More: For more information about wikis and blogs, see:

- Chapter 49, "Working with Wiki Documents"
- Chapter 50, "Working with Blogs"

3.3.9 Leveraging Lists

Lists are useful for so many space activities, such as tracking issues, capturing project milestones, publishing project assignments, and much more. The lists you create in the Spaces application can be widely varied in their complexity. For example, you can start with a list of team members, and then include columns for contact information, project role, and links to relevant documents, such as any plans or proposals associated with a listed team member.

Example: Bux Project

Finance and Operations approves John's project and provides a budget. John posts an announcement and IMs Mary to congratulate her on their mutual success. John creates a master list of project milestones, and links each row of high-level milestones to the pages containing each LOB's milestones. The project Activity Stream flows with information about new pages, new documents, new connections, and the like. Discussion topics proliferate. Polls are launched. Everyone is communicating, collaborating, and generating informed, consistent content.

Learn More: For more information about Lists, see Chapter 66, "Working with the Lists Service."

4 Accessing Spaces Administration Pages

This chapter describes how to access administration pages for the Spaces application. It contains the following sections:

- Section 4.1, "Accessing the Spaces Administration Page"
- Section 4.2, "Performing Actions From Spaces Administration Pages"

Audience

The content of this chapter is intended for Spaces administrators. This includes users granted the Spaces `Administrator` role or a custom role that grants one of the following permissions:

- `Application-Manage All`
- `Application-Manage Configuration`

4.1 Accessing the Spaces Administration Page

Many administrative actions are performed from Spaces Administration pages. Once you log in as the application administrator, you can access this page in the following ways:

- Click the **Administration** link.
- Enter the following URL in your browser to navigate directly to the Spaces Administration page:

  `http://`*`host`*`:`*`port`*`/webcenter/spaces/admin`

> **See Also:** Appendix A, "Spaces User Interface URLs."

4.2 Performing Actions From Spaces Administration Pages

In the Spaces application, there are five main Administration pages: Spaces, Pages, Resources, Security, and Configuration (Figure 4–1):

Figure 4–1 Spaces Administration Pages

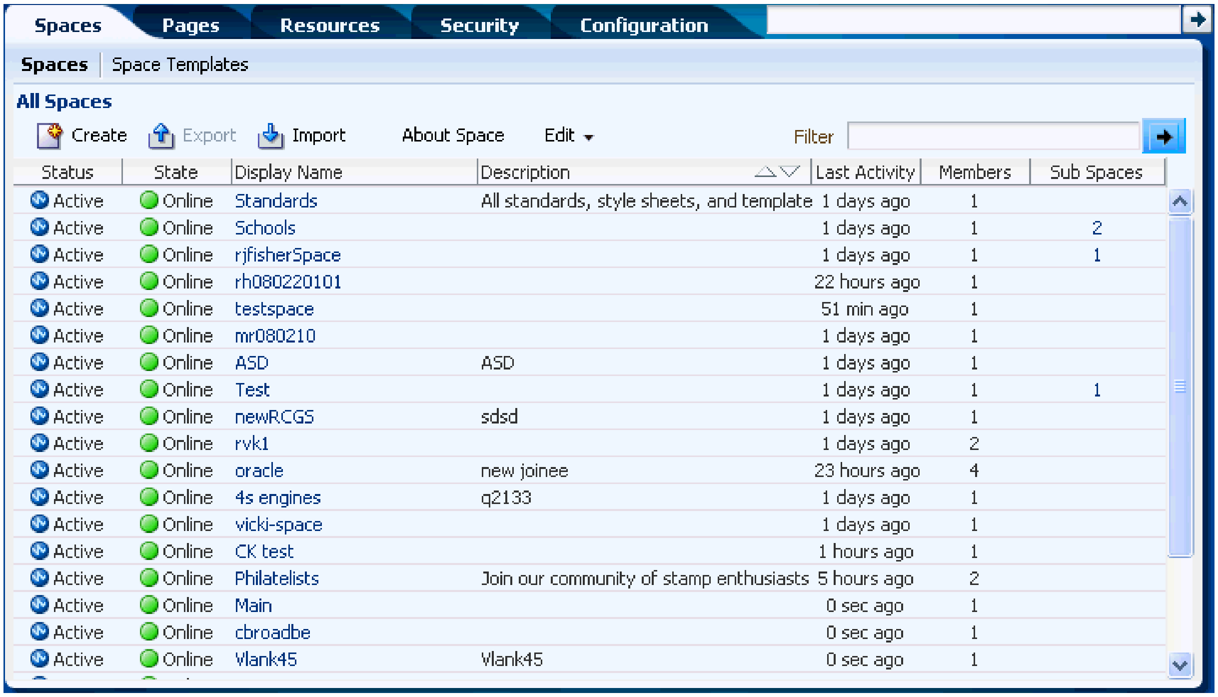


Table 4–1 describes the actions administrators can perform from Administration pages and lists the permission required to perform them.

Table 4–1 Spaces Administration Pages

Page	Description	Required Permission

Spaces
■ Spaces
■ Space Templates
	Use this page to manage spaces and space templates. For more information, see:
	Section 55.2, "Performing Administrative Tasks for All Spaces"
	Section 55.3, "Performing Administrative Tasks for All Space Templates"
	Section 55.5, "Importing and Exporting Spaces and Space Templates"
		`Spaces-Manage All`
		or
		`Spaces-Manage Configuration`

Pages
■ Business Role Pages
■ Personal Pages
■ System Pages
	Use this page to manage business role pages, personal pages, and system pages in the Spaces application. For more information, see:
	Section 7.1, "Working with Business Role Pages"
	Section 7.2, "Working with Personal Pages"
	Section 7.3, "Working with System Pages"
		`Spaces-Manage All`
		or
		`Spaces-Manage Configuration`

Table 4–1 (Cont.) Spaces Administration Pages

Page	Description	Required Permission
Resources	Use this page to manage application-level resources for the Spaces application, such as page templates, skins, and task flows. For more information, see: Section 11, "Working with the Resources that Compose a Portal or Community"	Spaces-Manage All or Spaces-Manage Configuration
Security ■ Users and Groups ■ Roles	Use this page to manage users and roles. For more information, see: Section 24, "Managing Users, Roles, and Permissions"	Spaces-Manage All or Spaces-Manage Members
Configuration ■ General ■ Services	Use the Configuration page to customize the Spaces application. For example, you can specify a default language, application name, and so on. For more information, see: Section 5, "Configuring Global Defaults" Use the Services page to set application-wide properties for discussion forums, announcements, mail, and people connection components such as activity streams, personal profiles, connections, messages boards, and feedback. For more information, see: Section 6.2, "Configuring Discussion Forum Options for the Spaces Application" Section 6.3, "Configuring Send Mail Notifications for the Spaces Application" Section 6.4, "Configuring People Connections Defaults for the Spaces Application" You can also register portlet producers and external applications from the Services tab: Section 6.5, "Registering Portlet Producers" Section 6.6, "Registering External Applications"	Spaces-Manage All or Spaces-Manage Configuration

Part II

Designing a Portal or Community

Part II of the User's Guide steps you through the process of setting up global defaults for your portal or community. It also describes how to customize task flows so that all instances are affected or just those instances appearing within a given space.

Part II includes the following chapters:

5 Configuring Global Defaults

Out-of-the-box, the Spaces application is pre-configured with various default settings The Spaces administrator can modify these settings to suit the needs of the organization.

This chapter includes the following sections:

- Section 5.1, "Customizing the Name and Logo"
- Section 5.2, "Choosing a Default Display Language"
- Section 5.3, "Customizing the Language List"
- Section 5.4, "Choosing a Default Skin"
- Section 5.5, "Customizing Copyright and Privacy Statements"
- Section 5.6, "Customizing the Online Help Link"
- Section 5.7, "Choosing a Default Start (or Landing) Page"
- Section 5.8, "Specifying Session Timeout Settings"
- Section 5.9, "Choosing a Default Page Template"
- Section 5.10, "Choosing Default Resource Catalogs"
- Section 5.11, "Choosing a Default Navigation"

See also Chapter 6, "Configuring Services, Portlet Producers, and External Applications."

Audience

This chapter is intended for Spaces administrators with the `Manage Configuration` permissions.

5.1 Customizing the Name and Logo

Out-of-the-box, the Oracle logo and application name **WebCenter Portal: Spaces** appears in the banner of all spaces (Figure 5–1). You can change the both the logo and name to better suit your target audience. For example, you might want to display your company name here or the name of a department within your company.

The logo you specify will resize according to the application's page template. If you want to adjust the logo size, you can modify the page template. See Section 13.3, "Editing a Page Template."

If you want, you can reference your application name and logo in EL expressions. For details, see Section B.4.2, "EL Expressions Relevant to the Spaces Application."

Figure 5–1 Space Logo and Name

To change the name or logo for the Spaces application:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click the **Configuration** tab, then the **General** subtab.

3. In the **Application Name** field, enter the new name.

   Alphanumeric characters are allowed and also spaces, underscores (_) and dashes (-). For example, `Finance Department - My Corporation`.

4. To change the logo, click **Browse** next to the **Application Logo** field.

5. In the File Upload dialog, navigate to the logo you want to use.

   The logo image file can be up to 1 MB. Supported file formats are `.gif` or `.GIF`, `.png` or `.PNG`, and `.jpg` or `.JPG`.

   The logo is uploaded to the application's image directory (`/webcenter/images`) and the new logo immediately appears in the top left corner of the application banner.

6. Click **Apply**.

5.2 Choosing a Default Display Language

Out-of-the-box, the Spaces application supports 27 languages and 100 different locales. It is the administrator's job to choose a default application display language for the Spaces application. When picking the default language, consider which language suits the majority of people using the application. Alternatively, enter an EL expression that determines the default language dynamically based on certain criteria. For example, you may prefer the default display language to change according to the location or organization of the user that is logged in.

The first time a user logs in to Spaces the default language displays but individuals can personalize their display language through user preferences. See Section 38.2, "Choosing Your Preferred Display Language."

The default display language only applies when users log in to Spaces. Public pages, such as the welcome page and the login page, display in the browser language. If no default language is provided, the browser language is used. See also Section 27.1.1, "Display Language Precedence."

> **Note:** Moderators can nominate a display language for a particular Space. When defined, the Space language overrides both the default language and any user language preference. See also Section 53.4.15, "Setting a Space Display Language."

To select the default display language for the Spaces application:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click the **Configuration** tab, then the **General** subtab.

3. Do one of the following:

   - Select a **Default Language** from the list available.

     If the language you want is not available in the dropdown list, click **Customize**, select the check box for the language you require, and click **Save**.

     To add a completely new language, your localization team must translate WebCenter Spaces resource bundles into the new language, and then these translations must be deployed to the managed server on which the Spaces application is deployed. For details, see "Adding Support for a New Language" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal.*

   - Click the **Advanced Edit Options** icon, then select **Expression Builder** to enter an EL expression that determines the default language dynamically based on certain criteria.

4. Click **Apply**.

The display languages that are available for selection here are also offered to users and space moderators through user preferences. As the administrator, you can reduce the range of languages available to users. For details, see Section 5.3, "Customizing the Language List."

5.3 Customizing the Language List

Out-of-the-box, the Spaces application offers 27 languages and 100 different locales and all these languages are available to users by default. As an administrator, you can tailor the languages that are on offer to suit your audience. For example, you may prefer to remove all the territory language variants in favor of a more simplified language list or only offer European languages if your portal is specifically aimed at a European audience.

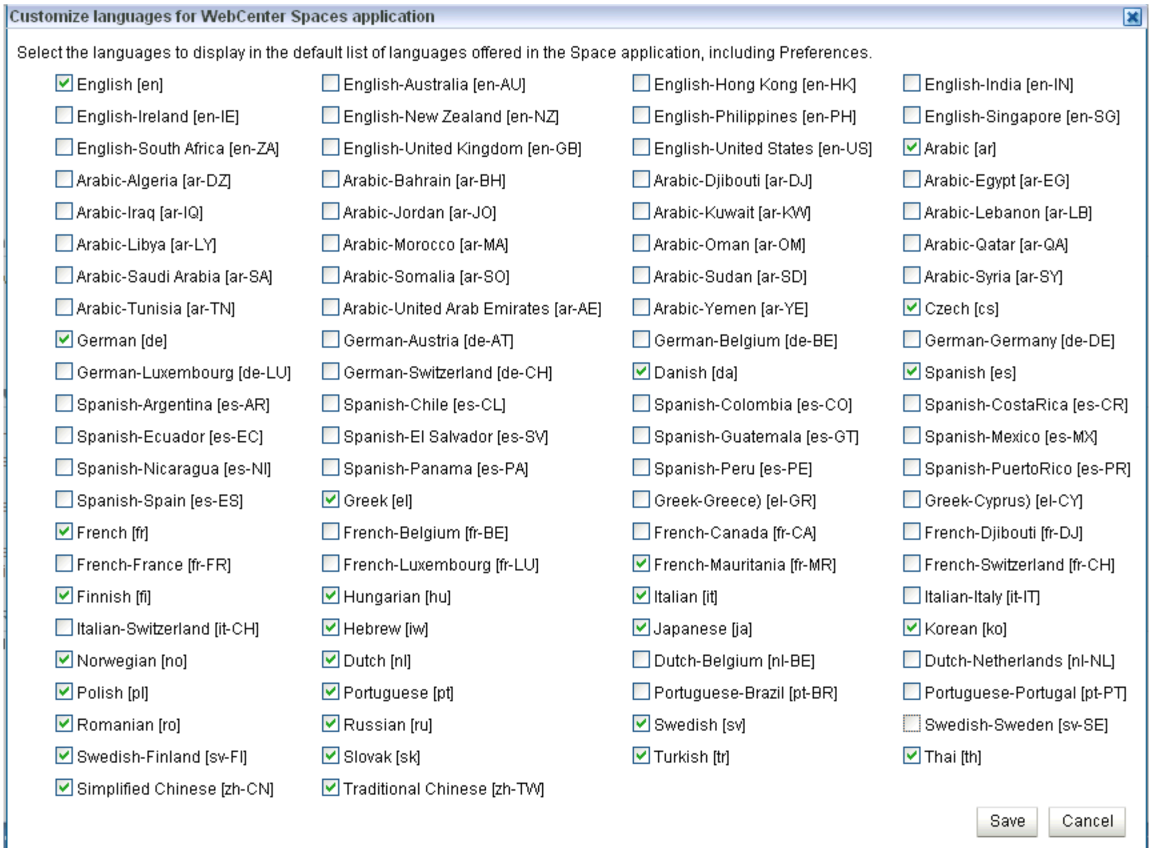
To customize the languages available to users:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click the **Configuration** tab, then the **General** subtab.
3. Click **Customize** (below **Default Language**).
4. Select which languages to offer by selecting (or deselecting) each language check box.

Figure 5–2 Choosing Which Languages Are Available



5. Click **Save**.

5.4 Choosing a Default Skin

As administrator, you may customize the default appearance of the Spaces application for all users by changing the default skin. A skin changes the way the user interface appears, but does not change the application's behavior. See Section 14.5.1, "Applying a Skin to the Spaces Application."

If you want, you can reference the default skin in EL expressions. For details, see Section B.4.2, "EL Expressions Relevant to the Spaces Application."

Individual users can change the skin applied to their Home space view through user preferences if they do not like the default skin that you specify. See Section 14.5.3, "Applying a Skin to the Home Space."

5.5 Customizing Copyright and Privacy Statements

Administrators can customize or hide copyright and privacy statements for the Spaces application:

- Copyright - Displays a copyright statement for the entire application.
- Privacy URL - Links to a document that contains a privacy policy for the entire application.

In the default page template, the copyright and privacy URL appear in the application's page footer (Figure 5–3).

If you want, you can reference your copyright message and privacy document in EL expressions. For details, see Section B.4.2, "EL Expressions Relevant to the Spaces Application."

Figure 5–3 Copyright and Privacy Statements in Page Footer

Individual spaces may provide their own copyright and privacy statements. For details, see Section 53.4.14, "Customizing the Copyright Statement and Privacy URL."

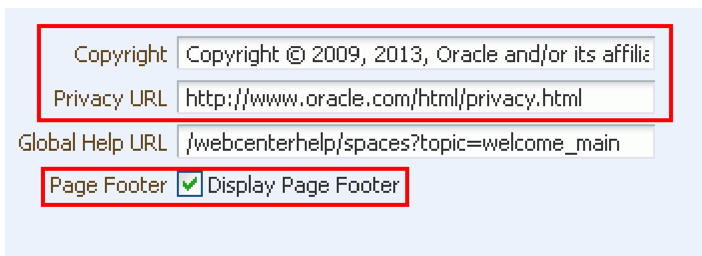
To customize or hide copyright and privacy statements:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click the **Configuration** tab, then the **General** subtab.
3. Modify the legal notices as required (Figure 5–4):

Figure 5–4 Customizing the Copyright and Privacy URL



   - **Copyright** - Enter a suitable copyright statement for the Spaces application. If no copyright information is required, leave this field blank.
   - **Privacy URL** - Specify the location of the application's privacy policy. Enter a fully qualified URL. If no privacy information is required, leave this field blank.

4. Select or deselect **Display Page Footer** to display or hide copyright and privacy information in the page footer.
5. Click **Apply** to save.

5.6 Customizing the Online Help Link

Online help for Spaces displays when you click the **Help** link for the application. Out-of-the-box, this Help **link** opens Oracle's built-in help. You can also write online help specifically aimed at your end-users and redirect the Help link to a different help location.

Optionally, you can reference the Help location in EL expressions. For details, see Section B.4.2, "EL Expressions Relevant to the Spaces Application."

When you customize the Help link, built-in help for Spaces is still available through help buttons, help icons, and so on.

To customize the main Help link:

1. Open Spaces Administration.

For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click the **Configuration** tab, then the **General** subtab.
3. In the **Global Help URL** field, enter the location of your help.

   Ensure that you enter a fully qualified URL in the format:

   `http://`*`host:port/helplocation`*

   For example:

   `http://myhost:8888/myhelp`

   The default Global Help URL is `/webcenterhelp/spaces?topic=welcome_main`. This URL opens Oracle Help for the Web (OHW) and displays Oracle's built-in help for Spaces. Enter this URL if you want to return to the default setting.

   Note: If you leave the Global Help URL field blank, the Help link is not displayed.

   ---

4. Click **Apply**.

Click **Help** in your application to check whether your custom help opens correctly.

5.7 Choosing a Default Start (or Landing) Page

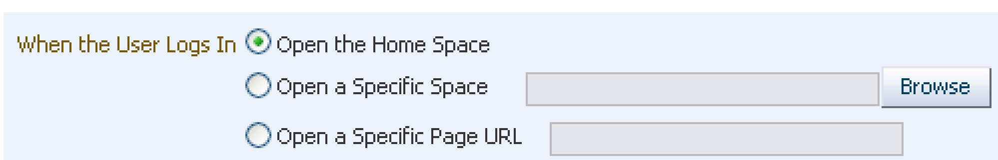
By default, users see the Home space when they log in but you can configure the initial landing page to be a specific space or page.

To select the landing page for Spaces:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click the **Configuration** tab, then the **General** subtab.
3. In the **Login** section, select what users should see first when they log in: the Home space, or a specific space or page (Figure 5–5).

Figure 5–5 Choosing a Default Start Page



- Open a Specific Space. Select to specify that a particular space displays, and enter the space name or click **Browse** to select from a list of spaces.
- Open a Specific Page URL. Select to specify that a particular page displays, and enter the page location.

  Typically this is an internal page. You can enter a full or relative page URL as shown in these examples:

  `http://mywebcenter.com:8888/webcenter/spaces/page/landingpage`

```
http://mywebcenter.com:8888/webcenter/spaces/myspace/page/
landingpage
```

```
/spaces/myspace/page/landingpage
```

If you specify an external page, ensure that you specify the full URL.

4. Click **Apply**.

5.8 Specifying Session Timeout Settings

When there is no activity for an extended period of time in a Spaces application session, it times out. Out-of-the box, the Spaces session timeout is 45 minutes. You can modify the default number of minutes that can elapse before a session times out, and select what is displayed on session timeout.

To modify the session timeout settings for a Spaces application:

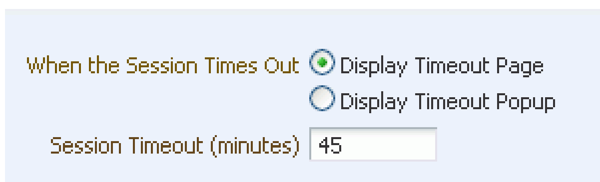
1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click the **Configuration** tab, then the **General** subtab.

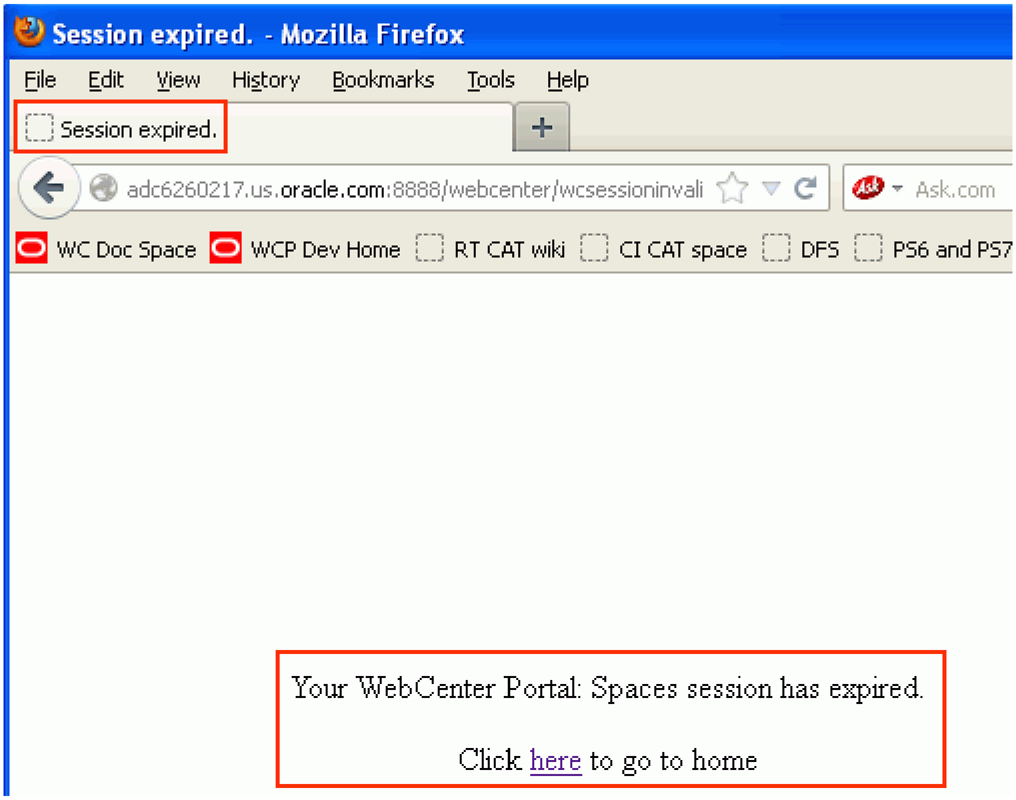
3. In the **Login** section, select the desired result when the Spaces application times out (Figure 5–6):

Figure 5–6   Setting a Session Timeout



- **Display Timeout Page**. Select to display the Spaces timeout page in the browser (Figure 5–7), where the user can click the provided link to log in again and restart at the default start page (see Section 5.7, "Choosing a Default Start (or Landing) Page").

Figure 5–7 Timeout Page



- **Display Timeout Popup**. Select to display an Expiration Warning notification popup (Figure 5–8) when the Session Timeout value is reached, where the user can click **OK** within 2 minutes to prevent the timeout. If the user does not respond to the Expiration Warning within 2 minutes, then the session times. In the Timeout notification popup (Figure 5–9), the user can click **OK** to log in again and restart at the page that was active when the session expired.

Figure 5–8 Expiration Warning Notification (displays at Session Timeout)

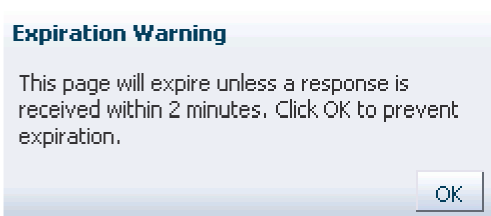
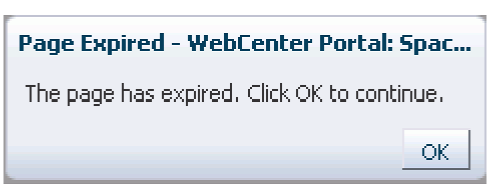


Figure 5–9 Timeout Notification (displays 2 minutes after Session Timeout)



4. (Optional) In the **Session Timeout (minutes)** field, enter a new value. The default value is 45, the minimum value is 5, and the maximum value is 1440 (24 hours). If this field is left blank, the default value (45) applies.

> **Note:** If the Spaces application is configured for single sign-on (SSO), Oracle recommends that the Session Timeout value set here is no higher than the SSO timeout value. The session timeout is a factor of the physical memory available and the number of concurrent users that have to be supported. If the Session Timeout value is less than the SSO session timeout, then the Spaces HTTP session times out after the duration specified here, but a new Spaces session will be automatically created as long as the SSO timeout is not reached.

5. Click **Apply**.

5.9 Choosing a Default Page Template

In the Spaces application, page templates define how individual pages and groups of pages display on a user's screen. Every page displays within a page template. Administrators can define the *default page template* used to display pages in:

- The Home space
- New spaces, when the space's template does not specify that a particular page template must be used

Space moderators can override the default selection within their space but users cannot override the page template applied to the Home space.

See also Chapter 13, "Working with Page Templates."

To select the default page template for the whole Spaces application:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click the **Configuration** tab, then the **General** subtab.
3. Do one of the following:
   - Select a **Default Page Template** from the list available.

     To learn how to add page templates to this list, read Section 13.5.1, "Showing and Hiding a Page Template."
   - Click the **Advanced Edit Options** icon, then select **Expression Builder** to enter an EL expression that determines the default page template dynamically based on certain criteria.

     For example, you may like the default page template to change depending on which department or organization the logged in user belongs to.
4. Click **Apply**.

5.10 Choosing Default Resource Catalogs

In the Spaces application, a series of Resource Catalogs display when you edit a page or a page template in Composer and click *Add Content*. Each catalog presents available resources in a series of folders and subfolders and the content on offer changes dynamically depending on which services are currently available and the permissions of the person who is editing the page or page template. Available resources include task flows, portlets, and page components, such as images, content boxes, hyperlinks, and the like.

Spaces provides several default catalogs out-of-the-box but you can add new task flows, remove task flows, or reorganize the folder hierarchy to better suit your audience or create brand new ones of your own. For details, see Chapter 16, "Working with Resource Catalogs."

Administrators can specify *default page catalogs* for:

- New spaces
- Home space
- Business role pages

As well as, *default page template catalogs* for:

- New spaces
- Home space

It is entirely up to you whether you specify a different catalog for each scenario or use the same catalog throughout.

To select default Resource Catalogs for the application:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click the **Configuration** tab, then the **General** subtab.
3. Select default Resource Catalogs for the following:
   - Resource Catalog for Spaces
   - Resource Catalog for Home space
   - Resource Catalog for Business Role Pages
   - Resource Catalog for Page Templates in Space
   - Resource Catalog for Page Templates in Home space

   To learn how to add Resource Catalogs to this list, read Section 16.4, "Showing and Hiding a Resource Catalog."

   Click the **Advanced Edit Options** icon, then select **Expression Builder** to enter an EL expression that determines the default Resource Catalog dynamically based on certain criteria. For example, you may like the default Resource Catalog to change depending on the which role the logged in user belongs to.
4. Click **Apply**.

5.11 Choosing a Default Navigation

In the Spaces application, navigation models enable users to see and navigate to information quickly and easily. Administrators can specify which navigation is used to present Home space information.

Alternatively, you can enter an EL expression that determines the navigation dynamically based on certain criteria. For example, you may like to display different navigations depending on which department or organization the logged in user belongs to.

See also Chapter 12, "Working with Navigation."

To select a navigation model for the Home space:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click the **Configuration** tab, then the **General** subtab.

3. Do one of the following:

   - Select a **Navigation for Home Space** from the list available.

     To learn how to add navigations to this list, read Section 11.4.3, "Showing and Hiding Resources."

   - Click the **Advanced Edit Options** icon, then select **Expression Builder** to enter an EL expression that determines the navigation dynamically based on certain criteria.

4. Click **Apply**.

6

Configuring Services, Portlet Producers, and External Applications

In the Spaces application, a series of WebCenter Portal services expose portal, team collaboration, and social features through various task flows. Some services, such as Lists, are ready to use out-of-the-box and require no further configuration. Other services, such as Discussions and Mail, require connections to external back-end servers, and additional configuration within Spaces to get things up and running.

This chapter describes how to enable, disable, and configure WebCenter Portal services in the Spaces application. It does not describe how to set up connections to back-end servers—this is a job for your Fusion Middleware Administrator. For details, see "Getting the Spaces Application Up and Running" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

This chapter includes the following sections:

- Section 6.1, "Enabling and Disabling Services"
- Section 6.2, "Configuring Discussion Forum Options for the Spaces Application"
- Section 6.3, "Configuring Send Mail Notifications for the Spaces Application"
- Section 6.4, "Configuring People Connections Defaults for the Spaces Application"
- Section 6.5, "Registering Portlet Producers" *
- Section 6.6, "Registering External Applications" *

See also Chapter 5, "Configuring Global Defaults."

Audience

This chapter is intended for Spaces administrators with the `Manage Configuration` permissions.

Additional permissions are required to manage portlet producers and external applications for the Spaces application, that is, you must have the `appConnectionManager` role.

6.1 Enabling and Disabling Services

In the Spaces application, a series of services expose portal, team collaboration, and social features through various task flows. Some services, like Tags, are available and work out-of-the-box, but other services, such as Mail, require connection to an *external* back-end server. Table 6–1 describes the services available in WebCenter Portal.

Table 6–1 WebCenter Portal: Services

Service	Description	For More Information
Activity Graph	Leverages collective intelligence to benefit search and social applications.	Chapter 60, "Working with the Activity Graph Service"
Analytics	Enables you to display usage and performance metrics for your Framework application.	Chapter 57, "Analyzing Usage and Performance Metrics"
Announcements	Provides the ability to post announcements about important activities and events to all authenticated users.	Chapter 61, "Working with the Announcements Service"
Discussions	Provides the ability to create threaded discussions, posing and responding to questions and searching for answers. Also provides an effective group communication mechanism for important activities and events.	Chapter 62, "Working with the Discussions Service"
Documents (includes Wikis and Blogs)	Provides content management and storage capabilities, including content upload, file and folder creation and management, file check out, versioning, and so on.	Chapter 41, "Introduction to Adding and Managing Content"
Events	Provides the ability to create and maintain a schedule of events relevant to a wider group of users. Events are published to all authenticated users.	Chapter 63, "Working with the Events Service"
Instant Messaging and Presence (IMP)	Provides the ability to observe the status of other authenticated users (whether online, offline, busy, or away) and to contact them instantly.	Chapter 64, "Working with the Instant Messaging and Presence Service (IMP)"
Links	Provides the ability to view, access, and associate related information; for example you can link to a solution document from a discussion thread.	Chapter 65, "Working with the Links Service"
Lists	Provides the ability to create, publish, and manage lists. Users can create lists from prebuilt structures or create their own custom lists.	Chapter 66, "Working with the Lists Service"
Mail	Provides easy integration with IMAP and SMTP mail servers to enable users to perform simple mail functions such as reading messages, creating messages with attachments, replying to or forwarding existing messages, and deleting messages.	Chapter 67, "Working with the Mail Service"
Notes	Provides the ability to "jot down" and retain quick bits of personally relevant information. **Note:** This service is available only in Oracle WebCenter Portal: Spaces.	Chapter 68, "Working with the Notes Service"
Notifications	Provides a means of subscribing to services and application objects and, when those objects change, receiving notification across one or more selected messaging channels.	Chapter 39, "Setting Up Your Personal Subscriptions and Notifications"
People Connections	Provides social networking capabilities, such as creating a personal profile, displaying current status, and viewing other users' recent activities.	Chapter 34, "Creating Your Social Network"

Table 6–1 (Cont.) WebCenter Portal: Services

Service	Description	For More Information
Personalization	Enables you to deliver content within your application to targeted application users based on selected criteria.	Chapter 9, "Using Personalization for WebCenter Portal"
Polls	Enables you to survey your audience (such as their opinions and their experience level), check whether they can recall important information, and gather feedback.	Chapter 69, "Working with the Polls Service"
RSS	Provides the ability to access the content of many different web sites from a single location—a news reader.	Chapter 70, "Working with the RSS Service"
Recent Activities	Provides a summary view of recent changes to documents, discussions, and announcements.	Chapter 71, "Working with the Recent Activities Service"
Search	Provides the ability to search services, the application, or an entire site. (This includes integrating Oracle Secure Enterprise Search for WebCenter Portal searches.)	Chapter 58, "Working with the Search Service"
Tags	Provides the ability to assign one or more personally relevant keywords to a given page or document.	Chapter 59, "Working with the Tags Service"
Worklist	Provides a personal, at-a-glance view of business processes that require attention (including a request for document review, and other types of business process that come directly from enterprise applications).	Chapter 72, "Working with the Worklist Service"

The following services require a connection to an external data repository (such as a content server, a presence server, a discussions server, a mail server) where relevant information is stored.

- Analytics
- Announcements
- Discussions
- Documents, including wikis and blogs
- Events
- Instant Messaging and Presence (IMP)
- Mail
- Search (for Oracle SES adapter)
- Worklist

Some services require a connection to a database schema where relevant information (such as relationship mapping) is stored.

- Activity Graph
- Analytics
- Documents (for documents, wikis and blogs that want to include the comments and Activity Stream)

- Links
- Lists
- People Connections
- Polls
- Tags

The Fusion Middleware Administrator is responsible for managing connections to external servers and also maintains the database schema and Metadata Service (MDS) repositories where application data, specific to Spaces, is stored. For details, see "Maintaining the Spaces Application" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

When a valid connection exists, the associated service becomes available. If you want to verify whether a service, such as Mail, is available in the Spaces application, check:

- Associated task flows display in the Resource Catalog.
- Existing task flows function as expected.
- Space moderators can choose whether to enable or disable that service in their space through the space administration settings.

When a back-end server is not configured, intentionally or otherwise, the Spaces application cannot offer features or functionality related to that service:

- Associated task flows are not available in the Resource Catalog.
- Existing task flows display a message indicating that the service is currently unavailable.
- Service is not listed, as available, to space moderators through the space administration settings.

Reporting Temporary Issues with WebCenter Portal Services

When a service is temporarily unavailable, report the issue to the Fusion Middleware Administrator. The Fusion Middleware Administrator can use Enterprise Manager to investigate, diagnose, and solve issues relating to services. See also "Navigating to the Home Page for the Spaces Application" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Hiding Task Flows When Services Unavailable

Most WebCenter Portal services are optional. If you decide not to offer a particular service in the Spaces application, temporarily or permanently, consider removing any associated task flows that display, by default, out-of-the-box. For more information, see Chapter 7, "Administering Portal Pages."

Enabling and Disabling Services for a Particular Space

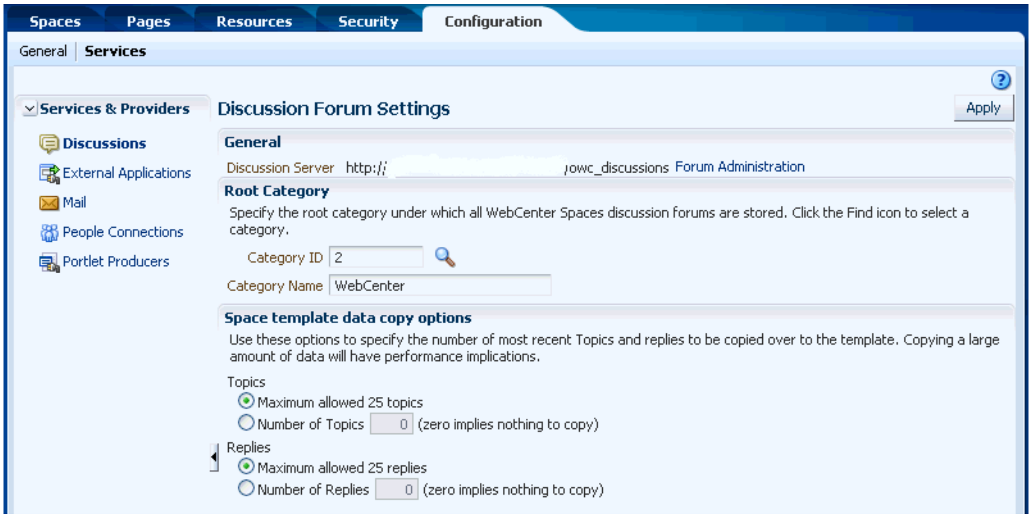
Moderators can enable or disable available services within their space. See Section 53.10, "Managing Space Services."

6.2 Configuring Discussion Forum Options for the Spaces Application

Discussion forums allow members to capture, share, and preserve content that is relevant to their project or community goals.

As administrator, you are responsible for setting discussion forum options for the entire application through Spaces Administration pages (Figure 6–1).

Figure 6–1 Setting Discussion Forum Options



From here you configure discussions-related setting, as well as access discussions server administration pages:

- Section 6.2.1, "Accessing the Discussions Server Admin Console"
- Section 6.2.2, "Specifying Where Discussions and Announcements are Stored on the Discussions Server"
- Section 6.2.3, "Choosing How Many Discussion Topics to Save In Space Templates"

Note: The Fusion Middleware administrator maintains the connection between the Spaces application and the discussions server. If you are experiencing issues with this connection, report the problem to the Fusion Middleware administrator. See also "Registering Discussions Servers" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

6.2.1 Accessing the Discussions Server Admin Console

For convenience, you can access the discussions server's Admin Console, a Web-based tool for configuring and managing discussion forums, from the portal's administration settings. In the discussions server's Admin Console, you can navigate all categories and forums and edit their properties, create new categories and forums, as well as set cache, security, and various other properties for the discussions server.

1. Open the portal's administration settings.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click **Configuration**, **Services**, and then select **Discussions**.
3. Click **Forum Administration**.
4. Enter your discussions server administrator **Username** and **Password**.

Note: If the **Forum Administration** link does not work, it could be because single sign-on or HTTPS is configured. Your system administrator must specify a public external URL (using the `linkURL` property).

6.2.2 Specifying Where Discussions and Announcements are Stored on the Discussions Server

Administrators can change the root category (on the discussions server) under which all Spaces discussions and announcements are stored.

The default system root category is suitable in most cases but you can choose a different location. This might be useful when Spaces is connected to a discussions server that is hosting discussion forums for multiple applications.

Oracle recommendations:

- Choose a category that is dedicated to this Spaces application. There may be conflicts when multiple Spaces applications share the same root category.
- Do not switch the root category after the Spaces application is up and running. If you change the root category, then all the discussion forums under the old root continue to work, but you cannot use the Links service to create links to discussions or announcements stored in the old category.

You can retain existing discussions in a space template saved with the data copy option. For example, on the **Administration - Configuration - Services - Discussions** page, enter the number (between 1 and 25) of most recent topics and replies to be copied over to the template.

Space templates support single or multiple forums under the root category that you specify. With some templates, one forum is created automatically under the root category for each new space based on that template.

To specify where discussion forums are stored:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click **Configuration**, **Services**, and then select **Discussions**.
3. Specify an appropriate **Root Category** for storing discussions.

   Click the **Find** icon to view the categories available and then select the most appropriate location.

   To create a new category for this application, click **Create Category**. You must have system administrator permissions on the discussions server to create new categories.
4. Click **Apply** to save the settings.

6.2.3 Choosing How Many Discussion Topics to Save In Space Templates

Administrators can limit how many recent topics and replies are copied to space templates. As copying large amounts of data has performance implications, there is an upper limit of 25 topics/replies. If you prefer not to include any recent topics/replies in space templates, specify zero.

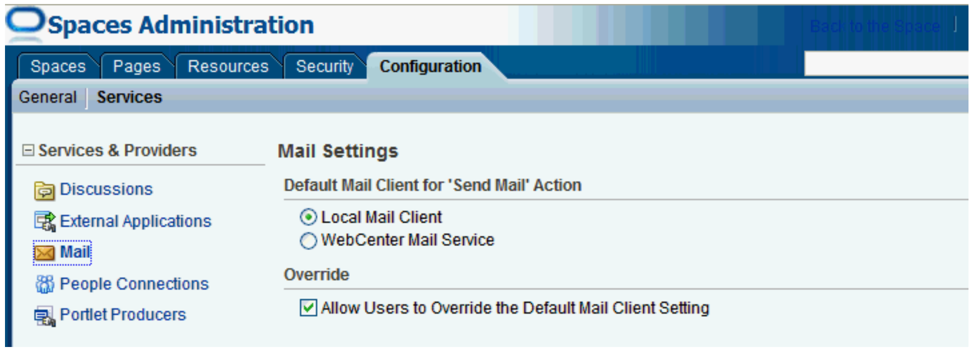
1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click **Configuration**, **Services**, and then select **Discussions**.
3. Specify an appropriate number of **Topics** and **Replies** to save in space templates.
4. Click **Apply** to save the settings.

6.3 Configuring Send Mail Notifications for the Spaces Application

Administrators are responsible for setting mail options through Spaces administration (Figure 6–2).

Figure 6–2 Setting Mail Options



From this page, you can assign the mail client for the "Send Mail" feature. This feature allows application resources to send mail directly from them, with the **Send Mail** icon (Figure 6–3).

Figure 6–3 Send Mail Icon

For example, from an announcement, users can click the **Send Mail** icon to open a mail window prepopulated with information including the announcement text, author, date created, and location. They can edit and add to the mail, as necessary. The way the mail window is prepopulated depends on the resource sending it. For example, from a wiki, Send Mail opens a mail window prepopulated with the name of the wiki, the size, who created it and when, who modified it and when, and a URL link to the wiki.

Within a space, the mail can be addressed to all members of the space. Space moderators (and anyone granted the `Manage Configuration` permission on the space) set this through the Services page in the administration settings. See Section 53.10.2, "Configuring the Mail Distribution List for a Space."

If the number of recipients is so large that the mail cannot be prepopulated with the addresses, then you must set up a distribution list for the space. Alternatively, your administrator could create an account on the mail server for each space (for example, called "space *name* moderator") for sending mail to all space members.

For all Send Mail notifications throughout the Spaces application, you can choose to use the local mail client, such as Microsoft Outlook or Mozilla Thunderbird, or WebCenter Portal's own Mail service. The local mail client is the default. The Send Mail feature does not require the Mail service, that is, if the Mail service is not yet configured, you can still use the Send Mail feature with your local mail client. Administrators can specify whether users may override the default mail client setting. For more information, see Section 67.1.1, "Configuring the Send Mail Feature."

Notes:

- With some browsers, Send Mail notifications are garbled for many non-English languages. When multibyte characters are encoded (required for the "mailto:" protocol), the URL length exceeds the browser limit. As a workaround, configure the Send Mail feature to use WebCenter Portal's Mail service instead of the local mail client.
- The system administrator maintains the connection between the Spaces application and the mail server. If you experience issues with this connection, report the problem to the administrator. See "Registering Mail Servers" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

6.3.1 Enabling Shared Mail Connections for Send Mail Notifications

Users do not need to specify credentials when sending mails using WebCenter Portal's Mail service when *shared credentials* are configured for the external application that is associated with the mail server connection.

To enable shared mail connections in Spaces:

1. Confirm that Spaces is using WebCenter Portal's Mail service to send mail.
   a. Open Spaces Administration.
   b. Click **Configuration**, **Services**, and then select **Mail**.
   c. Ensure that **Default Mail Client for 'Send Mail'** is set to **WebCenter Portal's Mail Service**.

   See also Section 6.3, "Configuring Send Mail Notifications for the Spaces Application."
2. Ask the Fusion Middleware administrator to set up a mail connection that uses an external application configured with the shared credentials and record the mail connection name.

   For details, see "Managing the Mail Service" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
3. Open the space where shared mail credentials are required and specify the name of the shared mail connection.

   For details, see Section 53.10.5, "Configuring a Shared Mail Connection for a Space."

6.4 Configuring People Connections Defaults for the Spaces Application

This section describes how to set application defaults for the People Connections service. You must be a Spaces administrator or granted `Application-Configure` and `Manage People Connections` permissions to set any of the application-wide properties described here.

This section includes the following subsections:

- Section 6.4.1, "What You Should Know About Administering the People Connections Service"
- Section 6.4.2, "People Connections Prerequisites"

- Section 6.4.3, "Configuring the People Connections Service for Spaces"
- Section 6.4.4, "Archiving the Activity Stream Schema"
- Section 6.4.5, "Troubleshooting Issues with the People Connections Service"

6.4.1 What You Should Know About Administering the People Connections Service

People Connections administrative settings are useful for controlling all users' initial views of People Connections features, including:

- Activity Stream—A streaming view of user activity
- Connections—An organically formed community of users who share a greater level of information with each other than with the unconnected
- Profile—A summary of user information, such as contact information, job position, chain of management, and the like
- Message Board—A feature for posting and receiving messages
- Feedback—A feature for posting and receiving feedback

Use the People Connections administrative settings to enforce the values you specify or to enable users to override these values with their own People Connections Preferences (for more information, see the chapters covering specific features of the People Connections service, available in Part IX, "Organizing Your Collaborative and Social Networking Environment").

Setting default values on the **Spaces Administration** page affects all users' views of People Connections features. There are a few levels at which these values can be set, and they are subject to an order of precedence:

- Administrative settings affect all users' views of People Connections features.
- Preferences settings affect the view of the user who sets them, and they override administrative settings.
- Settings on a particular task flow affect just that task flow instance, and they override Preference settings:
  - Values set in edit mode (application customization) affect all users' views of the task flow instance.
  - Values set in view mode (user customization) affect only that user's view of the task flow instance, and they override application customizations in that user's view.

6.4.2 People Connections Prerequisites

No special set up is required to enable users to access People Connections services. The People Connections service uses the WebCenter Portal repository, installed with WebCenter Portal: Spaces, to store information.

For Profile information, all but three attributes are stored and read from the LDAP identity store that is configured for the Spaces application. There are three exceptions: the Profile photo, expertise, and the Publisher status message. These are stored with other Spaces data in the WebCenter Portal repository.

> **See Also:** For information about Spaces and the LDAP identity store, see "Configuring the Identity Store" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

6.4.3 Configuring the People Connections Service for Spaces

This section steps you through the process of setting application-wide values for People Connections features. It includes the following subsections:

- Section 6.4.3.1, "Accessing People Connections Administrative Settings"
- Section 6.4.3.2, "Configuring Activity Stream"
- Section 6.4.3.3, "Configuring Connections"
- Section 6.4.3.4, "Configuring Profile"
- Section 6.4.3.5, "Configuring Message Board"
- Section 6.4.3.6, "Configuring Feedback"

6.4.3.1 Accessing People Connections Administrative Settings

To access People Connections administrative settings:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Configuration**, **Services**, and then select **People Connections**.

   Alternatively, use the following URL, and then select **People Connections**:

   ```
   http://host:port/webcenter/spaces/admin/services
   ```

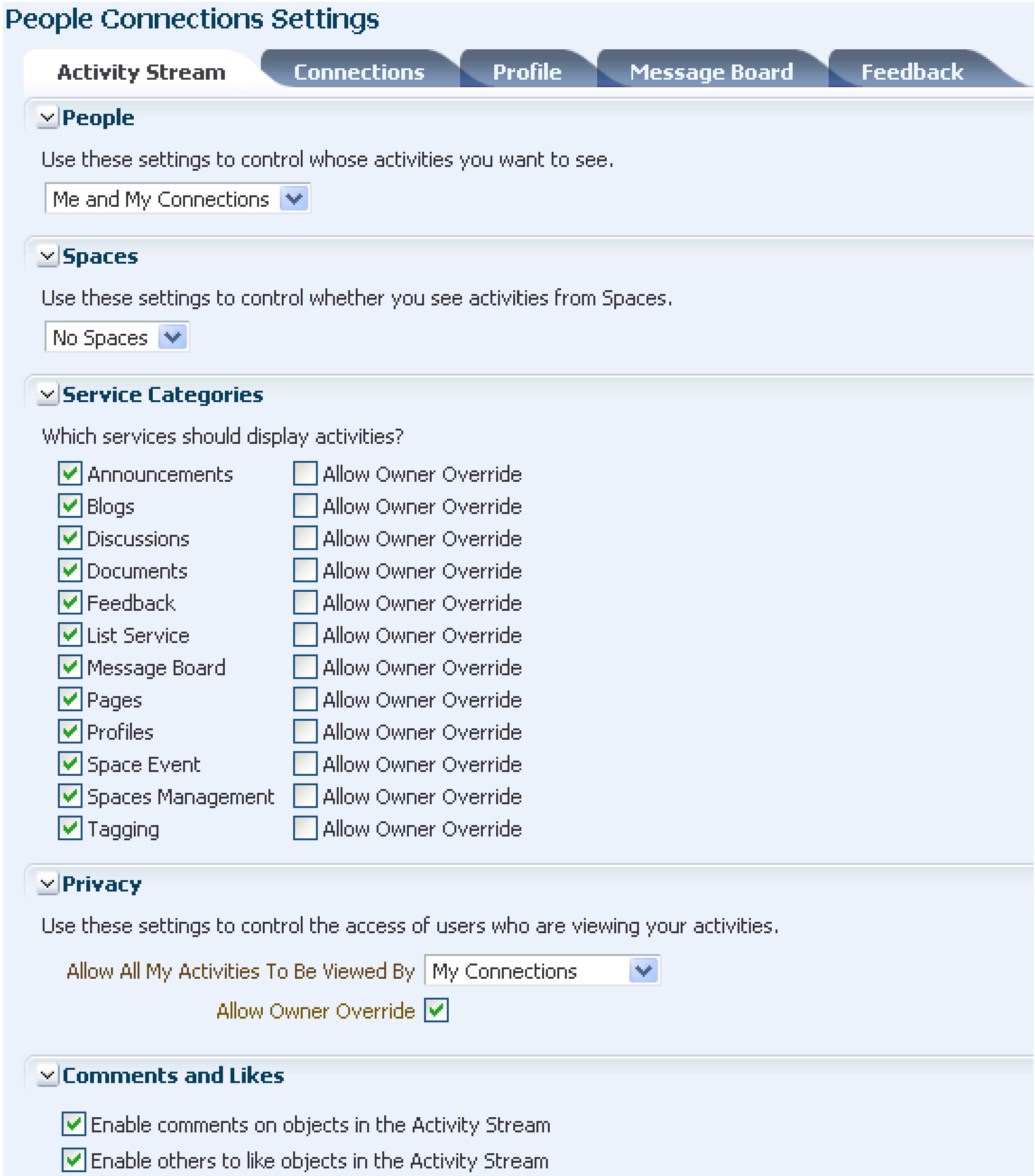
   Tabs with the names of People Connections features appear to the right (Figure 6–4).

Figure 6–4 Configuration Settings for the People Connections Service

6.4.3.2 Configuring Activity Stream

Activity Stream provides a means of publishing and tracking users' application activity. Activity Stream configuration settings specify from which users and services activities are streamed, who can see a user's streamed activities, and whether liking and commenting is available on each streamed activity (Figure 6–5).

Figure 6–5 Configuration Options for Activity Stream



Who can view a user's activities and the types of activities tracked depend on Activity Stream configuration. Table 6–2 lists the types of activities that may be tracked by Activity Stream.

Table 6–2 Activities Tracked by Activity Stream

Service	Tracked Activities	Scope	Activities Shared or Private
Announcements	▪ Create announcement ▪ Edit announcement	Space	Shared with other space members
Blogs	▪ Create blog ▪ Update blog	▪ Space ▪ Home space	▪ Activities on space blogs are shared with other space members. ▪ Activities on Home space blogs are shared with the blogger's connections.
Connections	▪ Invitations to connect ▪ People are connected	Home space	Shared with invitor and invitee's connections
Discussions	▪ Create forum ▪ Create topic ▪ Reply to topic	Space	Shared with other space members
Documents	▪ Create document ▪ Edit document ▪ Add tag ▪ Remove tag	▪ Space ▪ Home space	▪ Activities on space documents are shared with other space members. ▪ Activities on Home space documents are private to user.
Feedback	▪ Feedback left ▪ Feedback received	Home space	Shared with whomever is permitted to view such activities (for more information, see this section and Section 36.2, "Setting Message Board and Feedback Preferences."
Lists	▪ Create a list ▪ Add a row to a list ▪ Edit a list row	Space	Shared with other space members
Message Board	▪ Message left ▪ Message received	Home space	Shared with whomever is permitted to view such activities (for more information, see this section and Section 36.2, "Setting Message Board and Feedback Preferences."
Pages	▪ Create page ▪ Edit page ▪ Add tag ▪ Remove tag	▪ Space ▪ Home space	▪ Activities on space pages are shared with other space members. ▪ Activities on Home space pages are private to user.
Profiles	▪ Photo updated ▪ Profile updated ▪ Personal status note updated	Home space	Shared with whomever is permitted to view such activities (for more information, see this section and Section 33.3, "Setting Profile Preferences."

Table 6–2 (Cont.) Activities Tracked by Activity Stream

Service	Tracked Activities	Scope	Activities Shared or Private
Space Events	■ Create an event ■ Edit an Event	Space	Shared with other space members
Spaces Management	■ Create space ■ Join space	Space	Shared with other space members
Tagging	■ Add tag ■ Remove tag	■ Space ■ Home space	■ Activities in a space are shared with all space members. ■ Activities in a Home space are shared with whomever is permitted to view such activities (for more information, see Section 6.4.3.2, "Configuring Activity Stream," and Section 35.2, "Setting Activity Stream Preferences").

Activity Stream configuration falls under the following categories:

- **People**—For determining whose activities to show, either the current user's or both the current user and the user's connections.
- **Spaces**—For determining whether to show activities from all available spaces or just the Home space.
- **Service Categories**—For selecting the services from which to report activities and enabling users to override these default selections in their personal preferences or preventing users from overriding.
- **Privacy**—For selecting who may see the current user's activities.
- **Comments and Likes**—For enabling users to comment on a posted activity and express a liking for a posted activity

To configure Activity Stream for all users:

1. Access People Connections administrative settings as described in Section 6.4.3.1, "Accessing People Connections Administrative Settings."
2. Click the **Activity Stream** tab to bring it forward.
3. Expand the **People** node, and select whose activities to show:
   - **Only Me**—Show only the current user's activities in his or her view of the Activity Stream.
   - **Me and My Connections**—Show the current user's activities and the activities of that user's connections in his or her view of the Activity Stream.
   - **No Personal**—Omit all activities streamed from Home spaces in the current user's view of his Activity Stream.
4. Expand the **Spaces** node, and select to show activities from:
   - **All Spaces**—All spaces to which the user has access
   - **My Spaces**—All spaces of which the user is the moderator
   - **No Spaces**—Only the Home space

5. Expand the **Service Categories** node, and select the services from which to publish activity.

   > **Note:** The activities of services that are not selected are still tracked, but they do not appear in the Activity Stream. If you select to show the service activities at some later point, all of the activities that occurred when the service was not selected now appear in the Activity Stream.

   Table 6–2 lists the activities tracked by the Activity Stream.

6. Optionally, select **Allow Owner Override** to enable users to override a setting for a given service through their personal preferences.

   Deselect this check box to prevent users from overriding the application defaults you set here.

7. Expand the **Privacy** node, and specify who can view the current user's activities as well as whether the user can override this setting in their personal preferences.

   Table 6–3 lists and describes each option.

Table 6–3 Activity Stream Privacy Options

Option	Description
Allow all of my activities to be viewed by	Specify who can view another user's activities Select from: ■ **Everyone**—Any user, whether logged in or not, can view other users' activities. ■ **Authenticated Users**—Users who have logged in can view other users' activities. ■ **My Connections**—User A can view user B's activities if user B has accepted user A as a connection. User A can also view user A's activities. ■ **Myself**—Only user A can view user A's activities.
Allow Owner Override	Enable users to override the application default settings using their own People Connections Preferences (for more information, see Section 35.2, "Setting Activity Stream Preferences").

8. Expand the **Likes and Comments** node, and specify whether liking and commenting are allowed:

   - Select **Enable comments on objects in the Activity Stream** to enable users to comment on a given Activity Stream item. Deselect the check box to prevent users from commenting.
   - Select **Enable others to like objects in the Activity Stream** to enable users to express a liking for an Activity Stream item. Deselect the check box to prevent users from commenting.

Tip: Users can like and comment on streamed items that include objects. For example, users can like or comment on "Jack has updated doc.xml," but cannot like or comment on "Jack and Jill are now connected."

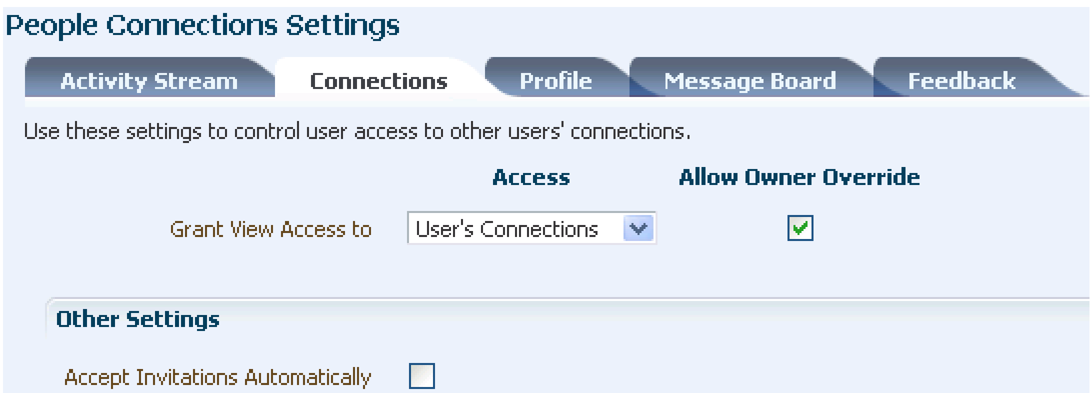
For additional information about liking and commenting, see Chapter 37, "Liking, Commenting On, and Sharing Objects."

9. Click **Apply** to save your configuration settings.

6.4.3.3 Configuring Connections

Connections configuration involves specifying who can view another user's connections and whether users accept invitations to connect automatically (Figure 6–6).

Figure 6–6 Configuration Settings for Connections



To configure Connections:

1. Access People Connections administrative settings as described in Section 6.4.3.1, "Accessing People Connections Administrative Settings."
2. Click the **Connections** tab to bring it forward.

   Table 6–4 lists and describes each option.

Table 6–4 Connections Configuration Options

Option	Description
Grant View Access to	Classes of users to whom to grant automatic view access to a user's connections The users you select can view and interact with another user's connections. Select from: ■ **Everyone**—All users, including users who are not logged in, can see other users' connections. ■ **Authenticated users**—Only users who are logged in can see other users' connections. ■ **User's Connections**—Only the user and the user's connections can see the user's connections. ■ **User Only**—Only a user can see his or her own connections.

Table 6–4 (Cont.) Connections Configuration Options

Option	Description
Allow Owner Override	Option to allow or prohibit users from overriding the administrator View access setting: ▪ Select to allow users to override the administrative View access setting specified here using their personal Preferences (for more information, see Section 34.2, "Setting Connections Preferences." ▪ Deselect to prohibit users from overriding the administrative View access setting.
Accept Invitations Automatically	▪ Select to specify that, by default, all invitations to connect are accepted automatically. ▪ Deselect to specify that, by default, a user must explicitly accept or reject invitations to connect.

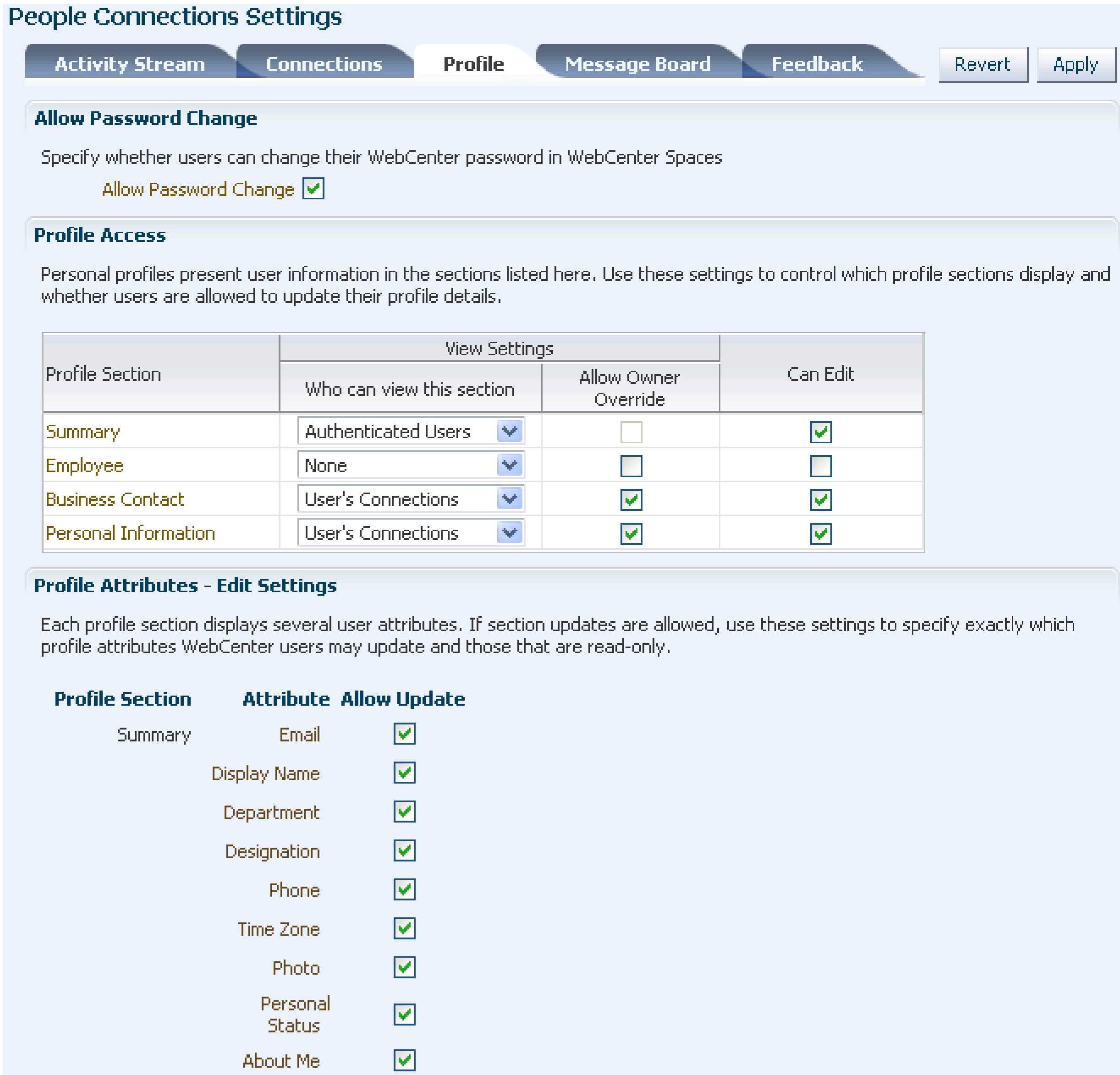
3. Click **Apply** to save your configuration settings.

6.4.3.4 Configuring Profile

Every authenticated user has a profile that displays personal information, such as the user's email address, phone number, office location, department, manager, direct reports, and so on. All but three attributes are stored and read from the LDAP identity store that is configured for the Spaces application. The three exceptions include the Profile photo and expertise and Publisher status messages.

Use administrative configuration settings for Profile to specify whether users are allowed to change their application passwords, which profile sections display, whether users are allowed to update their profile details, and the profile attributes that users may update (Figure 6–7).

Figure 6–7 Configuration Settings for Profile



Personal profiles are presented in four sections: **Summary**, **Employee**, **Business Contact**, **Personal Information**. Each section provides information related to the section heading. For example, **Summary** includes a collection of basic details, such as the user's name, email address, and office location.

In configuration settings, the access setting for the **Summary** section controls who can search for the user (for example, through global search, people pickers, and the searches one uses to find and invite other users to connect). For example, if Everyone is allowed to view the **Summary** section, then the user can be searched for by unauthenticated (public) users. If only Authenticated Users can view another user’s **Summary** section, then only logged in users can search for the user. If None is the selected value for **Who can view this section**, then the user will not appear in search results.

The **Summary** section is the only Profile section for which the privacy setting cannot be changed by the end-user through Preferences (for more information, see

Section 33.3, "Setting Profile Preferences"). It is controlled at a global level for all users through the settings described in this section.

It is the administrator's job to specify the information to show in each section and determine whether users are allowed to edit their profile data and their application password within the Spaces application.

To configure Profile:

1. Access People Connections administrative settings as described in Section 6.4.3.1, "Accessing People Connections Administrative Settings."
2. Click the **Profile** tab to bring it forward.

   Table 6–5 lists and describes each option.

Table 6–5 Profile Configuration Options

Option	Description
Allow Password Change	Specify whether users are allowed to change their application password ▪ Select to enable users to change their application password. ▪ Deselect to prevent users from changing their application password. This option is useful when your organization provides a single, separate application for managing user credentials and, consequently, prefers not to offer password management through each application.

Table 6–5 (Cont.) Profile Configuration Options

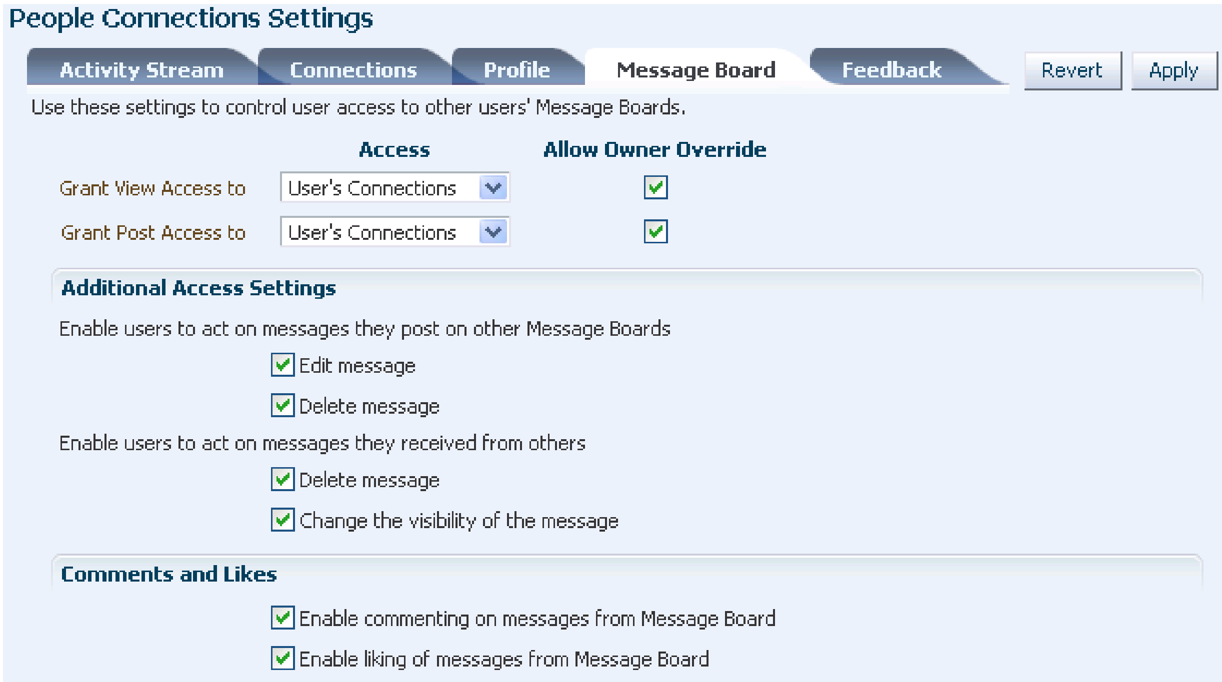
Option	Description
Profile Access	Specify which Profile sections to show and whether users are allowed to update their profile details Set application defaults in the following table columns: **Profile Section**—Identifies the groups of information shown in a user profile. **View Settings**—Specify which users can view a particular profile section, and indicate whether users can change these defaults in their personal Preferences. View Settings for the Summary section control not only who can view summary details but also for whom the user appears in people search results. Set values for: ■ **Who can view this section**—Specify which class of users can view the associated profile section by default. Select from: **User's Connections**—The users to whom the current user is connected can see the associated profile section in other users' profiles. This option is available for all sections except **Summary**. **Everyone**—All users, including users who are not logged in, can see the associated profile section in other users' profiles. **Authenticated users**—Only users who are logged in can see the associated profile section in other users' profiles. **User Only**—Only the user can see his or her own details in the associated profile section. **None**—The section is hidden from all users. **Note:** If you allow unauthenticated users to view the Organization View task flow, you must set the View Setting for all sections to Everyone. ■ **Allow Owner Override**—Enable or disable users' from overriding the default application settings you specify here. Select to enable; deselect to disable. **Can Edit**—Select to enable users to edit the associated profile section of their own personal profiles; deselect to prohibit users from editing the associated profile section. This setting also controls whether an **Edit** link appears in the Profile task flow, but it does not affect the appearance of the **Edit** button on the default version of the **My Profile About** subpage. On the default version of the About subpage, the **Edit** button always appears, though you can use the other Profile administrative settings to prohibit users from actually changing any Profile details.
Profile Attributes - Edit Settings	Indicate the section attributes that users are allowed to edit by default Under **Allow Update**: ■ Select an attribute to enable users to edit its value in their own profiles. ■ Deselect an attribute to prohibit users from editing it in their own profiles.
Profile Cache settings	A means of enabling and configuring a cache for Profile details Provide values for: ■ **Number of profile objects to keep in cache**—Enter or select a value for the size of the cache. ■ **Idle time in minutes to keep a profile object in cache**—Enter or select the number of minutes to hold objects in cache before the cache is refreshed. Cache settings take effect once you restart the Spaces application.

3. Click **Apply** to save your configuration settings.

6.4.3.5 Configuring Message Board

Message Boards provide users with a means of viewing and posting messages to their connections. Configuration settings for Message Board provide controls for who can view and post messages, who can edit and delete the messages they leave, who can delete and change the visibility of messages they receive, and whether commenting and liking are available on each message (Figure 6–8).

Figure 6–8 Configuration Settings for Message Board



> **See Also:** For information about likes and comments, see Chapter 37, "Liking, Commenting On, and Sharing Objects."

To configure Message Board:

1. Access People Connections administrative settings as described in Section 6.4.3.1, "Accessing People Connections Administrative Settings."
2. Click the **Message Board** tab to bring it forward.

   Table 6–6 lists and describes each option.

Table 6–6 Message Board Configuration Options

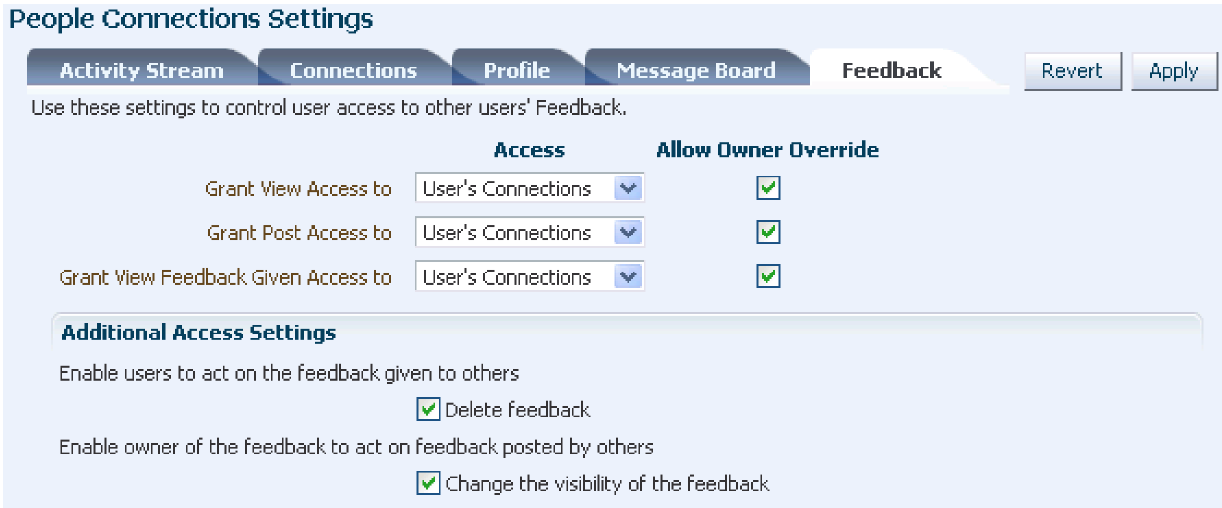
Option	Description
Grant View Access to	Specify who can view Message Board messages. ■ **Everyone**—All users, whether logged in or not, can see users' Message Board messages. ■ **Authenticated Users**—Only logged in users can see users' Message Board messages. ■ **User's Connections**—Only the user and the user's connections can view the user's Message Board. ■ **User Only**—Only the user can see the messages on his or her Message Board.
Grant Post Access to	Specify who can post Message Board Messages. ■ **Everyone**—All users, whether logged in or not, can post Message Board messages. ■ **Authenticated Users**—Only logged in users can post messages to Message Boards. ■ **User's Connections**—Only the user and the user's connections can post messages to the user's Message Board. ■ **User Only**—Only the user can post messages to his or her Message Board.
Allow Owner Override	Specify whether users can override these administrative defaults. ■ Select to enable users to edit the default settings through user Preferences (for more information, see Section 34.2, "Setting Connections Preferences." ■ Deselect to enforce the administrator default application settings.
Enable users to act on messages they post on other Message Boards	Specify whether users are allowed to act on the messages they post. ■ **Edit message**—Select to enable users to edit their own Message Board posts; deselect to prohibit users from editing the messages they post. ■ **Delete message**—Select to enable users to delete their own Message Board posts; deselect to prohibit users from deleting the messages they post.
Enable users to act on messages they receive from others	Specify whether users can act on messages they receive from others ■ **Delete message**—Select to enable users to delete messages they receive from other users; deselect to prohibit users from deleting the messages they receive. ■ **Change the visibility of the message**—Select to enable users to hide or show the messages from a given user; deselect to prohibit users from hiding or showing messages.
Enable commenting on messages from Message Board	Specify whether users can comment on messages that are posted on a Message Board. ■ Select to permit users to so comment. A **Comment** link appears below each message. Users click this to enter a comment. For more information, see Chapter 37, "Liking, Commenting On, and Sharing Objects." ■ Deselect to prohibit commenting.
Enable liking of messages from Message Board	Specify whether to enable users to indicate that they like a message. ■ Select to permit users to click a **Like** link on a given message. For more information, see Chapter 37, "Liking, Commenting On, and Sharing Objects." ■ Deselect to prohibit liking.

3. Click **Apply** to save your configuration settings.

6.4.3.6 Configuring Feedback

Feedback provides a means of viewing and posting user feedback for other application users. Configuration settings for Feedback (Figure 6–9).

Figure 6–9 Configuration Settings for Feedback



Feedback configuration settings offer controls for identifying who can view, post, and delete feedback.

To configure Feedback:

1. Access People Connections administrative settings as described in Section 6.4.3.1, "Accessing People Connections Administrative Settings."
2. Click the **Feedback** tab to bring it forward.

   Table 6–7 lists and describes each option.

Table 6–7 Feedback Configuration Options

Option	Description
Grant View Access to	Specifies who can view the current user's Feedback ■ **Everyone**—All users, whether logged in or not, can see a given user's Feedback. ■ **Authenticated Users**—Only users who are logged in can see a given user's Feedback. ■ **User's Connections**—Only the user and the user's connections can see a given user's Feedback. ■ **User Only**—Disables other users from viewing a given user's Feedback.
Grant Post Access to	Specifies who can post user Feedback ■ **Everyone**—All users, whether logged in or not, can post Feedback for a given user. ■ **Authenticated Users**—Only logged in users can post Feedback for a given user. ■ **User's Connections**—Only the user and the user's connections can post Feedback for a given user. ■ **User Only**—Users can post Feedback only for themselves. Effectively disables Feedback.
Grant View Feedback Given Access to	Specifies who can see the **View** menu to switch between Feedback Given and Feedback Received in a Feedback task flow ■ **Everyone**—All users, whether logged in or not, can see the options on the **View** menu. ■ **Authenticated Users**—Only logged in users can see the options on the **View** menu. ■ **User's Connections**—Only the user and the user's connections can see the **View** menu. ■ **User Only**—Disables the View menu for all but the current user. When users visit the current user's Feedback task flow, they can view only the Feedback the current user has received.
Allow Owner Override	Specifies whether users can override these administrative defaults ■ Select to enable users to revise application default settings through user Preferences (for more information, see Section 36.2, "Setting Message Board and Feedback Preferences"). ■ Deselect to prevent users from altering administrator settings for Feedback.
Enable users to act on the feedback given to others	Indicates whether users can delete the Feedback they post ■ Select **Delete Feedback** to enable users to delete the Feedback they post. ■ Deselect **Delete Feedback** to prohibit users from deleting the Feedback they post.
Enable owner of the feedback to act on feedback posted by others	Indicate whether to enable users to hide or show Feedback from another user. ■ Select **Change the visibility of the feedback** to enable users to hide or show the Feedback from another user. ■ Deselect **Change the visibility of the feedback** to prohibit users from hiding or showing Feedback left by others.

3. Click **Apply** to save your configuration settings.

6.4.4 Archiving the Activity Stream Schema

As the application administrator, you can use WLST commands to archive and restore data in the Activity Stream schema. The following commands are available:

- `archiveASByDate`—Archive Activity Stream data that is older than a specified date.
- `archiveASByDeletedObjects`—Archive Activity Stream data associated with deleted objects.
- `archiveASByClosedSpaces`—Archive Activity Stream data associated with Spaces that are currently closed.
- `archiveASByInactiveSpaces`—Archive Activity Stream data associated with Spaces that have been inactive since a specified date.
- `restoreASByDate`—Restore archived Activity Stream data from a specified date into production tables.

For more information, see the section, "Activity Stream," in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

6.4.5 Troubleshooting Issues with the People Connections Service

This section identifies the types of problems that may occur with each People Connections feature and provides suggestions for how to respond to them. It includes the following subsections:

- Section 6.4.5.1, "Troubleshooting Activity Stream"
- Section 6.4.5.2, "Troubleshooting Connections"
- Section 6.4.5.3, "Troubleshooting Profile"
- Section 6.4.5.4, "Troubleshooting Message Board"
- Section 6.4.5.5, "Troubleshooting Feedback"

6.4.5.1 Troubleshooting Activity Stream

Table 6–8 lists problems and responses for troubleshooting Activity Stream in Spaces.

Table 6–8 Activity Stream Errors and Responses

Problem	Response
Unexpected error or exception	Contact Oracle Support Services.
Connections exception is thrown	Check the exception's detail for an explanation of the exception.
Service Framework exception is thrown	Check the exception's detail for an explanation of the exception.
Settings exception is thrown	Check the exception's detail for an explanation of the exception.
Property value entered is not reflected in task flow	An invalid value may have been entered for the task flow property. In such cases, the default value is used. Ensure that task flow properties have valid values. For more information, see the chapters covering features associated with the People Connections service in Part IX, "Organizing Your Collaborative and Social Networking Environment".
Database exception in EclipseLink module	Contact Oracle Support Services.
Query exception in EclipseLink module	Contact Oracle Support Services.
Unable to publish analytics event	Contact Oracle Support Services.
Operation not supported	Contact Oracle Support Services.

Table 6–8 (Cont.) Activity Stream Errors and Responses

Problem	Response
Cannot retrieve user Profile information	Contact Oracle Support Services.
Check for valid repository failed	Either the database is down or the WebCenter Portal repository is not installed. Check the exception's detail for an explanation of the exception, and respond accordingly.
Activity exception during bulk publish	Check the individual activity exception's detail for an explanation of the exception.

6.4.5.2 Troubleshooting Connections

Table 6–9 lists problems and responses for troubleshooting Connections in Spaces.

Table 6–9 Connections Errors and Responses

Problem	Response
Unexpected errors or exceptions	Contact Oracle Support Services.
User name null or blank	Supply a valid user name.
Could not find user name	Supply a valid user name.
Connection list name not specified	An invalid value may have been entered for the task flow property. Ensure that task flow properties have valid values. For more information, see the chapters covering features associated with the People Connections service in Part IX, "Organizing Your Collaborative and Social Networking Environment".
Insufficient privileges	Contact the Spaces administrator, and request the required permission.
Cannot invite oneself as a connection	Supply a user name other than your own.
Cannot invite a user who has been invited	Wait for the invited user to act on your invitation.
Cannot invite a user who has invited you	Accept the invitation you have received from the user.
Cannot invite a user to whom you are connected	Supply a user name other than that of your existing connection.

6.4.5.3 Troubleshooting Profile

Table 6–10 lists problems and responses for troubleshooting Profile in Spaces.

Table 6–10 Profile Errors and Responses

Problem	Response
Unexpected errors or exceptions	Contact Oracle Support Services.
Personal status message cannot be changed	Only you can change your personal status message.
User cannot view Profile.	Contact the Spaces administrator, and request the required permission.
User cannot edit Profile.	Contact the Spaces administrator, and request the required permission.
User was not specified	The supplied user name was null or blank. Enter a valid user name.
Modifying property is not allowed	The task flow property may be read-only. In this case, you cannot supply a value.
Error getting an Instant Message address	Contact the Spaces administrator.

Table 6–10 (Cont.) Profile Errors and Responses

Problem	Response
Error getting tag data	Contact the Spaces administrator.
Tried to upload an invalid image	Try again with a valid image type. The file must have the mime-type *image*, and cannot have the extension `*.ico`.
Error instantiating object	Contact the Spaces administrator.
Error instantiating Profile	Contact Oracle Support Services.

6.4.5.4 Troubleshooting Message Board

Table 6–11 lists problems and responses for troubleshooting Message Board in Spaces.

Table 6–11 Message Board Errors and Responses

Problem	Response
Unexpected errors or exceptions	Contact Oracle Support Services.
Failed to create an instance of Message Board	Make sure the user is logged in.
Failed to persist Message Board message	Contact Oracle Support Services.
Failed to publish Message Board activity	Verify the reason for the failure in the Activity Stream subsystem.
Message Board message cannot be deleted	The Spaces administrator must explicitly allow users to delete the messages they send. Contact the application administrator, and request the required permission. For more information, see Section 6.4.3.5, "Configuring Message Board."
Message Board message cannot be updated	Contact the Spaces administrator, and request the required permission.
Message Board message cannot be added	Message content is empty. Enter message content, and try again. Otherwise, contact Oracle Support Services.
Message Board message cannot be hidden	User does not have permission to hide the message. You can hide only those messages you receive, and not the ones you send.
Failed to query preferences for Message Board	Contact Oracle Support Services.

6.4.5.5 Troubleshooting Feedback

Table 6–12 lists problems and responses for troubleshooting Feedback in Spaces.

Table 6–12 Feedback Errors and Responses

Problem	Response
Unexpected errors or exceptions	Contact Oracle Support Services.
Failed to create an instance of Feedback	Make sure the user is logged in.
Failed to persist Feedback message	Contact Oracle Support Services.
Failed to publish Feedback activity	Verify the reason for the failure in the Activity Stream subsystem.
Feedback cannot be deleted	The Spaces administrator must explicitly allow users to delete the Feedback they post. Contact the application administrator, and request the required permission. For more information, see Section 6.4.3.6, "Configuring Feedback." Otherwise, contact Oracle Support Services.

Table 6–12 (Cont.) Feedback Errors and Responses

Problem	Response
Feedback cannot be updated	Contact the Spaces administrator, and request the required permission.
Feedback cannot be added	Feedback content is empty. Enter Feedback content, and try again. Otherwise, contact Oracle Support Services.
Feedback cannot be hidden	User does not have permission to hide the Feedback. You can hide only the Feedback you receive; you cannot hide the Feedback you give.
Failed to query preferences for Feedback	Contact Oracle Support Services.

6.5 Registering Portlet Producers

A portlet producer is the object that owns portlets and makes them available to applications. To make a portlet available in Spaces, you must register the portlet's producer with the Spaces application.

This section includes the following subsections:

- Section 6.5.1, "What You Should Know About Registering Portlet Producers"
- Section 6.5.2, "Registering Portlet Producers Through Spaces Administration"
- Section 6.5.3, "Editing Portlet Producer Registration Details"
- Section 6.5.4, "Deregistering Portlet Producers"
- Section 6.5.5, "Working with the Producer Registration Task Flow"

6.5.1 What You Should Know About Registering Portlet Producers

To be able to register and manage portlet producers in the Spaces application, a user must be assigned the `AppConnectionManager` role. By default, users with the `Administrator` role in Spaces are assigned this role; and therefore, administrators can configure portlet producers.

You can grant any other user this capability through Fusion Middleware Control or using the WLST command `grantAppRole`. For example, the following `grantAppRole` WLST command grants the `AppConnectionManager` role to the user `monty`.

```
grantAppRole(appStripe='webcenter', appRoleName='AppConnectionManager',
principalClass='weblogic.security.principal.WLSUserImpl', principalName='monty')
```

For more information about this command, see the section "grantAppRole" in the *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

> **See Also:** "Granting Application Roles Using Fusion Middleware Control" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

6.5.2 Registering Portlet Producers Through Spaces Administration

To register portlet producers through Spaces Administration, you must have the following roles and permissions:

- **`AppConnectionManager` role**—Enables you to manage portlet producers. See the section "Granting Application Roles Using Fusion Middleware Control" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

- **`Application - Manage Configuration` permission**—Enables access to the Spaces Administration page. See Chapter 24, "Managing Users, Roles, and Permissions."

You can register portlet producers in Spaces through Spaces Administration. You can also add the Portlet Producer task flow to any page to enable users with administration privileges to register portlet producers.

This section includes the following subsection:

- Section 6.5.2.1, "Registering a WSRP Producer."
- Section 6.5.2.2, "Registering an Oracle PDK-Java Producer."
- Section 6.5.2.3, "Registering a Pagelet Producer."

6.5.2.1 Registering a WSRP Producer

A WSRP producer is a remote portlet producer that communicates with the consumer application through Web Services for Remote Producers (WSRP). Portlets built using the JSR 286 standard are deployed to WSRP producers.

When you register a WSRP portlet producer, you provide basic information that describes the producer's operational parameters. This information is used by the Spaces application to communicate with the producer and with the portlets through the producer.

Oracle WebCenter Portal: Framework supports both WSRP 1.0 and WSRP 2.0 producers. The WSRP 2.0 standard, among others, provides support for inter-portlet communication and export and import of portlet customizations. You can leverage the benefits of WSRP 2.0 while building standards-based JSR 286 portlets.

To register a WSRP producer for use in Spaces:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Configuration**, then **Services**.
3. Under **Services & Providers**, click **Portlet Producers**.
4. From the menu bar, click Register.
5. In the Register Portlet Producer page, in the Name and Type section, enter basic information for the portlet producer. See Table 6–13.

Table 6–13 WSRP Producer Registration - Name and Type

Field	Description
Producer Name	Enter a unique name to identify this portlet producer registration within Spaces. The name must be unique within the application.
Producer Type	Select WSRP Producer.

6. In the Portlet Producer URL section, enter connection details for the WSRP producer. See Table 6–14.

Table 6–14 WSRP Portlet Producer Registration - Portlet Producer URL

Field	Description

WSDL URL	Enter the registration URL for the WSRP portlet producer.
	
	The syntax varies according to your WSRP implementation. For example, possible URL formats for a portlet deployed to the Oracle WSRP container include:
	
	`http://`*`host`*`:`*`port`*`/`*`context_root`*`/portlets/wsrp2?WDSL`
	`http://`*`host`*`:`*`port`*`/`*`context_root`*`/portlets/wsrp1?WSDL`
	`http://`*`host`*`:`*`port`*`/`*`context_root`*`/portlets/?WSDL`
	
	where:
	
	■ *`host`* is the server where the producer is deployed
	■ *`port`* is the HTTP Listener port
	■ *`context_root`* is the Web application's context root
	
	In Spaces, only v2 WSDLs are supported for Oracle WebLogic Portal Producers.

Use Proxy?	Select if the Spaces application and the remote portlet producer are separated by a firewall and must use an HTTP proxy for communication. If selected, enter values for **Proxy Host** and **Proxy Port**.
Proxy Host	Enter the address for the proxy server. Do not prefix `http://` to the proxy server name.
Proxy Port	Enter the port number on which the proxy server listens. The default port is `80`.

7. In the Advanced Configuration section, specify additional information for the WSRP producer. See Table 6–15.

Table 6–15 WSRP Portlet Producer Registration - Advanced Configuration

Field	Description
Default Execution Timeout	Enter a suitable timeout for design time operations. For example, the maximum time the producer may take to register, deregister, or display portlets on pages in the Spaces application. The default is `30` seconds. Individual portlets may define their own timeout period, which takes precedence over the value specified here.

8. In the Security section, from the **Token Profile** dropdown list, select the type of security token to use for the identity propagation/assertion. The other fields in this section vary depending on the security token selected. See Table 6–16.

   The security token with the propagated or asserted user information is represented as an XML element in the SOAP header. The security token and the SOAP message body are then digitally signed to prove the authenticity of the SOAP message origin from the Spaces application. The Spaces application supports six types of security tokens: *WSS 1.0 Username Token Without Password, WSS 1.0 Username Token With Password, WSS 1.0 SAML Token, WSS 1.0 SAML Token With Message Integrity, WSS 1.0 SAML Token With Message Protection, and WSS 1.1 SAML Token With Message Protection.*

Table 6–16 WSRP Portlet Producer Registration - Security

Field	Description
Token Profile	Select the type of token profile to use for authentication with this WSRP producer: ■ **None**—No security on this connection. If you select None, no WS-Security header is attached to the SOAP message. ■ **WSS 1.0 SAML Token**—This policy provides SAML-based authentication for outbound SOAP request messages in accordance with the WS-Security 1.0 standard. The policy propagates user identity and is typically used in intra departmental deployments where message protection and integrity checks are not required. This policy does not require any keystore configuration. ■ **WSS 1.0 SAML Token with Message Integrity**—This policy provides message-level integrity protection and SAML-based authentication for outbound SOAP requests in accordance with the WS-Security 1.0 standard. A SAML token, included in the SOAP message, is used in SAML-based authentication with sender vouches confirmation. This policy uses WS-Security's Basic 128 suite of asymmetric key technologies and SHA-1 hashing algorithm for message integrity. ■ **WSS 1.0 SAML Token with Message Protection**—This policy provides message-level protection (integrity and confidentiality) and SAML-based authentication for outbound SOAP requests in accordance with the WS-Security 1.0 standard. The Web service consumer includes a SAML token in the SOAP header and the confirmation type is sender-vouches. This policy uses WS-Security's Basic 128 suite of asymmetric key technologies. Specifically, RSA key mechanisms for message confidentiality, SHA-1 hashing algorithm for message integrity, and AES-128 bit encryption. When you select this policy, you must also specify the **Recipient Alias**. ■ **WSS 1.0 Username Token with Password**—This policy provides username (with password) token profile based identity propagation with certificate based message protection for outbound SOAP requests in accordance with the WS-Security v1.0 standard. Both plain text and digest mechanisms are supported. This policy uses WS-Security's Basic128 suite of asymmetric key technologies. Specifically, RSA key mechanism for message confidentiality, SHA-1 hashing algorithm for message integrity, and AES-128 bit encryption. Use this token profile if the WSRP producer has a different identity store. You must define an external application pertaining to the producer and associate the external application with this producer. The external application defined here is used to retrieve and propagate the user credentials to the producer. The producer verifies this against the identity store configured for the external application. When you select this policy, you must also specify the **Recipient Alias**.

Table 6–16 (Cont.) WSRP Portlet Producer Registration - Security

Field	Description
Token Profile (Cont.)	■ **WSS 1.0 Username Token without Password**—This policy provides username (with password) token profile based identity propagation with certificate based message protection for outbound SOAP requests in accordance with the WS-Security 1.0 standard. Credentials (username only) are included in outbound SOAP request messages through a WS-Security UsernameToken header. No password is included. Message protection is provided using WS-Security 1.0's Basic128 suite of asymmetric key technologies. Specifically, RSA key mechanisms for message confidentiality, SHA-1 hashing algorithm for message integrity, and AES-128 bit encryption. When you select this policy, you must also specify the **Recipient Alias**. ■ **WSS 1.1 SAML Token with Message Protection**—This policy provides message-level protection (integrity and confidentiality) and SAML token population for outbound SOAP requests in accordance with the WS-Security 1.1 standard. A SAML token, included in the SOAP message, is used in SAML-based authentication with sender vouches confirmation. This policy uses the symmetric key technology for signing and encryption, and WS-Security's Basic128 suite of asymmetric key technologies for endorsing signatures.
Recipient Alias	Specify the key store alias that is associated with the producer's certificate. This certificate is used to encrypt the message to the producer. Valid for: WSS 1.0 SAML Token With Message Protection, WSS 1.1 SAML Token with Message Protection and WSS 1.0 Username Without Password.
Default User	Enter a user name to assert to the remote producer when the user is not authenticated with the Spaces application. When unauthenticated, the identity *anonymous* is associated with the application user. OWSM does not currently support the propagation of an *anonymous* identity, so you must specify an alternative identity here. Keep in mind though, that in this case, the Spaces application has not authenticated the user so the default user you specify should be a low privileged user in the remote producer that is an appropriate identity to use for showing public content. For example, you may want to create a guest account in the identity store for this purpose. If the user has authenticated to the application, then the user's identity is asserted rather than the default user. The remote WSRP producer must be set up to accept this information. You must also add a grant to the policy store as described in the section "Adding a Grant to the Policy Store for a Mapped User Identity" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. Valid for: WSS 1.0 SAML Token With Message Integrity, WSS 1.0 SAML Token With Message Protection, WSS 1.0 SAML Token, WSS 1.1 SAML Token with Message Protection and WSS 1.0 Username Without Password.

Table 6–16 (Cont.) WSRP Portlet Producer Registration - Security

Field	Description
Associated External Application	If this producer uses an external application for authentication, use the Associated External Application dropdown list to identify the application. An external application is required to support producers using the security option **WSS 1.0 Username Token With Password**. The external application stores and supplies the user credentials. See also Section 6.6, "Registering External Applications." Valid for: WSS 1.0 Username With Password only.

9. Click **Test** to verify that the server details you provided are correct.

   If the server is contactable, a success message is displayed. If the server is down or the host information is incorrect or no longer valid, a connection failure message is displayed.

   > **Note:** The test performs a simple server (host/port) PING test. To verify whether the producer is accessible, access the producer's test page in your browser. For more information, see the section "Testing WSRP Producer Connections" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

10. Click **Ok**.

6.5.2.2 Registering an Oracle PDK-Java Producer

When you register a PDK-Java portlet producer, you provide basic information that describes the producer's operational parameters. This information is used by the Spaces application to communicate with the producer and with the portlets through the producer.

To register an Oracle PDK-Java portlet producer for use in Spaces:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click **Configuration**, then **Services**.
3. Under **Services & Providers**, click **Portlet Producers**.
4. From the menu bar, click **Register**.
5. In the Register Portlet Producer page, in the Name and Type section, enter basic information for the portlet producer. See Table 6–17.

Table 6–17 PDK-Java Portlet Producer Registration - Name and Type

Field	Description
Producer Name	Enter a unique name to identify this portlet producer registration within the Spaces application. The name must be unique across all connection types within the application.
Producer Type	Select **Oracle PDK-Java Producer**.

6. In the Portlet Producer URL section, enter connection details for the Oracle PDK-Java producer. See Table 6–18.

Table 6–18 PDK-Java Portlet Producer Registration - Portlet Producer URL

Field	Description
URL Endpoint	Enter the Oracle PDK-Java producer's URL using the following syntax: `http://host:port/context_root/providers` where: ■ *`host`* is the server where the producer is deployed ■ *`port`* is the HTTP Listener port number ■ *`context_root`* is the Web application's context root
Service ID	Enter the unique identifier for this producer. PDK-Java enables you to deploy multiple producers under a single adapter servlet. Producers are identified by their unique service ID. A service ID is required only if the service ID is not appended to the **URL Endpoint**. The service ID is used to look up a file called *`serviceId`*`.properties`, which defines the characteristics of the portlet producer, such as whether to display its test page. If you do not specify a service ID, the `_default.properties` file is used instead.
Use Proxy?	Select if the Spaces application and the remote portlet producer are separated by a firewall and must use an HTTP proxy for communication. If selected, enter values for **Proxy Host** and **Proxy Port**.
Proxy Host	Enter the address for the proxy server. Do not prefix `http://` to the proxy server name.
Proxy Port	Enter the port number on which the proxy server listens. The default port is `80`.
Associated External Application	Select the relevant external application if one of this producer's portlets requires authentication. See also Section 6.6, "Registering External Applications."
Establish Session?	Select to enable a user session when executing portlets from this producer. When sessions are enabled, they are maintained on the producer server. This allows the portlet code to maintain information in the session. Message authentication uses sessions, so if you specify a shared key, you must also select this option. For sessionless communication between the producer and the server, do not select this option.

7. In the Advanced Configuration section, specify additional information for the PDK-Java producer. See Table 6–19.

Table 6–19 PDK-Java Portlet Producer Registration - Advanced Configuration

Field	Description
Default Execution Timeout	Enter a suitable timeout for communications with the producer, in seconds. For example, the maximum time the producer may take to register, deregister, or display portlets on pages. The default is `30` seconds. Individual portlets may define their own timeout period, which takes precedence over the value specified here.

Table 6–19 (Cont.) PDK-Java Portlet Producer Registration - Advanced Configuration

Field	Description
Subscriber ID	Enter a string to identify the consumer of the producer being registered. When a producer is registered with an application, a call is made to the producer. During the call, the consumer (Spaces in this instance) passes the value for Subscriber ID to the producer. If the producer does not see the expected value for Subscriber ID, it might reject the registration call.
Shared Key	Enter a shared key to use for producers that are set up to handle encryption. The shared key is used by the encryption algorithm to generate a message signature for message authentication. Note that producer registration fails if the producer is set up with a shared key and you enter an incorrect shared key here. The shared key can contain between 10 and 20 alphanumeric characters. This key is also used when registering a producer using the Federated Portal Adapter (FPA). The Shared Key is also known as the HMAC key.

8. Click **Test** to verify that the server details you provided are correct.

   If the server is contactable, a success message is displayed. If the server is down or the host information is incorrect or no longer valid, a connection failure message is displayed.

   > **Note:** The test performs a simple server (host/port) PING test. To verify whether the producer is accessible, access the producer's test page in your browser. For more information, see the section "Testing Oracle PDK-Java Producer Connections" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

9. Click **Ok**.

6.5.2.3 Registering a Pagelet Producer

This section describes how to register a Pagelet Producer using Spaces Administration.

To register a pagelet producer for use in Spaces:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click **Configuration**, then **Services**.
3. Under **Services & Providers**, click **Portlet Producers**.
4. From the menu bar, click Register.
5. In the Register Portlet Producer page, in the Name and Type section, enter basic information for the pagelet producer. See Table 6–20.

Table 6–20 Pagelet Producer Registration - Name and Type

Field	Description
Producer Name	Enter a unique name to identify this pagelet producer registration within the Spaces application. The name must be unique across within the application. The name you specify here appears in Composer under the *Mash-ups >Pagelet Producers* folder (by default).
Producer Type	Select **Pagelet Producer**.

6. In the Portlet Producer URL section, enter connection details for the pagelet producer. See Table 6–21.

Table 6–21 Pagelet Producer Registration - Portlet Producer URL

Field	Description	Producer Type
Server URL	Enter the URL of the WebCenter Portal's Pagelet Producer. The URL must include a fully-qualified domain name. Use the following syntax: `protocol://host:port/pagelets` For example: `http://myhost.example.com:7778/pagelets` If pagelets carry secure data, the URL registered must use the HTPPS protocol. For example: `https://myhost.com:7779/pagelets` In the Spaces application, if the Pagelet Producer URL is protected by OAM, the URL to the pagelet catalog must be excluded (mapped directly without access control), or the catalog will appear to be empty when using REST. The pagelet catalog URL is: `http://proxy_host:proxy_port/pagelets/api/v2/ensemble/pagelets`	Pagelet

7. Click **Test** to verify that the server details you provided are correct.

   If the server is contactable, a success message is displayed. If the server is down or the host information is incorrect or no longer valid, a connection failure message is displayed.

   > **Note:** The test performs a simple server (host/port) PING test.

8. Click **Ok**.

6.5.3 Editing Portlet Producer Registration Details

In Spaces Administration, you can access and revise many of the registration details provided for a portlet producer.

To edit portlet producer registration details:

1. Open Spaces Administration.

For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Configuration**, then **Services**.
3. Under **Services & Providers**, click **Portlet Producers**.
4. Select the portlet producer that you want to edit.
5. From the menu bar, click **Edit**.
6. Edit the producer registration properties as required:
   - WSRP Producers
     – Table 6–14, " WSRP Portlet Producer Registration - Portlet Producer URL"
     – Table 6–15, " WSRP Portlet Producer Registration - Advanced Configuration"
     – Table 6–16, " WSRP Portlet Producer Registration - Security"
   - Oracle PDK-Java Producers
     – Table 6–18, " PDK-Java Portlet Producer Registration - Portlet Producer URL"
     – Table 6–19, " PDK-Java Portlet Producer Registration - Advanced Configuration"
   - Pagelet Producers
     – Table 6–21, " Pagelet Producer Registration - Portlet Producer URL"

   You cannot edit the **Producer Name** or **Producer Type**.

   Note: While it is possible to edit the value of the **WSDL URL** or **URL Endpoint**, for example, if the producer port has changed, you can point to a different producer only if the new producer has access to the preference store of the old producer, or if the preference store of the old producer has been migrated to that of the new producer. For more information, see the section "Migrating Portlet Preferences" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

   ---

7. When you have changed all the necessary settings, you can click **Test** to verify that the server details you provided are correct.

   If the server is contactable, a success message is displayed. If the server is down or the host information is incorrect or no longer valid, a connection failure message is displayed.

   Note: The test performs a simple server (host/port) PING test.

   ---

8. When you are done, click **Ok**.

6.5.4 Deregistering Portlet Producers

If you no longer want to use a particular producer in Spaces, you can deregister the producer. When you deregister a producer, registration data is removed from both the Spaces application and the remote producer:

- Spaces - The producer connection is deleted and producer metadata is also deleted.
- Remote producer - Portlet instances are deleted (not the portlets themselves).

Portlet instances are not removed from Spaces pages. In place of the portlet, users see a "Portlet unavailable" message.

To deregister a portlet producer:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click **Configuration**, then **Services**.
3. Under **Services & Providers**, click **Portlet Producers**.
4. Select the portlet producer that you want to remove.
5. From the menu bar, click **Deregister**.

6.5.5 Working with the Producer Registration Task Flow

To manage portlet producers through the Producer Registration task flow, you must have the following roles and permissions:

- **`AppConnectionManager` role**—Enables you to manage portlet producers.
- **`View Page` permission—**Enables access to the page containing the task flow. See Section 26.1, "Setting Access on a Page Through Page Properties."

This section includes the following subsections:

- Section 6.5.5.1, "Adding the Producer Registration Task Flow to a Page"
- Section 6.5.5.2, "Registering Producers Through the Producer Administration Task Flow."
- Section 6.5.5.3, "Setting Producer Task Flow Properties."

6.5.5.1 Adding the Producer Registration Task Flow to a Page

To add a Producer Registration task flow:

1. Go to the page where you want to add the task flow, and open it in Composer.

   For more information, see Section 18.1, "Entering and Exiting Composer."
2. In Composer, click the **Add Content** button to open the Add Content dialog.
3. In the Add Content dialog, open **Portlets**.
4. In the Portlets folder, open **Administration**.
5. In the Administration folder, click the **Add** link next to the **Producer Registration** task flow. This adds the task flow to the page.
6. Click **Close** to exit Add Content dialog.

6.5.5.2 Registering Producers Through the Producer Administration Task Flow

When you have added the Producer Administration task flow to your page, you can register any portlet producer as described in the following tables in Section 6.5.2, "Registering Portlet Producers Through Spaces Administration":

- **WSRP Producers**

  - Table 6–13, " WSRP Producer Registration - Name and Type"
  - Table 6–14, " WSRP Portlet Producer Registration - Portlet Producer URL"
  - Table 6–15, " WSRP Portlet Producer Registration - Advanced Configuration"
  - Table 6–16, " WSRP Portlet Producer Registration - Security"
- **Oracle PDK-Java Producers**
  - Table 6–17, " PDK-Java Portlet Producer Registration - Name and Type"
  - Table 6–18, " PDK-Java Portlet Producer Registration - Portlet Producer URL"
  - Table 6–19, " PDK-Java Portlet Producer Registration - Advanced Configuration"
- **Pagelet Producers**
  - Table 6–20, " Pagelet Producer Registration - Name and Type"
  - Table 6–21, " Pagelet Producer Registration - Portlet Producer URL"

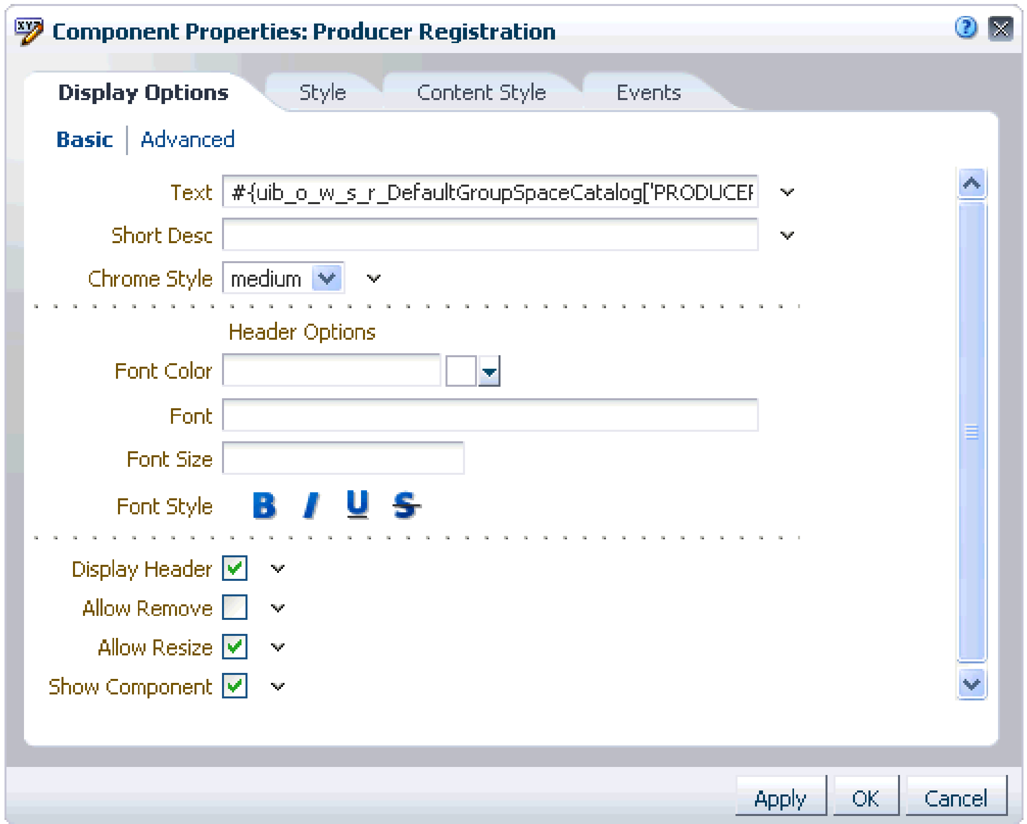
See also Section 6.5.4, "Deregistering Portlet Producers."

6.5.5.3 Setting Producer Task Flow Properties

The Producer Registration task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 6–10).

Most properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 18.6, "Modifying Page Components."

Figure 6–10 Producer Registration Task Flow Component Properties



Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6.4, "Working with Component Display Options" and Section 18.6.6, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 18.6.5, "Working with Child Components."

All properties on **Display Options** tab provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

6.6 Registering External Applications

An external application is any application that implements its own authentication process. Specifically, it is an application that does not take part in your Spaces single sign-on process. If Spaces interacts with another application that handles its own authentication, you can associate Spaces with an external application definition to allow for credential provisioning. In doing so, you use an external application definition to provide a means of accessing content from these independently authenticated applications. The WebCenter Portal services such as, Mail, IMP, Documents, portlet producers associate external applications with their connections to use the user credential management feature and to connect and access content from these independently authenticated applications.

You can manage external applications through the Services tab in the Spaces Administration page, the External Application task flow, and the Application Navigator task flow. These features are discussed in details in the following subsections:

- Section 6.6.1, "What You Should Know About External Applications"
- Section 6.6.2, "Registering External Applications Through Spaces Administration"
- Section 6.6.3, "Working with Task Flows for External Applications"
- Section 6.6.4, "Deleting External Applications"

6.6.1 What You Should Know About External Applications

To be able to register and manage external applications in Spaces, a user be assigned the `AppConnectionManager` role. By default, users with the Spaces `Administrator` role are assigned this role; and therefore, administrators can configure external applications.

You can grant any other user this capability through Fusion Middleware Control or WLST command `grantAppRole`. For example, the following `grantAppRole` WLST command grants the `AppConnectionManager` role to the user *monty*.

```
grantAppRole(appStripe='webcenter', appRoleName='AppConnectionManager',
principalClass='weblogic.security.principal.WLSUserImpl', principalName='monty')
```

For more information about this command, see the section "grantAppRole" in the *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

See also "Granting Application Roles Through Fusion Middleware Control" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

6.6.2 Registering External Applications Through Spaces Administration

To register external applications through Spaces Administration you must have the following roles and permissions:

- **AppConnectionManager** role - Enables you to manage external applications. See also "Granting Application Roles Through Fusion Middleware Control" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- **Application - Manage Configuration** permission - Enables access to the Spaces Administration page.

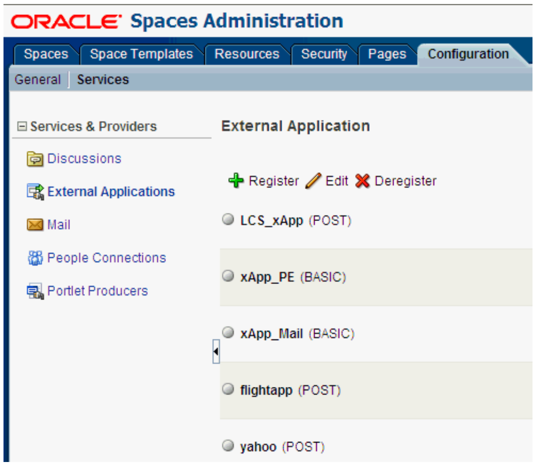
To register an external application for use in the Spaces application:

1. Open Spaces Administration.

For details, see Chapter 4, "Accessing Spaces Administration Pages."

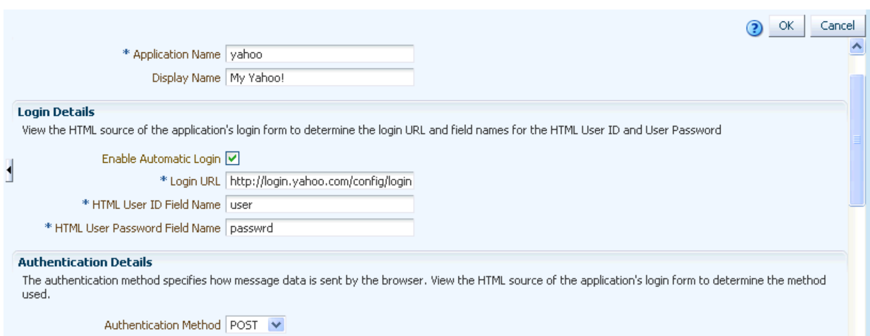
2. Click **Configuration**, then **Services**.
3. Under **Services & Providers**, select **External Applications**.
4. To register a new external application, click **Register** (Figure 6–11).

Figure 6–11 Registering External Applications



External application options display (Figure 6–12).

Figure 6–12 Configuring External Application Connections



5. Enter a unique name for the external application and a display name that Spaces users working with this external application will see.

   See also Table 6–22.

Table 6–22 External Application Connection - Name

Field	**Description**
Application Name	Enter a name to identify the application within the Spaces application. The name must be unique (across all connection types) within the Spaces application. For example: `yahoo` **Note:** Once registered, you cannot edit the Application Name.

Table 6–22 (Cont.) External Application Connection - Name

Field	Description
Display Name	Enter a user friendly name for the application that Spaces users will recognize. Spaces end-users working with this external application will see the display name you specify here. The display name must be unique across all external applications within Spaces. For example: `My Yahoo` If you leave this field blank, the Application Name is used.

6. Enter login details for the external application.

   For details, see Table 6–23.

Table 6–23 External Application Connection - Login Details

Field	Description
Enable Automatic Login	Select to allow automatically log users in to this application. Choosing this option requires you to complete the `Login URL`, `HTML User ID Field Name`, and `HTML User Password Field Name` fields With automated single sign-on, the user directly links to the application and is authenticated automatically, as their credentials are retrieved from the credential store. Selecting this option provides the end user with a seamless single sign-on experience. **Note:** Automated login is not supported for: ■ External applications using BASIC authentication. ■ External applications configured for SSO. ■ External applications with a customized login form (built using ADF Faces) that does not implement the J2EE security container login method `j_security_check` for authentication. ■ External sites that do not support UTF8 encoding.
Login URL	Enter the login URL for the external application. To determine the URL, navigate to the application's login page and record the URL. For example: `http://login.yahoo.com/config/login` **Note:** A login URL is not required if the sole purpose of this external application is to store and supply user credentials on behalf of another service.
HTML User ID Field Name	Enter the name that identifies the "user name" or "user ID" field on the login form. **Tip:** To find this name, look at the HTML source for the login page. This property does not specify user credentials. **Note:** Mandatory if the **Authentication Method** is GET or POST and a **Login URL** is specified. Leave this field blank if the application uses the basic authentication.

Table 6–23 (Cont.) External Application Connection - Login Details

Field	Description
HTML User Password Field Name	Enter the name that identifies the "password" field on the login form. **Tip:** To find this name, look at the HTML source for the login page. **Note:** You must complete this field if the Authentication Method is GET or POST. Leave this field blank if the application uses basic authentication (see **Authentication Method**).

7. Select the authentication method used by the external application.

   For details, see Table 6–24.

Table 6–24 External Application Connection - Authentication Details

Field	Description
Authentication Method	Select the form submission method used by the external application. Select from one of the following: ■ **GET**: Presents a page request to a server, submitting the login credentials as part of the login URL. This authentication method may pose a security risk because the user name and password are exposed in the URL. ■ **POST**: Submits login credentials within the body of the form. This is the default. ■ **BASIC**: Submits login credentials to the server as an authentication header in the request. This authentication method may pose a security risk because the credentials can be intercepted easily and this scheme also provides no protection for the information passed back from the server. The assumption is that the connection between the client and server computers is secure and can be trusted. The **Authentication Method** specifies how message data is sent by the browser. You can find this value by viewing the HTML source for the external application's login form, for example, `<form method="POST" action="https://login.yahoo.com/config/login?" AutoComplete="off">`

8. Specify additional login fields and details, if required.

   For details, see Table 6–25.

Table 6–25 External Application Connection - Additional Login Fields

Field	Description
Additional Login Fields	If your application requires additional login criteria, expand **Additional Login Fields**. For example, in addition to *user name* and *password*, the Lotus Notes application requires two additional fields - *Host* and *MailFilename*. Click **Add** to specify an additional field for the login form. For each new field, do the following: ■ **Name** - Enter the name that identifies the field on the HTML login form that may require user input to log in. This field is not applicable if the application uses basic authentication. ■ **Value** - Enter a default value for the field or leave blank for a user to specify. This field is not applicable if the application uses basic authentication. ■ **Display to User** - Select to display the field on the external application login screen. If the field is not displayed (unchecked), then a default **Value** must be specified. Click **Delete** to remove a login field.

9. Specify shared and public user credentials, if required.

For details, see Table 6–26.

Table 6–26 External Application Connection - Shared User and Public User Credentials

Field	Description
Enable Shared Credentials	Indicate whether this external application enables shared user credentials, and specify the credentials. Select **Enable Shared Credentials**, and then enter **User Name** and **Password** credentials for the shared user. When shared credentials are specified, every user accessing this external application, through Spaces, is authenticated using the user name and password defined here. Users are not presented with a login form. Because users do not need to define personal credentials of their own, external applications with shared credentials are not listed in the external application's change password task flows such as *My Accounts* (see also Section 38.7, "Providing Login Information for External Applications".)
Enable Public Credentials	Indicate whether unauthenticated users (public users) may access this external application. Select **Enable Public Credentials**, and then enter **User Name** and **Password** credentials for the public user. When public credentials are specified, public users accessing this external application through Spaces public pages are logged in using the user name and password defined here. If public credentials are not specified, public users will see an authorization error indicating this external application is not accessible to public users.

10. Click **OK** to register the application.

6.6.3 Working with Task Flows for External Applications

To register external applications through an external application task flow you must have the following roles and permissions:

- **AppConnectionManager** role - Enables you to manage external applications. See also "Granting Application Roles Through Fusion Middleware Control" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- **View Page** permission - Enables access to the page containing the task flow. See also Section 26.1, "Setting Access on a Page Through Page Properties."

This section includes the following subsections:

- Section 6.6.3.1, "Adding an External Application Task Flow to a Page"
- Section 6.6.3.2, "Registering External Applications Through the External Application Task Flow"
- Section 6.6.3.3, "Adding an Application Navigator Task Flow to a Page"
- Section 6.6.3.4, "Making External Applications Available through the Application Navigator Task Flow"
- Section 6.6.3.5, "Setting External Application Task Flow Properties"
- Section 6.6.3.6, "Using the External Application - Change Password Task Flow"

6.6.3.1 Adding an External Application Task Flow to a Page

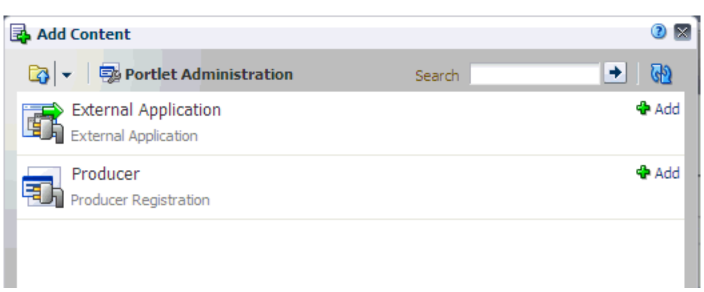
Note: External applications links exposed in the Application Navigator task flow are not automatically removed when an external application is deleted. To prevent unsuccessful access attempts, administrators are advised to remove links to unavailable applications.

To add an External Application task flow:

1. Go to the page where you want to add a task flow, and open it in Composer.

   For more information, see Section 18.1, "Entering and Exiting Composer."
2. In Composer, click the **Add Content** button to open the Add Content dialog.
3. In the Add Content dialog, open **Portlet Administration**, as shown in Figure 6–13.

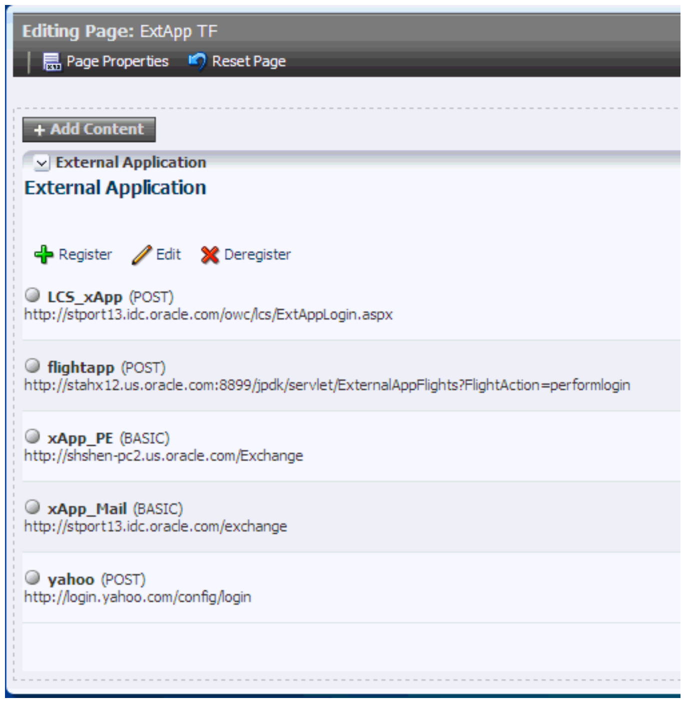
Figure 6–13 Add Content dialog - Portlet Administration



4. In the Portlet Administration folder, click the **Add** link next to the External Application task flow.

5. In the Add Content dialog, click **Apply**. This adds the task flow to the page, as shown in Figure 6–14.

Figure 6–14 External Application Task Flow in a Page



6.6.3.2 Registering External Applications Through the External Application Task Flow

Once you have added the External Application task flow to your page, you can register any external application as described in the following tables in Section 6.6.2, "Registering External Applications Through Spaces Administration":

- Table 6–22, " External Application Connection - Name"
- Table 6–23, " External Application Connection - Login Details"
- Table 6–24, " External Application Connection - Authentication Details"
- Table 6–25, " External Application Connection - Additional Login Fields"
- Table 6–26, " External Application Connection - Shared User and Public User Credentials"

See also Section 6.6.4, "Deleting External Applications."

6.6.3.3 Adding an Application Navigator Task Flow to a Page

The Application Navigator task flow enables centralized access to frequently used Web applications. Once links to your applications are set up, you simply click links to launch your day-to-day applications, and if necessary, supply your user name and password information.

Other users may not want to see all the applications offered through the Applications Navigator. If this is the case, individuals may personalize their view to show only those applications they want to access.

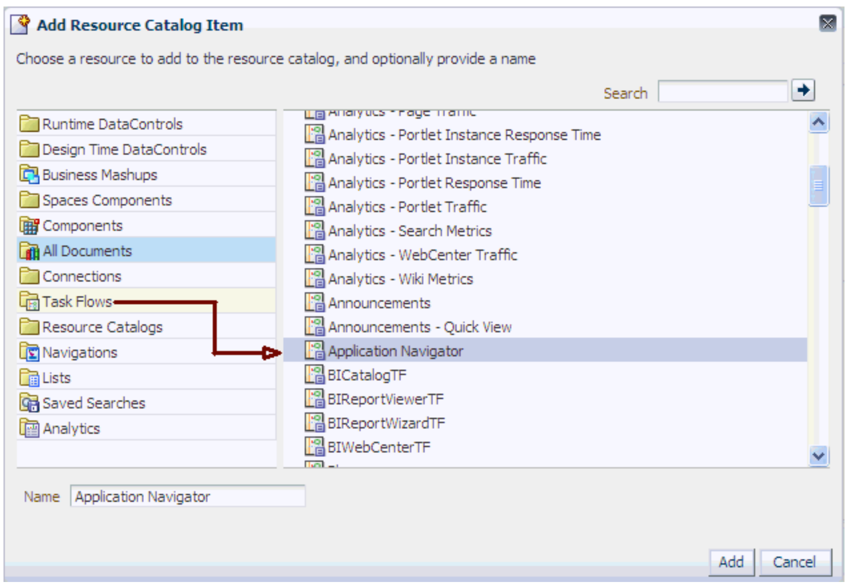
The Applications Navigator can launch different types of application:

- **External Applications** - Web-based, external applications that perform their own user authentication.
- **Task Flows** - Built-in task flows specific to WebCenter Portal: Spaces. Any of these can be launched directly from the Applications Navigator.

Before You Begin:

- Ensure that the Application Navigator task flow is included in the Resource Catalog you will use for your page. The Application Navigator task flow is not available in the Resource Catalog by default. To add this task flow to your Resource Catalog, follow the steps described in Section 16.3.1.2, "Adding Resources" and select **Task Flows** from the library. The Task Flows option in the Add Resource Catalog Item dialog includes the Application Navigator task flow, as shown in Figure 6–15.

Figure 6–15 Add Resource Catalog Item



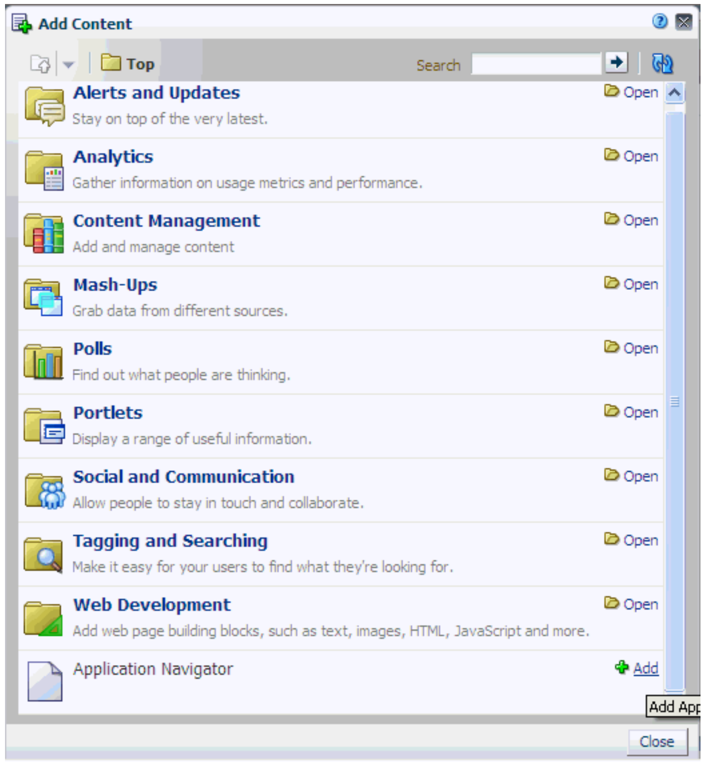
- Consider the points described in Section 6.6.1, "What You Should Know About External Applications."

To add an Application Navigator task flow:

1. Go to the page in which you want to add a task flow, and open it in Composer.

   For more information, see Section 18.1, "Entering and Exiting Composer."
2. In Composer, click the **Add Content** button to open the Add Content dialog.
3. In the Add Content dialog, select **Application Navigator**, as shown in Figure 6–16, and click the **Add** link.

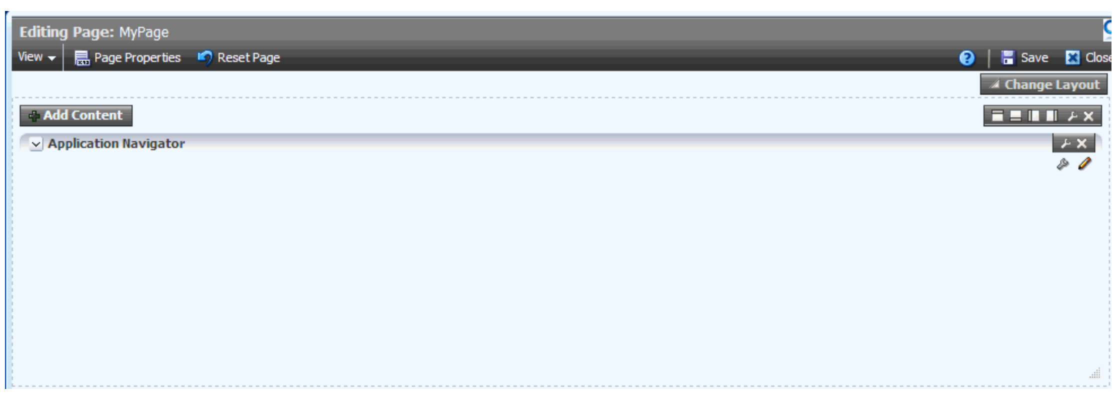
Figure 6–16 Add Content - Application Navigator



4. In the Add Content dialog, click **Apply**.

   This adds the task flow to the page, as shown in Figure 6–17.

Figure 6–17 Application Navigator Task Flow in a Page



Section 6.6.3.4, "Making External Applications Available through the Application Navigator Task Flow" describes how to add links to frequently used applications or task flows.

6.6.3.4 Making External Applications Available through the Application Navigator Task Flow

Use the Application Navigator to display links to external applications registered with Spaces and also links to any of the built-in task flows.

Some users may not want to see all the applications offered through the Applications Navigator. If this is the case, individuals may personalize their view to show only those applications they want to access.

To expose an application or task flows through the Applications Navigator:

1. In the page in which you added the Application Navigator task flow, click **Edit applications** (wrench icon) available for the task flow.

   If you do not have edit privileges you will not see this icon.

2. To add a link to an application, select the folder where you want the link to appear, and then click the green **Add** icon.

   To add a new folder, click the **New** icon. To create a subfolder, expand the parent folder first.

3. Navigate to the external application or task flow you require, and click its associated **Add** link.

   - To navigate to a previously registered external application, expand the **External Applications** node, and then expand the required application.

     Only registered external applications which have a *Login URL* defined appear in this list. If the application you want is not listed, ask your Spaces administrator to register the application for you. See also Section 6.6.3.2, "Registering External Applications Through the External Application Task Flow".

   - To navigate to a task flow, expand the **WebCenter Task Flows** node. If necessary, expand one or more subfolders to access the required task flow.

   If you are not sure of the exact name, enter a full or partial search term in the **Search** box, and then click **Find** to search for the application. Application names matching your search criteria are displayed.

   An information message displays indicating whether the application link was successful.

4. Click **OK** to dismiss the message box.

5. To add another application, repeat steps 4 and 5.

6. Click **OK** to return to the Edit Applications dialog.

   The selected application(s) appears within your chosen folder. From here, you can change the display name for the application link and set other display-related properties.

7. To edit link details for an application, highlight the row in the table and then click the Edit icon.

   The Edit Application Link dialog opens.

8. Edit the link display properties, as required.

For details, see Table 6–27, " Application Link Properties":

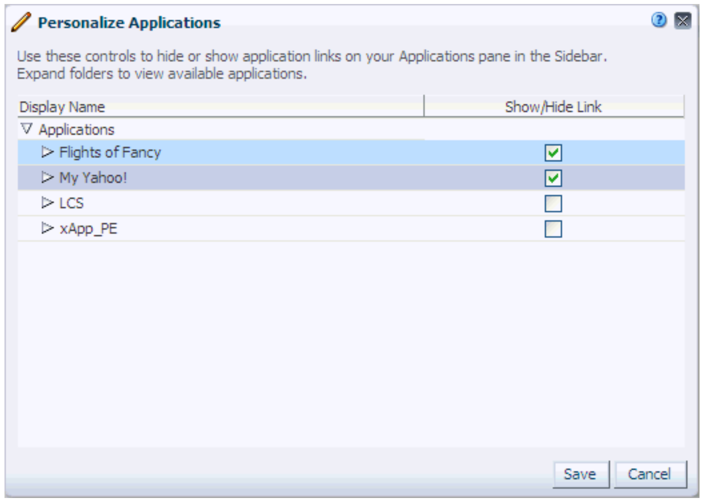
Table 6–27 Application Link Properties

Property	Description
Name	Enter the link text that Spaces users will click to launch the application.
Location	(Read-only) Displays the internal name for the application or task flow.
Open Behavior	Select how the application displays when users click the link: ■ **WebCenter Tab** - Application displays as a tab, and the application displays there. The current Spaces context is maintained. ■ **New Window** - Application opens in a new browser window. The current Spaces context is maintained. This is the default selection. ■ **Current Window** - Application opens in the current browser window (in place of the Spaces application).
Type	(Read-only) Displays the link type: EXTAPP - External application or TASKFLOW - WebCenter task flow
Icon	Associate an icon with the application. Enter a full qualified URL or a relative URL that specifies the location of a valid icon. The icon displays alongside the link in the Application Navigator. For best results, select an icon that is 16 x 16 pixels.
Created On	Shows when the link was created.
Last Visited On	Shows the last time a user clicked the link. If a link is not used very often or at all, you might consider removing it from the Application Navigator.
Locked	Indicate whether users are allowed to show/hide the link. Select **Locked** to prevent users from showing/hiding the link. Deselect **Locked** to let the user decide whether the link displays in their personal view. Individuals users can show or hide the link depending of whether they need access to the application from the Sidebar.
Visible	Indicate whether users see a link to this application in the Applications pane. Select **Visible** to show the link. Deselect **Visible** to hide the link.

9. Click **OK** to save.
10. Click **Close** to dismiss the Edit Application Link dialog.

If you choose not to *lock* application links, other users, including yourself, can hide/show links in the Application Navigator task flow by clicking **Personalize applications** (pencil icon), as shown in Figure 6–18.

Figure 6–18 Personalize Applications

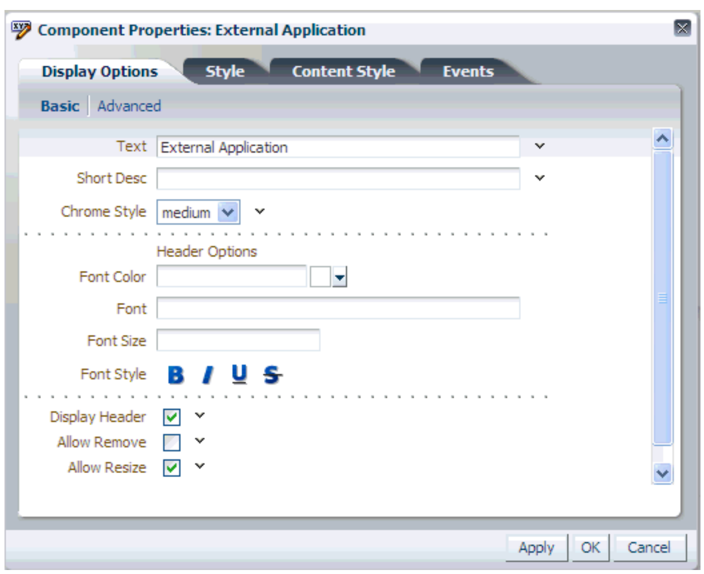


6.6.3.5 Setting External Application Task Flow Properties

The External Application task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 6–19).

The properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 18.6, "Modifying Page Components."

Figure 6–19 External Application Task Flow Component Properties



Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6.4, "Working with Component Display Options" and Section 18.6.6, "Working with Style and Content Style Properties."

For the Change Password task flow, there is an additional Parameters tab that provides an option to render the **Apply** button to allow users to change their password from the current page. For more information, see Section 6.6.3.6, "Using the External Application - Change Password Task Flow."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 18.6.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

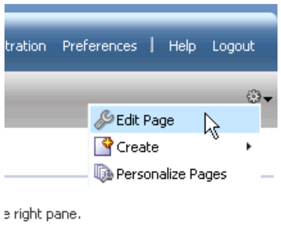
6.6.3.6 Using the External Application - Change Password Task Flow

The External Application - Change Password task flow does not render an **Apply** button with which to update passwords by default. However, if you are adding this task flow to a Spaces page, the **Apply** button is needed for the task flow to be functional. To change the default behavior, the External Application - Change Password task flow provides an additional parameter that provides an option to render the **Apply** button. When the **Apply** button is rendered on the page to which the task flow has been added, users can then change their password for the associated external application directly from that page. Note that rendering the **Apply** button is only required for Spaces as the option is turned off by default. For Framework applications these steps are not required.

To set the Render Apply in WebCenter Portal: Spaces option:

1. Add the Change Password task flow to a page, such as the My Accounts page, as described in Section 6.6.3.1, "Adding an External Application Task Flow to a Page."
2. Check that you have registered the external application as described in Section 6.6.3.2, "Registering External Applications Through the External Application Task Flow."
3. Navigate to the page for the task flow and click the **Pages and Spaces Actions** icon and select **Edit Page** from the dropdown list.

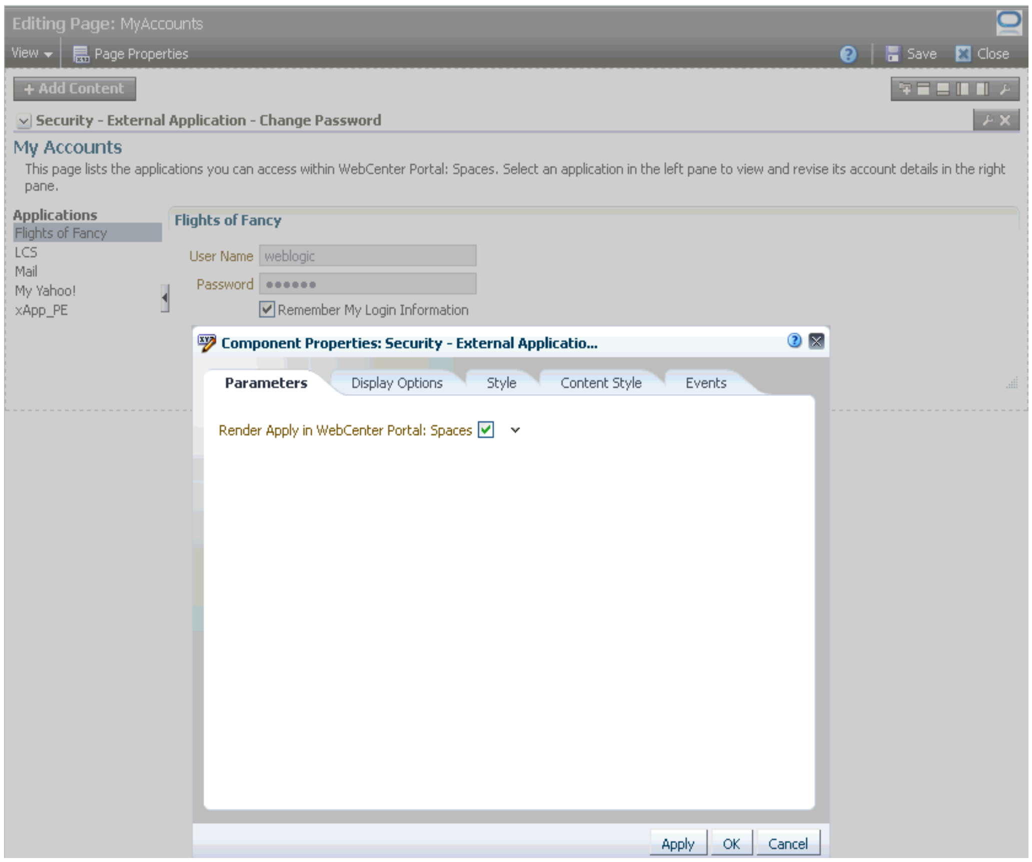
Figure 6–20 Pages and Spaces Actions Menu



4. Click the task flow's **Edit** (wrench) icon.

   The Component Properties: Security - External Application dialog appears (see Figure 6–21).

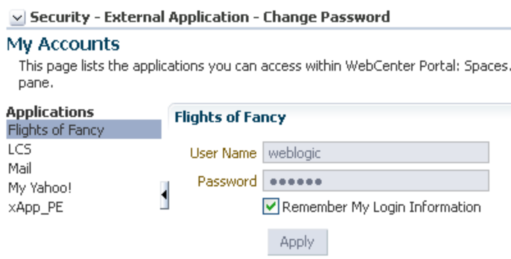
Figure 6–21 Component Properties: Security - External Application Dialog



5. On the Parameters tab, select the **Render Apply in WebCenter Portal: Spaces** option and click **OK**.

   The **Apply** button is now rendered on the page (see Figure 6–22).

Figure 6–22 My Accounts Page



6. Click **Save** to save the page.

6.6.4 Deleting External Applications

To delete an external application:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Configuration**, then **Services**.
3. Under **Services & Providers**, select **External Applications**.
4. Select the name of the external application you want to remove, and click **Deregister**.

> **Note:** If you also manage external applications through the Application Navigator task flow, ensure that you manually remove the external applications links added through this task flow, to prevent unsuccessful access attempts.

7 Administering Portal Pages

As the application administrator, you may want to brand the Welcome page that all users see when they first access a portal built with WebCenter Portal: Spaces, add a hint to the login page or the self-registration page, or place additional components on the default pages that users see in their view of the Home space. Such pages, called *system pages*, are provided out of the box and are partly or wholly customizable.

You can also establish a set of pages that are targeted to a specific type of user, such as a page for all members of your sales team, all department heads, all engineers, and the like. Such pages, called *business role pages*, are exposed to targeted users in their views of the Home space.

Finally, as an application administrator, you can view, revise, and manage all *personal pages* that users have added to their views of the Home space.

This chapter provides overviews of personal, business role, and system pages and describes how to work with them. It includes the following sections:

- Section 7.1, "Working with Business Role Pages"
- Section 7.2, "Working with Personal Pages"
- Section 7.3, "Working with System Pages"

Audience

This chapter is intended for administrator-level users tasked with setting up the pages users see when they access WebCenter Portal: Spaces, and managing system, business role, and personal pages.

Application administrators are users who are granted the `Administrator` role or a custom role that grants the `Application-Manage` permission.

> **Note:** To enable a user to edit, delete, or perform all actions on system and business role pages, you must grant them the `Application-Manage` permission.

7.1 Working with Business Role Pages

Business role pages provide a means of exposing highly relevant content to a specific audience. Business role pages are pages targeted to a particular type of group, or user (or user role), such as your sales force, your accounting team, your administrative staff. Business role pages are exposed to targeted users in their views of the Home space.

This section describes how to create and target business role pages and how to perform other related business role page management tasks. It includes the following subsections:

- Section 7.1.1, "What You Should Know About Business Role Pages"
- Section 7.1.2, "Setting Page Creation Defaults for Business Role Pages"
- Section 7.1.3, "Creating a Business Role Page"
- Section 7.1.4, "Specifying the Target Audience for a Business Role Page"
- Section 7.1.5, "Revoking Access to a Custom Business Role Page"
- Section 7.1.6, "Providing Navigation to Business Role Pages"
- Section 7.1.7, "Setting a Default Display Order for Business Role Pages"
- Section 7.1.8, "Editing a Business Role Page"
- Section 7.1.9, "Copying a Business Role Page"
- Section 7.1.10, "Removing All User Customizations from a Business Role Page"
- Section 7.1.11, "Deleting a Custom Business Role Page"

7.1.1 What You Should Know About Business Role Pages

A business role page may be available in the Home space views of all users who share the targeted business role when the administrator has set up a navigation model that publishes business role pages. For example, a business role page that targets all users assigned the `HR_ORG` role appears in the Home space views of all users assigned the role `HR_ORG`.

> **Tip:** Whether or not a business role page is shown in the Home space navigation, it is always available to targeted users on the **Personalize Pages** page.

If an individual user who is not assigned the `HR_ORG` role wants to see the page, the application administrator can grant access to this user. This is true for the business role pages that you, as the administrator, create. Seeded business role pages (see Table 7–1) have preconfigured access settings that cannot be altered through the Spaces application UI. For information about how to alter access settings on seeded business role pages, see Section 7.1.4.3, "Setting Access on a Seeded Business Role Page."

An application administrator is the only type of user who can create a business role page. Only when an administrator grants permission to do so can other users edit, copy, and delete business role pages and change page permissions (for more information, see Section 7.1.4, "Specifying the Target Audience for a Business Role Page").

Table 7–1 lists and describes the seeded business role pages included in a default WebCenter Portal: Spaces installation and provides information about the context in which they appear.

Table 7–1 Seeded Business Role Pages

Page	Description	Context
Activities	Displays the Activity Stream from the People Connections service and a Publisher task flow, which can be used to post content to the stream. For more information, see Chapter 35, "Tracking Your Connections' Activities" and Chapter 36, "Posting and Managing Messages and Feedback." This page also appears on the **System Pages** subtab (for more information, see Section 7.3, "Working with System Pages").	Appears by default in the Home space views of every authenticated (logged-in) user.
Analytics	Displays performance metrics related to the application, spaces, portlets, and services. For more information, see Chapter 57, "Analyzing Usage and Performance Metrics." This page also appears on the **System Pages** subtab (for more information, see Section 7.3, "Working with System Pages").	Is hidden by default, but can be accessed by application administrators on the **Personalize Pages** page in an administrator's view of the Home space.
Documents	Displays the Document Explorer task flow. For more information, see Section 43.1, "What You Should Know About the Documents Service Task Flows." This page also appears on the **System Pages** subtab (for more information, see Section 7.3, "Working with System Pages").	Appears by default in the Home space views of every authenticated user.
My Profile	Displays the current user's Profile Gallery, which includes subpages for Activity Stream, Connections, Documents, an organization chart (Organization), and the user's profile details (About). For more information, see Chapter 33, "Managing Your Profile," and Section 43.1, "What You Should Know About the Documents Service Task Flows." This page also appears on the **System Pages** subtab (for more information, see Section 7.3, "Working with System Pages").	Appears by default in the Home space views of every authenticated user.
Spaces	Displays spaces relevant to the current user, such as the spaces to which the user belongs or has access and the spaces that are discoverable by the user. Each listed space has an associated menu with options for performing actions on the space. This page also provides controls for creating spaces and searching for additional spaces. This page also appears on the **System Pages** subtab (for more information, see Section 7.3, "Working with System Pages").	Appears by default in the Home space views of every authenticated user.
Space Templates	Displays a list of default and custom space templates and provides a means of creating custom space templates and filtering the template list. This page also appears on the **System Pages** subtab (for more information, see Section 7.3, "Working with System Pages").	Is hidden by default, but can be accessed on the **Personalize Pages** page in the Home space views of every authenticated user.
Tag Center	Displays the Tag Center that is rendered when users click a tag in a Tags task flow or in search results. For more information, see Chapter 59, "Working with the Tags Service." This page also appears on the **System Pages** subtab (for more information, see Section 7.3, "Working with System Pages").	Invoked when users click tags.

7.1.2 Setting Page Creation Defaults for Business Role Pages

As the application administrator, you can set page creation defaults to reduce the number of steps required to create business role pages. That is, you can specify the page style that is selected by default when you open the Create Page dialog. You can also select to bypass the Create Page dialog, which enforces the default page style.

Note: The page creation defaults an application administrator sets for business role pages also affect personal pages. Authorized users can override page creation defaults for their own personal pages created in the Home space (for more information, see Section 32.5, "Setting Page Creation Defaults for Personal Pages"). Defaults for pages created in a space are controlled by the space moderator (for more information, see Section 53.7.1, "Setting Page Creation Defaults for a Page in a Space").

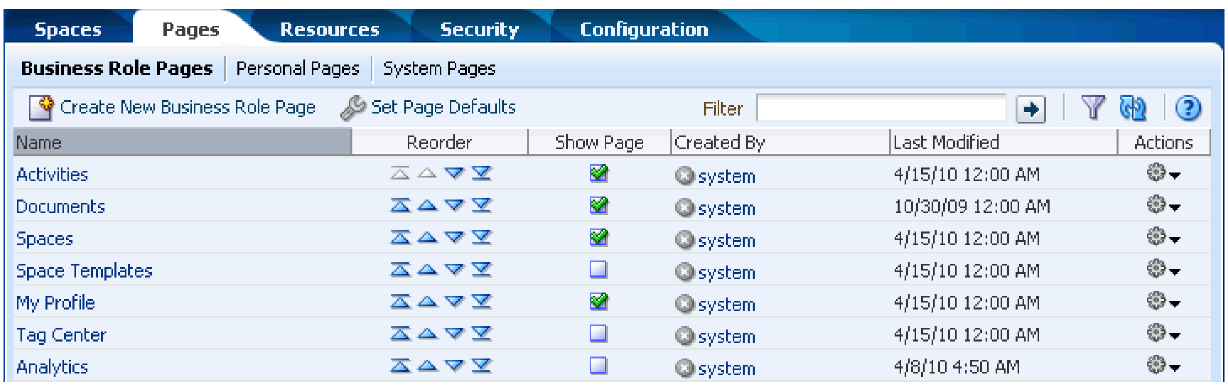
To set page creation defaults for business role pages:

1. In Spaces Administration, click the **Pages** tab, then **Business Role Pages** to view all business role pages (Figure 7–1).

   You can also use the following URL to access this page:

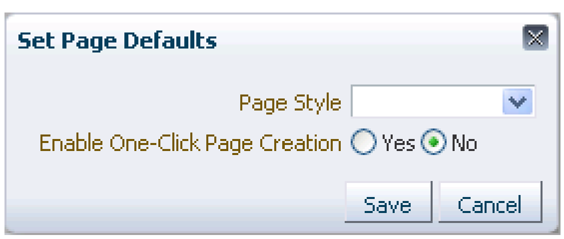
   ```
   http://host:port/webcenter/spaces/admin/brpages
   ```

Figure 7–1 Business Role Pages



2. Click **Set Page Defaults** to open the Set Page Defaults dialog (Figure 7–2):

Figure 7–2 Set Page Defaults Dialog



3. Select a page layout from the **Page Style** dropdown list.

   See Also: For information about the seeded page styles, see Section 15.1, "What You Should Know About Page Styles." The list may include additional custom page styles or restrict page styles to a shorter list.

4. Select an option next to **Enable One-Click Page Creation**:

Yes: Bypass the Create Page dialog, and create all of your personal pages using the specified **Page Style**.

> **Tip:** When you skip the Create Page dialog, the new page has a generic name. For information about renaming pages, see Section 17.6, "Renaming a Page."

No: Display the Create Page dialog, with the specified **Page Style** selected as the default in the Create Page dialog for all of your personal pages. You can select a different style for your new personal pages

5. Click **Save** to save your changes and exit the dialog.

7.1.3 Creating a Business Role Page

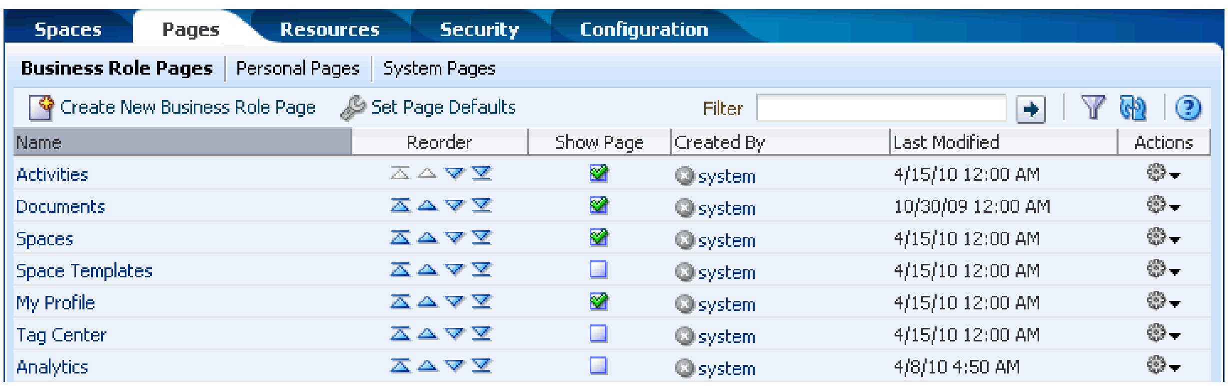
To create a new business role page:

1. In Spaces Administration, click the **Pages** tab, then **Business Role Pages** to view all business role pages (Figure 7–3).

   You can also use the following URL to access this page:

   `http://host:port/webcenter/spaces/admin/brpages`

Figure 7–3 Business Role Pages



2. Click **Create New Business Role Page**.

   If you enabled one-click page creation, the new page opens. If you did not enable one-click page creation, continue with the next steps.

3. Enter a unique name for the page (**Page Name**), and then select a page style.

   > **See Also:** For an overview of seeded page styles, see Table 15–2, " Default Page Styles".

4. Click **Create** to open the newly created page.

   > **See Also:** The application administrator can set an attribute on a custom page style that determines whether a newly created page that is based on that style opens in page edit mode or page view mode. For more information, see Section 15.4.2, "Setting Properties on a Custom Page Style."

Later, you can add content to the page. The next section (Section 7.1.4) steps you through setting access permissions for the business role page.

5. Next steps:

   - Define the page audience, see Section 7.1.4, "Specifying the Target Audience for a Business Role Page."
   - Choose the page display order, see Section 7.1.7, "Setting a Default Display Order for Business Role Pages."
   - Add content to the page, see Chapter 20, "Working with Layout Components on a Page" and Chapter 21, "Adding Spaces Components to a Page or Page Template."

7.1.4 Specifying the Target Audience for a Business Role Page

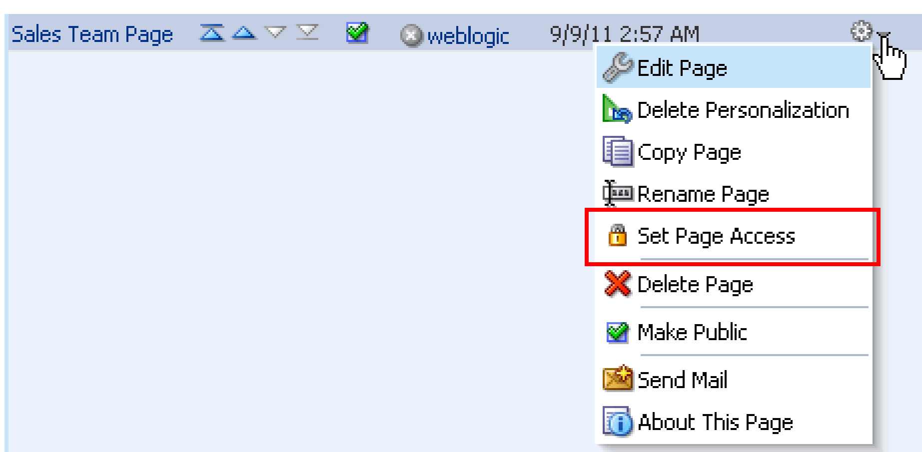
The target audience for business role pages may change from time to time. For example, you may want the whole Sales team to see a page originally designed for a Product Development team. You may want to provide public access to the Marketing department's page. You may want to provide additional access privileges, such as the *Edit Page* privilege, to a selected department member.

Note: As the application administrator, you can set access on the new business role pages that you create (for more information, see Section 7.1.4.1, "Setting Access on a Custom Business Role Page.").

You cannot alter the default access settings of seeded business role pages through the Spaces application UI (see Table 7–1, " Seeded Business Role Pages"). For information about how to set access on seeded business role pages, see Section 7.1.4.3, "Setting Access on a Seeded Business Role Page."

You can find controls for setting page access on the **Personalize Pages** page and on the **Business Role Pages** subtab of the **Pages** tab in Spaces administration (Figure 7–4).

Figure 7–4 Set Page Access Option on a Business Role Page



This section describes how to set specific access on a business role page as well as how to make such a page public. It includes the following subsections:

- Section 7.1.4.1, "Setting Access on a Custom Business Role Page"

- Section 7.1.4.2, "Providing Public Access to a Custom Business Role Page"
- Section 7.1.4.3, "Setting Access on a Seeded Business Role Page"

7.1.4.1 Setting Access on a Custom Business Role Page

As the application administrator, you can use the Spaces application UI to set access on the business role pages that you create. But you cannot go through the Spaces application UI to set access on seeded business role pages (for information about setting access on seeded business role pages, see Section 7.1.4.3, "Setting Access on a Seeded Business Role Page").

To specify the target audience for a custom business role page that you created:

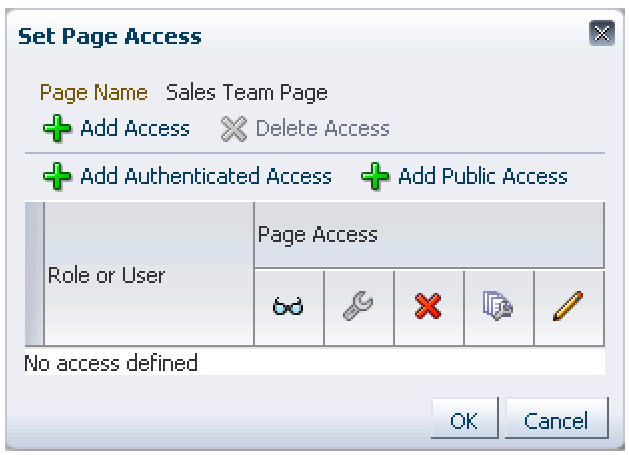
1. In Spaces administration, click the **Pages** tab, then **Business Role Pages** to view all business role pages.

   You can also use the following URL to access the **Business Role Pages** page:

   ```
   http://host:port/webcenter/spaces/admin/brpages
   ```

2. Click the **Actions** icon on the custom business role page for which you are setting access, and select **Set Page Access** to open the Set Page Access dialog (Figure 7–5).

Figure 7–5 Set Page Access Dialog



3. Follow the general steps for setting page access in Section 17.7, "Controlling User Access to a Page", beginning with Step 4.

   > **See Also:** This method of enabling public access to a business role page provides a means of granting more than view access to public users. If you want to give such users view access only, you can set this quickly by following the steps in Section 7.1.4.2, "Providing Public Access to a Custom Business Role Page."

The page is pushed to its target audience, who sees it in their views of the Home space the next time they log in to the Spaces application.

7.1.4.2 Providing Public Access to a Custom Business Role Page

You can specify that any user, whether logged in or not, can view a particular custom business role page. Such a page can be exposed in a public Home space, or you can publish the URL to the public business role page to provide all users easy access.

See Also: The process described in this section enables all public users to view a selected custom business role page. To provide public users with additional permissions on the page, follow the steps described in Section 7.1.4.1, "Setting Access on a Custom Business Role Page."

To make a custom business role page public:

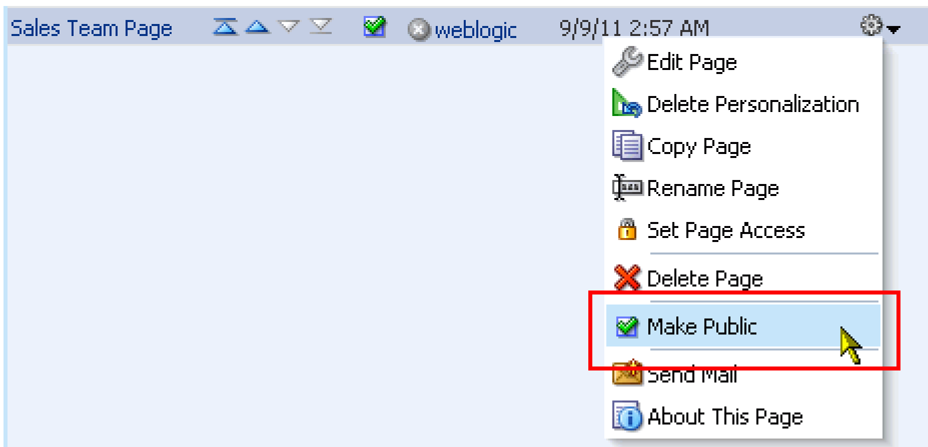
1. In Spaces Administration, click the **Pages** tab, then **Business Role Pages** to view all business role pages.

   You can also use the following URL to access the **Business Role Pages** page:

   ```
   http://host:port/webcenter/spaces/admin/brpages
   ```

2. Click the **Actions** icon on the business role page for which you are setting access, and select **Make Public** (Figure 7–6).

Figure 7–6 Make Public Option on Page Actions Menu



7.1.4.3 Setting Access on a Seeded Business Role Page

Out-of-the-box business role pages, such as Activities and Spaces, are available to all users by default (see Table 7–1, " Seeded Business Role Pages"). You cannot modify the security of seeded business role pages through the Spaces application. If you want to change the default security settings, for example you want to hide a seeded business role page from all users, you must ask your system administrator to modify the default business role page settings in `pages.xml` file, and upload the changes to the MDS repository used by Spaces using the WLST commands `exportMetadata /importMetadata`.

To modify the default security settings for a seeded business role page, as system administrator:

1. Run the WLST command `exportMetadata` to export `pages.xml` for the `anonymous-role` and the `authenticated-role`.

   For example:

   ```
   exportMetadata(application='webcenter',server='WC_Spaces',toLocation='/scratch/
   mdsdump',
   docs='/oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/rol
   e/anonymous-role/pages.xml')
   ```

```
exportMetadata(application='webcenter',server='WC_Spaces',toLocation='/scratch/
mdsdump',
docs='/oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/rol
e/authenticated-role/pages.xml')
```

where `toLocation` specifies a target directory on your system for the file you want to export. For detailed syntax, see "exportMetadata" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

For information on how to run WLST commands, see "Running Oracle WebLogic Scripting Tool (WLST) Commands" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

2. Modify the security in both `pages.xml` files as required, that is, mark each business role page as hidden or shown:

```
<!-- Business Role Pages -->
     <pageDef id="Page_2eb852ac_10f5902cb2f__7ff7"
     contentMRef="/oracle/webcenter/page/scopedMD/
     s8bba98ff_4cbb_40b8_beee_296c916a23ed/businessRolePages/
     ActivityStreamMainView.jspx" shared="false" hidden="false"/>...
```

   - Set `hidden="true"` for the pages that should be hidden.
   - Set `hidden="false"` for the pages that should be shown.

3. Upload your changes to the `pages.xml` files to MDS using the WLST command `importMetadata`.

For example:

```
importMetadata(application='webcenter',server='WC_Spaces',fromLocation='/scratc
h/mdsdump',
docs='/oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/rol
e/anonymous-role/pages.xml')
importMetadata(application='webcenter',server='WC_Spaces',fromLocation='/scratc
h/mdsdump',
docs='/oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/rol
e/authenticated-role/pages.xml')
```

Where `fromLocation` specifies the directory that contains the file you want to import. For detailed syntax, see "importMetadata" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

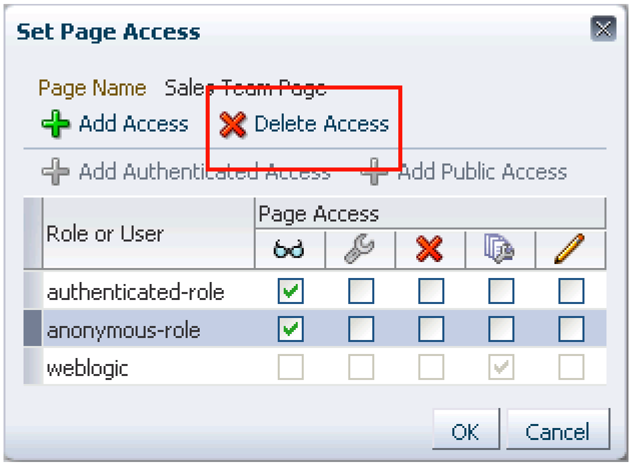
For information on how to run WLST commands, see "Running Oracle WebLogic Scripting Tool (WLST) Commands" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

7.1.5 Revoking Access to a Custom Business Role Page

To revoke access privileges to a custom business role page:

1. Follow the steps in Section 7.1.4.1, "Setting Access on a Custom Business Role Page," to open the Set Page Access dialog.
2. Select the user, group, or application role from whom to revoke access, and click the **Delete Access** button (Figure 7–7).

Figure 7–7 Delete Access Option in Set Page Access Dialog



3. Click **Delete** in the resulting confirmation dialog.

7.1.6 Providing Navigation to Business Role Pages

You have a couple of options for providing your users with navigation to business role pages:

- You can make the page visible to all authorized users in one step, using the **Show Page** check box.
- You can create a navigation link to a business role page.

This section describes how to use the **Show Page** option. It also provides a pointer to information about creating your own navigation.

This section includes the following subsections:

- Section 7.1.6.1, "Showing and Hiding Business Role Pages"
- Section 7.1.6.2, "Creating Navigation to a Business Role Page"

7.1.6.1 Showing and Hiding Business Role Pages

A control is available in the Spaces Administration pages for instantly showing or hiding a business role page to all authorized users (authorized users are users who have been granted access to the business role page). Use the **Show Page** check box to expose the page in the navigation of all authorized users.

To show or hide a business role page in Home space navigation:

1. In Spaces Administration, click the **Pages** tab, then **Business Role Pages** to view all business role pages.

   You can also use the following URL to access the **Business Role Pages** page:

   `http://`*`host`*`:`*`port`*`/webcenter/spaces/admin/brpages`

2. For the page you want to show or hide:

   - Select the check box in the **Show Page** column to show the page in the Home space views of authorized users.
   - Deselect the check box in the **Show Page** column to hide the page from view.

7.1.6.2 Creating Navigation to a Business Role Page

Once you make a business role page available to users through page permissions, you will likely also want to make it easy to access by including a link to it in your application navigation. This process is described in detail in Section 12.2.2.1, "Adding Resources to a Navigation Model Using the Edit Dialog."

7.1.7 Setting a Default Display Order for Business Role Pages

If you present business role pages in a logical order, the page content is more accessible and easier for users to navigate. As the application administrator, you can determine the initial order in which business role pages are presented to their intended audience. You can do this by dragging and dropping pages into the desired order or by clicking Rearrange icons.

Individual users can change the initial display order you specify by accessing the **Personalize Pages** page and using the provided icons. Additionally, they can hide the business role pages they do not use.

Note: There are two locations from which to define the order and the visibility of pages: from the Administration pages (described here) and from the **Personalize Pages** page (described in Section 51.11.2, "Rearranging Page Order in Your View"). The difference between the two is that the Administration change is an *application customization* and the **Personalize Pages** change is a *user customization*. Keep in mind that user customizations override application customizations in a given user's view.

To change the display order of all business role pages:

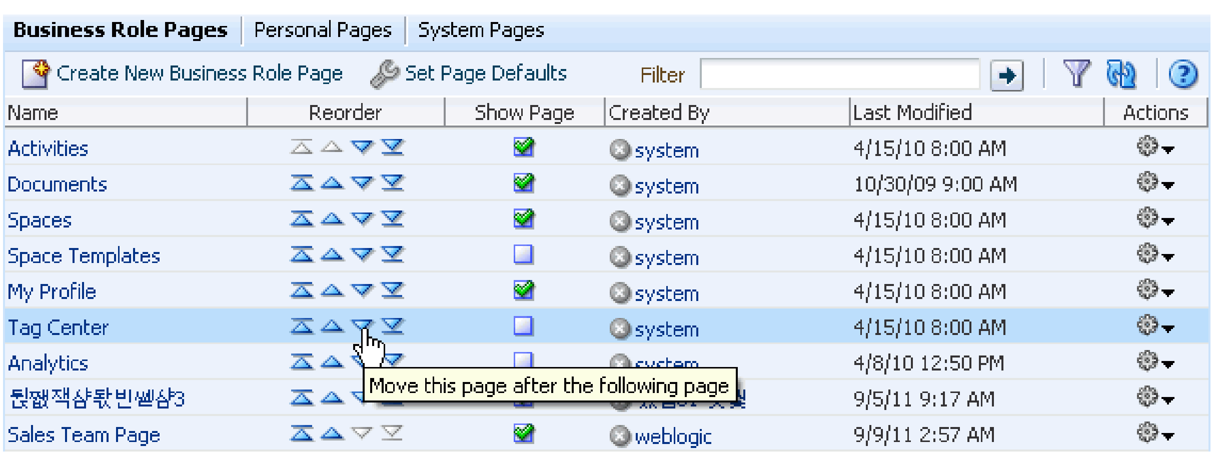
1. In Spaces Administration, click the **Pages** tab, then **Business Role Pages** to view all business role pages.

   You can also use the following URL to access the **Business Role Pages** page:

   ```
   http://host:port/webcenter/spaces/admin/brpages
   ```

2. Click the arrows in the **Reorder** column to change the display order (Figure 7–8).

Figure 7–8 Reorder Icons on Business Role Pages



Alternatively, drag and drop pages into the desired order.

7.1.8 Editing a Business Role Page

Anyone granted the `Edit Page` permission on a business role page can edit that page. For these users, the editing process is the same as for regular pages. See Chapter 18, "Editing a Page."

As the application administrator, you can also initiate an edit of a business role page from Spaces Administration pages.

To edit a business role page through Spaces Administration:

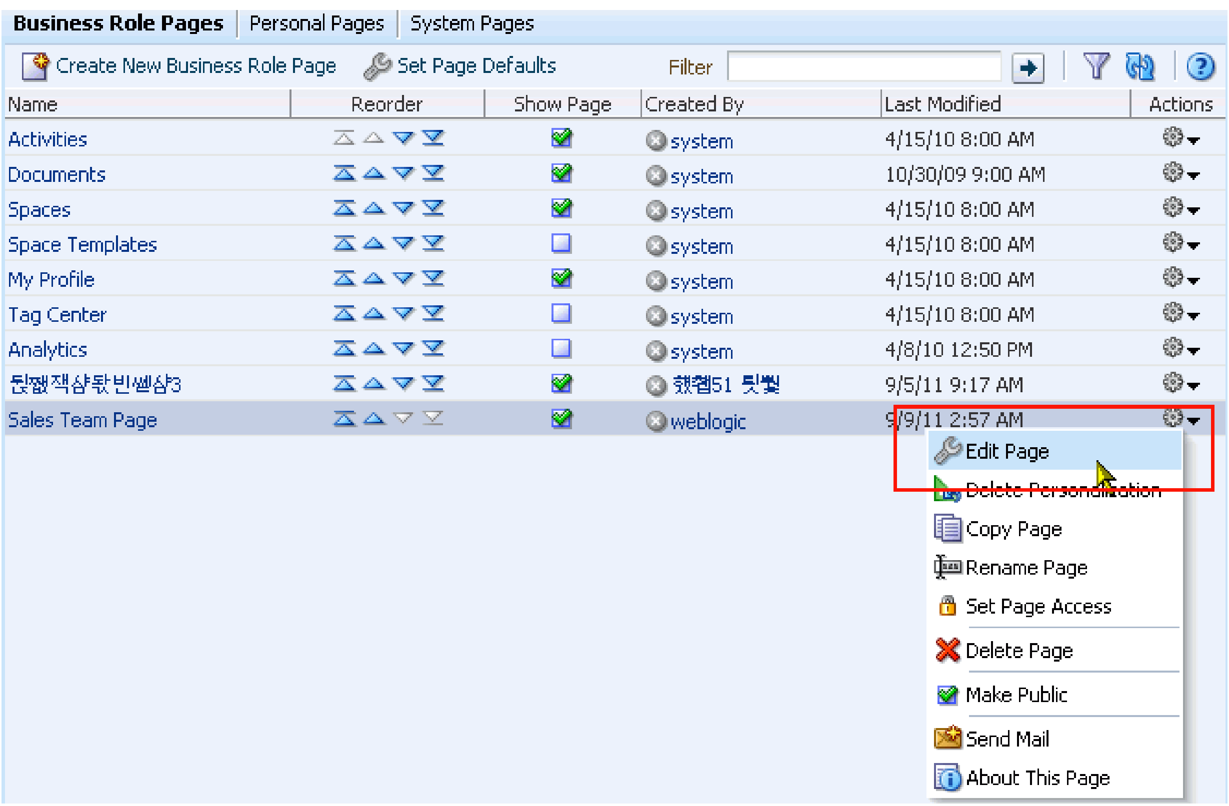
1. In Spaces Administration, click the **Pages** tab, then **Business Role Pages** to view all business role pages.

   You can also use the following URL to access the **Business Role Pages** page:

   `http://host:port/webcenter/spaces/admin/brpages`

2. Click the **Actions** icon on the page you want to edit, and select **Edit Page** from the context menu (Figure 7–9).

Figure 7–9 Edit Option on Page Actions Menu



The page opens in edit mode in Oracle Composer.

3. Edit the page, and click **Save** and then **Close** when you have finished.

7.1.9 Copying a Business Role Page

When you copy a business role page, you can save it as another business role page or as a personal page in your view of the Home space. If you make the copy another business role page, you must set access on the new page because access permissions from the original page are not copied (for more information, see Section 7.1.4, "Specifying the Target Audience for a Business Role Page").

To copy a business role page:

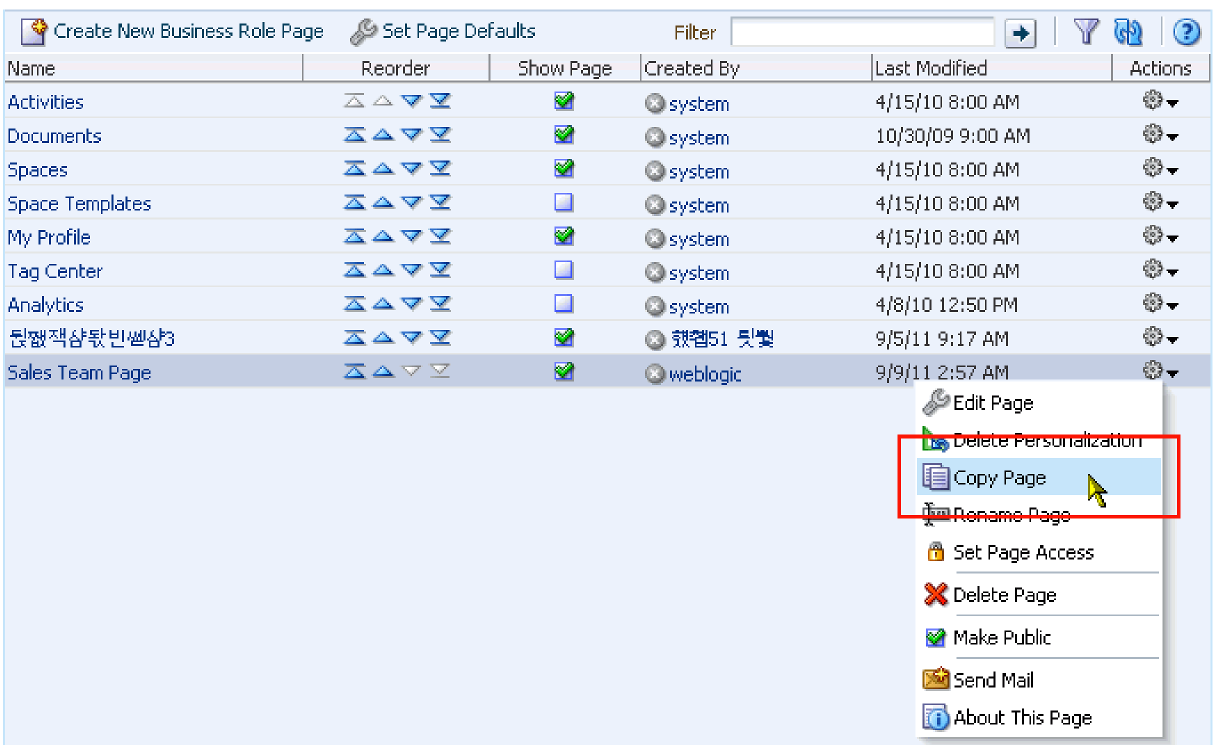
1. In Spaces Administration, click the **Pages** tab, then **Business Role Pages** to view all business role pages.

   You can also use the following URL to access the **Business Role Pages** page:

   http://*host*:*port*/webcenter/spaces/admin/brpages

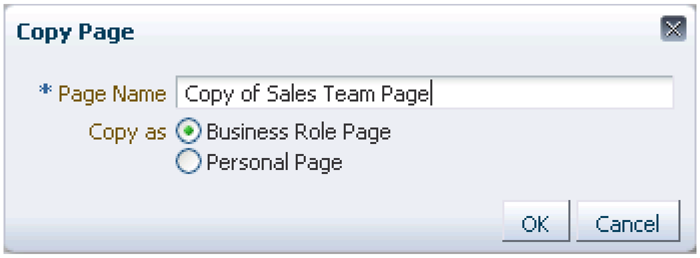
2. Click the **Actions** icon on the page you want to copy, and select **Copy Page** from the context menu (Figure 7–10).

Figure 7–10 Copy Page Option on Page Actions Menu



3. In the resulting dialog, enter a name for the new page (Figure 7–11).

Figure 7–11 Copy Page Dialog



4. Next to **Copy as**, specify whether the copy is a personal or business role page:
   - Select **Business Role Page** if you intend to push the copy out to a group of people with the same job role.
   - Select **Personal Page** if you intend to expose the copy only in your own application view (that is, as a personal page in your view of the Home space).
5. Click **OK**.

   The new page opens in edit mode in Oracle Composer.
6. Optionally, edit the page, and click **Save** and then **Close** when you have finished.

7.1.10 Removing All User Customizations from a Business Role Page

A control is available for removing all user customizations from a selected business role page. Using this control removes such personal changes as rearrangement, resizing, or collapsing of task flows. It does this in each user's personal view of the business role page.

To remove all user customizations from all views of a business role page:

1. In Spaces Administration, click the **Pages** tab, then **Business Role Pages** to view all business role pages.

   You can also use the following URL to access the **Business Role Pages** page:

   `http://host:port/webcenter/spaces/admin/brpages`
2. From the **Actions** menu next to the target page, select **Delete Personalization**.
3. In the resulting dialog, click **OK**.

   All user customizations added by users to their own views of the page are removed. That is, task flows are returned to their original positions and their original sizes; collapsed task flows are expanded; and so on.

7.1.11 Deleting a Custom Business Role Page

Anyone granted the `Delete Page` permission on a custom business role page can delete it. For these users, the process is the same as deleting regular pages (for more information, see Section 17.8, "Deleting a Page"). As the application administrator, you have the additional option of deleting custom business role pages through Spaces Administration.

Note: No one can delete seeded business role pages (see Table 7–1, " Seeded Business Role Pages").

Once a custom business role page is removed from the Spaces application, it cannot be recovered. Deleted pages are permanently removed, and users previously assigned that page no longer see it in their views of the Home space.

To delete a custom business role page through Spaces Administration:

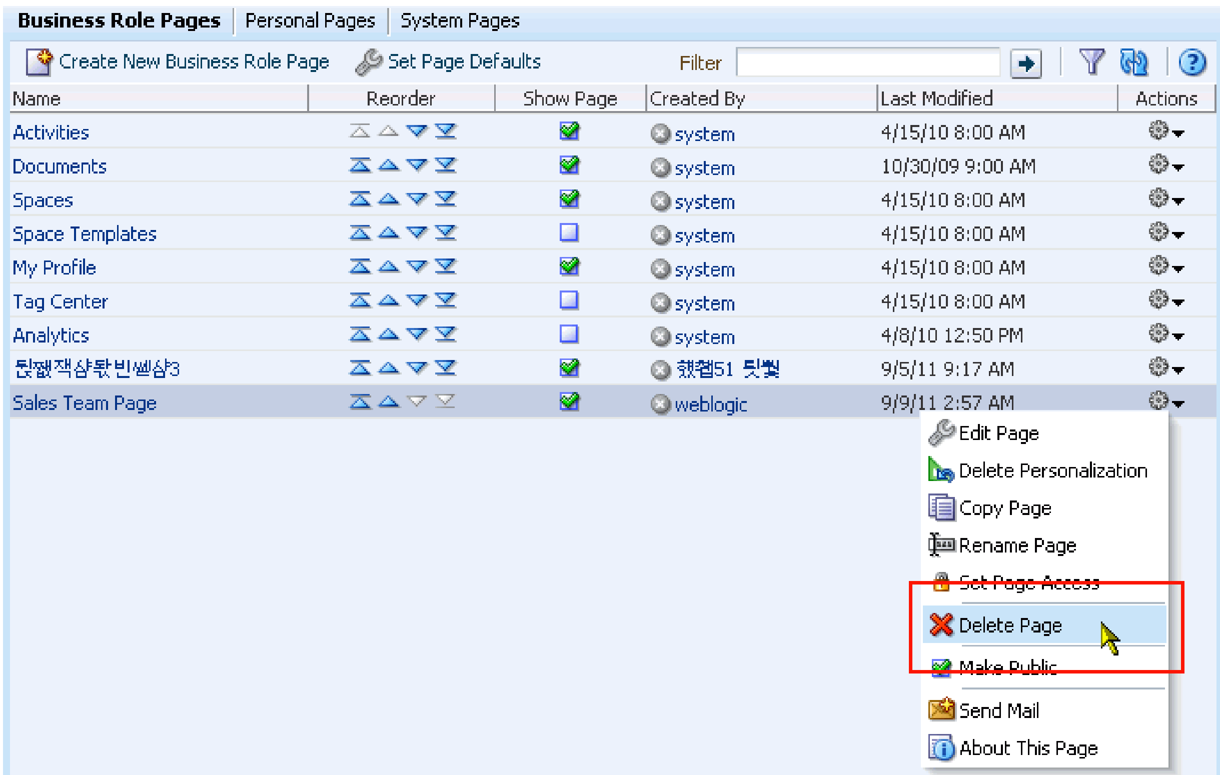
1. In Spaces Administration, click the **Pages** tab, then **Business Role Pages** to view all business role pages.

   You can also use the following URL to access the **Business Role Pages** page:

   ```
   http://host:port/webcenter/spaces/admin/brpages
   ```

2. Click the **Actions** icon on the page you want to delete, and select **Delete Page** from the context menu (Figure 7–12).

Figure 7–12 Delete Page Option on Page Actions Menu



3. In the confirmation dialog, click **Delete**.

7.2 Working with Personal Pages

While individuals are primarily responsible for managing the content of their personal pages, Spaces administrators also have access to all personal pages by default. Administrators may be required to clean up or manage personal data when owners experience difficulties with their personal pages or leave the organization.

This section describes how to administer personal pages in WebCenter Portal: Spaces. It includes the following sections:

- Section 7.2.1, "What You Should Know About Personal Page Administration"

- Section 7.2.2, "Setting Application-Level Page Creation Defaults for Personal Pages"
- Section 7.2.3, "Changing Access Permissions on a Personal Page"
- Section 7.2.4, "Preventing Users From Creating Personal Pages"
- Section 7.2.5, "Providing Navigation to Personal Pages"
- Section 7.2.6, "Editing Personal Pages with Administrative Privileges"
- Section 7.2.7, "Copying a Personal Page"
- Section 7.2.8, "Removing All User Customizations from a Personal Page"
- Section 7.2.9, "Deleting a Personal Page Through Spaces Administration"

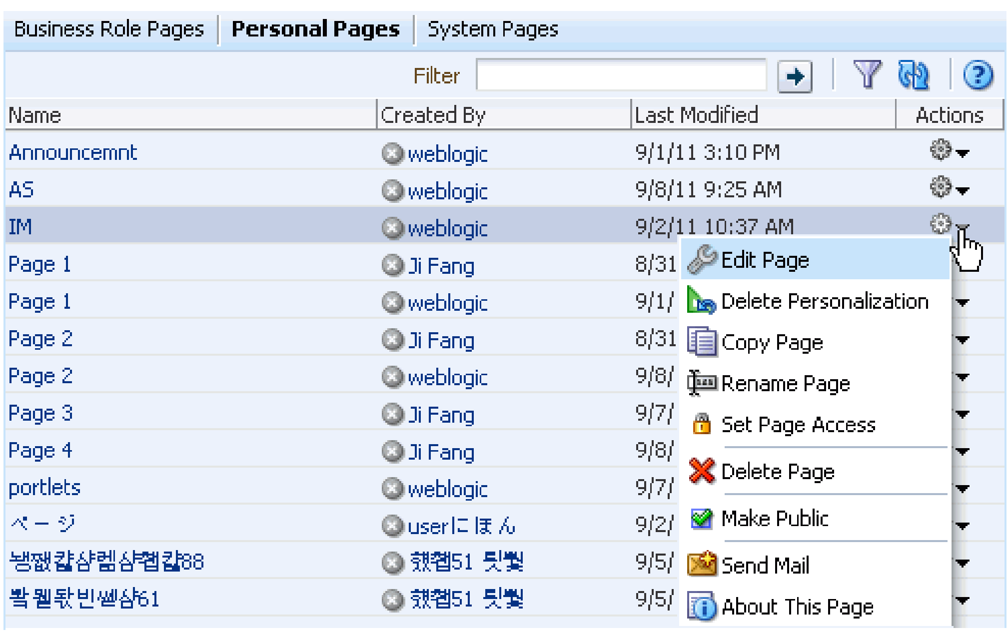
7.2.1 What You Should Know About Personal Page Administration

Personal pages are the pages users create in their personal views of the Home space. As the Spaces administrator, you have full access to all personal pages created by other users. Full access means you can edit, copy, rename, set access, delete, and perform other like actions on any user's personal pages.

Spaces administrators can access everyone's personal pages from one, central place: **Spaces Administration**. Through Spaces Administration, the **Pages** tab provides access to a list of personal pages that includes information about who created the page and when it was last modified.

An **Actions** menu is associated with each listed page, providing access to options for editing, removing user customizations, copying, renaming, securing, deleting, and making the personal page public (Figure 7–13).

Figure 7–13 Page Actions Menu on a Personal Page



Additional options include sending a mail message containing a link to the page and viewing information about the page.

7.2.2 Setting Application-Level Page Creation Defaults for Personal Pages

In addition to the page creation defaults authorized users can set for themselves (see Section 32.5, "Setting Page Creation Defaults for Personal Pages"), application administrators can set application-level page creation defaults for personal pages. Once configured, application-level page creation defaults affect the creation of all personal pages. This control (**Set Page Defaults**) is available on the **Business Role Pages** subpage of the **Pages** page in Spaces Administration (for more information, see Section 7.1.2, "Setting Page Creation Defaults for Business Role Pages").

Note, however, that the page creation defaults that authorized users set for themselves through the **Personalize Pages** page override the application-level settings described in this chapter.

7.2.3 Changing Access Permissions on a Personal Page

As the application administrator, you are authorized to view and manage security for personal pages in the Spaces application. Page owners normally determine who can see their pages, but, occasionally, when a page owner is not available, the administrator may be required to make changes.

To change access permissions for a personal page:

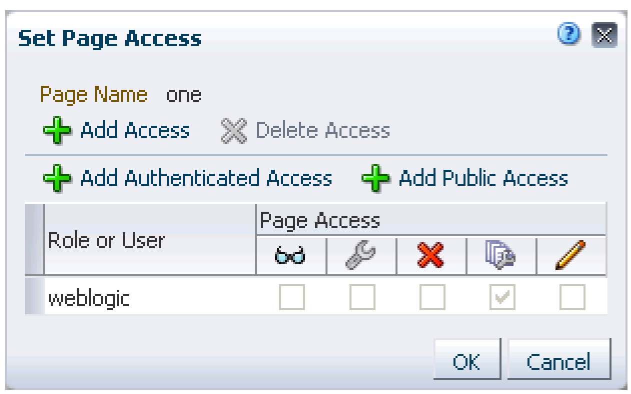
1. In Spaces Administration, click the **Pages** tab, then **Personal Pages** to view all personal pages.

   You can also use the following URL to access the **Personal Pages** page:

   ```
   http://host:port/webcenter/spaces/admin/personalpages
   ```

2. Click the **Actions** icon on the page you want to secure, and select **Set Page Access** to open the Set Page Access dialog (Figure 7–14).

Figure 7–14 Set Page Access Dialog



3. Follow the general steps for setting page access in Section 17.7, "Controlling User Access to a Page," beginning with Step 4.

7.2.4 Preventing Users From Creating Personal Pages

You can revoke the application-level permission `Create-Pages` to prevent users from creating personal pages in the Home space. The `Create-Pages` application-level permission applies only to creating personal pages; the creation of pages in a space is controlled by the given space's own security settings (for information about space security settings, that is, space-level users and roles, see Section 53.5, "Managing Space Roles," and Section 53.6, "Managing Space Members").

The process of revoking an application-level permission is described in Section 24.2.3, "Modifying Application Role Permissions."

7.2.5 Providing Navigation to Personal Pages

If you want to add a link to a personal page in your application navigation, this process is described in detail in Section 12.2.2.1, "Adding Resources to a Navigation Model Using the Edit Dialog." For detailed information about working with application navigation, see Chapter 12, "Working with Navigation."

7.2.6 Editing Personal Pages with Administrative Privileges

As the application administrator, you are authorized to view and modify any personal pages that users have created in their view of the Home space. Individuals are primarily responsible for editing content on their personal pages, but, occasionally, administrators may be required to clean up or edit such content.

To edit a personal page:

1. In Spaces Administration, click the **Pages** tab, then **Personal Pages** to view all personal pages.

   You can also use the following URL to access the **Personal Pages** page:

   ```
   http://host:port/webcenter/spaces/admin/personalpages
   ```

2. Click the **Actions** icon on the page you want to edit, and select **Edit Page** from the context menu (see Figure 7–13).

   The page opens in Composer.

   > **See Also:** To find out more about editing a page through Composer, see Chapter 18, "Editing a Page."

3. Update the page, and click **Save** and then **Close** when you have finished.

7.2.7 Copying a Personal Page

As the application administrator, you are authorized to copy any page in the Spaces application. This includes other users' personal pages. When you copy a personal page as an administrator, you can save it as a business role page to be pushed to other users or as a personal page in your own view of the Home space.

> **Tip:** If you create another business role page, you must set access on the new page because access permissions from the original page are not copied. For more information, see Section 7.1.4, "Specifying the Target Audience for a Business Role Page."

To copy a personal page:

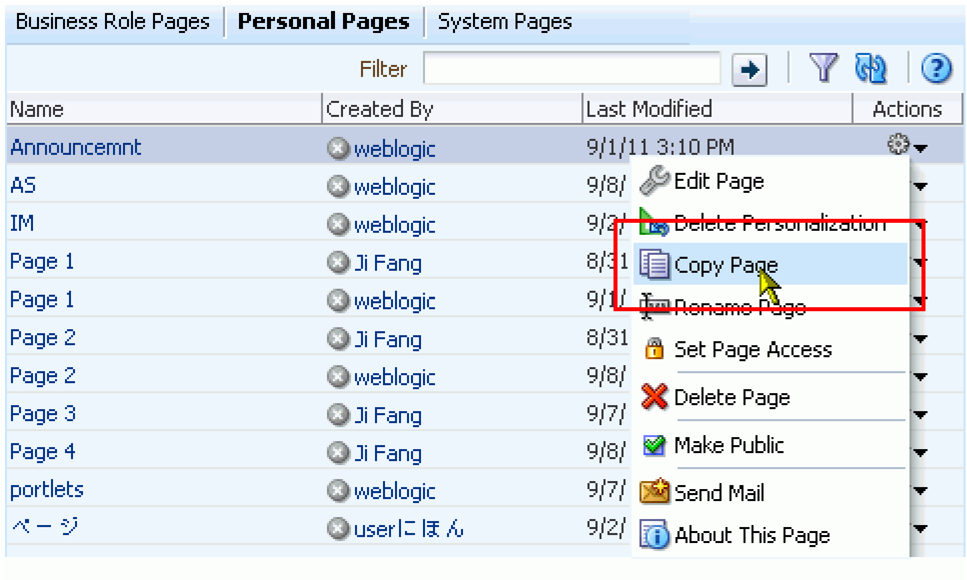
1. In Spaces Administration, click the **Pages** tab, then **Personal Pages** to view all personal pages.

   You can also use the following URL to access the **Personal Pages** page:

   ```
   http://host:port/webcenter/spaces/admin/personalpages
   ```

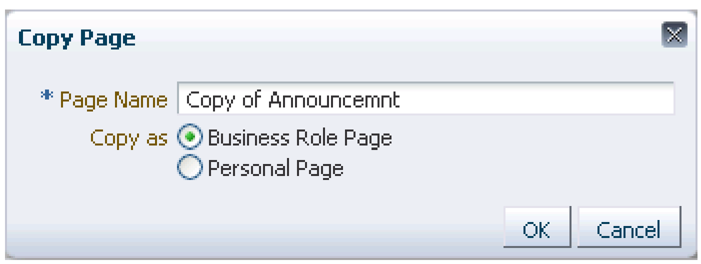
2. Click the **Actions** icon on the page you want to copy, and select **Copy Page** from the context menu (Figure 7–15).

Figure 7–15 Copy Page Option on Page Actions Menu



The Copy Page dialog opens (Figure 7–16).

Figure 7–16 Copy Page Dialog



3. Enter a name for the new page.
4. Next to **Copy as**, specify whether the copy is one of your personal pages or a business role page:
   - Select **Business Role Page** if you intend to push the page out to a group of people with the same job role.
   - Select **Personal Page** if you intend to expose the copy only in your own application view.
5. Click **OK**.

   The new page opens in edit mode in Composer.
6. Optionally, update the page, and click **Save** and then **Close** to exit Composer.

7.2.8 Removing All User Customizations from a Personal Page

A control is available for removing all user customizations from a selected personal page. Using this control removes such personal changes as rearrangement, resizing, or collapsing of task flows. It does this in each user's personal view of the page.

To remove all user customizations from all views of a personal page:

1. In Spaces Administration, click the **Pages** tab, then **Personal Pages** to view all personal pages.

   You can also use the following URL to access the **Personal Pages** page:

   `http://`*`host`*`:`*`port`*`/webcenter/spaces/admin/personalpages`

2. From the **Actions** menu next to the target page, select **Delete Personalization**.
3. In the resulting dialog, click **OK**.

   All user customizations added by users to their own views of the page are removed. That is, task flows are returned to their original positions and their original sizes; collapsed task flows are expanded; and so on.

7.2.9 Deleting a Personal Page Through Spaces Administration

In addition to having full access to users' personal pages, an application administrator can delete them. Once a personal page is removed, it cannot be recovered. Deleted pages are removed permanently.

To delete a personal page through Spaces Administration:

1. In Spaces Administration, click the **Pages** tab, then **Personal Pages** to view all personal pages.

   You can also use the following URL to access the **Personal Pages** page:

   `http://`*`host`*`:`*`port`*`/webcenter/spaces/admin/personalpages`

2. Click the **Actions** icon on the page you want to delete, and select **Delete Page** from the context menu.
3. In the confirmation dialog, click **Delete**.

7.3 Working with System Pages

System pages are provided out-of-the-box and are designed to fulfill a specific purpose. For example, in a default installation, users who are not logged in when they visit the Spaces application see the public WebCenter Welcome Page. The Welcome page appears because it allows access to the role `anonymous-role` that is provided to accommodate users who are not logged in, also known as *public* users.

System pages include a variety of utility pages that you can customize to reflect your company brand, to provide useful hints, or to display some other enhancement that you determine.

This section provides information about working with system pages. It includes the following subsections:

- Section 7.3.1, "What You Should Know About System Pages"
- Section 7.3.2, "Customizing System Pages"
- Section 7.3.3, "Removing All Page Customizations from a System Page"

7.3.1 What You Should Know About System Pages

System pages are provided to support a rapid deployment of a portal built with WebCenter Portal: Spaces. They fulfill a range of needs, from a finished introductory page (the **Welcome** page) to pages that provide content that is generated on the spot and tailored to the individual user (the **Activity Stream** page).

System pages are preconfigured with page access settings that target their anticipated audience. For example, the **Welcome** page is configured to target the `anonymous-role`, the **Activity Stream** page is targeted to individual users, with dynamic content that is tailored to each user. In view of this preconfiguration, you cannot alter the security settings of a system page.

You can, however, customize system pages. Customization enables you to enhance the seeded content of a system page to apply your company brand, add hint text, provide additional functionality (such as task flows and portlets), and the like.

System pages also make task flow customization possible. The system page **Task Flow Editor** provides an environment for customizing all instances of a seeded task flow in a given scope in one operation. (Custom task flows created through the Resource Manager cannot be edited using this page.) Authorized users can add seeded task flows to this page and then customize all instances of the task flow. For more information, see Chapter 8, "Customizing Task Flows at Runtime."

Table 7–2 lists and describes the system pages that are delivered out-of-the-box and provides information about the context in which they appear.

Table 7–2 Seeded System Pages

Page	Description	Context
Activities	For the Home space, displays the Publisher task flow and the Activity Stream task flow from the People Connections service. For more information, see Chapter 35, "Tracking Your Connections' Activities."	This is an application-level system page.
Activity Stream	For a space, displays the Publisher task flow and the Activity Stream task flow from the People Connections service. For more information, see Chapter 35, "Tracking Your Connections' Activities."	Appears by default in the Home space of every authenticated (logged-in) user. Both application- and space-level system pages are available.
Analytics	Provides information about application usage and performance metrics. For more information, see Chapter 57, "Analyzing Usage and Performance Metrics." For Analytics task flows to work, the Analytics schema (`ACTIVITIES`) must be installed and configured, and a connection set up between the Spaces application and the Analytics Collector. For information about the Analytics schema and managing the Analytics service backend, see "Managing the Analytics Service" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.	Available for showing in the Home space through the **Personalize Page**. Useful only when configuration requirements are met (see information in **Description** column). This is an application-level system page.

Table 7–2 (Cont.) Seeded System Pages

Page	Description	Context
Announcements	Displays the Announcement Manager task flow. For more information, see Chapter 61, "Working with the Announcements Service."	Appears by default in many out-of-the-box space templates. Both application- and space-level system pages are available.
Discussions	Displays the Discussion Forum Manager task flow. For more information, see Section 62.1, "What You Should Know About the Discussions Service."	Appears by default in many out-of-the-box space templates. Both application- and space-level system pages are available.
Documents	Displays the Document Explorer task flow. There are two Documents system pages: for the Home space, which shows the current user's personal documents; and one for spaces, which shows documents uploaded to that space. For more information, see Section 43.1.1, "Understanding the Document Explorer Task Flow."	Appears by default in many out-of-the-box space templates. Both application- and space-level system pages are available.
Error Encountered	Displays an error page when an error occurs	Appears when an application error occurs This is an application-level system page.
Events	Displays the Events task flow. For more information, see Section 63.1, "What You Should Know About the Events Service."	Appears by default in many out-of-the-box space templates. Both application- and space-level system pages are available.
Lists	Displays the List Manager task flow. For more information, see Section 66.1, "What You Should Know About the Lists Service."	Appears by default in many out-of-the-box space templates. Both application- and space-level system pages are available.
Login	Provides fields for logging in to your portal.	Appears in lieu of the WebCenter Welcome Page when you disable public access to all application pages and when your current session expires. This is an application-level system page.
Members	Provides features for managing the members of a space. For more information, see Chapter 54, "Managing Space Members and Roles."	Appears in the default navigation as the **Members** page in some seeded space templates, for example, the Team Space template. Both application- and space-level system pages are available.

Table 7–2 (Cont.) Seeded System Pages

Page	Description	Context
My Profile	Displays the current user's Profile Gallery, which includes subpages for Activity Stream, Connections, Documents, an organization chart (Organization), and the user's profile details (About). For more information, see Chapter 33, "Managing Your Profile," and Section 43.1, "What You Should Know About the Documents Service Task Flows."	Appears by default in the Home space of every authenticated (logged-in) user. Both application- and space-level system pages are available.
No Pages Accessible	Displays a message telling the user that no pages are accessible.	Appears when a user navigates to a space in which he has no access permissions on the space's pages. Both application- and space-level system pages are available.
Outlook Add-in Discussions	Displays content from the Discussions service in the context of an Outlook window. For more information, see Chapter 48, "Working with Microsoft Office and Explorer Integration."	Appears when you access content from the Discussions service through Microsoft Outlook This is an application-level system page.
Outlook Add-in Documents	Displays content from the Documents service in the context of an Outlook window. For more information, see Chapter 48, "Working with Microsoft Office and Explorer Integration."	Appears when you access content from the Documents service through Microsoft Outlook This is an application-level system page.
Outlook Add-in Events	Displays content from the Events service in the context of an Outlook window. For more information, see Chapter 48, "Working with Microsoft Office and Explorer Integration."	Appears when you access content from the Events service through Microsoft Outlook This is an application-level system page.
Outlook Add-in Members	Displays content about space members in the context of an Outlook window. For more information, see Chapter 48, "Working with Microsoft Office and Explorer Integration."	Appears when you access content about the members of a given space through Microsoft Outlook This is an application-level system page.
Outlook Add-in Space Home	Displays content from a space home page when you view it in the context of an Outlook window. For more information, see Chapter 48, "Working with Microsoft Office and Explorer Integration."	Appears when you access content from a space home page through Microsoft Outlook This is an application-level system page.
Page Not Found	Displays a message telling the user that the page to which to navigate cannot be found	Appears when users navigate to a page that is no longer available in the Spaces application This is an application-level system page.

Table 7–2 (Cont.) Seeded System Pages

Page	Description	Context
Page Viewer	Displays an external web site (such as google.com) in a space, surrounded by the page template. For more information, see Chapter 12, "Working with Navigation."	Used when you create a Navigation model that contains an External URL item (with target Same Page). When users click on such links in the navigation, the Page Viewer is used. Both application- and space-level system pages are available.
Resource Viewer	Displays a resource in a space, surrounded by the page template. For more information, see Chapter 12, "Working with Navigation."	Used when you create a Navigation model that contains a resource item (with target Same Page). When users click on such links in the navigation, the Resource Viewer is used. Both application- and space-level system pages are available.
Search	Displays the Search Results page. For more information, see Chapter 58, "Working with the Search Service."	Renders dynamically to display the results of a search. Both application- and space-level system pages are available.
Self Registration	Provides a means of enabling users to create their own login accounts to your portal. For more information, see Section 32.2, "Registering Yourself with WebCenter Portal: Spaces."	Opens in response to clicking the Register button on the Login or WebCenter Welcome Page. This is an application-level system page.
Self-Service Membership	Provides a means of subscribing to a space that is configured to allow membership by subscription. For more information, see Section 51.9, "Joining a Space." **Note:** This is a renamed system page. Its previous name was *Subscribe*.	Appears when a user initiates a subscription to a space. Both application- and space-level system pages are available.
space Not Found	Displays a message telling the user that the space to which to navigate cannot be found	Appears when users navigate to a space that is no longer available in the Spaces application This is an application-level system page.
Spaces	Provides a view of all spaces that the current user can access. Additionally provides features for creating, searching for, sorting, and filtering spaces. For more information, see Part XI, "Planning and Building a Space".	Appears when users select **Browse Spaces** from the **Spaces** menu. This is an application-level system page.
Space Templates	Provides a view of all available space templates. Includes controls for creating, editing, and filtering space templates and viewing information about a selected space template. For more information, see Chapter 55, "Administering Spaces and Templates."	Appears in application administration pages on the **Spaces** page. This is an application-level system page.

Table 7–2 (Cont.) Seeded System Pages

Page	Description	Context
Tag Center	Displays the Tag Center task flow. For more information, see Chapter 59, "Working with the Tags Service," and particularly Section 59.2.7, "Working with Tags and Tagged Items in the Tag Center."	Appears when a user navigates to the Tag Center by one of several methods. Both application- and space-level system pages are available.
Task Flow Editor	Provides an environment for customizing all instances of a seeded task flow in a given scope in one operation. (Custom task flows created through the Resource Manager are not supported.) For more information, see Chapter 8, "Customizing Task Flows at Runtime."	Authorized users can add seeded task flows to this page and then customize all instances of the task flow. Both application- and space-level system pages are available.
Task Flow Viewer	Displays a task flow in a space, surrounded by the page template. For more information, see Chapter 12, "Working with Navigation."	Used when you create a Navigation model that contains a task flow item (with target Same Page). When users click on such links in the navigation, the Task Flow Viewer is used. Both application- and space-level system pages are available.
Unauthorized	Displays a message telling users that they are not authorized to access a space or a page.	Appears when a user navigates to a space or a page on which he does not have access permission. Both application- and space-level system pages are available.
Unavailable	Displays a message telling users that the space is not available.	Appears when a user navigates to a space that is offline. Both application- and space-level system pages are available.
User Profile	Displays the Profile Gallery of a user other than the current user, which, by default, displays the same subpages and task flows as the current user's Profile Gallery. It differs in that it displays information associated with the other user.	Renders dynamically when the current user accesses another user's profile. Both application- and space-level system pages are available.
WebCenter Portal Welcome Page	Displays login fields, a self-registration button, boilerplate information with links to help topics about specific features, a link to public spaces, and a language changer for the selection of an alternate session language.	This is the public welcome page. It is the first page users see when they access WebCenter Portal: Spaces. If you decide to disable public access to all application pages, the public welcome page is not shown and users are directed to the Login page. This is an application-level system page.

Caution: Avoid adding a Connections - Network task flow to a system page. Adding the Connections - Network task flow to a system page causes an error that prevents you from editing any other task flow on the page. You can work around this issue by clicking the **Restore Default** link on the system page to undo all changes made to the page, including removing the Connections - Network task flow.

For information about the Restore Default link, see Section 7.3.3, "Removing All Page Customizations from a System Page."

7.3.2 Customizing System Pages

Users granted the permissions `Application: Manage All` and `Pages: Create, Edit, and Delete Pages` can customize certain aspects of system pages through Composer.

This section describes how to customize system pages at the application-level or space-level. It includes the following subsections:

- Section 7.3.2.1, "What You Should Know About System Page Customization"
- Section 7.3.2.2, "Customizing an Application-Level System Page"
- Section 7.3.2.3, "Customizing a Space-Level System Page"

7.3.2.1 What You Should Know About System Page Customization

You can customize out-of-the-box system pages to bring them in line with your organization's brand or look and feel. As the application administrator, you can remove existing components, add new components, and change the page layout. For example, you can customize the My Profile and User Profile system pages to show content other than its defined default content.

You cannot, however, edit or delete system page input fields and buttons.

System pages enable task flow customization in Composer's Source view. Use task flow customization to change the appearance and behavior of all instances of a task flow in the current scope—that is, either application- or space-wide. For more information, see Chapter 8, "Customizing Task Flows at Runtime."

7.3.2.2 Customizing an Application-Level System Page

The process of customizing a system page is the same for each page. This section generally describes the steps you take to customize any system page that is editable in the Spaces application.

To customize a system page:

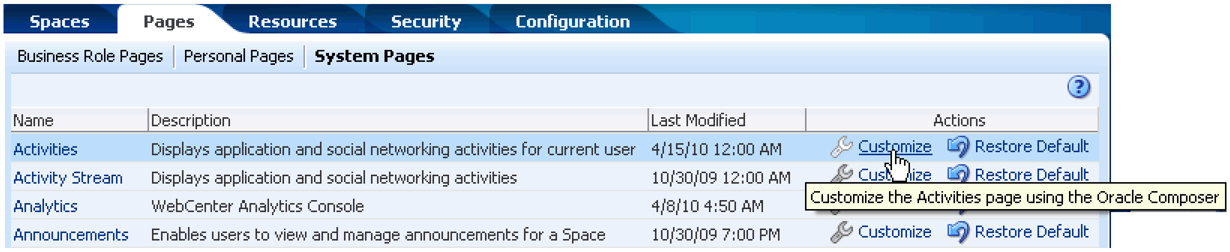
1. In Spaces Administration, click the **Pages** tab, then **System Pages** to view all personal pages.

   You can also use the following URL to access the **System Pages** page:

   `http://`*`host`*`:`*`port`*`/webcenter/spaces/admin/systempages`

2. Click the **Customize** link next to the system page to open it in Composer (Figure 7–17).

Figure 7–17 Customize Link Next to a System Page



3. Revise the page.

   See Also: For information about editing pages, see Chapter 18, "Editing a Page."

4. Click **Save** and then **Close** to exit Composer.

7.3.2.3 Customizing a Space-Level System Page

You can customize system pages such that the customizations render only within a selected space. To do so, simply customize the system page as described in Section 7.3.2.2, "Customizing an Application-Level System Page," but do so through in the space administration settings.

To customize a space-level systems page:

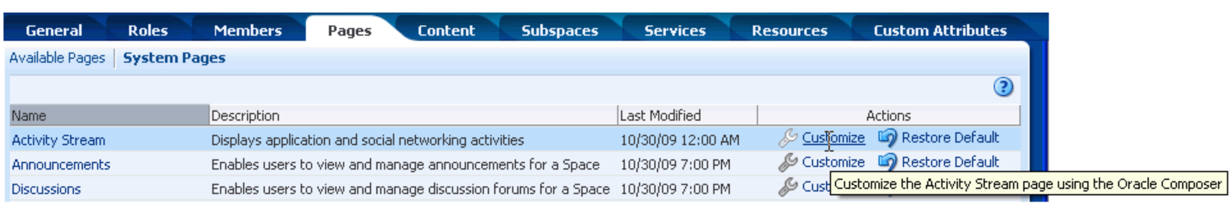
1. Navigate to the **Pages** page in the space administration settings, then click the **System Pages** subpage.

   You can use the following URL to get to this location:

   ```
   http://host:port/webcenter/spaces/spaceName/admin/systempages
   ```

2. Click the **Customize** link next to the system page to open it in Composer (Figure 7–18).

Figure 7–18 Customize Link Next to a System Page



3. Revise the page.

   See Also: For information about editing pages, see Chapter 18, "Editing a Page."

4. Click **Save** and then **Close** to exit Composer.

7.3.3 Removing All Page Customizations from a System Page

You can return a system page to its default, out-of-the-box state, removing all page customizations.

Note: This process does not also remove task flow customizations. To remove task flow customizations, you must revise the given task flow on a system page. For more information, see Chapter 8, "Customizing Task Flows at Runtime."

To remove all customizations from a system page:

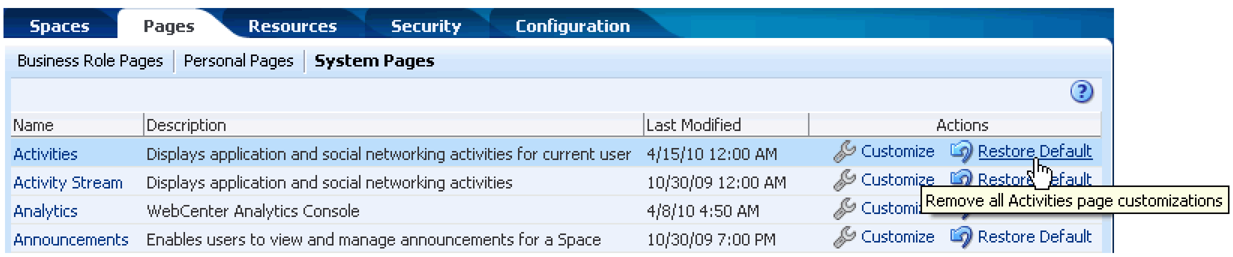
1. In Spaces Administration, click the **Pages** tab, then **System Pages** to view all personal pages.

   You can also use the following URL to access the **System Pages** page:

   `http://host:port/webcenter/spaces/admin/systempages`

2. Click the **Restore Default** link next to the system page (Figure 7–19).

Figure 7–19 Restore Default Link Next to a System Page



3. In the resulting confirmation dialog, click the **Restore** button.

   All customizations are permanently removed from the selected system page.

8 Customizing Task Flows at Runtime

Through the Task Flow Editor system page, you can customize a task flow at application runtime so that all instances are affected. You can change all task flow instances at the application level or just those instances in a given space.

This chapter provides details about runtime task flow customization and steps you through the process of customizing task flows application-wide and space-wide. It includes the following sections:

> **See Also:** For information about system pages, see Section 7.3, "Working with System Pages." Task flow customization is also possible at design time through Oracle JDeveloper. The process differs significantly from the runtime procedure discussed in this chapter. For more information, see the chapter, "Customizing Task Flows," in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

8.1 What You Should Know About Runtime Task Flow Customization

Runtime Task flow customization provides a means of configuring a particular task flow in a way that all instances of that task flow within the current scope are affected.

The task flow customization feature is available exclusively on the Task Flow Editor system page. The Task Flow Editor system page is available at both the application and space levels:

- To change all instances of a given task flow across all spaces (including the Home space), customize the task flow on the application-level Task Flow Editor system page.
- To change only those instances exposed in a given space, customize the task flow on the space-level Task Flow Editor system page.

> **Note:** When you customize a task flow element at the application level, and another user customizes the same task flow element at the space level, the space-level customization take precedence in that space.

The **Task Flow Editor** system page is provided to enable customization of any seeded task flow (custom task flows that are created through the Resource Manager cannot be customized in this way). Edit the Task Flow Editor page, and add any seeded task flow to it. Edit the task flow by selecting any of its elements on the page and then editing the selected element's properties.

The changes you make to task flows on the Task Flow Editor system page affect all instances of the task flow at the application level, when you customize the application-level system page, or within the scope of the current space, when you customize the space-level system page.

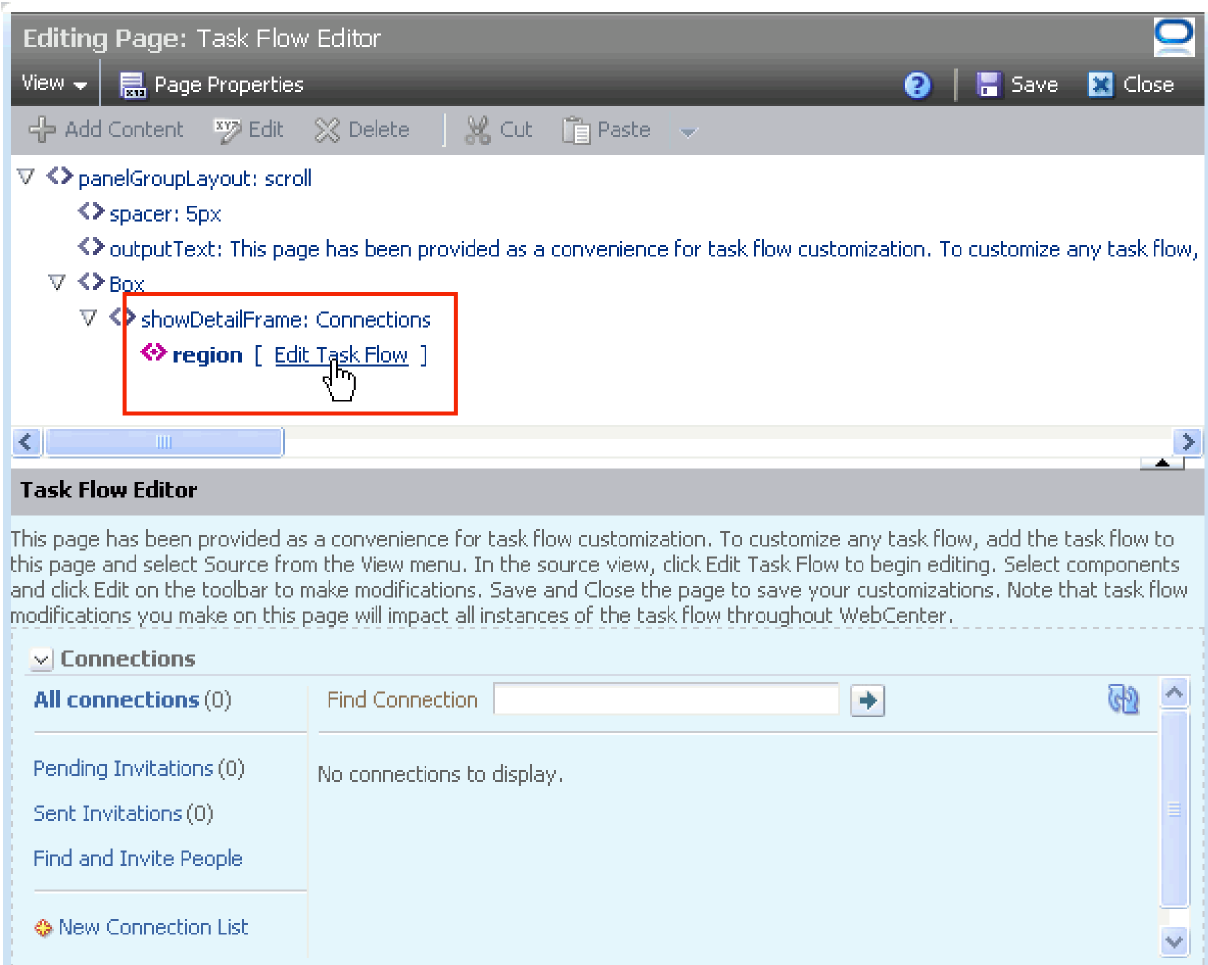
System pages at both the application and space level have a Restore Default feature that enables authorized users to remove all page customizations and restore a system page to its out-of-the-box state. It is important to note that Restore Default does **not** also restore customized task flows to their default states. A separate control, Reset Task Flow, is available to remove task flow customizations (for more information, see Section 8.4, "Removing Task Flow Customizations").

Note: Customizations made to task flows created at runtime—that is, created through the Resource Manager—are base document edits rather than layered customizations. Consequently, they cannot be reset. When you edit a task flow created at runtime in Composer, edits are saved, even if you do not explicitly click **Save**.

See Also: For information about the Restore Default feature for system pages, see Section 7.3.3, "Removing All Page Customizations from a System Page."

Make runtime task flow customizations in page edit mode Source view. In Source view, an **Edit Task Flow** link is provided next to the region that represents the task flow. You can click this link to start the customization process (Figure 8–1).

Figure 8–1 Edit Task Flow Link Next to a Region Tag



Once in, you can select different task flow elements directly on the page and edit their properties through the Component Properties dialog. All changes made in this way affect all instances of the task flow either application-wide or within the scope of a space, depending on where you initiated the customization. Changes to one element affect all like elements. For example, if you select a folder in the Document Explorer task flow, and change its icon, all folder icons in all Document Explorer task flows within the current scope are affected.

8.2 Customizing Task Flows at the Application Level

This section describes how to perform runtime task flow customizations at the application level.

Note: When you customize a task flow element at the application level, and another user customizes the same task flow element at the space level, the space-level customization take precedence in that space.

To perform runtime task flow customizations application-wide:

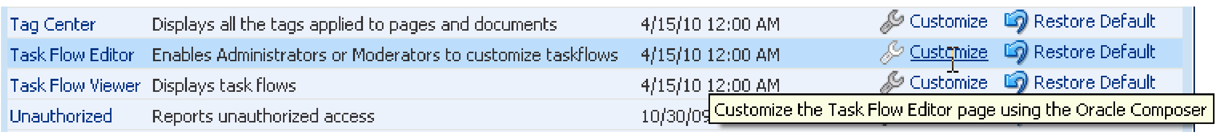
1. Navigate to the **Spaces Administration** page, click the **Pages** tab to bring it forward, and then click **System Pages** to view all system pages.

   You can use the following URL to get to this location:

   http://*host:port*/webcenter/spaces/admin/systempages

2. Click the **Customize** link next to the Task Flow Editor system page to open it in page edit mode (Figure 8–2).

Figure 8–2 Customize Link Next to the Task Flow Editor System Page

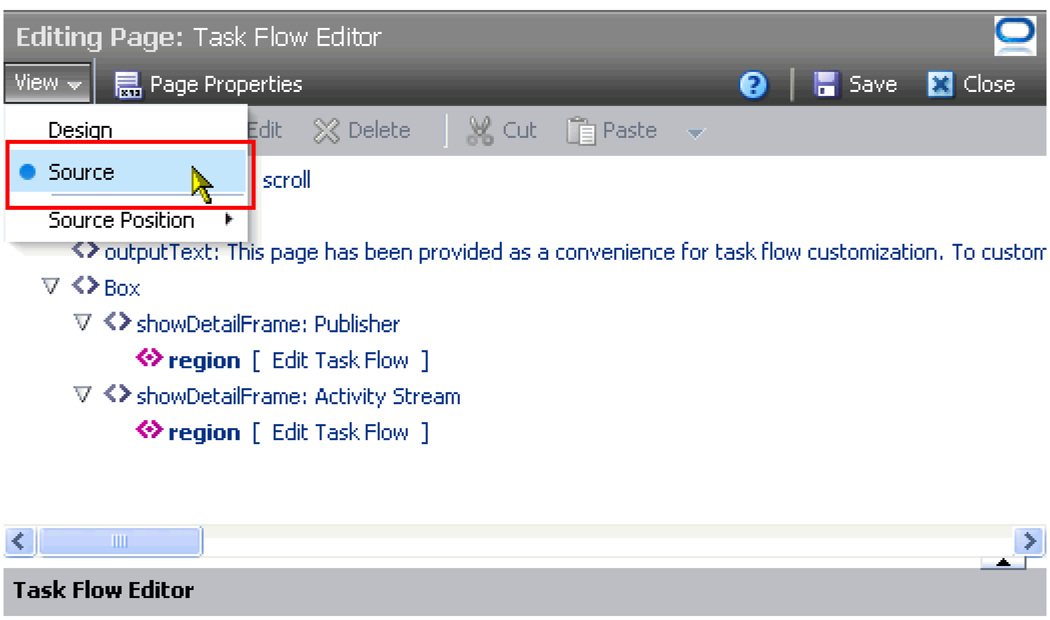


3. Add the task flow of interest to the application-level Task Flow Editor system page.

   See Also: For more information, see Section 18.5, "Adding a Component to a Page."

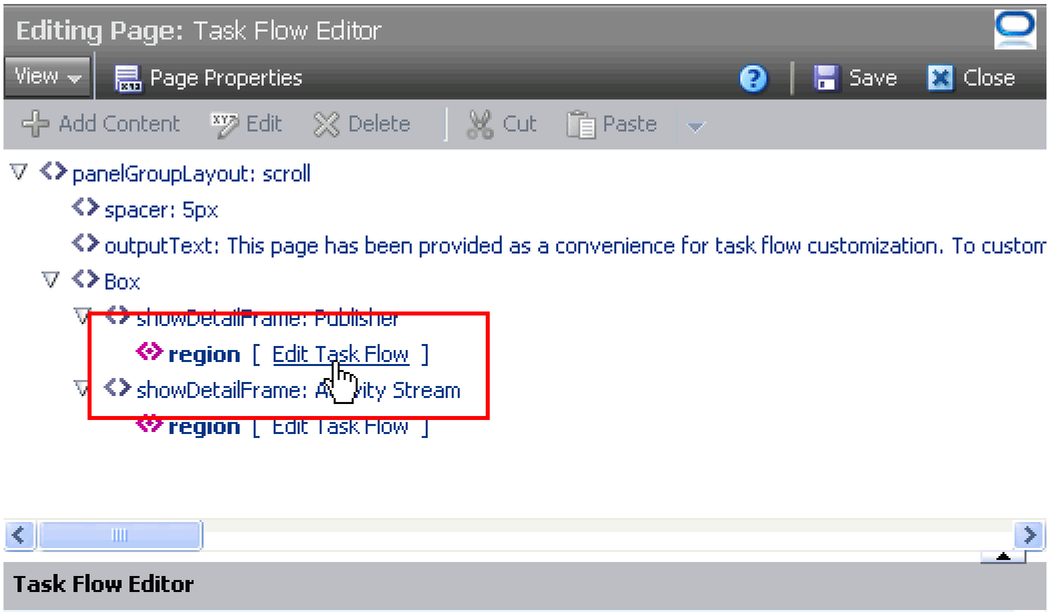
4. From the **View** menu, select **Source** to view the page source (Figure 8–3).

Figure 8–3 Source Option on View Menu



5. Click the **Edit Task Flow** link next to the task flow you want to customize (Figure 8–4).

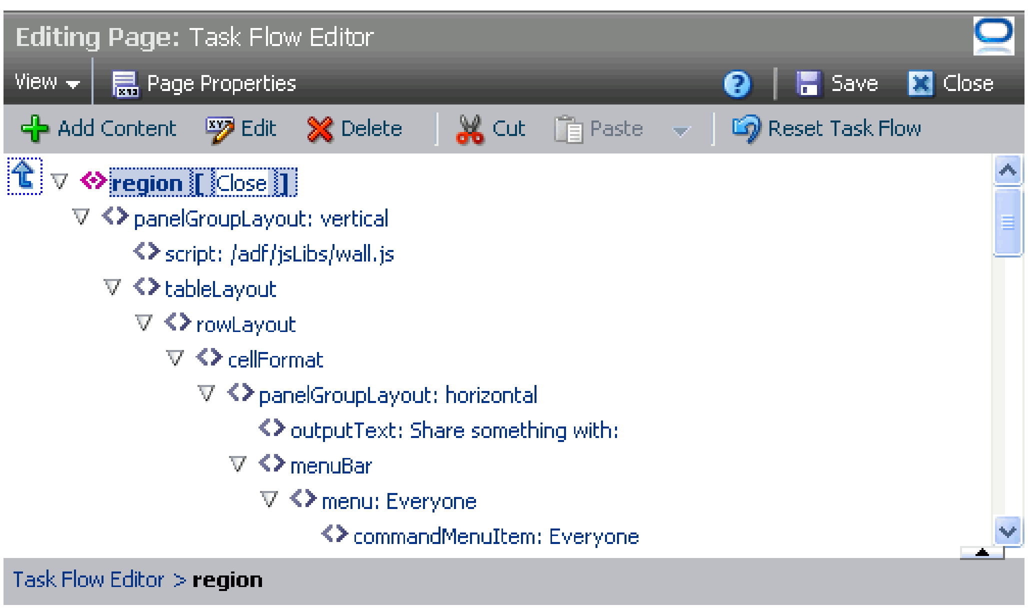
Figure 8–4 Edit Task Flow Link Next to a Region Tag



6. In the resulting Confirm Task Flow Edit dialog, click **Edit**.

   Source view zooms into the source code hierarchy of the task flow being edited (Figure 8–5)

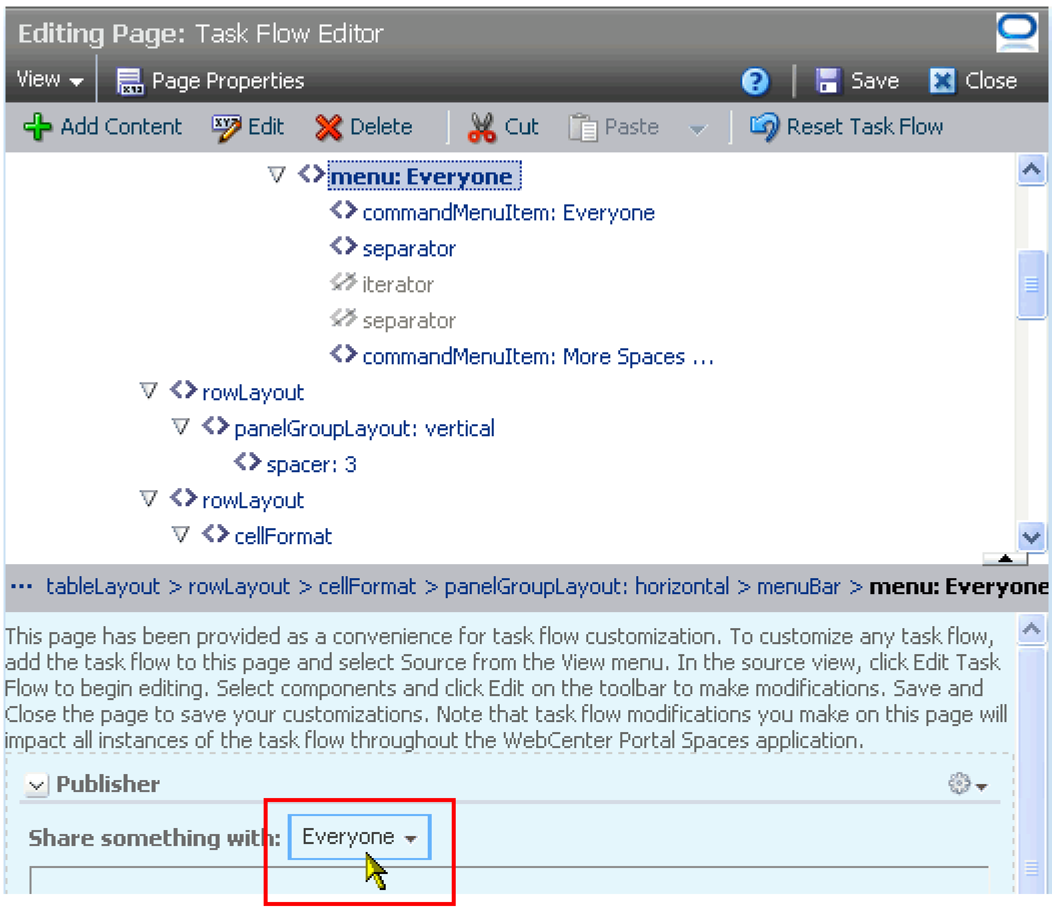
Figure 8–5 Zoomed-In View of Task Flow



> **Tip:** Use the **Show Hierarchy** icon (arrow) in Source view to navigate back up the source hierarchy.

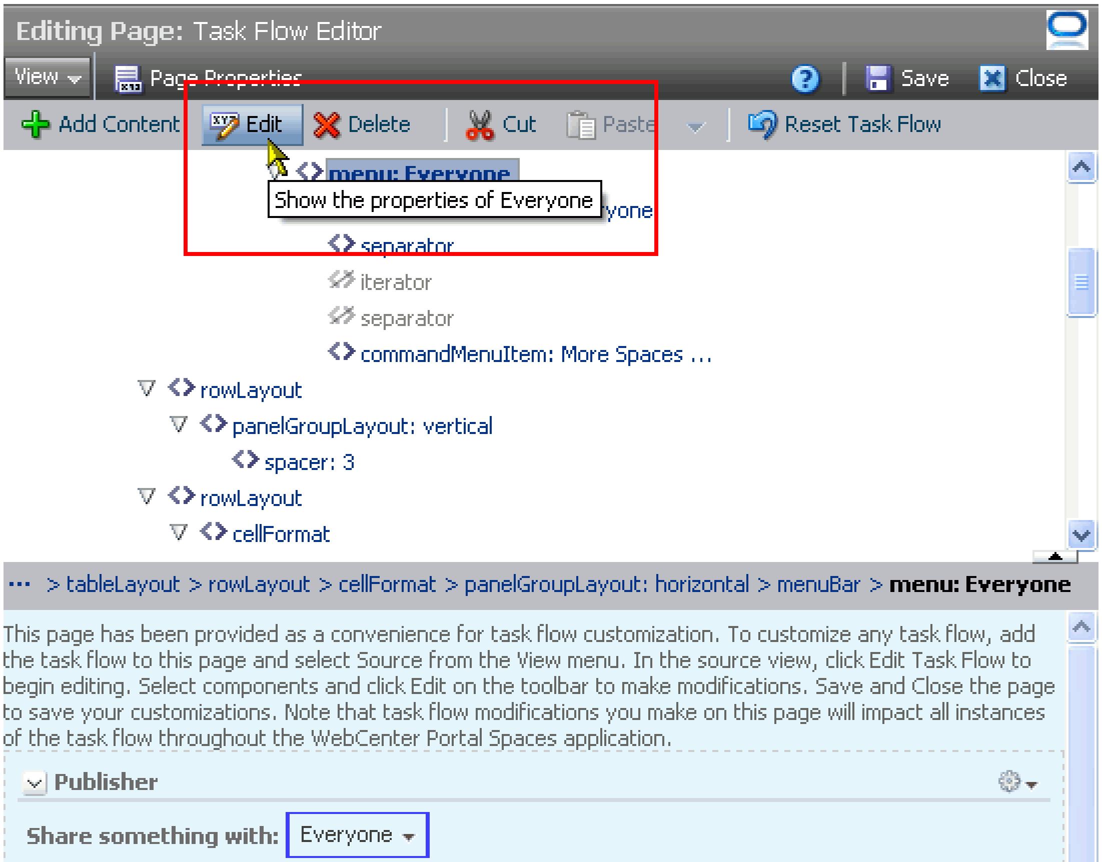
7. Select a task flow element by clicking it on the page (Figure 8–6).

Figure 8–6 Selected Task Flow Element on a Page in Source View



8. Click the **Show the properties of *selected_element*** to open the Component Properties dialog (Figure 8–7).

Figure 8–7 Show the Properties of Everyone Icon



9. Make your changes to the element's properties.

Note: Remember that changes to one element affect all like elements in the task flow within the current scope. For example, a change to the font used on a folder name affects all folder names within the scope and not just the selected instance.

---

10. Click **Apply** to view the effect of your changes; click **OK** to save your changes and exit the dialog.

    Every instance of the customized task flow within the current scope renders with your customizations.

11. Click **Save** then **Close** to exit Composer.

8.3 Customizing Task Flows at the Space Level

This section describes how to perform task flow customizations at the space level.

Note: When you customize a task flow element at the application level, and another user customizes the same task flow element at the space level, the space-level customization take precedence in that space.

To perform space-wide task flow customizations through the Task Flow Editor system page:

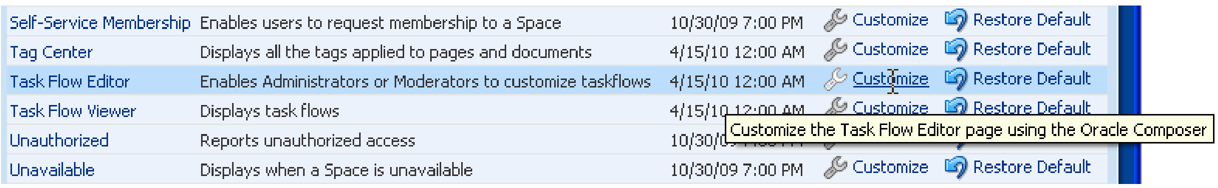
1. Navigate to the **Pages** page in the space administration settings, then click the **System Pages** subpage.

   You can use the following URL to get to this location:

   http://*host:port*/webcenter/spaces/*spaceName*/admin/systempages

2. Click the **Customize** link next to the Task Flow Editor system page to open it in page edit mode (Figure 8–8).

Figure 8–8 Customize Link on the Space-Level System Page Task Flow Editor

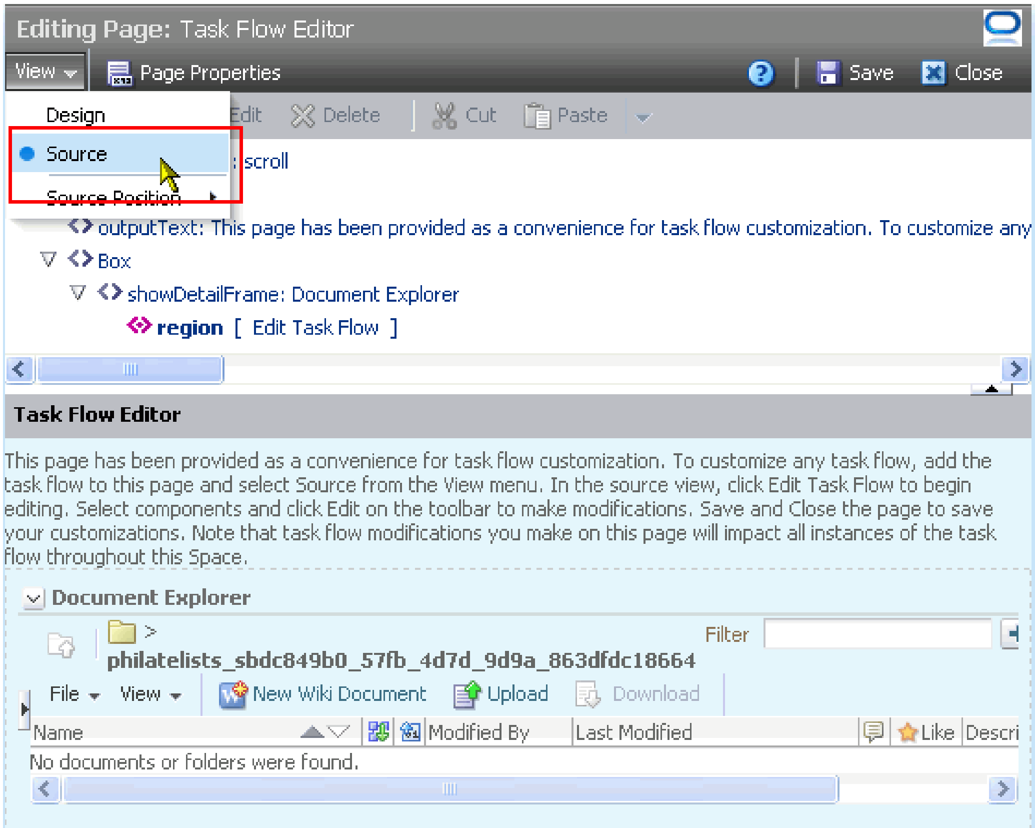


3. Add the task flow of interest to the space-level Task Flow Editor system page.

   See Also: For more information, see Section 18.5, "Adding a Component to a Page."

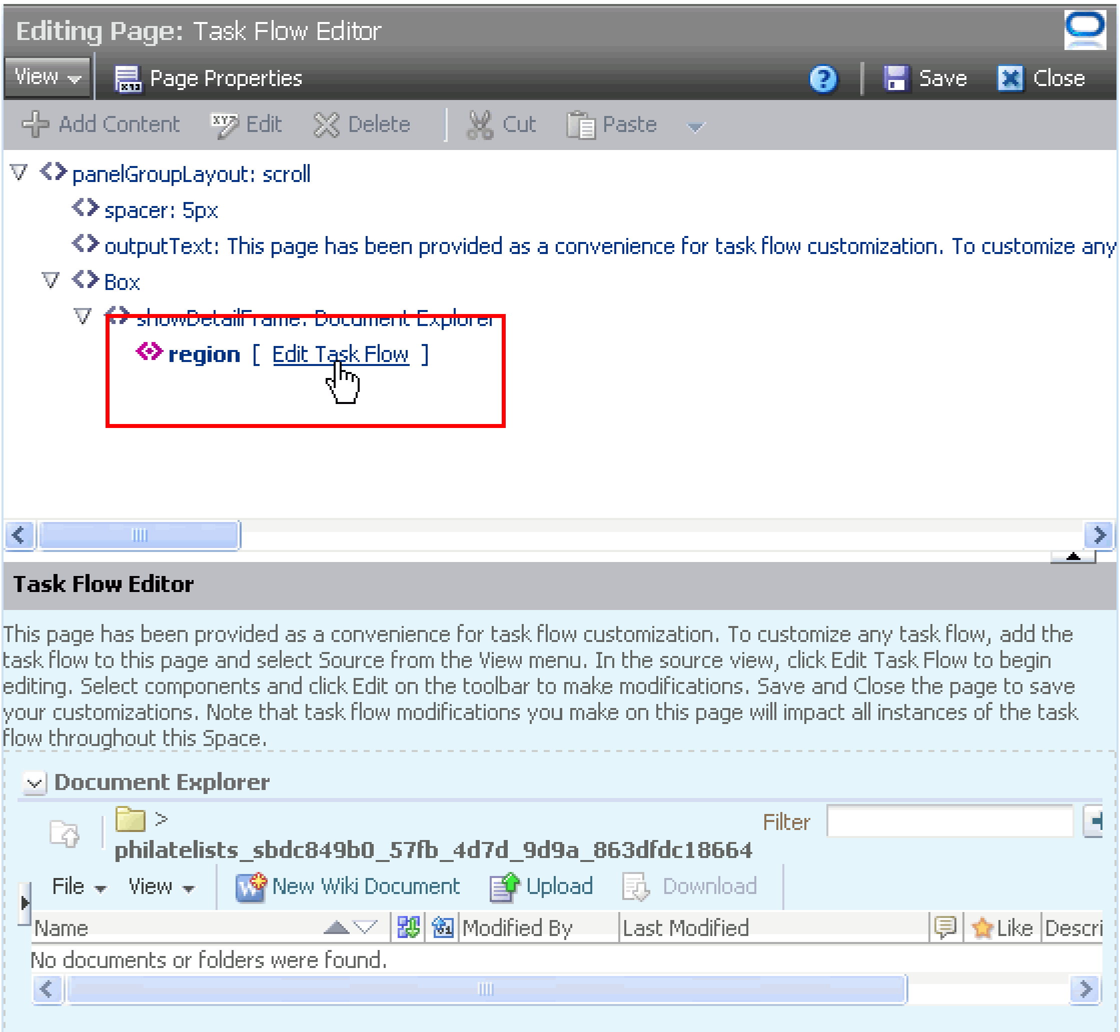
4. From the **View** menu, select **Source** to view the page source (Figure 8–9).

Figure 8–9 Source Option on View Menu



5. Click the **Edit Task Flow** link next to the task flow you want to customize (Figure 8–10).

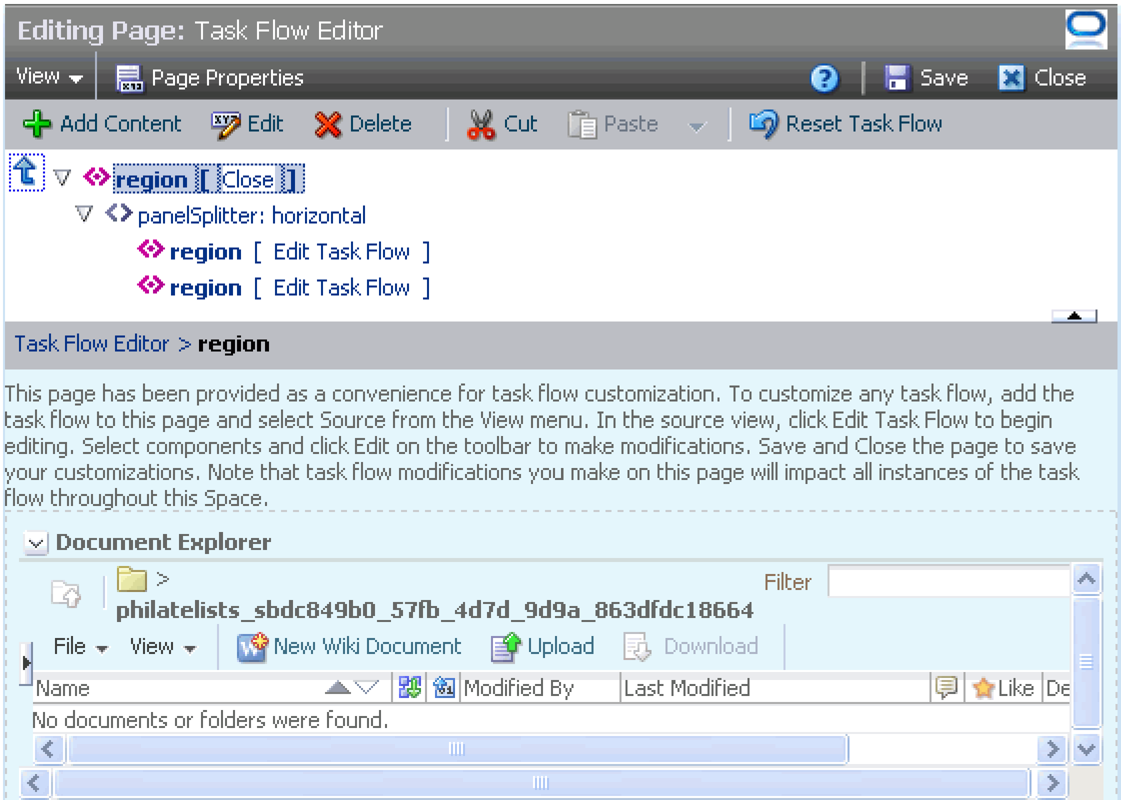
Figure 8–10 Edit Task Flow Link In Source View



6. In the resulting Confirm Task Flow Edit dialog, click **Edit**.

   Source view zooms into the source code hierarchy of the task flow being edited (Figure 8–11)

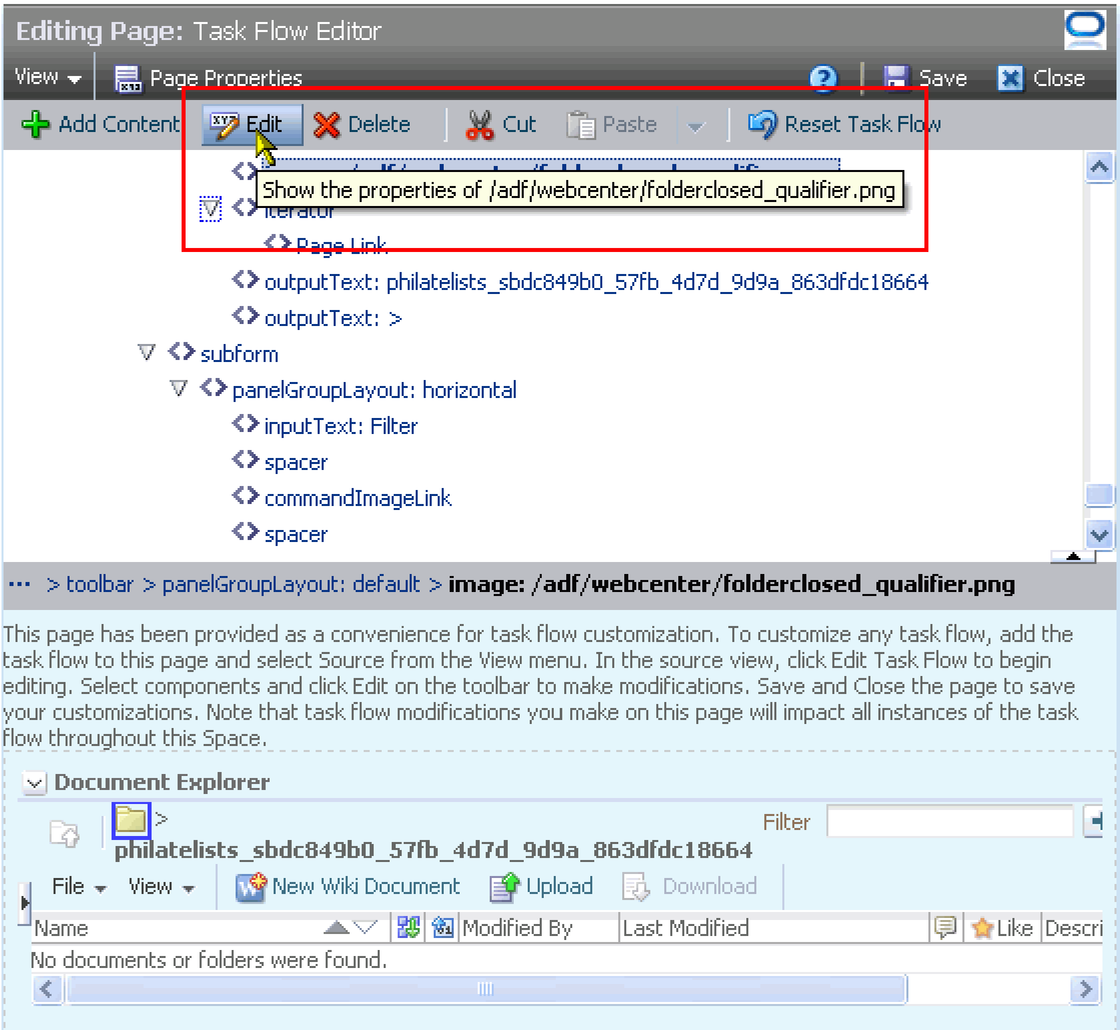
Figure 8–11 Zoomed-In View of Task Flow in Edit Mode



> **Tip:** Use the **Show Hierarchy** icon (arrow) in Source view to navigate back up the source hierarchy.
>
> 
>

7. Select a task flow element by clicking it on the page.
8. Click the **Show the properties of *selected_element*** to open the Component Properties dialog (Figure 8–12).

Figure 8–12 Show the Properties of folderclosed_qualifier.png



9. Make your changes to the element's properties.

> **Note:** Remember that changes to one element affect all like elements in the task flow within the current scope. For example, a change to the font used on a button affects all like buttons on every instance of the selected task flow within the scope and not just the selected instance.

10. Click **Apply** to view the effect of your changes; click **OK** to save your changes and exit the dialog.

    Every instance of the customized task flow within the current scope renders with your customizations.

11. Click **Save** then **Close** to exit Composer.

8.4 Removing Task Flow Customizations

Use the **Reset Task Flow** feature to remove customizations from seeded task flows.

Note: Reset Task Flow does not apply to task flows created at runtime. That is, task flows created through the Resource Manager. Changes made to a task flow created through the Resource Manager are base edits rather than layered customizations; therefore, when you click **Reset Task Flow**, there are no customization layers to remove.

To remove task flow customizations made at the application or space level:

1. Navigate to the **System Pages** subpage at the application or space level.

   To navigate to the application Systems Pages subpage, use the following URL:

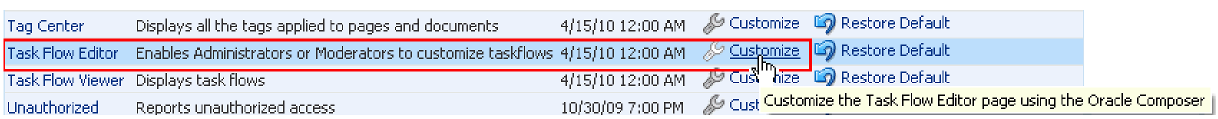
   `http://`*`host:port`*`/webcenter/spaces/admin/systempages`

   To navigate to a space Systems Pages subpage, use the following URL:

   `http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/systempages`

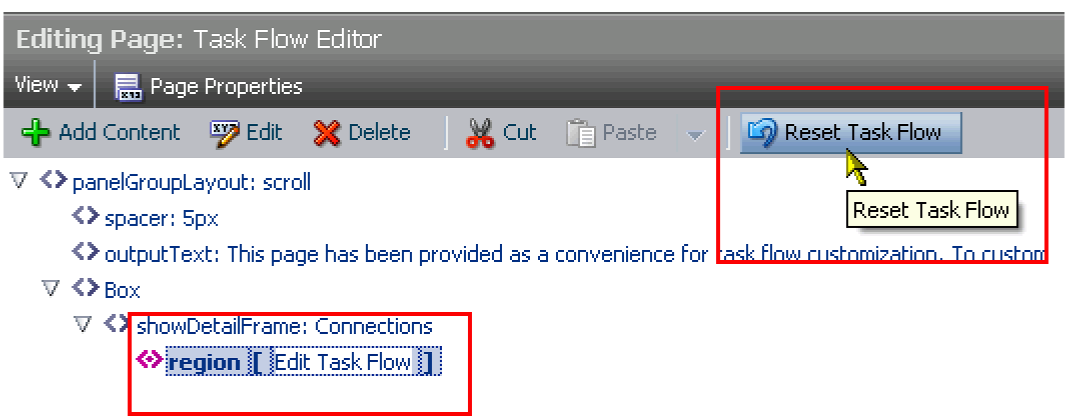
2. Click the **Customize** link next to the Task Flow Editor system page to open it in page edit mode (Figure 8–13).

Figure 8–13 Customize Link Next to a System Page



3. In Source view, select the customized task flow, and click **Reset Task Flow** (Figure 8–14).

Figure 8–14 A Selected Task Flow and the Reset Task Flow Button



4. Click **Reset Task Flow** in the confirmation dialog.

Part III

Personalizing Your Portal

Part III of the User's Guide describes a way to vary the presentation of page content and templates to suit the current user.

Part III includes the following chapter:

- Chapter 9, "Using Personalization for WebCenter Portal"

9

Using Personalization for WebCenter Portal

WebCenter Portal's Personalization provides a dynamically derived user experience that can be applied to any Oracle WebCenter Portal: Spaces object that can be used in conjunction with Expression Language (EL) expressions. This chapter provides an overview of how the Personalization engine can be used to determine which WebCenter Portal: Spaces objects are presented to the user and how these objects are presented based on the outcome of a Personalization scenario.

This chapter includes the following sections:

- Section 9.1, "Introduction to Personalization"
- Section 9.2, "Driving Content Using Personalization"
- Section 9.3, "Driving Portal Look and Feel Using Personalization"

9.1 Introduction to Personalization

WebCenter Portal's Personalization provides a mechanism with which to vary the user experience based on dynamically evaluated criteria defined in a Personalization scenario. The scenario evaluates defined sources of input data, and generates a decision. The results of that decision or outcome can be applied in WebCenter Portal: Spaces using Expression Language (EL) expressions.

To use Personalization for WebCenter Portal in WebCenter Portal: Spaces, you first need to create a scenario in a WebCenter Portal: Framework application. You then use ELs to execute and return the results of the scenario, and modify the user experience accordingly in WebCenter Portal: Spaces. For information about how to create Personalization scenarios, see "Personalizing WebCenter Portal Applications" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*. The Personalization ELs used to run a scenario are cataloged in Section B.4.11, "EL Expressions Relevant to the Personalization Conductor."

Once you've set up your scenario, you can use ELs in WebCenter Portal: Spaces to present targeted content or shape the way content is presented based on information about the user. For example, you can use a Personalization scenario to determine a user's role within an enterprise, and based on that selectively show content for that role. You can also tailor the presentation (such as page templates, page styles, skins, Resource Catalogs, and so on) for the user.

9.2 Driving Content Using Personalization

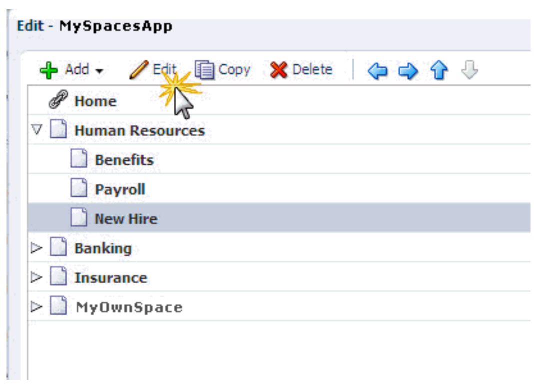
WebCenter Portal's Personalization can deliver targeted content based on both user and application context. Personalization, for example, can return content or change application flow based on information about a user in a Human Resources database, targeting the WebCenter Portal: Spaces experience for that specific user.

You can define the content sources, or data providers, that are used to evaluate or provide data for a scenario. The default data provider for Personalization is the Oracle WebCenter Content Server, but a data provider for Activity Graph and a locator for People Connections is also available out of the box. You can also define your own data providers for other data sources. For more information about data providers, see "Personalization Providers" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

You can create a simple example of using Personalization to drive content based on information about the user by creating a scenario that returns “true” if the employee hire date is within the last two months (see "Authoring Personalized Scenarios in JDeveloper" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal* to learn how to create a Personalization scenario). After creating the scenario:

1. Log in as an administrator in WebCenter Portal: Spaces.
2. Create a page for new hires, naming it `New Hire`.
3. Edit the navigation model for the site, and add a new navigation link to the New Hire page.
4. Select New Hire and click the Edit (Pencil) icon.

Figure 9–1 Navigation Model

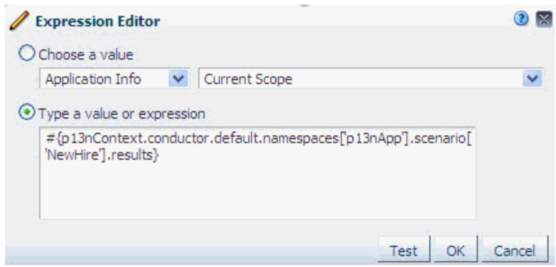


5. For the **Visible** attribute, open the Expression Editor, select **Type a value or expression** and enter:

```
#{p13nContext.conductor.default.namespaces['p13nApp'].scenario['NewHire'].resul
ts}
```

Where `p13nApp` is the name of the WebCenter Portal application containing the scenario, and `NewHire` is the name of the scenario. This will execute the scenario and return the results (`True` or `False` in this case). If the user is a new hire (`True`) based on the results of the scenario, then the menu item will display when the user logs in.

Figure 9–2 Expression Editor



9.3 Driving Portal Look and Feel Using Personalization

As well as targeting content to the user, you can also use Personalization and Personalization ELs to select the page templates, page styles, skins, and navigation flow within which that content is presented.

Part IV

Building a Portal or Community

Part IV of the User's Guide introduces the resources you use to create your portal or community.

Part IV includes the following chapters:

10

Creating a Look and Feel

The look and feel for Oracle WebCenter Portal: Spaces can be designed using a combination of features, including page templates, navigations, skins, page styles, and Content Presenter display templates. This chapter explains how these features work together and provides tips on using them to their best advantage.

This chapter includes the following sections:

10.1 Technologies Used for Creating a Look and Feel

There are several technologies involved with creating a look and feel:

- HyperText Markup Language (HTML) is the main language for displaying web pages and other information that can be displayed in a web browser.
- Cascading Style Sheets (CSS) provide a simple mechanism for ensuring a consistent look and feel or adding style, such as fonts, colors, and spacing, to web documents. CSS allows you to separate content from presentation, improving accessibility, and allowing you to easily render content for different situations (for example, for mobile phones or screen reader devices).
- JavaScript is a scripting language commonly implemented as part of a web browser in order to create enhanced user interfaces and dynamic websites.
- Oracle Application Development Framework (ADF) provides a range of technologies aimed at making Java EE application development faster and simpler for developers while at the same time taking advantage of proven software patterns to ensure that the developed application is scalable, performant, and the like.
- Expression Language (EL) provides a shorthand way of working with web application data by providing operators for retrieving and manipulating application data residing in a Java EE web container.

10.2 What You Should Know About Creating a Look and Feel

WebCenter Portal: Spaces provides the following features to control the look and feel of the application, individual spaces, pages, components, and content:

- Page Templates—define the structure and layout of pages. A page template typically includes a header on top of the page; a navigation structure at the top of the page or in a sidebar to link to important targets; a content area; and footer at the bottom of the page.

  For more information on page templates, see Chapter 13, "Working with Page Templates."

- Navigations—provide links to access content in WebCenter Portal: Spaces or external resources. For example, WebCenter Portal: Spaces might include a series of tabs or menus along the top of each page, a tree structure or list of links on the side of each page, or a trail of breadcrumbs showing the path a user has taken to reach the current location in WebCenter Portal: Spaces.

  For more information on page templates, see Chapter 12, "Working with Navigation."

- Skins—define colors, fonts, and other aspects to give individual spaces or the entire Spaces application a distinct personality or to provide specific branding.

  For more information on page templates, see Chapter 14, "Working with Skins."

- Page Styles—describe the layout of a newly created page and may also dictate the type of content the page supports. For example, the Wiki page style provides an instant wiki; a Blank page style has few restrictions on the types of content users can add to the pages that are based on it.

  For more information on page templates, see Chapter 15, "Working with Page Styles."

- Content Presenter Display Templates—defines the style and layout for the selected content.

  For more information on page templates, see Section 42.5, "Selecting a Display Template."

10.3 Tips on Defining Page Templates

This section includes the following subsections:

10.3.1 Page Template Layout

The biggest challenge in page template design is how to lay out components, both elements of the template and page content. There are two basic strategies:

- Flow layout—components have fixed sizes and are arranged side by side. If necessary, the browser displays scroll bars.
- Stretch layout—components will be stretched to occupy the available space on the page. If necessary, individual components display scroll bars (which might mean

that you have multiple scroll bars on one page). Stretching enables you to maximize the usage of the viewable area. Use tabs, accordions, menus, and popups to virtually expand your viewable area.

Because most web sites use a flow layout, you probably also want to use a flow layout as it will likely feel more familiar to your users. However, stretch layouts are good for dashboards and applications that are rich in nature or when you want to mimic a desktop experience. You can also combine flow and stretch layout on the same page.

Depending on the strategy you use, the vertical behavior of the page differs:

- Flow layout:
  - The header and/or footer might not always be visible
  - The height of the page is calculated based on the components
  - The content is never stretched vertically
  - The browser might display a scroll bar
- Stretch layout:
  - The header and footer are always visible
  - The height of the page is determined by the browser window
  - The content is stretched vertically
  - The content might display a scroll bar

Depending on the strategy you use, the horizontal behavior of the page differs:

- Flow layout:
  - If your page includes a side bar (for example, left-side navigation), the side bar might not always be visible
  - The width of the page is calculated based on the components
  - Some components might be stretched to fill up existing space
  - The browser might display a scroll bar
- Stretch layout:
  - If your page includes a side bar (for example, left-side navigation), the side bar is always visible
  - The width of the page is determined by the browser window
  - The content is stretched horizontally
  - The content might display a scroll bar

There are a few additional considerations when defining your page template layout:

- As a template developer, you control whether the content facet is in a flowing or stretching region of the page, but you cannot control the content. Therefore, page content creators should be aware of the layout strategy and take that into consideration.
- Because a page template can be changed, create pages and design custom components that display properly in flowing and stretching context.
- We recommend you use ADF Faces containers to create page layouts, though you can also use Trinidad or HTML tags.

10.3.1.1 Layout Building Blocks

Layout building blocks (shown in Figure 10–1):

- af:panelStretchLayout - stretched frame with top, start, center, end, and bottom
- af:panelSplitter - stretched box divided into two user-modifiable sections
- af:panelDashboard - stretched, tiled structure of boxes
- af:panelGroupLayout - series of components - default, horizontal, vertical, scroll structures
- af:panelBorderLayout - flowing frame with top, start, center, end, and bottom
- trh:tableLayout, trh:rowLayout, and trh:cellFormat - flowing raw HTML table structure

Figure 10–1 Layout Building Blocks

For details on what different layout components look like, see the ADF Faces Rich Client demo online tool (`http://jdevadf.oracle.com/adf-richclient-demo/faces/visualDesigns/index.jspx`). When viewing a component, select **Page** or **Page Template** from the **View Source** menu to see what tags and attributes are used as well as what the component structure looks like for the page.

10.3.1.2 Tips on Creating Stretch Layouts

Creating stretch layouts:

- Build outer structure with containers that can be stretched and can stretch their children. Use containers such as `decorativeBox`, `panelStretchLayout` and `panelSplitter` inside your `document` component to create the stretchable outer frame.

Note: Each layout or panel component's tag documentation identifies whether it is stretchable and how to achieve it in its "Geometry Management" documentation. Some components have attributes to determine whether children will be stretched or not. For example: `document` has a `maximized` attribute, `showDetailItem` has a `stretchChildren` attribute.

- Create flowing islands. Inside of the stretchable outer structure, create islands of flowing (non-stretched) components. To make this transition from stretching to flowing, use `panelGroupLayout` with `type="scroll"` or `type="vertical"` since it supports being stretched but will not stretch its children.
- Do not embed stretching components inside flowing islands.
- Do not stretch something vertically (by using a height with a percent value) when inside a flowing container.
- Many leaf components do not make sense in isolation. For example, if you have a series of input components, you would never want to just place these in a `panelGroupLayout` because it would be much better for usability if you placed them in a `panelFormLayout` so the labels and fields align.
- Do not use the `position` style.

Note: The following components are just some of the components that cannot be reliably stretched:

- Most input components
- `panelBorderLayout`
- `panelFormLayout`
- `panelGroupLayout` (with `layout="default"`)
- `panelGroupLayout` (with `layout="horizontal"`)
- `panelHeader` (with `type="flow"`)
- `panelLabelAndMessage`
- `panelList`
- Apache MyFaces Trinidad HTML Component - `tableLayout`
- JSF HTML Component - `panelGrid`

10.3.1.3 Tips on Creating Flow Layouts

Creating flow layouts:

- Use non-stretching containers such as `panelGroupLayout` and `panelBorderLayout`. You can use `panelBorderLayout` to approximate an HTML table component.
- To avoid multiple scroll bars, do not nest scrolling `panelGroupLayout` components, instead use `type="vertical"`.
- Most stretchable ADF components also work in flowing context with `dimensionsFrom="auto"`.

- To stretch a component horizontally, use `styleClass="AFStretchWidth"` (instead of `inlineStyle="width:100.0%"`).

To approximate an af:div:

```
<af:group id="pt_navbarright" rendered="#{securityContext.authenticated}">
     <div id="navbarright" class="floatright">
       right side menu stuff...
     </div>
</af:group>
```

The `af:group` protects the DOM structure. The `div` lets you apply CSS styling and positioning.

Working with customizable components:

- In `panelCustomizable`, use `layout="auto"` to detect whether to stretch its children.
- To support flow and stretch layouts, use `showDetailFrame` with `stretchChildren="auto"`.

10.3.2 Customizing the Appearance of Components

You can customize the appearance of components using the following mechanisms:

- For custom styling use a declarative approach (theme, hint, or other attribute), for example, make the page dark blue with af:document's `theme="dark"`
- Use themed decorativeBox components to organize your page layers with visual distinction and decorative borders as seen in some of the sample skins. Note that not all skins have alternative themes so you may not see any distinction. If your decorativeBox components are not showing up with different colored backgrounds and you know that you are using a skin that has definitions for alternate themes, you might be missing a web.xml context-param setting for "oracle.adf.view.rich.tonalstyles.ENABLED" being set to false.
- Your document component also has a theme attribute so you can use it to change the main background styling of your page.
- Use a custom skin for consistently modified appearances if the existing skin doesn't provide all that you need.
- For instance-specific alternative styling, use the styleClass attribute. Keep the corresponding style definitions in an easy-to-maintain location such as in a custom skin, in the metaContainer facet of the document component, or in a style provided by the resource tag.
- As a last resort, use component attributes such as inlineStyle, contentStyle, and labelStyle. These are less declarative, harder to maintain, contribute more to the page's raw HTML size, and may not even be needed if one or more of the above mechanisms are used.

  Styles are directly processed by the web browser, which gives you a great deal of power but at the cost of being less declarative and error-prone. The browsers do not support all styles on all elements and certain combinations of styles produce non-obvious results. Here is some guidance on style configurations to avoid:

  – An inlineStyle with a "height" value with "%" units

  – An inlineStyle with a "width" value between "90%" and "100%" (use styleClass="AFStretchWidth" or styleClass="AFAuxiliaryStretchWidth" instead)

- An inlineStyle with "height", "top", and "bottom" values
- An inlineStyle with "width", "left", and "right" values
- An inlineStyle with a "position" value
- In a child being stretched by a parent component, an inlineStyle with "width" or "height" values

10.3.3 Defining Scrolling

- You should only have scrollbars around flowing island content. The recommended transition component for switching from a stretching outer frame into a flowing island is the panelGroupLayout with layout="scroll". If the contents of this panelGroupLayout cannot fit in the space allocated, the browser will determine whether scrollbars are needed and will add them automatically.
- Do not nest scrolling panelGroupLayout components because this will make the user see multiple scrollbars. Also, this should only be used at transitions from stretching to flowing areas and since you should not have stretching areas inside of flowing areas, you would generally never end up with nested scrollbars. It is best to minimize the number of areas that a user must scroll in order to see what he or she is looking to find. Take time to consider what scrolling the user will need. In cases where undesired scrollbars exist, you may want to simply change the layout attribute of that panelGroupLayout to "vertical".
- There is a known scrolling issue that has been filed against Internet Explorer 7.0.5730.11. The issue is only resolved in Internet Explorer 8 when running in pure IE8 rendering mode. If a scrolling box has contents that are set to be as wide as the containing box and if the contents are large enough to warrant the need for a vertical scrollbar, an unnecessary horizontal scrollbar will be added. The browser is failing to adjust the width of the contents for the presence of the vertical scrollbar and thus a horizontal scrollbar appears. This horizontal scrollbar lets you scroll the small amount of space equal to the width of the vertical scrollbar. With this issue, it is not recommended to specify a width anywhere between 90% and 100%. Smaller widths will generally not encounter the bug. Workarounds (as seen in this page) involve setting the widths of the contents to be smaller than full width so that the browser has enough space for a vertical scrollbar to fit. For your convenience, a styleClass named "AFStretchWidth" is built into the skin to specify that a component with this styleClass will get a reduced width in Internet Explorer 7 or full width in other browsers. If you need a smaller size for an thin auxiliary column, you can alternatively use "AFAuxiliaryStretchWidth" or you may create a similar skin definition in your own skin like this:

```
@agent ie and (version: 7.0) {
  .AFIEOverflowWorkaround75 {
    width: 75%;
  }
}
```

10.3.4 Defining Margins, Borders, and Padding

- Due to the browser's CSS Box Model Rules, defining margins, borders and padding on components might be complex. Refer to the Navigation-Master-Detail, Tiled Flowing, and Tiled Stretching layout pattern examples for various mechanisms to apply padding.

- In many cases, to apply these kinds of styles, you need to use multiple components together. In a scrolling area, adding an extra panelGroupLayout with layout="vertical" with the padding defined on it, inside of the outer layout="scroll" panelGroupLayout, will be required. In a stretching area, you may need to wrap a component inside of a panelStretchLayout with spacers in its top, start, end, and bottom facets for the padding.

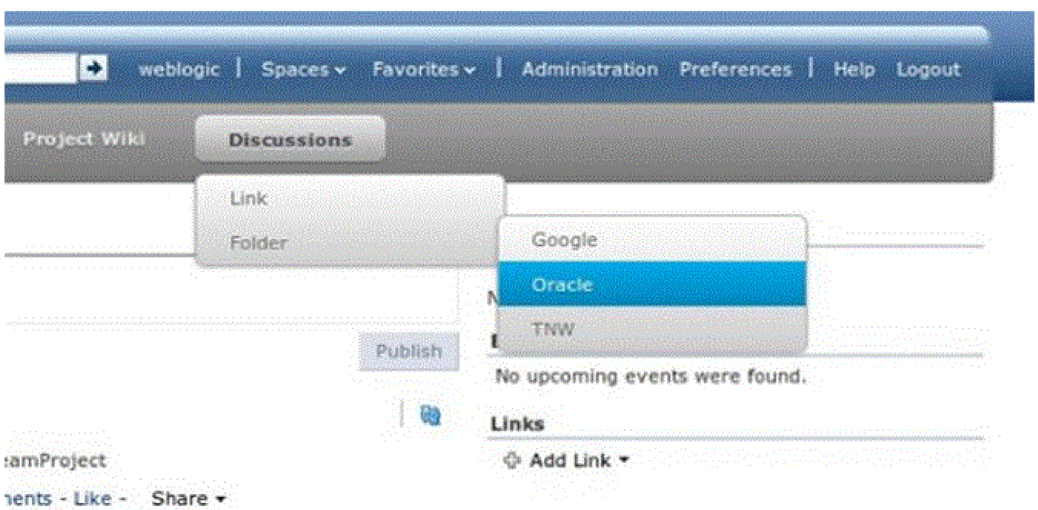
10.4 Tips on Defining Skins

When skinning WebCenter Portal: Spaces we can look at it from coarse-grain and fine-grain standpoint. At the coarse-grain level many large elements on the page like the background and the center of the page can use very basic styling techniques to impart a look and feel to particular corporate brand with very little effort. At the fine-grain level we can apply the styling to specific components and controls within the page. The most efficient way to develop your skin is to start by defining the coarse-grain elements and then use fine-grain styling to tune your overall look and feel to be inline with your corporate brand.

In many cases a hybrid model of styling works very well. Taking the coarse-grained elements (page background, main portion of the body, etc) and using traditional CSS approaches with those, but then getting specific using the ADF skinning, will work together to generate the overall appearance for WebCenter Portal: Spaces.

An example of a hybrid approach would be using technology in WebCenter Portal: Spaces to generate a menu that uses unordered lists and list items, then applying traditional CSS to them. Even though you are benefiting from WebCenter Portal: Spaces's navigation models, you are not doing traditional ADF skinning – but instead using standard CSS.

Figure 10–2 Hybrid Example



The CSS navigation pictured in Figure 10–2 uses expression language that WebCenter Portal: Spaces provides to place the various items within the navigation into the markup that WebCenter Portal: Spaces renders for the client. We can then apply coarse-grained styling that uses traditional CSS techniques to style our menu.

Expression Language (EL) allows you to access the various objects for navigation within your template design. Looping in EL is simple and coding is done inline with the page template. You can mix regular HTML directly into the looping markup.

10.4.1 Externalizing Static Assets

When using coarse-grained techniques in addition to ADF styling, it is often helpful to hold various styling assets outside of WebCenter Portal: Spaces. To do this we can use WebCenter Content to manage all of the unstructured assets for WebCenter Portal: Spaces. They can include things like CSS and images that we want manage within our environment and provides revision control and workflow. This is a best practice if you want to allow design teams to access and work with WebCenter Portal: Spaces without involving the development team for each and every change

10.5 Optimizing WebCenter Portals for Mobile Devices

Responsive Web Design allows Web pages to flexibly adapt to different form factors. It has caught fire in the Web world as one approach to delivering Web content to desktop browsers, tablets, and smart phones.

These techniques will enable you rapidly go from HTML/CSS markup to a WebCenter Portal with similar look and feel. You will also improve the experience of WebCenter Portal: Spaces when viewed from mobile devices.

To make WebCenter Portal: Spaces accessible via smart phones and tablets you can take several approaches:

- The simplest solution is to leverage your existing Spaces application with a browser-based option that requires no changes other than ensuring that WebCenter Portal: Spaces renders within native browsers of devices. However, this solution might not provide the best user experience.
- You can also leverage your existing Spaces application by generating HTML based on device profiles, configuring device-specific templates and pages. This solution might provide a slightly better user experience.
- For the best user experience, you can create native applications developed using ADF Mobile or native iOS or Android SDK. Although this provides the best user experience, it also requires more up-front development time and more support.

You can use adaptive programming techniques, designing applications to adjust to the available viewport.

When you design your Spaces application, design for a tablet, then scale up the design for the desktop. You should create a separate design for smart phones. Achieve these designs through page templates.

The two most important things to do when designing for mobile devices are:

- Set the `viewport` metatag, which causes mobile browsers to set a good initial zoom.

  Add the following fragment to your page template:

  ```
  <f:verbatim>
       <![CDATA[
            <script type="text/javascript">
                 var metaTag = document.createElement("meta");
                 metaTag.name = "viewport"’
                 metaTag.content = "width=device-width, initial-scale=1.0";
                 document.getElementsByTagName(’head’)[0].appendChild(metaTag);
            </script>
       ]]>
  </f:verbatim>
  ```

- Set `max-width` on images, which causes images to fit nicely on mobile browsers.

Add the following code to your CSS:

```
img, object {
     max-width: 100%;
}
```

ADF skins can work with portlets to achieve a common look and feel, but they insert a lot of styles into your HTML, so make sure to create a "reset" skin and use the -tr-inhibit property.

Your Reset skin should look like the following:

```
body {
     color: inherit;
     font: inherit;
}
af|document {
     -tr-inhibit: all;
}
af|commandLink {
     -tr-inhibit: all;
}
af|goLink {
     -tr-inhibit: all;
}
af|inputText::content {
     font: inherit;
}
```

Set the Reset skin to inherit settings from V1.2 ADF skins as shown in Figure 10–3.

Figure 10–3 Reset Skin Inheritance Setting

CSS3 media queries allow you to write CSS rules specifically for certain situations, such as adapting to small screens or adjusting for orientation. Here is an example of a CSS3 media query:

```
@media only screen and (max-width: 480px) {
     #content {
          margin: 0;
     }

     #navbarright {
          display: none;
     }
}
```

ADF Rich Faces provides the following mobile support:

- Supports iPad
- DVT components render via HTML
- Touch gesture support
- Page size reduced by up to 20%

Although adaptive techniques allows web and tablet design to work, you need to refine your design for phones. Focus on specific smart phone use cases. Build a separate site and separate templates, then build in code to detect smart phones and redirect them to the appropriate design.

Here is an example of a simple JavaScript redirect that can be added to WebCenter Portal: Spaces's index.html:

```
<script>
     car Browser = navigator.userAgent;

     if (Browser.indexOf('iPad') > 0)
     {
          location.replace('http://<host>/CustomerAccount/faces/pages_home');
     }
     else if (Browser.indexOf('iPhone') > 0)
     {
          location.replace('http://<host>/CustomerAccount/faces/PhonePage.jspx');
     }
     else {
          location.replace('http://<host>/CustomerAccount/faces/pages_home');
     }
</script>
```

Here is an example of a manual redirect within the application that displays a message providing a link to the mobile version of your Spaces application's welcome page:

```
#{requestContext.agent.platformName=='windows' ? '' :
'Click <A HREF="http://<host>/myApp/faces/PhoneWelcome.jspx">here</A> to view the
mobile site.' }
```

Here is an example of a redirect within the application that automatically redirects a mobile device to the mobile version of your Spaces application:

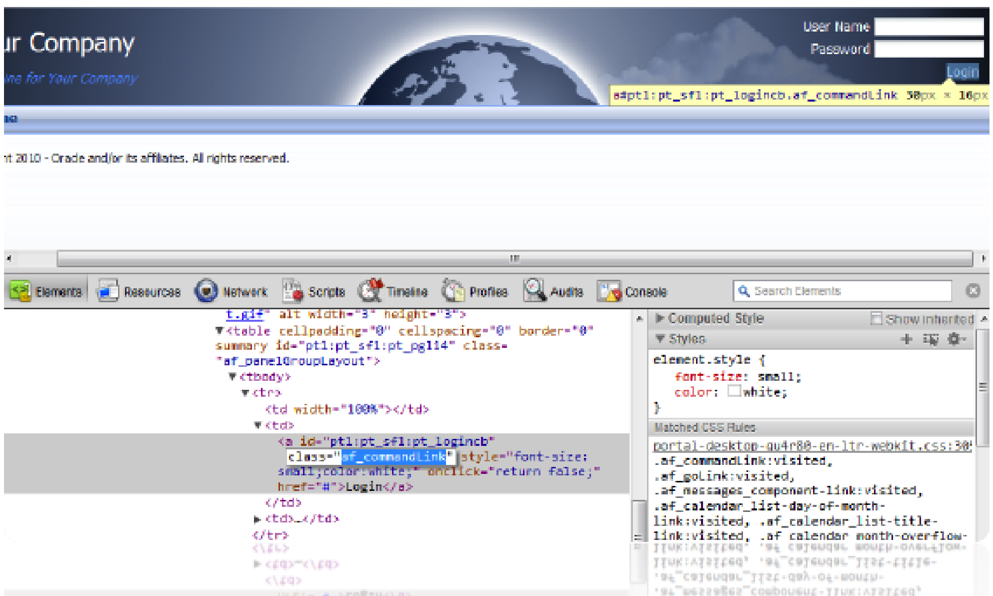
```
#{requestContext.agent.platformName=='windows' ? '' :
'<META HTTP-EQUIV="Refresh" CONTENT="0;
URL=http://<host>/myApp/faces/PhoneWelcome.jspx">' }
```

10.6 Useful Design Tools

Using visualization and inspection features in chrome and Firefox you are able to work very quickly through the CSS needed to style your work. In addition, CSS3 is very powerful for providing visualizations that previously required images to achieve – like drop shadows and gradients; you can use a CSS3 generator to expedite this type of design. Finally, using something like JQuery we are able to actually manipulate the Document Object Model to achieve any change using client-side technology.

Figure 10–4 shows an example of inspection within Google Chrome. As we hover over the login link in the upper right-hand corner, we are able to get a good sense of which styles are being applied to this particular element of the page. This makes it easy to go back and adjust our skin for a particular component. This is an example of “fine-grained” skinning.

Figure 10–4 Google Chrome Inspection



11

Working with the Resources that Compose a Portal or Community

Out-of-the-box, Spaces provides a range of built-in resources that you can use to define and enrich your application and spaces. If these resources do not meet your specific requirements, you can create your own custom resources.

This chapter provides an introduction to Spaces resources and describes how you can create and manage them. It includes the following sections:

- Section 11.1, "What You Should Know About Resources"
- Section 11.2, "Creating Resources"
- Section 11.3, "Editing Resources"
- Section 11.4, "Managing Resources"
- Section 11.5, "Using JDeveloper to Build Resources for the Spaces Application"

Note: For detailed information about a particular resource, refer to the resource-specific chapter listed in Table 11–1.

11.1 What You Should Know About Resources

Though Spaces comes with an out-of-the-box application framework, it is a constantly evolving application. Users with appropriate privileges can continue to customize it by creating and applying various types of resources that define the structure, look and feel, and the content of the entire Spaces application or a particular space. Users can customize Spaces without redeploying resources or restarting the application.

This section provides an overview of the various resources and the permissions required to work with them, and describes how you can access resources. It includes the following subsections:

- Section 11.1.1, "Introducing Resources"
- Section 11.1.2, "Understanding Application-Level and Space-Level Resources"
- Section 11.1.3, "Permissions Required to Work with Resources"
- Section 11.1.4, "Accessing Resources"
- Section 11.1.5, "Viewing Information About a Resource"

11.1.1 Introducing Resources

Spaces categorizes resources under the following categories: Structure, Look and Layout, and Mashups. Figure 11–4 shows the various types of resources available under each of these categories.

Figure 11–1 Resources Available in Spaces

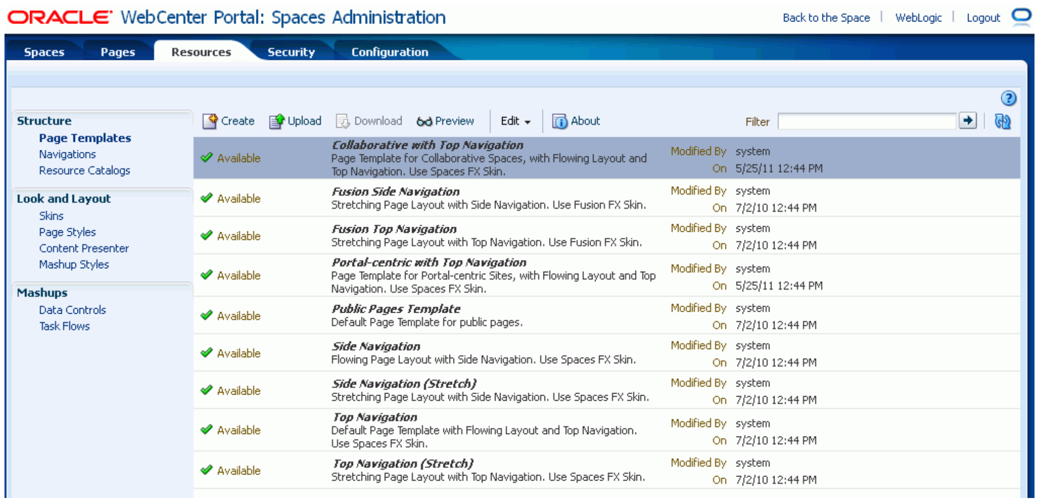


Table 11–1 describes the various types of resources, and provides links to the chapters where you can find more information about each resource.

Table 11–1 Resources Available in Spaces

Resource	Description	Documentation
Structure	**Resources under this category help you define templates, navigation, and catalogs**	
Page Templates	Define how individual pages and groups of pages display on a user's screen.	See Chapter 13, "Working with Page Templates"
Navigations	Define how to link together information from multiple sources, such as spaces, pages, content repositories, and even external web pages.	See Chapter 12, "Working with Navigation"
Resource Catalogs	Define the components and connections that users can add to their pages, page templates, and task flows.	See Chapter 16, "Working with Resource Catalogs"
Look and Layout	**Resources under this category help you define the appearance and layout**	
Skins	Define the appearance and look and feel, including colors and fonts, of a specific space or the entire application.	See Chapter 14, "Working with Skins"
Page Styles	Define the layout of a newly created page, and may also dictate the type of content the page supports.	See Chapter 15, "Working with Page Styles"
Content Presenter	Manage Content Presenter templates for presenting content.	See Chapter 42, "Publishing Content Using Content Presenter"

Table 11–1 (Cont.) Resources Available in Spaces

Resource	Description	Documentation
Mashup Styles	Manage the templates available for creating task flows.	See Section 29.3.4, "Managing Mashup Styles"
Mashups	**Resources under this category help you define task flows and data controls**	
Data Controls	Create and manage data controls, which connect to and read data from external repositories, particularly for use in business mashups. Spaces does not provide any built-in data controls.	See Section 29.2, "Creating and Managing Data Controls"
Task Flows	Create and manage task flows based on a selected mashup style. Spaces does not provide any built-in task flows.	See Section 29.3, "Creating and Managing Task Flows"

11.1.2 Understanding Application-Level and Space-Level Resources

Out-of-the-box, Spaces provides various built-in resources at the application level and the space level (Home spaces or any other spaces). You cannot modify or download built-in resources.

To meet your business requirements, you can create custom resources at the application level or at the space level. At both these levels, the resources available and their functionality are the same. The difference between application- and space-level resources is that of scope:

- Application-level resources are available for use to all spaces, unless a space has been specifically excluded.
- Space-level resources are available for use only in the space in which they are created.

By default, application-level resource settings, such as the page template, skin, Resource Catalog, and navigation model, are applied to all spaces. However, in a space, you can choose to use the default application-level resource settings or specify your own resource settings. If your space uses application-level settings, any changes to an application-level setting are reflected in your space too. For example, consider that your application uses the `Fusion FX` skin, and there are two spaces in your application, `SpaceA` and `SpaceB`. By default, both your spaces will use the `Fusion FX` skin. Consider that you configure the application to use the skin named `Dew`, and `SpaceB` to use the `Mist` skin. Now, `SpaceA`, which is still using an application-level setting for its skin, is automatically updated to use the `Dew` skin; however `SpaceB` continues to use `Mist`.

When you create and publish a custom, application-level resource, it automatically becomes available to all spaces. However, an application-level resource can be edited only at the application level.

11.1.3 Permissions Required to Work with Resources

To create and manage resources, you require appropriate application-level and space-level permissions.

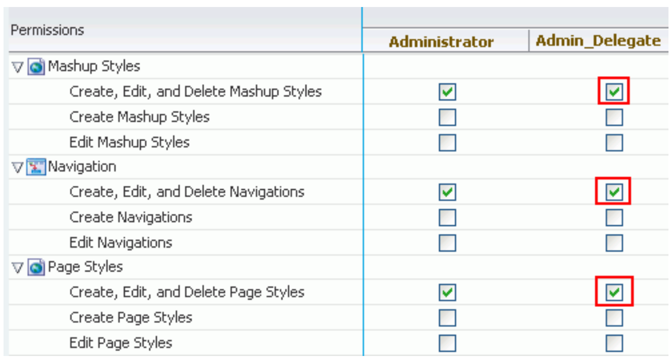
To create and manage application-level resources, you must be a Spaces administrator. Or, you must have either of the following permissions:

- `Application-Manage All` (Figure 11–2)

- `Application-Manage Configuration` and the permission to create, edit, and delete the required resource. For example, the `Create, Edit, and Delete Page Styles` permission for page styles (Figure 11–3).

Figure 11–2 Manage All Permission for Application

Figure 11–3 Permissions Required to Manage Resources at the Application Level



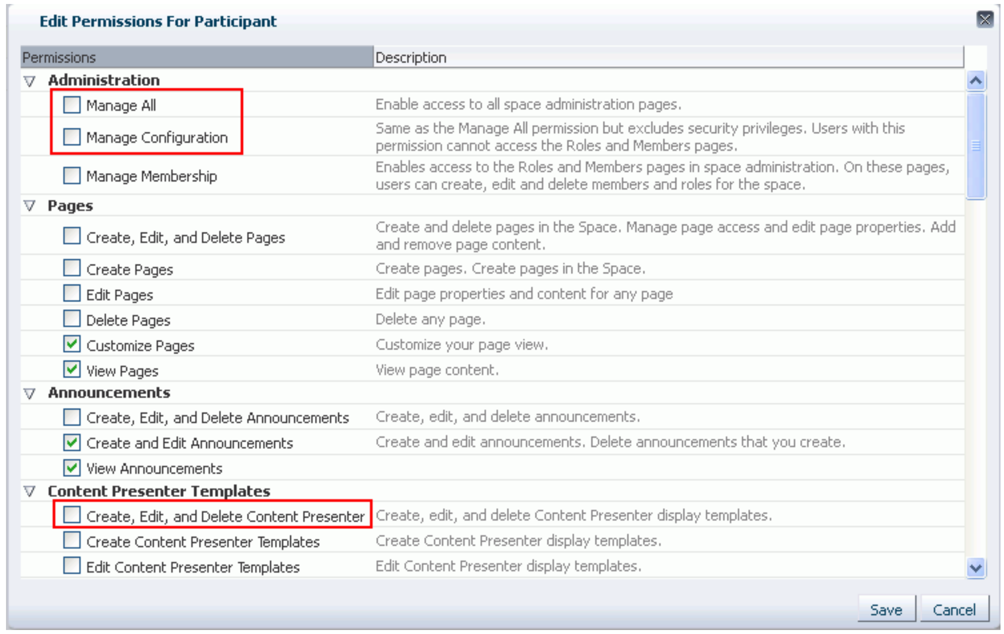
To create and manage a resource for a particular space, you must be granted the following permissions:

- Standard Permission Model: You must be granted the `Resources-Create, Edit, and Delete Resources` (Figure 11–4) and either `Manage All` or `Manage Configuration` for space Administration (Figure 11–5).

Figure 11–4 Role with the Create, Edit, and Delete Resources Permission for a Space

- Advanced Permission Model: You must be granted the permission to create, edit, and delete the desired resource. For example, you require the `Create, Edit, and Delete Content Presenter` permission to create and manage content presenter templates. You must also be granted either `Manage All` or `Manage Configuration` for space Administration (Figure 11–5).

Figure 11–5 Permissions Required for Creating Content Presenter Templates in a Space



11.1.4 Accessing Resources

You use the **Resources** page to manage resources. This section describes how to access resources in your application and in a specific space. It includes the following subsections:

- Section 11.1.4.1, "Accessing Application-Level Resources"
- Section 11.1.4.2, "Accessing Space-Level Resources"

11.1.4.1 Accessing Application-Level Resources

To access the application-level **Resources** page:

1. Log on to Spaces with administrative privileges.
2. After you log on as the application administrator, you can access the **Resources** page in either of the following ways:
   - Use the following URL:

     http://*host*:*port*/webcenter/spaces/admin/resources

     Where, *host* and *port* refer to the host name and the port number of the server where the Spaces application is deployed.

     See Also: For more information about Spaces user interface URLs, see Appendix A, "Spaces User Interface URLs."

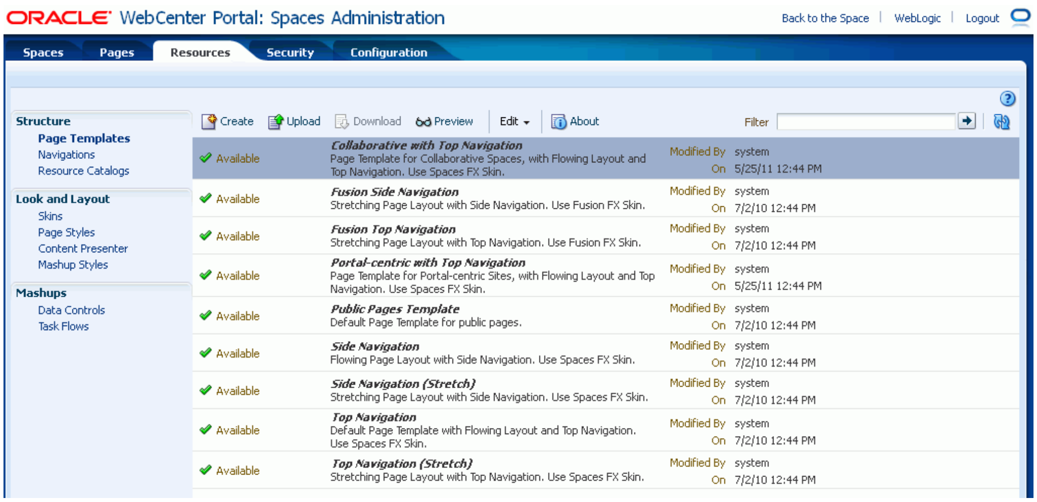
   - Click the **Administration** link (Figure 11–6). If you use this option, proceed to step 3.

Figure 11–6 Administration Link

3. In SpacesAdministration, click the **Resources** tab.

   The application-level **Resources** page opens, as shown in Figure 11–7, also known as the *Resource Manager*.

Figure 11–7 Application-Level Resources Page



11.1.4.2 Accessing Space-Level Resources

To access the **Resources** page of a space:

1. Log on to Spaces with space moderator privileges.
2. You can access the space's **Resources** page in either of the following ways:
   - Use the following URL:

     `http://host:port/webcenter/spaces/spaceName/admin/resources`

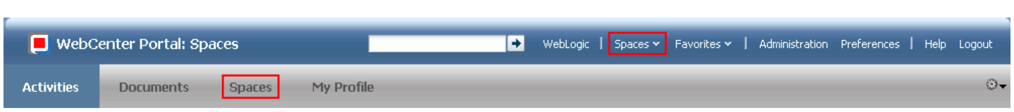
     Where, `host:port` refer to the host name and the port number of the server where the Spaces application is deployed, and `spaceName` refers to the name of the space whose resources you want to access.

     See Also: For more information about the Spaces application's user interface URLs, see Appendix A, "Spaces User Interface URLs."

   - Use the Spaces navigation. For details, proceed to step 3.
3. In the Home space, display the **Spaces** page.

   Tip: The way you access this page depends on the page template in use. For example, in a top navigation template, you may access it through a **Spaces** menu (Figure 11–8).

Figure 11–8 Accessing a Space

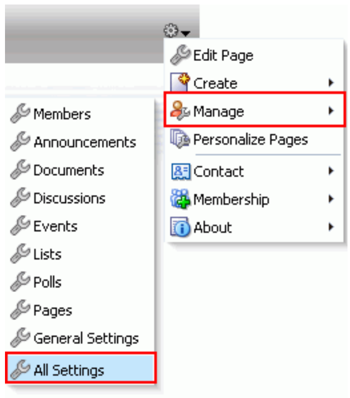


4. On the **Spaces** page, select the required space.
5. Display the space administration page.

Tip: The way you access the space administration pages depends on the page template in use. For example, in a top navigation template, you may access space administration pages through a **Manage** menu (Figure 11–9).

You can also navigate to these pages using the direct URL provided in Section A.5, "User Interface URLs for Space Pages."

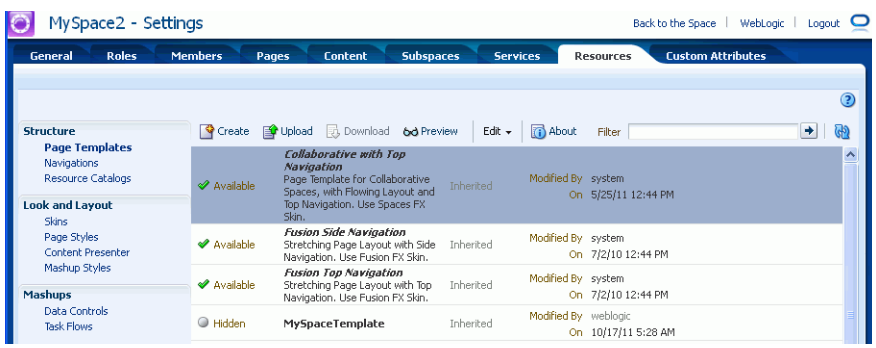
Figure 11–9 Manage Menu in a Top Navigation Template



6. Click the **Resources** tab.

   The **Resources** page for the selected space displays, as shown in Figure 11–10, also known as the *Resource Manager*.

Figure 11–10 Resources Page of a Space



11.1.5 Viewing Information About a Resource

Each resource has an associated About dialog that summarizes useful information about it. For information about the properties displayed in the About dialog, see Section 11.4.2.1, "What You Should Know About a Resource's Properties."

You cannot edit the properties displayed in the About dialog of a resource.

To access the About dialog of a resource:

1. Navigate to the **Resources** page of the application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. In the navigation panel on the left, select the resource type.
3. From the list of resources displayed on the right, select the resource whose details you want to view.

4. On the menu bar, click **About**.

   The About dialog displays, showing the properties related to the selected resource (Figure 11–11).

Figure 11–11 About Dialog of a Resource

11.2 Creating Resources

This section includes the following subsections:

- Section 11.2.1, "What You Should Know About Resource Creation"
- Section 11.2.2, "Creating a Resource"

11.2.1 What You Should Know About Resource Creation

In Spaces, you can create certain resources from scratch, and there are certain resources that you can create only by making a copy of an existing resource. For example, you can create a task flow from scratch, but you can create a skin only by making a copy of an existing skin. Further, there are certain resources, such as Content Presenter templates, that Spaces restricts you from creating.

Table 11–1 describes the support available for creating various resources in Spaces.

Table 11–2 Support for Creating Resources in Spaces

Resource	Can You Create the Resource in Spaces?	How can the Resource be Created?
Page Templates	Yes	Only by extending another page template
Navigations	Yes	From scratch or by extending another navigation resource
Resource Catalogs	Yes	From scratch or by extending another Resource Catalog
Skins	Yes	Only by making a copy of another skin
Page Styles	No	(Not applicable)

Table 11–2 (Cont.) Support for Creating Resources in Spaces

Resource	Can You Create the Resource in Spaces?	How can the Resource be Created?
Content Presenter templates	No	(Not applicable)
Mashup styles	No	(Not applicable)
Data Controls	Yes	Only from scratch
Task flows	Yes	Only from scratch

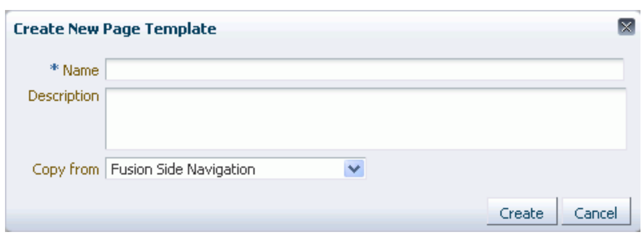
11.2.2 Creating a Resource

To create a resource in Spaces:

> **Note:** The procedure for creating a data control is different than other resources. For information about how to create a data control, see Chapter 29, "Creating Business Mashups."

1. Navigate to the **Resources** page of your application or the space in which you want to create a resource, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, select the desired type of resource.
3. On the menu bar, click **Create**.
4. In the Create dialog, in the **Name** field, enter the name of the resource.

Figure 11–12 Creating a Resource



5. In the **Description** field, enter a description of the resource.
6. From the **Copy from** list, select the existing resource that you want to extend for creating a new resource.

> **Note:** The **Copy From** list is available only for page template, navigation, Resource Catalog, and skin resources. It is not available for a data control or task flow resource.
>
> For a task flow resource, you need to select the page layout. For information, see Section 29.3.1, "Creating a Task Flow."

7. Click **Create**.

   The newly created resource is listed on the Resources page. The gray icon next to a resource indicates that it is not yet published and hence not available to users for use. For information about publishing resources, see Section 11.4.3, "Showing and Hiding Resources."

11.3 Editing Resources

This section includes the following sections:

- Section 11.3.1, "What You Should Know about Resource Editing"
- Section 11.3.2, "Editing the Source Code of a Resource"
- Section 11.3.3, "Editing a Resource by Using the Edit Dialog"

11.3.1 What You Should Know about Resource Editing

Spaces enables you to edit custom resources. It supports two types of resource editing:

- Simple editing—provides a simple means of editing a resource's basic settings. Use the Edit dialog to perform simple editing.
- Source editing—enables you to work with the source code of a resource. Use the Edit Source dialog to perform source editing.

  You may want to edit a resource's source file to make advanced edits to its code without having to download the file, edit it in JDeveloper, and upload it back into the Spaces application. You can even use the Edit Source option to create a resource from the beginning—by creating a resource and then replacing its default source code with your own original code. Note, however, that, due to the heavy hand-coding requirement, this scenario is not recommended.

You cannot edit built-in resources. If you want to modify a built-in resource, consider creating a copy of the resource and then editing the copy according to your preferences.

Oracle WebCenter Portal supports round-trip development of resources. To get enhanced functionality for your resources, you can download your resource, edit it in JDeveloper, and then upload it back into the Spaces application. For information, see Section 11.5, "Using JDeveloper to Build Resources for the Spaces Application."

11.3.2 Editing the Source Code of a Resource

Use the Edit Source dialog to get more control over resource editing at runtime. You can edit the underlying source code of any custom resource except data controls. Changes made to a resource are saved to the MDS, and are made available immediately.

To edit the source code of a resource:

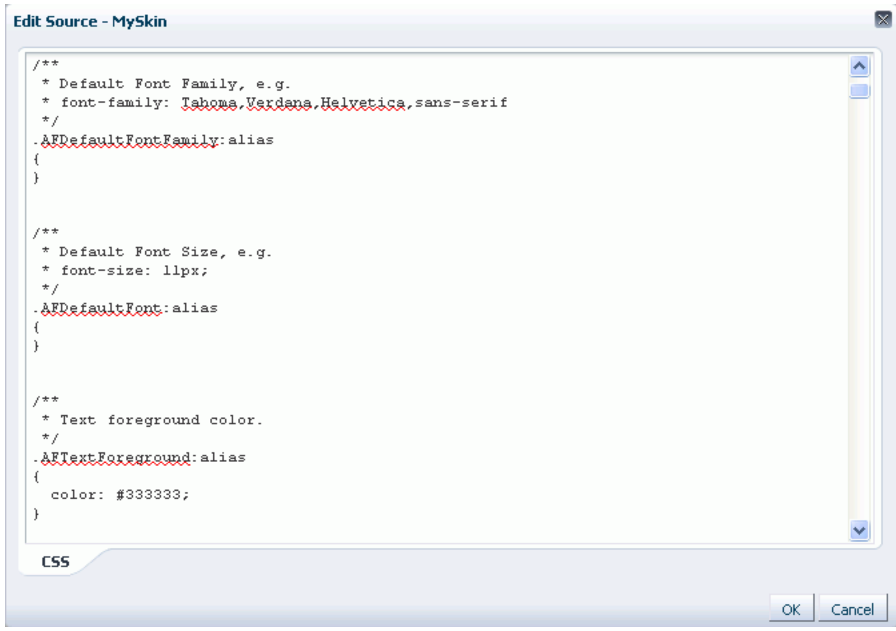
1. Navigate to the **Resources** page of your application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. On the **Resources** page, from the navigation panel on the left, select the desired type of resource.
3. From the list of resources displayed on the right, select the resource whose code you want to edit.
4. From the **Edit** menu, select **Edit Source**.

   The Edit Source dialog displays the resource definition.
5. Edit the code as required.

   The XML syntax in the code is validated and an error message is displayed if you miss any tags or add them incorrectly. Validation is not performed for non-XML files, such as a CSS file.

Figure 11–13 shows the sample source code of a skin's CSS file.

Figure 11–13 Editing the Source Code of a Resource



6. Click **OK**.

11.3.3 Editing a Resource by Using the Edit Dialog

Use the Edit dialog to make simple changes to your resource. The properties displayed in the Edit dialog vary from resource to resource. For information about editing a resource, refer to the resource-specific chapter listed in Table 11–1.

11.4 Managing Resources

This section includes the following subsections:

- Section 11.4.1, "Copying a Resource"
- Section 11.4.2, "Setting Properties on a Resource"
- Section 11.4.3, "Showing and Hiding Resources"
- Section 11.4.4, "Setting Security for a Resource"
- Section 11.4.5, "Deleting a Resource"
- Section 11.4.6, "Previewing a Resource"
- Section 11.4.7, "Querying for a Resource Through the Expression Builder"
- Section 11.4.8, "Applying Resources Dynamically Using EL Expressions"

11.4.1 Copying a Resource

Spaces enables you to create a copy of a resource. This feature is useful when you want to:

- Create a backup of a resource.

- Update a resource while keeping the original in use.
- Use a built-in resource as a sample to build a new resource. Built-in resources cannot be edited, but you can create a copy of a resource to use it as a starting point for further refinement.

You can create a copy of all types of resources except Content Presenter templates. When you create a copy of a resource, the copy is marked as hidden.

To make a copy of a resource:

1. Navigate to the **Resources** page of your application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, select the desired type of resource.
3. From the list of resources displayed on the right, select the resource whose copy you want to create.
4. From the **Edit** menu, select **Copy**.
5. In the Copy dialog, in the **Display Name** field, enter a name for the resource copy (Figure 11–14).

Figure 11–14 Copying a Resource

6. In the **Description** field, enter a description of the resource copy.
7. Click **OK**.

11.4.2 Setting Properties on a Resource

Each resource has certain associated properties that define its display properties, availability, and attributes. This section describes how to access and modify these properties for custom resources. It includes the following sections:

- Section 11.4.2.1, "What You Should Know About a Resource's Properties"
- Section 11.4.2.2, "Accessing the Edit Properties Dialog of a Resource"
- Section 11.4.2.3, "Renaming, Describing, and Categorizing a Resource"
- Section 11.4.2.4, "Associating an Icon with a Resource"
- Section 11.4.2.5, "Setting the Availability of an Application-Level Resource in Other Spaces"
- Section 11.4.2.6, "Working with the Attributes of a Resource"

11.4.2.1 What You Should Know About a Resource's Properties

Use the Edit Properties dialog to edit the properties associated with custom resources. The Edit Properties dialog contains these sections: General, Exclude Resource Usage, and Attributes.

General Section

The General section displays details such as the resource's name, location, and internal ID. These properties are common across all resources.

Table 11–3 describes the properties listed in the General section.

Table 11–3 Properties in the General Section of the Edit Properties Dialog

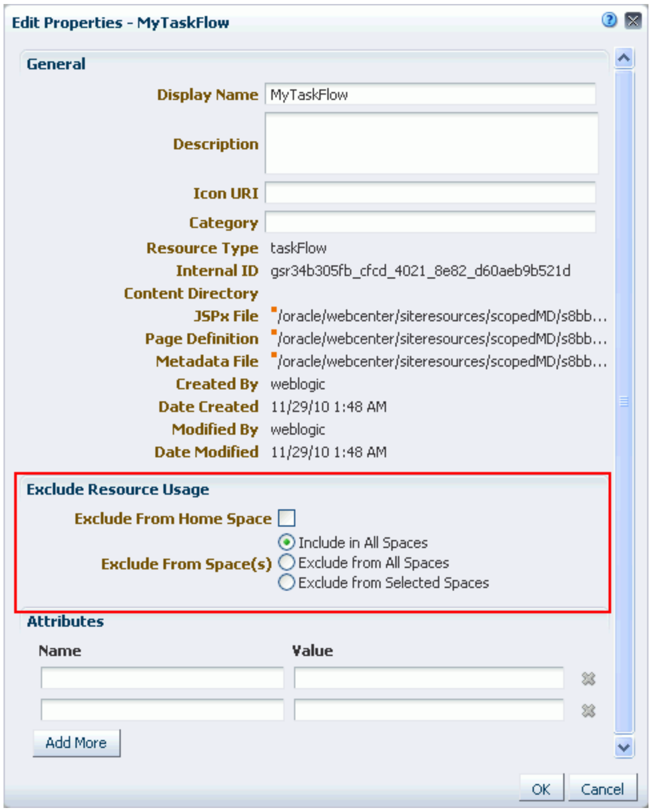
Property	Description
Display Name	Specify the name of a resource.
Description	Enter the description of a resource.
Icon URI	Specify the URI of the icon that you want to associate with a resource.
Category	Specify the category, like Sales, that you want to associate with a resource.
Resource Type	Displays the type of the resource. For example, for a page style resource, the resource type is `pageStyle`.
Internal ID	Displays the unique internal identification number assigned to a resource in Spaces.
Content Directory	Displays the path where dependent objects of a resource, such as images, JavaScripts, stylesheets, and HTML files, are stored on the managed server where the Spaces application is deployed.
JSPx File	Displays the path to the `.jspx` file of a resource.
Page Definition	Displays the path where the page definition (`.xml` file) of a resource is stored on the Spaces server. Page definitions are used for page templates, task flows, page styles, and mashup styles.
Metadata File	Displays the path where metadata files, if any, of a resource are stored on the Spaces server.
Created By	Displays the name of the user who created a resource.
Date Created	Displays the date and time when a resource was created.
Modified By	Displays the name of the user who last modified the resource.
Date Modified	Displays the date and time when a resource was last modified.

Exclude Resource Usage Section

When an application-level resource is marked as available, it becomes available to all spaces and Home space. Spaces gives you the control to choose whether that resource is available in Home space and all spaces, or only in selected spaces. Use the controls in the Exclude Resource Usage section to prevent or promote the display of a selected custom resource (Figure 11–15).

You can set availability of custom resources only at the application level. The Exclude Resource Usage section is not available in Home space and spaces.

Figure 11–15 Setting Availability of a Resource in Other Spaces



Attributes Section

The **Attributes** section (Figure 11–16) lists the attributes associated with a resource. The attributes displayed in the Attributes section vary from resource to resource. For example, while a page template does not have any default attributes, skins have the following default attributes: `skinFamily`, `skinId`, and `skinExtends`.

Figure 11–16 Attributes of a Resource

Attributes determine the behavior of a resource. For example, `editPageAfterCreation` is a custom attribute of the page style resource and controls whether a newly created page opens in edit or view mode. It takes a value of `true` or `false`. When you associate this attribute with a particular page style, every time a user creates a page based on the selected style, the attribute value is considered and the page behaves accordingly.

You can add, edit, or delete attributes as described in Section 11.4.2.6, "Working with the Attributes of a Resource." For information about resource-specific attributes, if any, refer to the relevant chapter listed in Table 11–1.

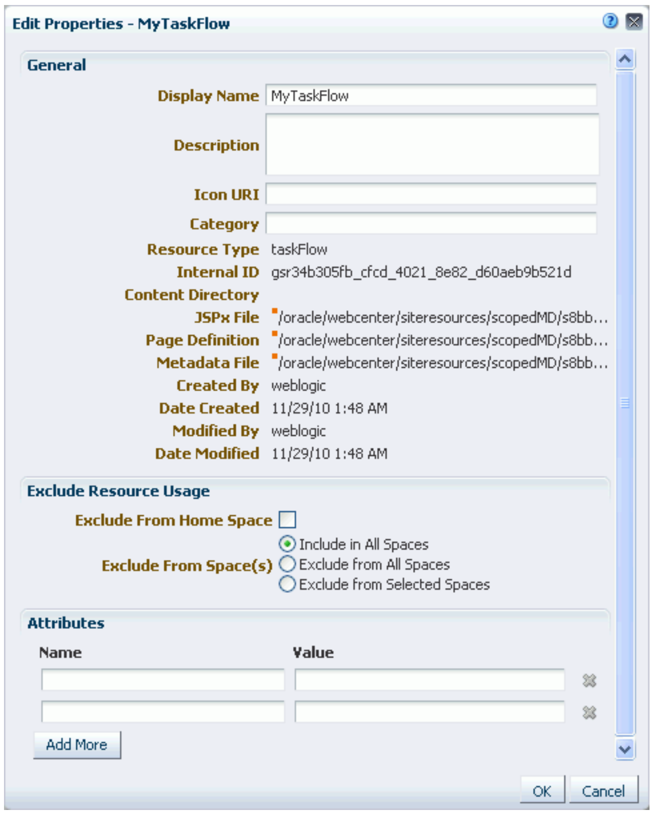
11.4.2.2 Accessing the Edit Properties Dialog of a Resource

To access the Edit Properties dialog of a resource:

1. Navigate to the **Resources** page of your application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. From the left navigation panel, select the type of resource you want to edit.
3. From the list displayed on the right, select the relevant resource, and from the **Edit** menu, select **Edit Properties**.

   The Edit Properties dialog opens (Figure 11–17).

Figure 11–17 Edit Properties Dialog of a Resource



See Also: The next thing you do depends on what you want to accomplish. For more information, see:

- Section 11.4.2.3, "Renaming, Describing, and Categorizing a Resource"
- Section 11.4.2.4, "Associating an Icon with a Resource"
- Section 11.4.2.5, "Setting the Availability of an Application-Level Resource in Other Spaces"
- Section 11.4.2.6, "Working with the Attributes of a Resource"

11.4.2.3 Renaming, Describing, and Categorizing a Resource

Resources, whether built-in or custom, are sorted on the Resource page according to their display names. To maintain a well-organized set of resources, consider developing a standard naming scheme and method of description. This is not a required step, but it may be useful in identifying and clarifying your intended purpose for a given resource.

You can classify your resources into relevant groups. For example, all page styles associated with Sales could have a *sales* category. This value is available and exposed only in the Edit Properties dialog.

To provide a name, description, and category for a resource:

1. Open the Edit Properties dialog for the desired resource as described in Section 11.4.2.2, "Accessing the Edit Properties Dialog of a Resource."
2. In the **Display Name** field, edit the display name for the resource, if required.
3. Optionally, in the **Description** field, enter a description of the resource.
4. Optionally, in the **Category** field, enter a category name.
5. Click **OK** to save your changes and exit the dialog.

11.4.2.4 Associating an Icon with a Resource

You can associate an icon with a resource. In the current version of Spaces, the associated icon is visible only for page styles when you create a page using the Create dialog.

To associate an icon with a resource:

1. Open the Edit Properties dialog for the desired resource as described in Section 11.4.2.2, "Accessing the Edit Properties Dialog of a Resource."
2. In the **Icon URI** field, enter a standard URI path to the icon.

> **Note:** You can either specify an absolute URL (where the URL should also work if entered in a browser address field), or a relative URL that points to an image located somewhere in Spaces. To store an image in Spaces, you must upload the required file using the Documents service, as described in Section 43.8.1, "Uploading Files." You can then obtain the image's URL by copying the Download URL value as described in Section 43.27.1, "Retrieving the URL for a Folder or File."

3. Click **OK** to save your changes and exit the dialog.

11.4.2.5 Setting the Availability of an Application-Level Resource in Other Spaces

Use the Exclude Resource Usage section of the Edit Properties section to set the availability of an application-level resource in a Home space or a space. The Exclude Resource Usage section is available only at the application level, and not in Home space or other spaces.

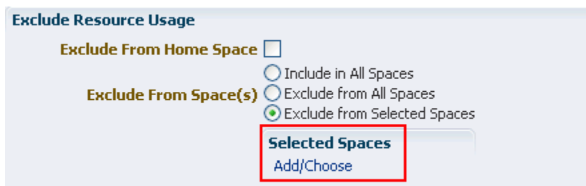
To set the availability of an application-level resource in Home space and other spaces:

1. Open the Edit Properties dialog for the desired resource as described in Section 11.4.2.2, "Accessing the Edit Properties Dialog of a Resource."
2. Under **Exclude Resource Usage**:
   - For the **Exclude From Home space** check box:
     - Select to hide the resource on the Resources page of Home spaces
     - Deselect to show the resource on the Resources page of Home spaces

- For **Exclude From Space(s)**, check box:
  - **Include in All Spaces** - to make the resource available on the Resources page of all spaces
  - **Exclude from All Spaces** - to exclude the resource from being listed on the Resources page of all spaces
  - **Exclude from Selected Spaces** - to specify the spaces on whose Resources page the resource will not be listed

    When you select this option, an **Add/Choose** link appears (Figure 11–18).

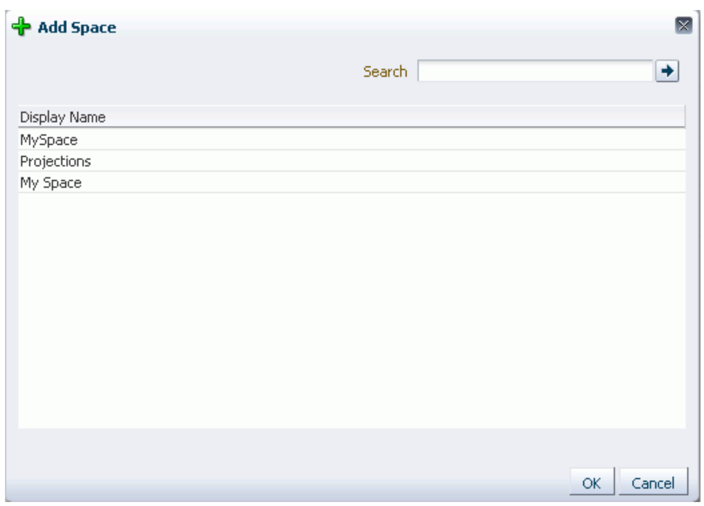
Figure 11–18 Exclude Resource Usage Section



Clicking this link displays the Add Space dialog. Select the spaces from which to exclude the resource and click **OK** (Figure 11–19).

A list of the selected spaces is displayed in the Edit Properties dialog.

Figure 11–19 Excluding a Resource from Selected Spaces



3. Click **OK** to save your changes and exit the Edit Properties dialog.

11.4.2.6 Working with the Attributes of a Resource

This section describes how to associate a custom attribute with a resource and how to remove a custom attribute. It contains the following sections:

- Section 11.4.2.6.1, "Associating an Attribute with a Resource"
- Section 11.4.2.6.2, "Deleting an Attribute of a Resource"

11.4.2.6.1 Associating an Attribute with a Resource To associate an attribute with a resource:

1. Follow the steps outlined in Section 11.4.2.2, "Accessing the Edit Properties Dialog of a Resource."
2. In the **Attributes** section, in the **Name** field, enter the attribute name (Figure 11–20).

Figure 11–20 Adding an Attribute

For information about the attributes, if any, that can be associated with a resource, refer to the resource-specific chapter listed in Table 11–1.

3. In the **Value** field, enter the value of the attribute.
4. Click **Add More** if you want to add more attributes.

   This adds a new row. You can then enter the required details in the **Name** and **Value** fields.
5. Click **OK** to save your changes and exit the dialog.

11.4.2.6.2 Deleting an Attribute of a Resource To remove an attribute associated with a resource:

1. Follow the steps outlined in Section 11.4.2.2, "Accessing the Edit Properties Dialog of a Resource."
2. In the **Attributes** section, click the **Remove** icon displayed next to the attribute you want to delete.
3. Click **OK** to save your changes and exit the dialog.

11.4.3 Showing and Hiding Resources

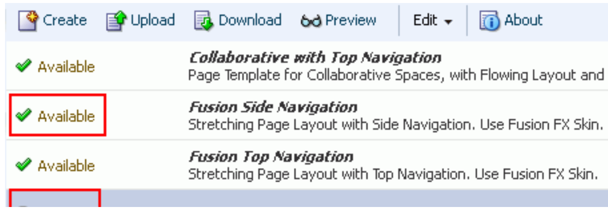
This section includes the following subsections:

- Section 11.4.3.1, "What You Should Know About Showing and Hiding Resources"
- Section 11.4.3.2, "Showing a Resource"
- Section 11.4.3.3, "Hiding a Resource"

11.4.3.1 What You Should Know About Showing and Hiding Resources

All resources, whether built-in or custom, can be marked as hidden or available. For all resources that are available for use, a green tick mark and the word "Available" appear next to the resource’s name on the Resources page. A gray icon and the word "Hidden" next to a resource’s name indicates that the resource is marked as hidden, as shown in Figure 11–21.

Figure 11–21 Showing or Hiding a Resource



When you create or upload a resource, by default the resource is marked as hidden. A hidden application-level resource is not available for selection in the resource picker in the application, spaces, or Home space. Similarly, a hidden space-level resource is not listed in the resource picker in that space. For a resource to become available in the resource picker, it must be published.

You can use a hidden resource for creating a new resource. For example, Figure 11–22 shows that the page template `MySpaceTemplate` is marked as hidden. But it is listed in the **Copy from** list when you create a new page template. Figure 11–23 shows the list of all page templates that are available for use. Note that `MyTemplate` is not listed there.

Figure 11–22 A Hidden Resource Available for Creating a New Resource

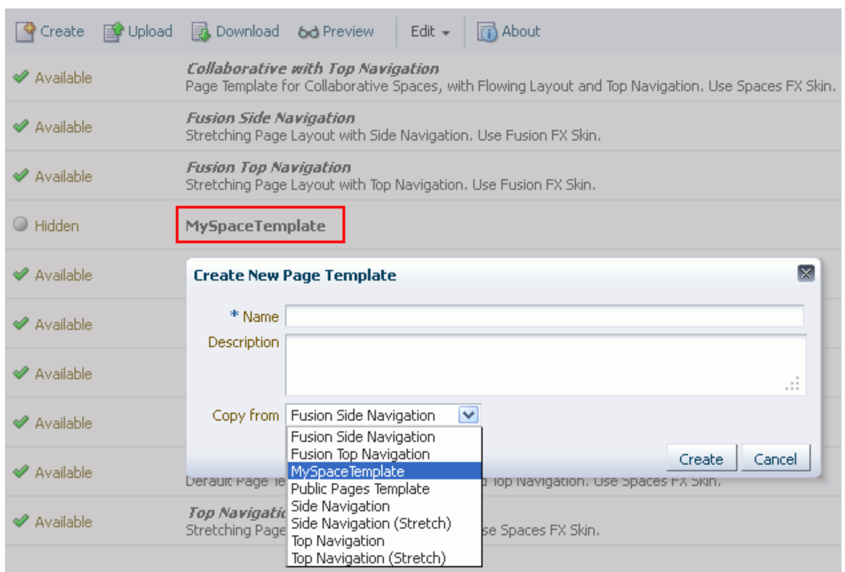
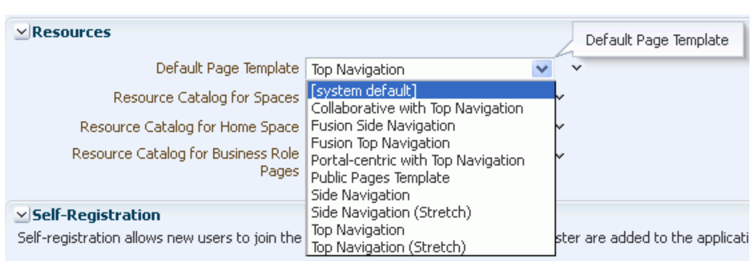


Figure 11–23 A Hidden Resource Not Listed in the Resource Picker



11.4.3.2 Showing a Resource

To mark a hidden resource as available:

1. Navigate to the **Resources** page of the application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. From the left navigation panel, select the desired type of resource.
3. From the list of resources displayed on the right, select the resource that you want to mark as available.
4. From the **Edit** menu, select **Show**.

   A green checkmark and the word "Available" appear next to the resource's name, indicating that the resource is available for use.

11.4.3.3 Hiding a Resource

To hide a resource:

1. Navigate to the **Resources** page of the application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, select the desired type of resource.
3. From the list of resources displayed on the right, select the resource that you want to hide.
4. From the **Edit** menu, select **Hide**.

   A gray icon and the word "Hidden" appear next to the resource's name, indicating that the resource is now hidden and is not available to users.

11.4.4 Setting Security for a Resource

You can control whether all users or only specific users or groups can access the custom resources that you created in the application. By default, resource access is controlled by application-level permissions (see Section 11.1.3, "Permissions Required to Work with Resources"). After you define resource-specific permissions, the permissions defined at the application or space level no longer apply.

To set access permissions for a resource:

1. Navigate to the **Resources** page of your application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, select the desired type of resource.
3. From the list of resources displayed on the right, select the resource for which you want to set access permissions.
4. From the **Edit** menu, select **Security Settings**.
5. In the Security Settings dialog, specify an access method by selecting either of the following (Figure 11–24):

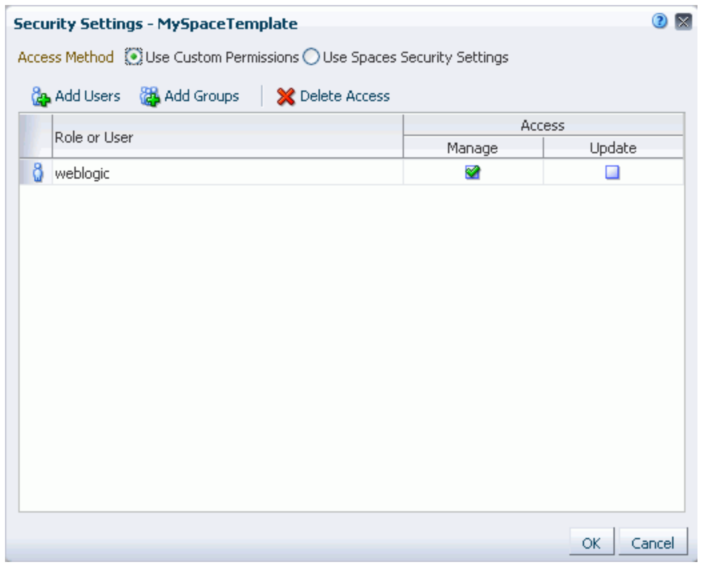
   - **Use Custom Permissions** - Select this option to define who can manage and update the selected resource. When you select this option, the other controls in the dialog become available. Proceed to step 6.

     Note: When you select **Use Custom Permissions**, ensure that at least one user or group is granted the `Manage` access.

- **Use Spaces Security Settings** - Select this option to inherit the selected resource's access settings from those defined for the application. After selecting this option, click **OK** to save your changes and exit the dialog.

  Note: Selecting **Use Spaces Security Settings** removes any custom permissions that you may have set.

Figure 11–24 Setting Security for a Resource



6. If you selected, **Use Custom Permissions**, specify the user or group to whom you want to grant resource access. In the Security Settings dialog:

   - Click **Add Users** to open a dialog that you can use to search for and select individual users available in your identity store.
   - Click **Add Groups** to open a dialog that you can use to search for and select groups of users available in your identity store.

   For tips on searching for a user or group in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."

7. For each user or user group listed in the **Role or User** column, specify the level of access you want to grant:

   - Select the **Manage** check box to grant full access on the resource. Such users can perform tasks such as edit, delete, grant access, show or hide, and the like.
   - Select the **Update** check box to grant the permission to edit the resource. Such users can edit the resource, but they cannot delete it.

Note: Since resources have their own separate security, page-level permissions do not apply to resources. For example, if a user has the `Personalize Page` permission on a page that contains a task flow with movable boxes, the minimize icons on movable boxes do not show unless the user has the `Update` or `Manage` permission on the task flow.

For information about page-level permissions, see Chapter 26, "Securing Pages and Components."

---

8. If you want to revoke permissions from any user or user group, select that entity and click **Delete Access**.
9. Click **OK**.

11.4.5 Deleting a Resource

When a resource is no longer required, you may want to remove it. In Spaces, you can delete custom resources, but not built-in resources.

Note: Before you use delete a resource, you must ensure that the resource is not in use. If you mark a resource for deletion, it will be deleted even if it is in use.

To delete a custom resource:

1. Navigate to the **Resources** page of your application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, select the desired resource type.
3. From the list of resources displayed on the right, select the resource you want to delete.
4. From the **Edit** menu, select **Delete**.
5. In the Delete confirmation dialog, click **Delete** to delete the resource.

11.4.6 Previewing a Resource

Spaces provides a means of previewing certain resources—page templates, mashup styles, and task flows. You can use the Preview option to preview a resource and make adjustments, if required.

To preview a resource:

1. Navigate to the **Resources** page of your application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. From the left navigation panel, select the desired resource type.
3. From the list of resources on the right, select the resource you want to preview.
4. Click **Preview**.

Note: The Preview option is not available for all resources. For information about a particular resource, refer to the resource-specific chapter listed in Table 11–1.

11.4.7 Querying for a Resource Through the Expression Builder

You can access any resource anywhere in Spaces through Expression Language (EL) expressions.

For example, the following EL expression returns the first template resource found with a display name `myPage`:

```
#{srmContext.resourceType['siteTemplate'].displayName['myPage'].
singleResult}
```

You must set query parameters in the format `.property['`*`value`*`']`, where `property` is the name of the resource property, for example, it can be `id` or `resourceScope`, and *`value`* is the value of that property you want to search for.

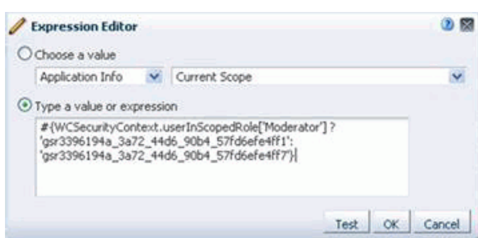
For information about EL expressions that you can use to query resources, see Section B.4.5, "EL Expressions Relevant to Resources."

11.4.8 Applying Resources Dynamically Using EL Expressions

Spaces provides a way to dynamically apply certain resources at runtime based on some criteria. For example, you can present content or shape the way content is presented by using Personalization-related ELs to select and apply a page template based on whoever is the current user.

Consider an example where you want the top-navigation page template to be displayed to space moderators, and a side-navigation page template to be displayed to other users. Figure 11–25 shows a sample EL expression that you can use in such scenario. The EL expression uses the resource IDs of the page templates.

Figure 11–25 Specifying an EL Expression for Applying a Page Template Based on User Role



Instead of using the exact resource ID of the resource that you want to apply, you can also include queries in an EL expression as shown in the following example.

```
#{WCSecurityContext.userInScopedRole['Moderator'] ?
srmContext.resourceScope['space_
name'].resourceType['siteTemplate'].displayName['Top'].singleResult.id :
 srmContext.resourceScope['space_
name'].resourceType['siteTemplate'].displayName['Side'].singleResult.id}
```

Figure 11–26 shows how a space may appear to a space Moderator, and Figure 11–27 shows how the space may appear to other users.

Figure 11–26 A Page Template Dynamically Applied for Space Moderators

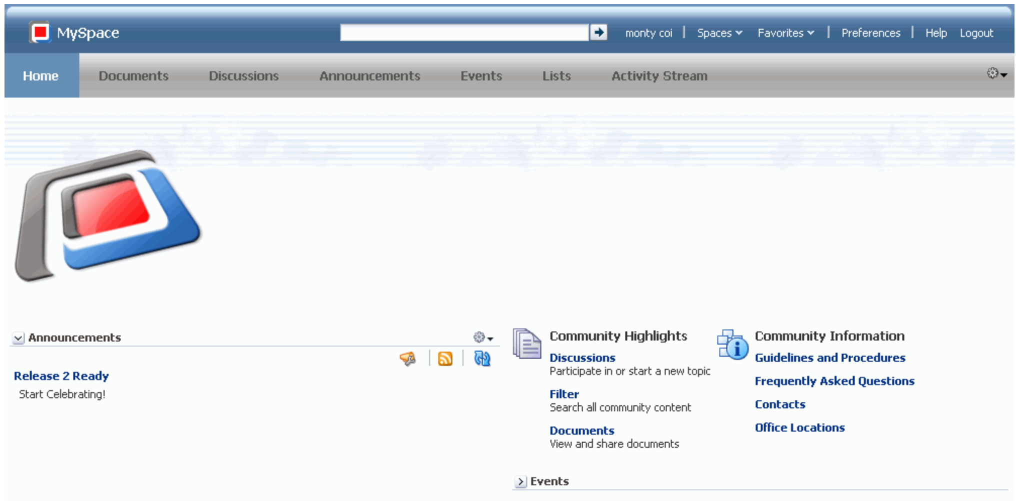
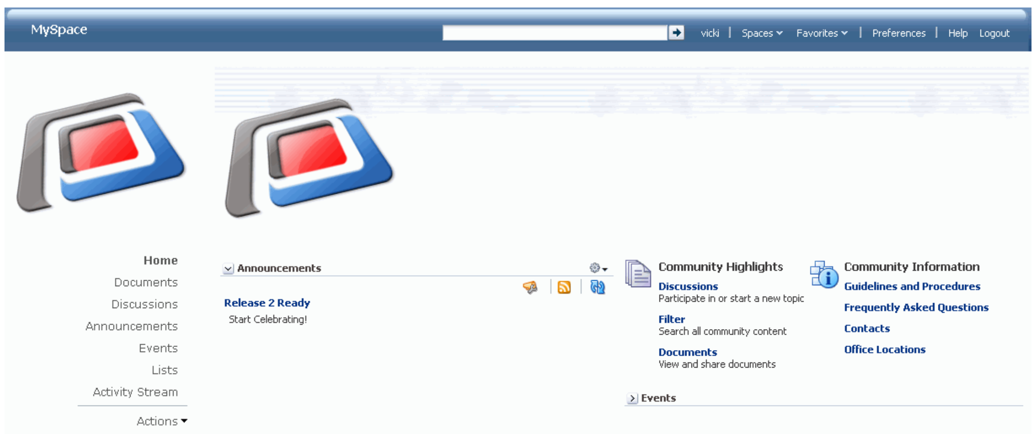


Figure 11–27 A Page Template Dynamically Applied for Other Users



You can also use EL expressions to execute personalization server scenarios, as described in Appendix B.4.11, "EL Expressions Relevant to the Personalization Conductor." For information about common EL expressions that you can use, see Appendix B, "Expression Language (EL) Expressions."

To dynamically apply a resource at runtime:

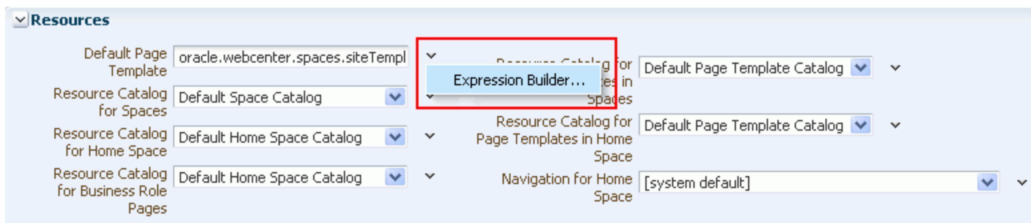
1. Note down the Internal ID of the required resource from its About dialog. For information about how to access this dialog, see Section 11.1.5, "Viewing Information About a Resource."

2. Access the Spaces Administration page as described in Section 4.1, "Accessing the Spaces Administration Page," and open the **General** sub page of the **Configuration** page. Or, access a specific space's administration page as described in Section 53.3, "Accessing Space Administration Pages," and open the **General** page.

> **Tip:** You can use "pretty URLs" to navigate to the settings page:
>
> - Application-level **Configuration** page:
>
>   `http://`*`host:port`*`/webcenter/spaces/admin/general`
>
> - Space-level **General** page:
>
>   `http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/general`

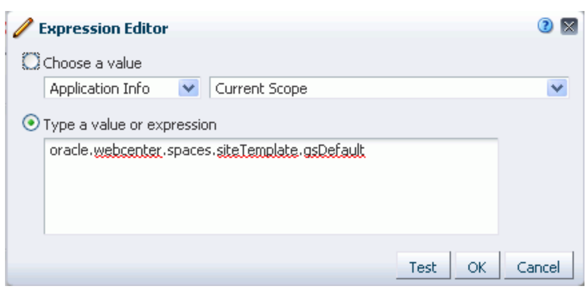
3. Click the icon next to the desired resource field, then click **Expression Builder** to open the editor.

Figure 11–28 Using the Expression Builder for a Resource



4. Select the **Type a value or expression** radio button, if not already selected.
5. Type the required expression builder statement.

Figure 11–29 Expression Editor Dialog



For example, if you want to display different page templates depending on whether the page is rendered in a browser on a Windows platform or on a mobile device, you can use the following EL expression:

```
#{requestContext.agent.platformName=='windows' ?
'gsr3396194a_3a72_44d6_90b4_57fd6efe4ff7' : 'gsr1472d17b_
8f10_4689_89fb_7431f561567f'}
```

This EL expression is an 'if-then-else' statement. The EL `requestContext.agent.platformName` retrieves the platform information. The page template IDs are the ones noted down from the About dialog.

6. Click **Apply**.

11.5 Using JDeveloper to Build Resources for the Spaces Application

This section includes the following subsections:

- Section 11.5.1, "What You Should Know About Building Resources in JDeveloper"

- Section 11.5.2, "Downloading a Resource"
- Section 11.5.3, "Uploading a Resource"

11.5.1 What You Should Know About Building Resources in JDeveloper

You may find yourself in a situation where you want to edit or create resources beyond the capabilities of Spaces. Oracle WebCenter Portal provides features for round-trip development of Spaces resources. To further enhance your existing resources, you can download them from Spaces, edit them at a really fine level of granularity in an IDE like JDeveloper, and then upload the updated resources back into the Spaces application. You can upload resources directly to Spaces from within JDeveloper or through Spaces itself.

In JDeveloper, you can also create resources from scratch for the purpose of using them in Spaces. However, you do not necessarily need to start from scratch. An efficient way is to make a copy of an existing Spaces resource and refine it further in JDeveloper without worrying about the prerequisites involved in creating it from scratch in JDeveloper. Oracle WebCenter Portal provides a special JDeveloper workspace (`DesignWebCenterSpaces.jws`) to help you develop and upload resources to Spaces. For more information about editing custom resources and uploading them into Spaces through JDeveloper, see "Developing Resources for the Spaces Application" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

When you download a resource, its configuration is saved into an export archive (`.ear` file). You can save the export archive either to your local file system or a remote server file system.

When you upload resources to Spaces:

- Existing resources, that is, resources with the same internal ID, are overwritten.
- Space-level resources are uploaded back only into their original space. You cannot upload a space-level resource into a different space.
- Resources must be in an export archive (`.ear`) format on your local file system or a remote server

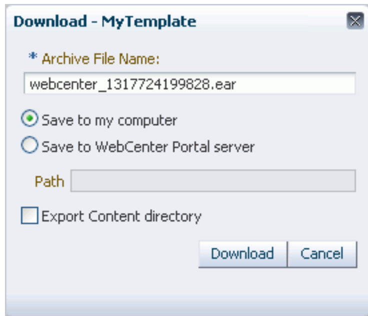
11.5.2 Downloading a Resource

To download a resource:

1. Navigate to the **Resources** page of your application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, select the desired resource type.
3. From the list of resources displayed on the right, select the resource you want to download as an EAR file.
4. Click **Download**.
5. In the Download dialog, in the **Archive File Name** field, enter the name of the export archive file.
6. In the Download dialog, specify where you want to save the export archive file. Use either of the following options (Figure 11–30):
   - **Save to my computer** - Click this if you want to save the export archive file to your local file system. Then, specify the path where you want to save the file.

- **Save to WebCenter Portal Server** - Click this to save the export archive file to a remote server file system. In the **Path** field, enter the server path.

Figure 11–30 Download Dialog



7. If the resource that you are downloading includes custom content, such as images, javascripts, stylesheets, and HTML files, you must specify whether or not you want to include such resource-specific content in the archive. To include the custom content, select the **Export Content directory** check box.

   The Spaces application stores content for all portal resources under a 'shared' directory (`oracle/webcenter/siteresources/scopedMD/shared/...`) rather than on a resource-by-resource basis. You can find out the content directory location by selecting the required resource on the **Resources** page, and clicking **About**. The location is displayed in the **Content Directory** field.

   Consider the following before exporting content directories for a resource in your archive:

   - Entire content directories are exported rather than individual files. For example, if a skin references two files (`.../shared/skins/logos/mylogo.gif` and `.../shared/skins/icons/myicon.gif`), the entire content of both directories (`/logos` and `/icons`) are exported.
   - If your Spaces installation utilizes a large number of portal resources (both at the application-level as well as by individual spaces and space templates), then the number of files stored under the `/shared` directory or its subdirectory is potentially large.
   - On upload, all files under content directories are uploaded to the target application and existing files with the same name are overwritten. While you can opt not to upload content directories on import, it is an all or nothing approach, that is, you cannot upload content specific to a particular resource or space.

   Deselect the **Export Content Directory** checkbox to exclude content under the `/shared` directory that is referenced by the portal resource.

   If you choose not to include resource content directories in the archive, your system administrator can migrate the resource content for you later on if required (using the `exportMetadata` and `importMetadata` WLST commands). For more information, see the "Exporting Spaces Resources" section in the Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal.

8. Click **Download**.

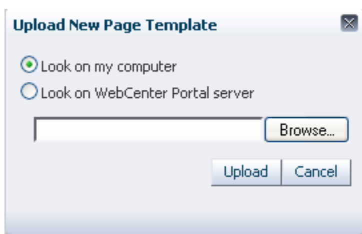
Note: Spaces administrators can download resources using the WLST command, `exportWebCenterResource`. For information, see "exportWebCenterResource" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

11.5.3 Uploading a Resource

To upload a resource in Spaces:

1. Navigate to the **Resources** page of your application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, select the desired resource type.
3. Click **Upload**.
4. In the Upload dialog, specify the location of the resource archive file. Depending on the location of your EAR file, select either of the following (Figure 11–31):
   - **Look on my computer**: Select if the archive is located on your local file system. Enter the path to the EAR file or use the **Browse** button.
   - **Look on WebCenter Portal Server**: Select if the archive is located on a remote server. Enter the path to the EAR file.

Figure 11–31 Upload Dialog



5. Click **Upload**.
6. Click **Yes** in the Confirm Replace Resource dialog.
7. If the resource that you are uploading contains custom content, such as images and stylesheets, the Overwrite Content Directory dialog displays. (Figure 11–32)
   - Click **Yes** to import all content directories in the archive and overwrite existing content directories and files (if any).
   - Click **No** to import only new files, that is, content directories and files that do not already exist on the target.

Figure 11–32 Overwriting Content Directory Files

8. Click **OK**.

> **Note:** Spaces administrators can upload resources using the WLST command, `importWebCenterResource`. For information, see "importWebCenterResource" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

12 Working with Navigation

Navigation enables the users of your portal to see what information the portal provides and to get to that information quickly and easily.

This chapter describes how to define your portal navigation model in Oracle WebCenter Portal: Spaces and how to use built-in navigation task flows to visualize that model in page templates. It includes the following sections:

- Section 12.1, "What You Should Know About Navigation"
- Section 12.2, "Building a Navigation Model"
- Section 12.3, "Rendering Navigation in Your Portal"

Portal designers with advanced navigation requirements can use development tools, such as Oracle JDeveloper, to build navigation models and then upload them to Spaces. For more information, see Section 12.2.5, "Using JDeveloper to Build Your Navigation Model."

Similarly, page template designers can use those same development tools to build the navigation UI directly into page templates and upload those templates to Spaces. For more information, see Section 12.3.3, "Using JDeveloper to Visualize Your Navigation."

For generic information about adding and editing different types of resources, see Chapter 11, "Working with the Resources that Compose a Portal or Community."

Audience

This chapter is intended for Portal designers with the application permission `Application-Navigations-Create, Edit, and Delete`.

To build navigation models for a particular space, you need the permission `space-Resources-Create, Edit, and Delete Resources` (standard permission model) or `space-Navigations-Create, Edit, and Delete Navigations` (advanced permission model).

To add navigation to page templates, you also need the appropriate page template permissions, that is, `Application-Page Templates-Edit` to edit an application-wide page template, and either `space-Resources-Edit Resources` or `space-Page Templates-Edit` to edit a page template for a particular space.

> **See Also:** For information about roles and permissions, see Chapter 23, "Understanding Security."

12.1 What You Should Know About Navigation

Navigation is a fundamental aspect of your portal. Users need to be able to see what is available in the portal, move around the portal, and orient themselves within the portal.

Navigation is essentially a set of links pointing to the content of the portal, or to external resources. Examples of navigation include:

- A series of tabs or menus along the top of each page
- A tree structure or list of links on the side of each page
- A trail of breadcrumbs showing the path a user has taken to reach the current location in the portal

In Spaces, you can break navigation down into two main concepts:

- The *navigation model* defines the content, structure, and metadata of the navigation. For more information, see Section 12.1.1, "What You Should Know About Navigation Models."
- The *navigation visualization* determines how the navigation appears on the pages of the portal, say as a menu, a tree, or breadcrumbs. For more information, see Section 12.1.2, "What You Should Know About Navigation Visualization."

12.1.1 What You Should Know About Navigation Models

When you create the navigation model, you specify the resources to which users can navigate. You can link together information from multiple sources, such as spaces, pages, content repositories, and even external web pages. You can also introduce folders and separators to make navigations easier to use. You can include nested navigation models within a navigation model to delegate development of the navigation across multiple teams, or to control access to different items in the navigation.

Navigation models can include the following resources:

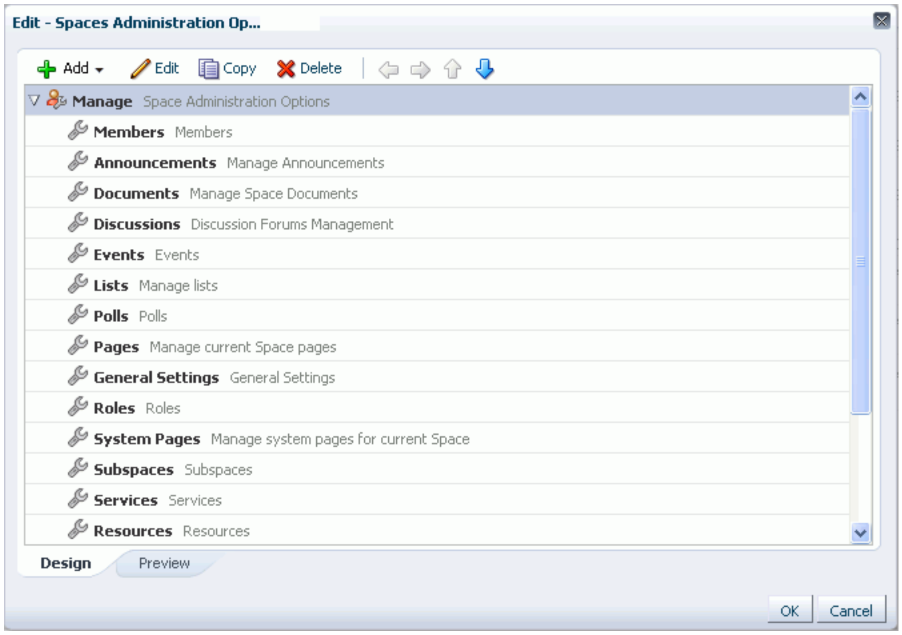
- Spaces (individual spaces and space hierarchies)
- Pages (individual pages and page hierarchies)
- Content (individual content items or the results of a content query)
- Other navigation models
- Portlets
- Task flows
- External applications
- External links

The navigation model is aware of the security policies that have been applied to the elements (pages, link, task flows, and so on) that the navigation model controls. If the current user is not authorized to see a particular page, the navigation model, by default hides any navigational links to that page. Navigation model metadata can also be determined contextually using EL expressions. These expressions are evaluated at runtime to determine exactly which pieces of the navigation model are rendered in the navigation UI and to whom.

Spaces includes three built-in navigation models to get you started:

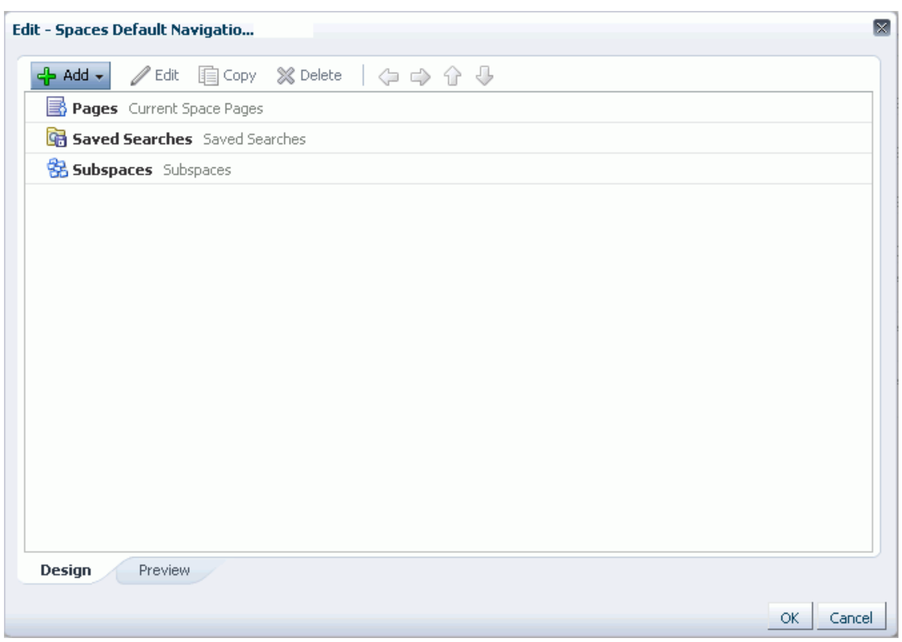
- Spaces Administration Options—This navigation model contains administration options for spaces or the Home space (Figure 12–1). The links displayed when the navigation is rendered on a page vary depending on whether it appears in a space or in a Home space and on the permissions of the current user. By default, this navigation model includes a Manage dropdown menu to provide access to administration settings.

Figure 12–1 The Spaces Administration Options Navigation Model



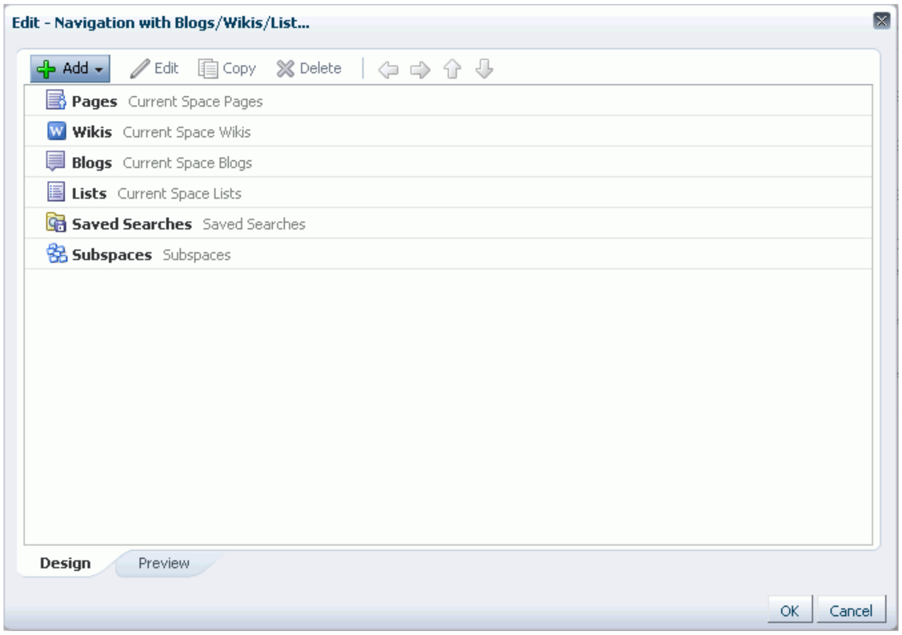
- Spaces Default Navigation Model—This navigation model contains the default top level entries for navigation in a space. It includes links to the current space pages, and links to any saved searches and subspaces (Figure 12–2).

Figure 12–2 The Spaces Default Navigation Model



- Spaces Navigation with Blogs/Wikis/Lists Submenus—This navigation model is similar to the Spaces Default Navigation Model, except it also includes links to any blogs, wikis, and lists for the current space (Figure 12–3).

Figure 12–3 The Navigation with Blogs/Wikis/Lists Navigation Model



You can use these built-in navigations as they are, create copies of them and edit them to support your own requirements, or create a completely new navigation model for your portal.

> **Note:** You cannot edit the built-in navigation models. If you want to edit these navigation models, you must first create a copy, which you can then edit.

Just like other Spaces resources, portal designers can build navigation models that are available to the whole application (application-level resources) and navigation models that are scoped to a particular space (space-level resources).

If the navigation model functionality provided by Spaces does not meet your requirements, you can create the navigation model in a development tool, such as JDeveloper, and upload the model to Spaces using the Resource Manager. For more information, see Section 12.2.5, "Using JDeveloper to Build Your Navigation Model."

12.1.2 What You Should Know About Navigation Visualization

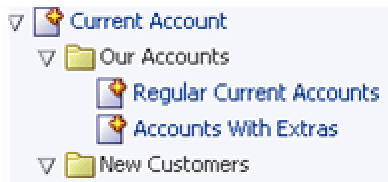
The navigation visualization determines how the navigation model should appear in the portal. For example, the navigation could be provided as a set of tabs along the top of each page, or perhaps as a tree-like structure down the side of the page.

Spaces provides the following built-in navigation task flows that page template designers can add to page templates to quickly visualize a navigation model across the entire portal:

- **Navigation Tree task flow**—Tree navigations display navigational links in a hierarchical structure and often contain multiple-level hierarchies (Figure 12–4).

Tree navigations can provide relatively simple access to a complex structure and quite often appear on the left in page templates.

Figure 12–4 The Navigation Tree Task Flow



- **Navigation Menu task flow**—Menu navigations display navigational links as a series of tabs, menus, bars, buttons, choices, or as a list (Figure 12–5). Menu navigation is appropriate when linking to WebCenter Portal pages, spaces, and documents, and where the number of items is known, such that there is enough room to display all the options that are available.

Figure 12–5 The Navigation Menu Task Flow

- **Navigation Breadcrumb task flow**—Breadcrumb navigations display a series of horizontal or vertical links that show users their current position in the navigation hierarchy (Figure 12–6). Breadcrumbs are particularly useful for deep hierarchies, say four levels or more, and when users might want to get back to a specific place.

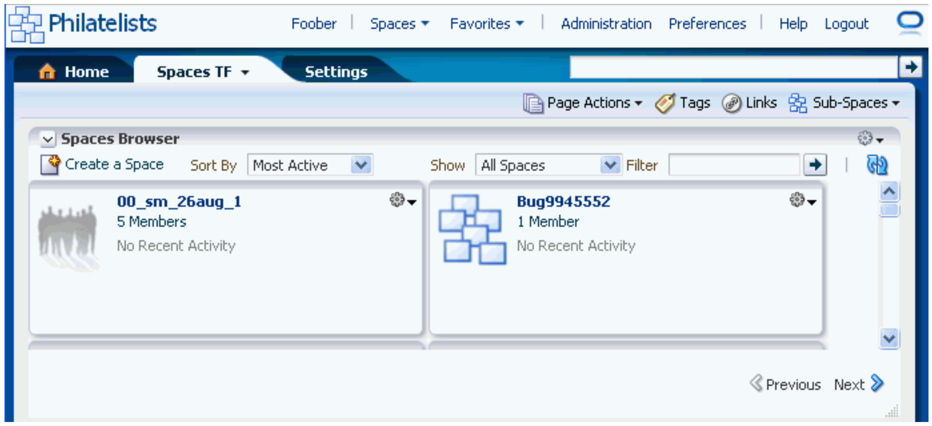
Figure 12–6 The Navigation Breadcrumb Task Flow

See Also: For information about how to add these built-in navigation task flows to your page templates, see Section 12.3, "Rendering Navigation in Your Portal."

For information about the different properties you can set for the built-in navigation task flows, see Section 12.3.2, "Setting Navigation Task Flow Properties."

Spaces also provides the Spaces Browser task flow, which displays all the spaces that are available to you. This includes spaces for which you are the moderator, spaces in which you are a member, spaces that are public and available to non-Spaces users, and spaces that are private, which you must be invited to join. For more information, see Section 53.15, "Working with the Space Task Flows."

Figure 12–7 The Spaces Browser Task Flow



If the built-in task flows do not sufficiently satisfy the navigation requirements of your portal, page template designers can also edit page templates in a development tool, for example, JDeveloper, to build the navigation UI directly into the page templates themselves, then upload them to Spaces to use there.

For more information, see Section 12.3.3, "Using JDeveloper to Visualize Your Navigation."

12.2 Building a Navigation Model

The first step in providing navigation for your portal is to define the navigation model; that is, defining the structure and content of the navigation. You do this by creating the basic navigation model, adding navigation items to it, and setting the properties of those navigation items.

This section includes the following subsections:

- Section 12.2.1, "Creating a Navigation Model"
- Section 12.2.2, "Editing a Navigation Model"
- Section 12.2.3, "Managing a Navigation Model"
- Section 12.2.4, "Selecting the Default Navigation Model"
- Section 12.2.5, "Using JDeveloper to Build Your Navigation Model"

12.2.1 Creating a Navigation Model

You can either create an entirely new navigation model or create a copy of an existing navigation model to use as a starting point for your navigation model.

You can create navigation models at the application level or at the space level. Application-level navigation models are available for use in all spaces, unless the space has been specifically excluded. For more information, see Section 11.4.2, "Setting Properties on a Resource." Space-level navigation models are available for use only in the space in which they are created.

To create a navigation model:

1. Navigate to the **Resources** page of your application or the space in which you want to create the navigation model, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Navigations**.

3. On the menu bar, click **Create**.
4. In the Create New Navigation dialog (Figure 12–8), in the **Name** field, enter a name for the navigation model.

Figure 12–8 The Create New Navigation Dialog

5. In the **Description** field, enter a description for the navigation model.

   The description is displayed below the name in the **Resources** page and as a tool tip when selecting a navigation model. You should ensure that the description helps page template designers determine if they want to use this particular navigation model.
6. From the **Copy From** list, select an existing navigation model to use as the starting point for your new navigation model, if desired. If you leave this blank, a new empty navigation model is created.

   > **Tip:** You can also create a copy of an existing navigation model by selecting the existing navigation on the **Resources** page, clicking **Edit** and then **Copy** on the menu bar, and providing a name and description for the new navigation model.

7. Click **Create**.

   The newly created navigation model is listed on the **Resources** page. The gray circle icon next to the navigation model indicates that it is not yet published and hence is not available to other users. For information about publishing a navigation model, see Section 11.4.3, "Showing and Hiding Resources."

12.2.2 Editing a Navigation Model

After creating the basic navigation model, the next step is to define exactly what to include in it. The resources that you include in the navigation model determine what users can navigate to when the model is displayed on a page.

This section includes the following subsections:

- Section 12.2.2.1, "Adding Resources to a Navigation Model Using the Edit Dialog"
- Section 12.2.2.2, "Editing the Source Code of a Navigation Model"

12.2.2.1 Adding Resources to a Navigation Model Using the Edit Dialog

The Edit dialog provides various options for adding resources to your navigation model.

This section includes the following subsections:

- Section 12.2.2.1.1, "Adding a Document to a Navigation Model"
- Section 12.2.2.1.2, "Adding Content Based on the Results of a Query to a Navigation Model"
- Section 12.2.2.1.3, "Adding a Spaces Page, Portlet, Task Flow, External Application, or Web Page to a Navigation Model"
- Section 12.2.2.1.4, "Adding a List of Pages to a Navigation Model"
- Section 12.2.2.1.5, "Adding a List of Subspaces to a Navigation Model"
- Section 12.2.2.1.6, "Nesting a Navigation Model Within a Navigation Model"
- Section 12.2.2.1.7, "Organizing Navigation Items in a Navigation Model"
- Section 12.2.2.1.8, "Setting Display Options for Navigation Items"

12.2.2.1.1 Adding a Document to a Navigation Model You can add a document from your content repository to the navigation model. Selecting a document in the navigation displays that document in the page.

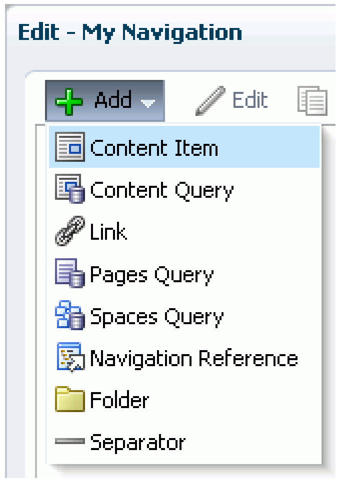
> **Note:** You can also include a set of documents that match particular query criteria in a navigation model. For more information, see Section 12.2.2.1.2, "Adding Content Based on the Results of a Query to a Navigation Model."

To add a document:

1. Navigate to the **Resources** page of your application or the space that contains the navigation model to which you want to add the navigation item, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Navigations**.
3. In the main panel, select the navigation model to which you want to add the navigation item.
4. From the **Edit** menu, select **Edit**.
5. In the Edit dialog, from the **Add** menu, select **Content Item**.

   Tip: To create a navigation item within a folder, select the folder first and then click **Add**.

Figure 12–9 The Add Content Item Menu Option



6. In the **Target** tab, the **ID** field is automatically populated with a generated ID. This ID is used to create the URL to access the item in the navigation model, so you may want to change it to something more descriptive.

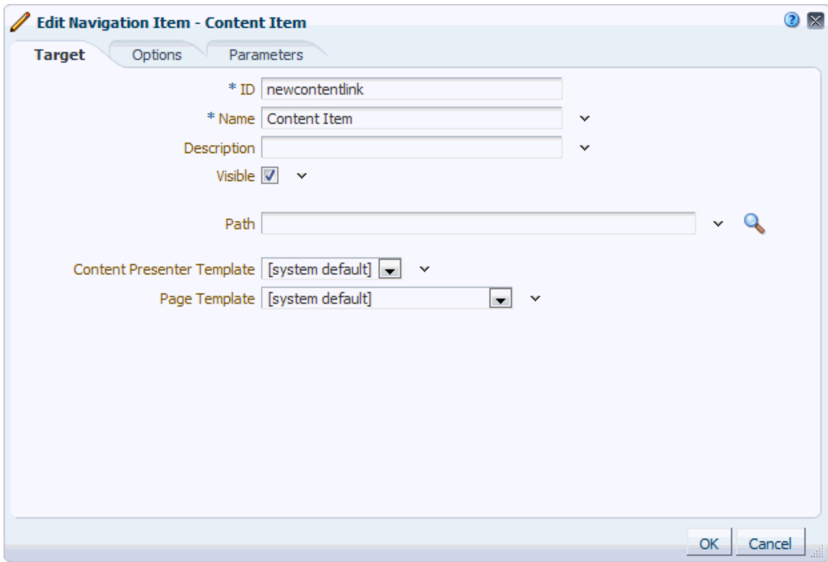
   The ID must be unique within the navigation model. The first character must be either an uppercase or lowercase letter or the underscore character (_). Subsequent characters can be any alphanumeric character or a dash (-), period (.), or underscore (_).

   If the resource is at the top level of the navigation model, the ID must not be `wc_navtitle` or `wcnav_externalId`; these IDs are reserved.

7. In the **Name** field, enter a name for the navigation item. This name is displayed in the navigation when it is rendered on a page.

   > **Tip:** All fields in the Edit dialog provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a field to open the editor. For more information about using the editor and for common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Figure 12–10 The Edit Navigation Item Dialog for a Content Item



8. In the **Description** field, enter a brief description of the navigation item.
9. Select **Visible** if you want to display the navigation item when the navigation model is rendered on a page.

   Alternatively, you can specify an EL expression to determine under which conditions the navigation item displays in the navigation. For example, to specify that the navigation item should be visible only to users with the `Moderator` role, use the following EL expression:

   ```
   #{WCSecurityContext.userInScopedRole['Moderator']}
   ```

10. In the **Path** field, enter the path for the content item. If you do not know the path, click the **Select** icon to browse the content repository for available content.

    Note: You can also select a content folder, in which case, you should also select a Content Presenter display template that expects a folder and renders all the content from that folder.

    ---

11. From the **Content Presenter Template** dropdown list, select the Content Presenter display template to use to render the content item when it is selected in the navigation.

    See Also: For more information about Content Presenter, see Chapter 42, "Publishing Content Using Content Presenter."

    ---

12. From the **Page Template** dropdown list, select the page template to use to display the navigation item when it is selected in the navigation.

    Select **[system default]** to use the space or application default page template.

13. In the **Options** tab, set the display options for the navigation item. For more information, see Section 12.2.2.1.8, "Setting Display Options for Navigation Items."
14. In the **Parameters** tab enter values, as desired, for any parameters supported by the selected page template. You can also add custom parameters.

15. Click **OK** to create the navigation item.
16. Click **OK** to close the Edit dialog.

12.2.2.1.2 Adding Content Based on the Results of a Query to a Navigation Model You can add a Content Query navigation item to the navigation model to include all documents that match specific search criteria.

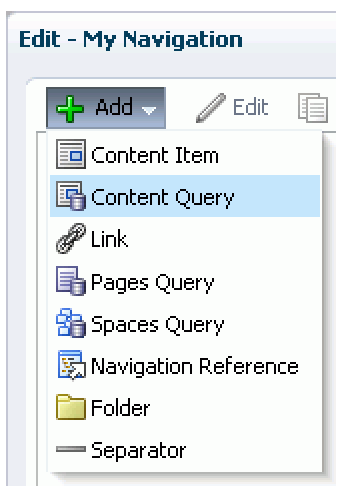
> **See Also:** To add a single document, or all documents within a particular folder to the navigation model, see Section 12.2.2.1.1, "Adding a Document to a Navigation Model."

To add a content query to a navigation model:

1. Navigate to the **Resources** page of your application or the space that contains the navigation model to which you want to add the navigation item, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Navigations**.
3. In the main panel, select the navigation model to which you want to add the navigation item.
4. From the **Edit** menu, select **Edit**.
5. In the Edit dialog, from the **Add** menu, select **Content Query**.

   > **Tip:** To create a navigation item within a folder, select the folder first and then click **Add**.

Figure 12–11 The Add Content Query Menu Option



6. In the **Target** tab, the **ID** field is automatically populated with a generated ID. This ID is used to create the URL to access the item in the navigation model, so you may want to change it to something more descriptive.

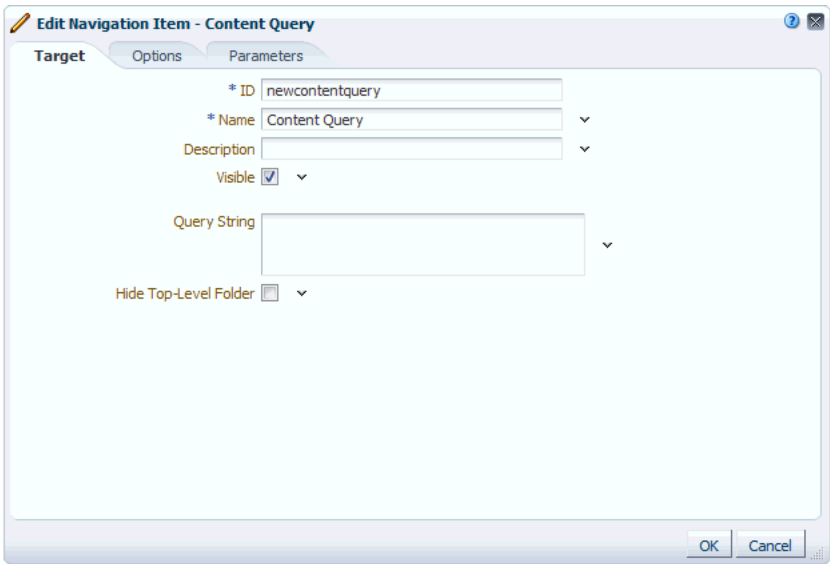
   The ID must be unique within the navigation model. The first character must be either an uppercase or lowercase letter or the underscore character (_). Subsequent characters can be any alphanumeric character or a dash (-), period (.), or underscore (_).

If the resource is at the top level of the navigation model, the ID must not be `wc_navtitle` or `wcnav_externalId`; these IDs are reserved.

7. In the **Name** field, enter a name for the navigation item. This name is displayed in the navigation when it is rendered on a page.

   Tip: All fields in the Edit dialog provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a field to open the editor. For more information about using the editor and for common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Figure 12–12 The Edit Navigation Item Dialog for a Content Query



8. In the **Description** field, enter a brief description of the navigation item.

9. Select **Visible** if you want to display the navigation item when the navigation model is rendered on a page.

   Alternatively, you can specify an EL expression to determine under which conditions the navigation item displays in the navigation. For example, to specify that the navigation item should be visible only to users with the `Moderator` role, use the following EL expression:

   ```
   #{WCSecurityContext.userInScopedRole['Moderator']}
   ```

10. In the **Query String** field, enter the query criteria to identify the content to include in the navigation model, for example:

    ```
    select * from cmis:document WHERE cmis:name LIKE 'Foo%'
    ```

    For more information about how to format the query and for more examples, see the *Oracle Fusion Middleware Content Management REST Service Developer's Guide*.

11. Select **Hide Top-Level Folder** to display the results of the query directly in the navigation rather than displaying them under a folder.

12. In the **Options** tab, set the display options for the navigation item. For more information, see Section 12.2.2.1.8, "Setting Display Options for Navigation Items."

13. In the **Parameters** tab you can add custom parameters.
14. Click **OK** to create the navigation item.
15. Click **OK** to close the Edit dialog.

12.2.2.1.3 Adding a Spaces Page, Portlet, Task Flow, External Application, or Web Page to a Navigation Model You can add links to individual resources, such as pages, portlets, task flows, external applications, and web pages.

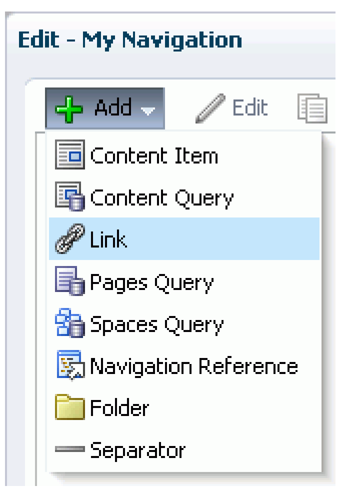
See Also: The Link navigation item type enables you to include a link to a single page in the navigation. For information about how to include an entire page hierarchy, see Section 12.2.2.1.4, "Adding a List of Pages to a Navigation Model."

To add a link to a spaces page, portlet, task flow, external application, or web page:

1. Navigate to the **Resources** page of your application or the space that contains the navigation model to which you want to add the navigation item, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Navigations**.
3. In the main panel, select the navigation model to which you want to add the navigation item.
4. From the **Edit** menu, select **Edit**.
5. In the Edit dialog, from the **Add** menu, select **Link** (Figure 12–13).

Tip: To create a navigation item within a folder, select the folder first and then click **Add**.

Figure 12–13 The Add Link Menu Option



Note: If you provide navigation directly to a portlet or task flow, users cannot customize that portlet or task flow. If you want users to be able to customize the portlet or task flow, add it to a page and create a navigation item for that page.

---

6. In the **Target** tab, the **ID** field is automatically populated with a generated ID. This ID is used to create the URL to access the item in the navigation model, so you may want to change it to something more descriptive.

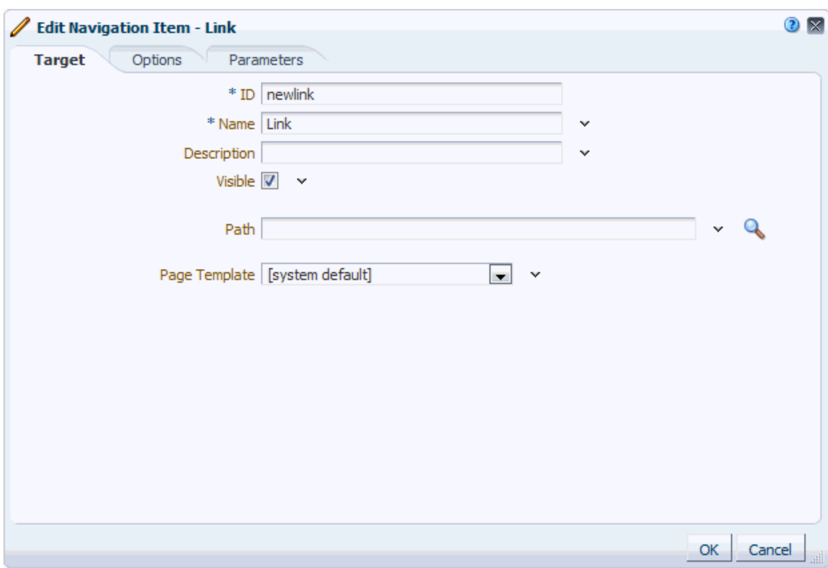
   The ID must be unique within the navigation model. The first character must be either an uppercase or lowercase letter or the underscore character (_). Subsequent characters can be any alphanumeric character or a dash (-), period (.), or underscore (_).

   If the resource is at the top level of the navigation model, the ID must not be `wc_navtitle` or `wcnav_externalId`; these IDs are reserved.

7. In the **Name** field, enter a name for the navigation item. This name is displayed in the navigation when it is rendered on a page.

   > **Tip:** All fields in the Edit dialog provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a field to open the editor. For more information about using the editor and for common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Figure 12–14 The Edit Navigation Item Dialog for a Link



8. In the **Description** field, enter a brief description of the navigation item.

9. Select **Visible** if you want to display the navigation item when the navigation model is rendered on a page.

   Alternatively, you can specify an EL expression to determine under which conditions the navigation item displays in the navigation. For example, to specify that the navigation item should be visible only to users with the `Moderator` role, use the following EL expression:

   ```
   #{WCSecurityContext.userInScopedRole['Moderator']}
   ```

10. In the **Path** field, enter the URL of the web page or click the **Select** icon to browse for available spaces pages, portlets, task flows, or external applications to include in the navigation model.

Note: In the Select dialog, the **Select** button is active only when you select an item that can be included in the navigation model. For example, if you expand the **Portlets** node and select a portlet producer, then the **Select** button is disabled. If you expand the portlet producer node and select a portlet, then the **Select** button is enabled.

11. From the **Page Template** dropdown list, select the page template to use to display the navigation item when it is selected in the navigation.

    Select **[system default]** to use the space or application default page template.

12. In the **Options** tab, set the display options for the navigation item. For more information, see Section 12.2.2.1.8, "Setting Display Options for Navigation Items."

    Tip: If you are linking to a page in a different space from the space in which the navigation model will be used, you must select the **Redirect** option to ensure that the link is displayed correctly.

13. In the **Parameters** tab enter values, as desired, for any parameters supported by the selected page, task flow, or portlet, or by the page template. You can also add custom parameters.
14. Click **OK** to create the navigation item.
15. Click **OK** to close the Edit dialog.

12.2.2.1.4 Adding a List of Pages to a Navigation Model You can add a list of pages to the navigation model by selecting the starting point for the list and specifying the criteria to use to determine the pages to display. For example, you can include all the pages in a specific space, all the Wiki pages in the current space, or all Home space pages. All pages below the selected starting point that match the criteria are included in the navigation model.

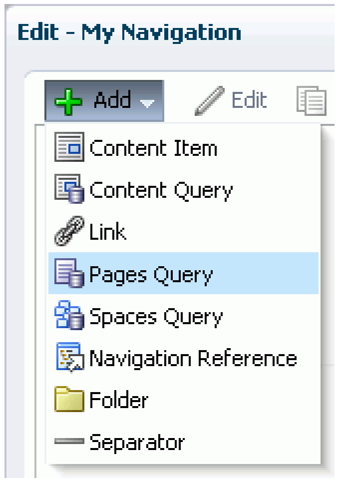
See Also: If you just want to include a single page in the navigation model, use the Link navigation item type. For more information, see Chapter 12.2.2.1.3, "Adding a Spaces Page, Portlet, Task Flow, External Application, or Web Page to a Navigation Model."

To add a list of pages:

1. Navigate to the **Resources** page of your application or the space that contains the navigation model to which you want to add the navigation item, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Navigations**.
3. In the main panel, select the navigation model to which you want to add the navigation item.
4. From the **Edit** menu, select **Edit**.
5. In the Edit dialog, from the **Add** menu, select **Pages Query**.

    Tip: To create a navigation item within a folder, select the folder first and then click **Add**.

Figure 12–15 The Add Pages Query Menu Option



6. In the **Target** tab, the **ID** field is automatically populated with a generated ID. This ID is used to create the URL to access the item in the navigation model, so you may want to change it to something more descriptive.

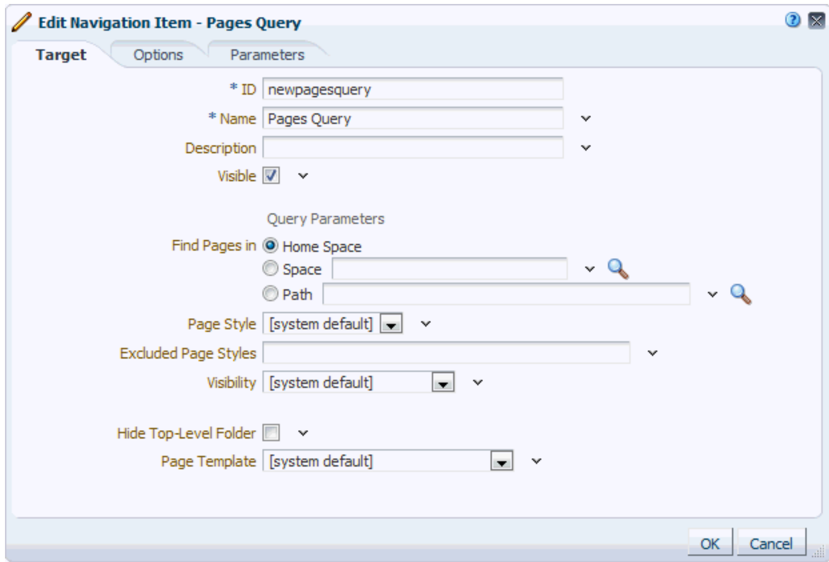
   The ID must be unique within the navigation model. The first character must be either an uppercase or lowercase letter or the underscore character (_). Subsequent characters can be any alphanumeric character or a dash (-), period (.), or underscore (_).

   If the resource is at the top level of the navigation model, the ID must not be `wc_navtitle` or `wcnav_externalId`; these IDs are reserved.

7. In the **Name** field, enter a name for the navigation item. This name is displayed in the navigation when it is rendered on a page.

   > **Tip:** All fields in the Edit dialog provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a field to open the editor. For more information about using the editor and for common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Figure 12–16 The Edit Navigation Item Dialog for a Pages Query



8. In the **Description** field, enter a brief description of the navigation item.

9. Select **Visible** if you want to display the navigation item when the navigation model is rendered on a page.

   Alternatively, you can specify an EL expression to determine under which conditions the navigation item displays in the navigation. For example, to specify that the navigation item should be visible only to users with the `Moderator` role, use the following EL expression:

   ```
   #{WCSecurityContext.userInScopedRole['Moderator']}
   ```

10. In the **Find Pages in** radio group, select:

    - **Home Space** to add the current user's Home space and all its pages to the navigation model.
    - **Space** to add the home page of a specific space and all its other pages to the navigation model. Enter the name of the space, or click the **Select Space** icon to select from all available spaces. In the Select Space dialog, you can list all available spaces or you can filter the list of spaces to those that you have joined, those that you moderate, or those that are public.
    - **Path** to add a specific page to the navigation model. Enter the path of the page, or click the **Select Page** icon to select from all available pages.

11. From the **Page Style** dropdown list, select the style of page to include in the navigation model. For example, if you select **Wiki**, only pages that use the Wiki page style are included in the navigation model.

    Selecting **[system default]** displays all pages, regardless of style.

12. In the **Excluded Page Styles** field, specify the styles of pages to exclude from the navigation model by entering a comma-separated list of page style paths, for example:

    ```
    /oracle/webcenter/siteresources/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/
    pageStyle/gsr1b60e8a7_2e23_48ff_9571_31ede592de1a/TemplateWiki.jspx,
    /oracle/webcenter/siteresources/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/
    pageStyle/gsr1b60e8a7_2e23_48ff_9571_31ede592de1b/TemplateBlog.jspx
    ```

> **Tip:** You can find the path of a page style by selecting it in the **Resources** page and clicking **About** in the menu bar.

Any pages that use the page styles specified here are *not* included in the navigation.

13. From the **Visibility** dropdown list, select whether to include pages even if they have been flagged as hidden in the Personalize Pages page.

    Selecting **[system default]** displays all pages, regardless of visibility.

14. Select **Hide Top-Level Folder** to display the subpages in the hierarchy directly in the navigation rather than displaying them under a folder for the parent page.

15. From the **Page Template** dropdown list, select the page template to use to display the navigation item when it is selected in the navigation.

    Select **[system default]** to use the space or application default page template.

16. In the **Options** tab, set the display options for the navigation item. For more information, see Section 12.2.2.1.8, "Setting Display Options for Navigation Items."

17. In the **Parameters** tab enter values, as desired, for any parameters supported by the selected page template. You can also add custom parameters.

18. Click **OK** to create the navigation item.

19. Click **OK** to close the Edit dialog.

12.2.2.1.5 Adding a List of Subspaces to a Navigation Model You can include a list of all the subspaces of a particular space in your navigation model. You can also include all the pages in those subspaces, or specify a query to further refine which subspaces to include in the list.

To add a list of subspaces:

1. Navigate to the **Resources** page of your application or the space that contains the navigation model to which you want to add the navigation item, as described in Section 11.1.4, "Accessing Resources."

2. In the left navigation panel, under Structure, select **Navigations**.

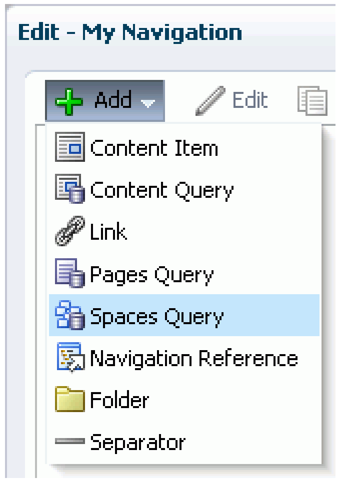
3. In the main panel, select the navigation model to which you want to add the navigation item.

4. From the **Edit** menu, select **Edit**.

5. In the Edit dialog, from the **Add** menu, select **Spaces Query**.

> **Tip:** To create a navigation item within a folder, select the folder first and then click **Add**.

Figure 12–17 The Add Spaces Query Menu Option



6. In the **Target** tab, the **ID** field is automatically populated with a generated ID. This ID is used to create the URL to access the item in the navigation model, so you may want to change it to something more descriptive.

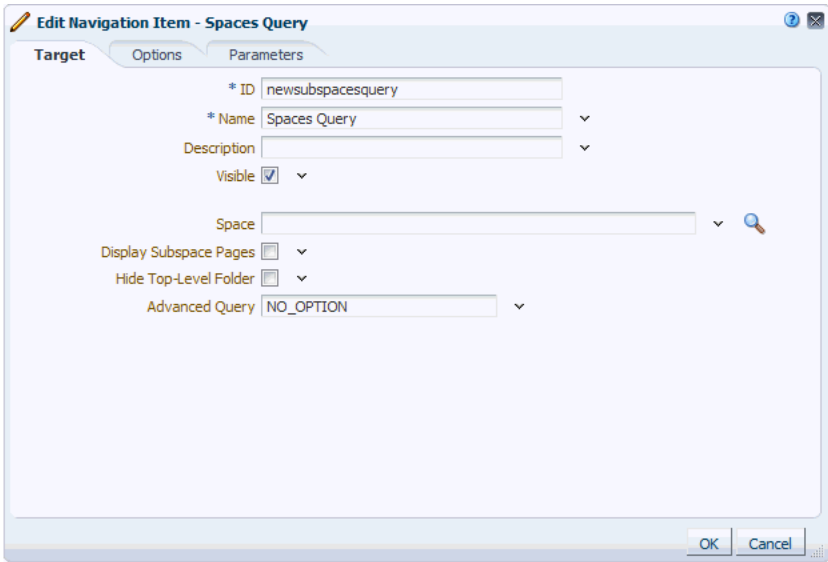
   The ID must be unique within the navigation model. The first character must be either an uppercase or lowercase letter or the underscore character (_). Subsequent characters can be any alphanumeric character or a dash (-), period (.), or underscore (_).

   If the resource is at the top level of the navigation model, the ID must not be `wc_navtitle` or `wcnav_externalId`; these IDs are reserved.

7. In the **Name** field, enter a name for the navigation item. This name is displayed in the navigation when it is rendered on a page.

> **Tip:** All fields in the Edit dialog provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a field to open the editor. For more information about using the editor and for common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Figure 12–18 The Edit Navigation Item Dialog for a Spaces Query



8. In the **Description** field, enter a brief description of the navigation item.
9. Select **Visible** if you want to display the navigation item when the navigation model is rendered on a page.

   Alternatively, you can specify an EL expression to determine under which conditions the navigation item displays in the navigation. For example, to specify that the navigation item should be visible only to users with the `Moderator` role, use the following EL expression:

   ```
   #{WCSecurityContext.userInScopedRole['Moderator']}
   ```

10. In the **Space** field, enter the name of the space for which you want to display subspaces, or click the Select Space icon to select from the available spaces.

    If you leave the field empty, then the current space is used.
11. Select **Display Subspace Pages** to also include the pages within the subspaces in the navigation.
12. Select **Hide Top-Level Folder** to display the subspaces directly in the navigation rather than displaying them under a folder for the parent space.
13. In the **Advanced Query** field, enter an EL expression to further refine the list of subspaces included in the navigation model. For example, you might want to include only community subspaces, or subspaces with a particular string in the title. For more information about using the Expression Language editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."
14. In the **Options** tab, set the display options for the navigation item. For more information, see Section 12.2.2.1.8, "Setting Display Options for Navigation Items."
15. In the **Parameters** tab you can add custom parameters.
16. Click **OK** to create the navigation item.
17. Click **OK** to close the Edit dialog.

12.2.2.1.6 Nesting a Navigation Model Within a Navigation Model You can nest navigation models within each other. For example, if you have a complex navigation model, it might be easier to break it down into several separate models and then nest them all within a single overarching navigation model. You can also use nested navigation models to delegate the development of navigation models to different users or to control access to different parts of the navigation.

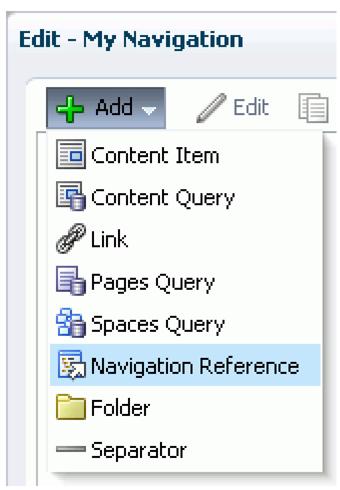
For example, if you are creating a navigation model for a space that contains several subspaces, you may want to delegate the management of the navigation models for the subspaces to the subspace moderators. You can then include navigation references to the subspace navigation models within the main space navigation model. In this way, the person who is most familiar with the content of the subspace creates the navigation model, without having to have access to other areas of the space.

To nest navigation models:

1. Navigate to the **Resources** page of your application or the space that contains the navigation model to which you want to add the navigation item, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Navigations**.
3. In the main panel, select the navigation model to which you want to add the navigation item.
4. From the **Edit** menu, select **Edit**.
5. In the Edit dialog, from the **Add** menu, select **Navigation Reference**.

    Tip: To create a navigation item within a folder, select the folder first and then click **Add**.

Figure 12–19 The Add Navigation Reference Menu Option



6. In the **Target** tab, the **ID** field is automatically populated with a generated ID. This ID is used to create the URL to access the item in the navigation model, so you may want to change it to something more descriptive.

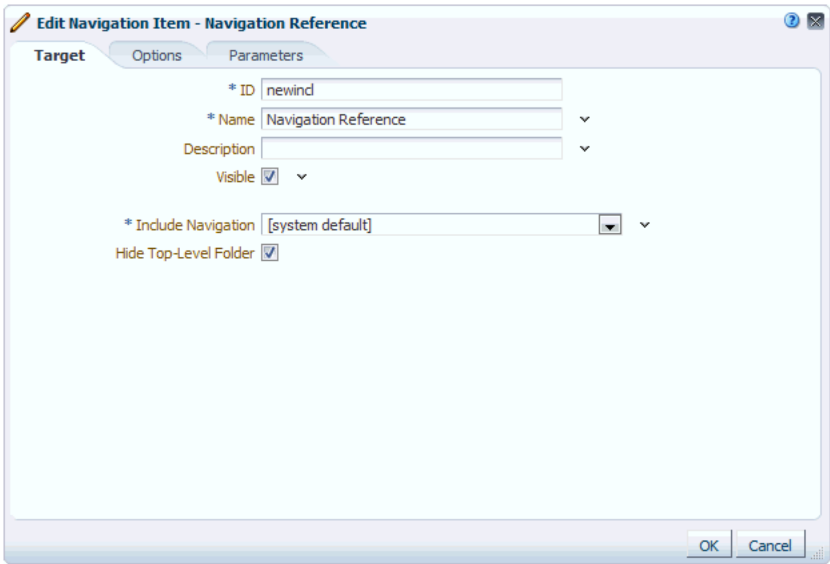
    The ID must be unique within the navigation model. The first character must be either an uppercase or lowercase letter or the underscore character (_). Subsequent characters can be any alphanumeric character or a dash (-), period (.), or underscore (_).

    If the resource is at the top level of the navigation model, the ID must not be `wc_navtitle` or `wcnav_externalId`; these IDs are reserved.

7. In the **Name** field, enter a name for the navigation item. This name is displayed in the navigation when it is rendered on a page.

   Tip: All fields in the Edit dialog provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a field to open the editor. For more information about using the editor and for common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Figure 12–20 The Edit Navigation Item Dialog for a Navigation Reference



8. In the **Description** field, enter a brief description of the navigation item.
9. Select **Visible** if you want to display the navigation item when the navigation model is rendered on a page.

   Alternatively, you can specify an EL expression to determine under which conditions the navigation item displays in the navigation. For example, to specify that the navigation item should be visible only to users with the `Moderator` role, use the following EL expression:

   ```
   #{WCSecurityContext.userInScopedRole['Moderator']}
   ```

10. From the **Include Navigation** dropdown list, select the navigation model that you want to nest within this navigation model.
11. Select **Hide Top-Level Folder** to display the content of the navigation model directly in the navigation rather than displaying it under a folder.
12. In the **Options** tab, set the display options for the navigation item. For more information, see Section 12.2.2.1.8, "Setting Display Options for Navigation Items."
13. In the **Parameters** tab you can add custom parameters.
14. Click **OK** to create the navigation item.
15. Click **OK** to close the Edit dialog.

12.2.2.1.7 Organizing Navigation Items in a Navigation Model You can add folders to your navigation model to create subsets of navigation items or to group similar navigation items. You can also add separators to divide the navigation model into distinct groupings of navigation items. Folders and separators enable you to break up the items in the navigation when it is rendered on in a page, making it easier to locate items.

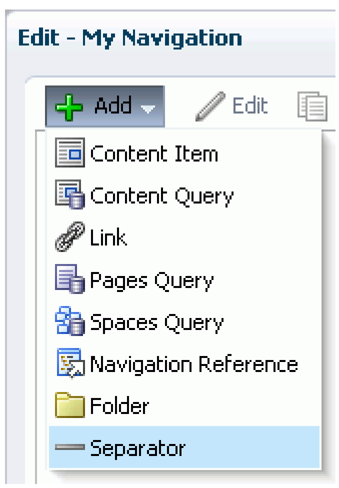
In addition to folders and separators, you can also organize items within the navigation model by moving them up and down in relation to each other and even indenting items to indicate hierarchy.

You can also rearrange items within the navigation model by dragging them up and down in relation to each other and dragging them inside other items to indicate hierarchy.

To organize navigation items:

1. Navigate to the **Resources** page of your application or the space that contains the navigation model to which you want to add the navigation item, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Navigations**.
3. In the main panel, select the navigation model to which you want to add the navigation item.
4. From the **Edit** menu, select **Edit**.
5. To add a separator, in the Edit dialog, from the **Add** menu, select **Separator**.

Figure 12–21 The Add Separator Menu Option



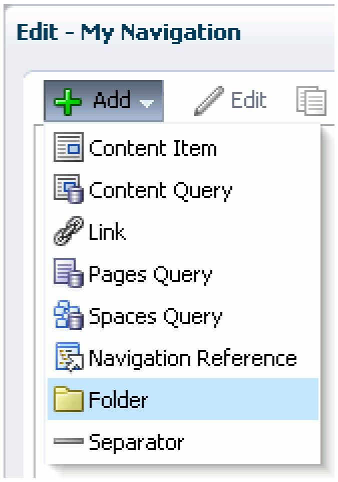
A separator is added at the end of the navigation model. You can move the separator to the desired location as described later in this procedure.

6. To add a folder:

   a. In the Edit dialog, from the **Add** menu, select **Folder**.

   Tip: To create a navigation item within a folder, select the folder first and then click **Add**.

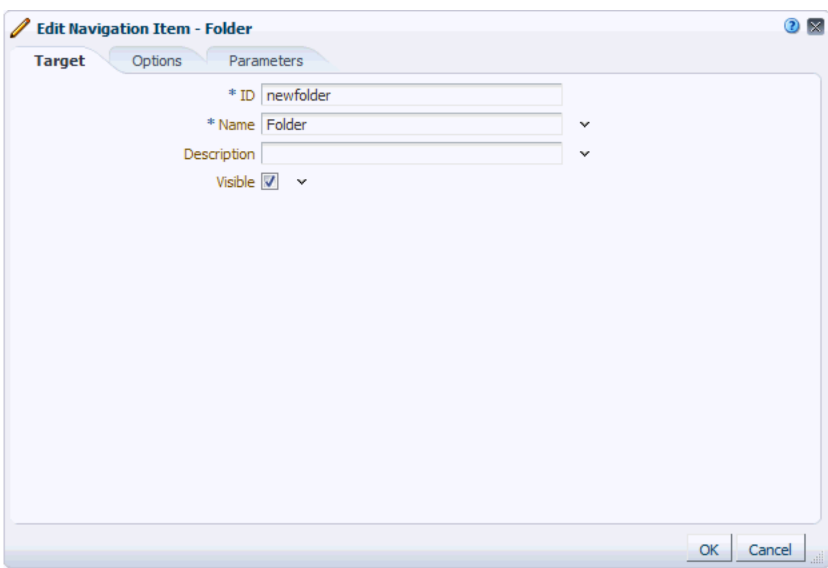
Figure 12–22 The Add Folder Menu Option



b. In the **Target** tab, specify an **ID**, **Name**, and **Description** for the navigation item.

Tip: All fields in the Edit dialog provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a field to open the editor. For more information about using the editor and for common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Figure 12–23 The Edit Navigation Item Dialog for a Folder



c. Select **Visible** if you want to display the navigation item when the navigation model is rendered on a page.

Alternatively, you can specify an EL expression to determine under which conditions the navigation item displays in the navigation. For example, to specify that the navigation item should be visible only to users with the `Moderator` role, use the following EL expression:

```
#{WCSecurityContext.userInScopedRole['Moderator']}
```

   d. In the **Options** tab, set the display options for the navigation item. For more information, see Section 12.2.2.1.8, "Setting Display Options for Navigation Items."

   e. In the **Parameters** tab you can add custom parameters.

   f. Click **OK** to create the navigation item.

   The folder is added at the end of the navigation model. You can move the folder to the desired location as described in the next step.

7. To move a navigation item within the navigation model, select the item and click the **Move Up** or **Move Down** icon as many times as necessary until the item is in the desired location.
8. To indent one navigation item (child item) under another item (parent item), move the child item so that it is immediately below the parent item, select the child item and click the **Indent** icon.
9. To move an indented item so that it is no longer indented below another item, select the item and click the **Outdent** icon.
10. Click **OK** to close the Edit dialog.

12.2.2.1.8 Setting Display Options for Navigation Items

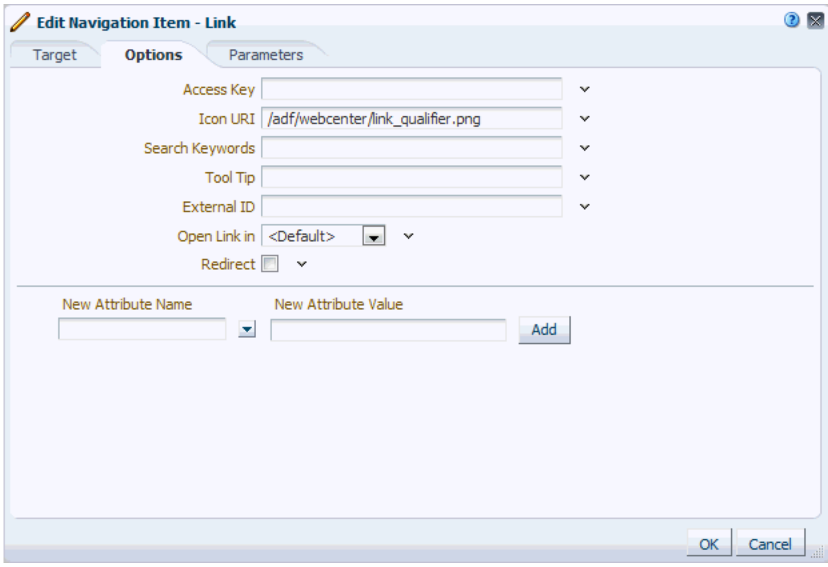
You can specify various display options for navigation items to determine their appearance and behavior when the navigation is rendered on a page.

The display options available depend on the type of the navigation item.

1. Navigate to the **Resources** page of your application or the space that contains the navigation model to which you want to add the navigation item, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Navigations**.
3. In the main panel, select the navigation model that contains the navigation item for which you want to specify display options.
4. From the **Edit** menu, select **Edit**.
5. Select the navigation item.
6. From the menu bar, click **Edit**.
7. In the **Options** tab, in the **Access Key** field, enter a key mnemonic (single character) that can be used to access the navigation item without using the mouse.

> **Tip:** All fields in the Edit dialog provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a field to open the editor. For more information about using the editor and for common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Figure 12–24 The Options Tab of the Edit Navigation Item Dialog



8. In the **Icon URI** field, enter a path and file name of an image to use to represent the navigation item.
9. In the **Search Keywords** field, enter keywords to facilitate searching of the navigation item.
10. In the **Tool Tip** field, enter some brief descriptive text to display when users hover the mouse over the navigation item.
11. In the **External ID** field, enter an ID to enable a direct reference to the navigation item from a static link in the page.

    Navigation items in the application's default navigation model with this attribute defined can be accessed using `/faces/wcnav_externalId/`*`externalId`* from an `af:goLink` component in a page or using `/wcnav_externalId/`*`externalId`* from an External Link navigation item in the navigation model. The alternative is to access the node by its hierarchy, which is faster, but may change as the application develops.

Note: To directly access a node in the default navigation model for a particular space, you must specify the space by setting the `wc.contextURL` parameter, for example:

```
/faces/wcnav_
externalId/myNavigationItem?wc.contextURL=/spaces/myProjectSpace
```

To directly access a node in a non-default navigation model, you must specify the path of the navigation model by setting the `wcnav.modelPath` URL parameter, for example:

```
/faces/wcnav_externalId/myNavigationItem?wcnav.model=
/oracle/webcenter/siteresources/scopedMD/
s7f446cab_f622_4b68_a83e_b7eaf28b52ec/navigation/
gsr0271c712_721a_4565_9f0e_755784a7093b/myNavigation.xml
```

Depending on where you are using the link, you may need to encode the URL parameters, for example, `%2Fspaces%2FmyProjectSpace`.

---

12. From the **Open Link in** dropdown list, select how to display the navigation item when it is selected, either in the same browser window, a new window, or a popup.

    The options available depend on the type of navigation item.

    Note: Popups are not supported for pages.

    ---

13. Select **Redirect** to redirect to the URL specified for the navigation item. If you do not select this check box, then the URL is rendered within an inline frame in the current page template.

    Note: This display option is available for all navigation items except for Navigation Reference, Folder, and Separator.

    For Link navigation items that point to business role pages (for example, the My Profile page), the **Redirect** option has no effect; clicking the link always displays the page in the Home space.

    For Link navigation items that point to a page in a different space, you must select **Redirect** to open the page inside the space to which the page belongs. Deselecting **Redirect** opens the page in the current space and may cause errors with subsequent links.

    ---

14. In the **New Attribute Name** field, enter the name of an attribute that has been defined for the resource but not exposed in the dialog. You can also select an attribute from the dropdown list.
15. In the **New Attribute Value** field, specify a value for the attribute specified in the **New Attribute Name** field, and click **Add**.

    Note: You can click **Add** without specifying a value for the attribute. You can specify the value once the field is displayed in the dialog, along with other fields. However, if you exit the Edit Navigation Item dialog without providing a value for the attribute, the attribute is not saved.

12.2.2.2 Editing the Source Code of a Navigation Model

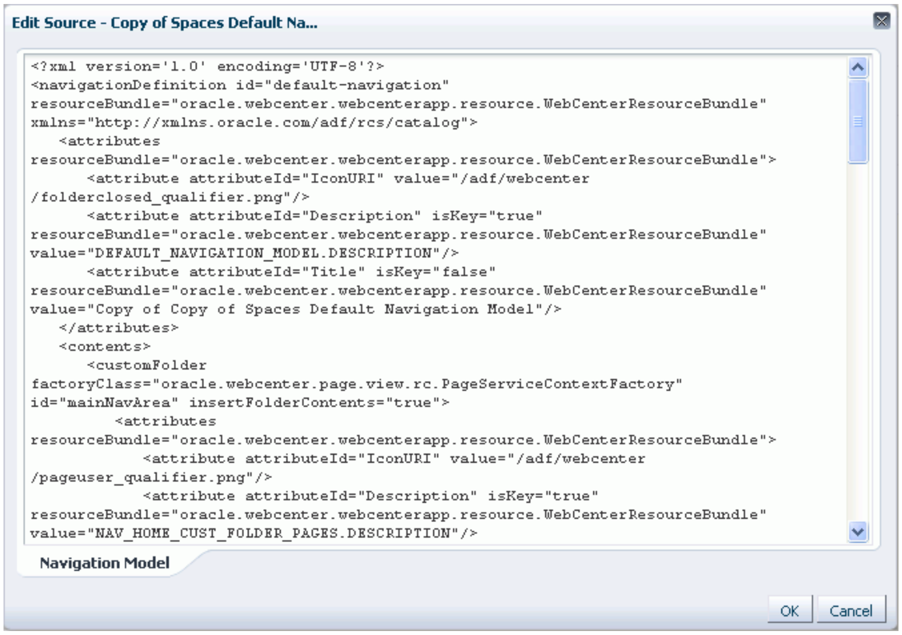
If you prefer working in source code, you can use the Edit Source option.

To edit the source code of a navigation model:

1. Navigate to the **Resources** page of your application or the space that contains the navigation model that you want to edit, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Navigations**.
3. In the main panel, select the navigation model that you want to edit.
4. From the **Edit** menu, select **Edit Source**.

   The Edit Source dialog (Figure 12–25) displays the source code of the navigation model.

Figure 12–25 The Edit Source Dialog for a Navigation Model



5. Edit the code as required.

   The XML syntax in the code is validated and an error message is displayed if you miss any tags or add them incorrectly. Validation is not provided for non-XML files.

   You might prefer to copy the code from the dialog and paste it into an editor of your choice, for example, JDeveloper, where further validation can be performed. After editing the code, you can then copy it and paste it back into the Edit Source dialog.

   > **Tip:** To make more full use of JDeveloper's capabilities for editing navigation models, you might prefer to download the navigation model from Spaces and import it into JDeveloper for editing. For more information, see Section 12.2.5, "Using JDeveloper to Build Your Navigation Model."

6. Click **OK**.

12.2.3 Managing a Navigation Model

This section includes the following subsections:

- Section 12.2.3.1, "Showing and Hiding a Navigation Model"
- Section 12.2.3.2, "Setting Properties on a Navigation Model"
- Section 12.2.3.3, "Setting Security on a Navigation Model"
- Section 12.2.3.4, "Copying a Navigation Model"
- Section 12.2.3.5, "Deleting a Navigation Model"

12.2.3.1 Showing and Hiding a Navigation Model

When you create a navigation model, by default it is hidden. A hidden navigation model is not available for use in the application, the Home space, or any other space.

To make a navigation model available, it must be marked as shown. Further, for a navigation model created at the application level, you can control whether it is available to any, all, or selected spaces in the application.

For generic information about hiding and showing resources, see Section 11.4.3, "Showing and Hiding Resources."

For generic information about resource availability in spaces, see Section 11.4.2, "Setting Properties on a Resource."

12.2.3.2 Setting Properties on a Navigation Model

You can control a navigation model's display attributes and availability by setting the model's properties in the Edit Properties dialog. Setting navigation model properties follows the same procedure as any other resource. For more information, see Section 11.4.2, "Setting Properties on a Resource."

To view the properties associated with a navigation model, use the **About** menu option.

12.2.3.3 Setting Security on a Navigation Model

You can control whether all users or only specific users or groups can access the navigation model that you created in your application or space. Setting access to a navigation model follows the same procedure as any other resource. For more information, see Section 11.4.4, "Setting Security for a Resource."

12.2.3.4 Copying a Navigation Model

You can make a copy of a page template by selecting it and choosing Copy from the Edit menu on the Resources - Navigations page. Copying a navigation model follows the same procedure as any other resource. For more information, see Section 11.4.1, "Copying a Resource."

12.2.3.5 Deleting a Navigation Model

Provided you are assigned the required permissions, you can delete any custom navigation model. Deleting a navigation model follows the same procedure as deleting any other resource. For more information, see Section 11.4.5, "Deleting a Resource."

12.2.4 Selecting the Default Navigation Model

The default navigation model provides a convenient way to select the navigation model that is used by default at the application or space level. Page template designers can then reference this default navigation model without having to know its actual name. For example, in navigation EL expressions, the default navigation model is often referenced, such as in:

```
#{navigationContext.defaultNavigationModel}
```

To specify the navigation model to use as the application-level default navigation model, perform the steps in Section 5.11, "Choosing a Default Navigation."

To specify a different navigation model to use as the default for a specific space, perform the steps in Section 53.4.12, "Changing the Navigation for a Space."

12.2.5 Using JDeveloper to Build Your Navigation Model

You may want to create a navigation model that is beyond the editing capabilities of Spaces. For example, using JDeveloper to create you navigation model enables you to use source control and also provides wizards and other tools to help you build more advanced navigation models. To do this, you have several options:

- Use the **Edit Source** option to edit the source code of the navigation model. You can edit the source code directly in the Edit Source dialog or you can copy the contents of the dialog to JDeveloper for editing and then copy the edited code back into the dialog. For more information, see Section 12.2.2.2, "Editing the Source Code of a Navigation Model."
- Download an existing Spaces navigation model, import the navigation model into JDeveloper for editing, and then upload it back to Spaces.
- Create a completely new navigation model in JDeveloper and upload it to Spaces.

The steps to download and upload navigation models from Spaces are described in Section 11.5, "Using JDeveloper to Build Resources for the Spaces Application."

Oracle WebCenter Portal provides a special JDeveloper workspace (`DesignWebCenterSpaces.jws`) for developing Spaces resources, such as navigation models. The workspace offers a design environment in which to create and edit your navigation models, and also enables you to upload your navigation models to Spaces for testing. For more information and to download the JDeveloper workspace, see the section "Developing Resources for Spaces Applications" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

For information about specific considerations for creating navigation models for use in Spaces, see the section "Working with WebCenter Portal: Spaces Navigation Models" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

12.3 Rendering Navigation in Your Portal

One of the key parts of a page template is the navigation visualization. This determines how the navigation looks and behaves in your portal. You can also add navigation visualization to a page, but typically you add it to a page template so that it can be defined in one place and propagated consistently across the whole portal.

This section includes the following subsections:

- Section 12.3.1, "Adding Built-in Navigation Task Flows to Page Templates"
- Section 12.3.2, "Setting Navigation Task Flow Properties"
- Section 12.3.3, "Using JDeveloper to Visualize Your Navigation"

12.3.1 Adding Built-in Navigation Task Flows to Page Templates

WebCenter Portal provides several built-in navigation task flows to enable you to quickly add navigation to your portal.

> **Note:** By default the Resource Catalog for pages does not include the built-in navigation task flows because the recommended method of providing navigation is through your page templates. If you want to be able to add the navigation task flows to a page, you must create a custom Resource Catalog that includes the task flows. For more information, see Section 16.2, "Creating Resource Catalogs."

Typically, you first add the desired task flow to the page template and then select the navigation model to use to drive the content of the navigation. This is the method described in this section. However, if you are using a custom Resource Catalog that includes navigation models, you can start by selecting the navigation model and then choosing which task flow to use to visualize that model. Navigation models are not included in the default page template Resource Catalog.

As well as the task flows described in this section, which you associate with navigation models, Spaces also provides the Spaces Browser task flow, which you can use to enable users to navigate to different spaces. For more information, see Section 53.15, "Working with the Space Task Flows."

Additional navigation task flows are available for download from Oracle Technology Network at:

`http://www.oracle.com/technetwork/middleware/webcenter/samples-196325.zip`

The zip file contains the following navigation task flows:

- List Navigation—Renders a navigation model in a vertical list format. Folders and their items are rendered as dropdown menus. Empty folders are not rendered.
- Menu with Links Navigation—Renders a navigation model in a horizontal menu format. For top level navigation items, folders are rendered as dropdown menus, navigable links with no children are rendered as a top level link. Empty folders are not rendered.
- Tree Navigation—Renders a navigation model in a vertical collapsed tree format.

Download the zip file and extract its contents locally. You can then upload one or more of the EAR files to your application, as described in Section 11.5.3, "Uploading a Resource." The task flows are then available in the Resource Catalog under Mash-Ups, Task Flows.

To add a built-in navigation task flow to a page template:

1. Open the page template in edit mode.

   For more information, see Section 13.3, "Editing a Page Template."
2. Click **Add Content** in the target region to open the Resource Catalog.
3. Navigate to the section of the Resource Catalog that contains the built-in navigation task flows.

   > **Tip:** The presence or location of this component depends on how the Resource Catalog is configured. For example, in the default Page Templates Resource Catalog, next to **Template Development**, click **Open** to expose a list that includes a **Navigations** folder. Click **Open** next to this folder to display the list of built-in navigation task flows.

4. Click **Add** next to the task flow that you want to add to your page.
5. Click **Close** to exit the Resource Catalog.
6. Hover the mouse over the task flow and, in the menu that pops up, click the **Edit** icon (wrench) for the task flow.

   > **Tip:** Ensure that you click the **Edit** icon for the task flow and not the one for the region that contains the task flow.

7. In the Component Properties dialog, click the **Parameters** tab.
8. From the **Navigation** dropdown list, select the navigation model that you want to associate with the task flow.

9. Set any other properties as desired.

   For information about the other properties available for the different navigation task flows, see Section 12.3.2, "Setting Navigation Task Flow Properties."

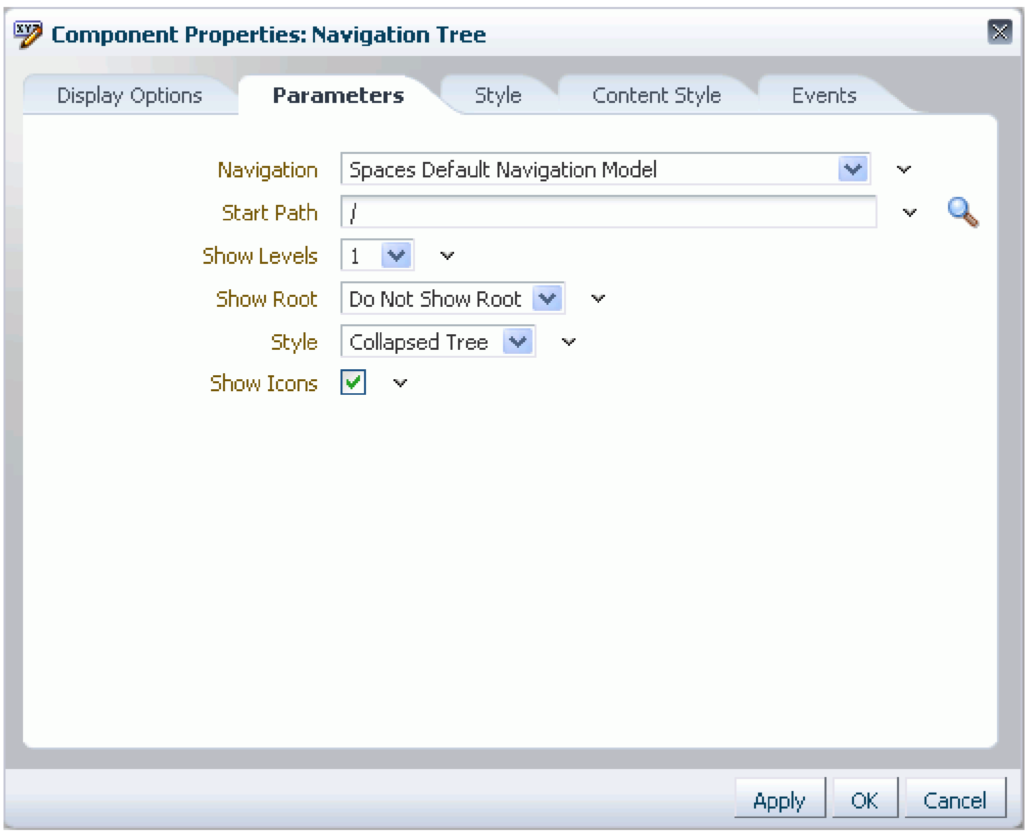
   For some examples of the effects of these properties, see Section 12.3.2.3, "Using Properties to Configure Navigation Task Flow Instances."

10. Click **OK**.

12.3.2 Setting Navigation Task Flow Properties

The navigation task flows have associated properties, which users with sufficient privileges can access from the Component Properties dialog in Composer (Figure 12–26).

Figure 12–26 Navigation Tree Task Flow - Component Properties



This section provides an overview of the navigation task flow properties and steps you through examples of configuring a task flow instance using property values. This section includes the following subsections:

For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Activity Graph service task flows and describe the properties on the Parameters tab:

- Section 12.3.2.1, "What You Should Know About Navigation Task Flow Properties."
- Section 12.3.2.2, "Navigation Task Flow Parameters"

- Section 12.3.2.3, "Using Properties to Configure Navigation Task Flow Instances."

12.3.2.1 What You Should Know About Navigation Task Flow Properties

When you set property values on a navigation task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 12.3.2.2, "Navigation Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type and are covered in this section. For information about wiring pages and components, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

12.3.2.2 Navigation Task Flow Parameters

The following tables describe the parameters that are unique to each of the built-in navigation task flows.

Table 12–1 describes the parameters for the Navigation Breadcrumb task flow.

Table 12–1 Navigation Breadcrumb Task Flow Parameters

Parameter	Description
`Display Style`	Specifies whether to display breadcrumbs horizontally or vertically.

Table 12–1 (Cont.) Navigation Breadcrumb Task Flow Parameters

Parameter	Description
`Navigation`	The navigation model to associate with this task flow.
`Show Root`	Specifies whether to show the start node in the breadcrumbs.
`Start Path`	The level in the navigation model at which to start the navigation. You can enter a path or an EL expression or click the **Select Path** icon to select the start node. Valid values are: ■ **Start at the Currently Selected Page Path** ■ **Start at This Level of the Currently Selected Page Path** ■ **Select Page Path** For more information, see Section 12.3.2.3.2, "Selecting the Start Path for Your Navigation."

Table 12–2 describes the parameters for the Navigation Menu task flow.

Table 12–2 Navigation Menu Task Flow Parameters

Parameter	Description
`Navigation`	The navigation model to associate with this task flow.
`Second Level Style`	The style for rendering the second level of navigation items. Valid values are: **Do Not Display**, **Tabs**, **Bar**, **Buttons**, **Choice**, **List** **Notes:** ■ If the resource being rendered is non-navigable, for example, a folder, then it cannot be displayed as a tab, bar, button, choice, or list. It can be displayed only if the style Menu or Menu with Sub-Menus is selected. ■ This property is available only if the **Style** property is not **Menu** or **Menu with Sub-Menus**.

Table 12–2 (Cont.) Navigation Menu Task Flow Parameters

<table>
<tr><th>Parameter</th><th>Description</th></tr>
<tr><td><code>Show Icons</code></td><td>Specifies whether to render icons for each resource.</td></tr>
<tr><td><code>Start Path</code></td><td>The level in the navigation model at which to start the navigation.

You can enter a path or an EL expression or click the Select Path icon to select the start node.

Valid values are:
■ Start at the Currently Selected Page Path
■ Start at This Level of the Currently Selected Page Path
■ Select Page Path

For more information, see Section 12.3.2.3.2, "Selecting the Start Path for Your Navigation."

Note: The Navigation Menu task flow is limited to showing a maximum of two levels of resources.</td></tr>
<tr><td><code>Style</code></td><td>The style for rendering the first level of resources.

Valid values are Tabs, Bar, Buttons, Choice, List, Menu, Menu with Sub-Menus

Notes:
■ If the resource being rendered is non-navigable, for example, a folder, then it cannot be displayed as a tab, bar, button, choice, or list. It can be displayed only if the style Menu or Menu with Sub-Menus is selected.
■ If a navigable item is rendered using the Menu with Sub-Menus style, the item is rendered twice, once as a dropdown menu, and once as a link to the item itself.</td></tr>
</table>

Table 12–3 describes the parameters for the Navigation Tree task flow.

Table 12–3 Navigation Tree Task Flow Parameters

<table>
<tr><th>Parameter</th><th>Description</th></tr>
<tr><td><code>Navigation</code></td><td>The navigation model to associate with this task flow.</td></tr>
<tr><td><code>Show Icons</code></td><td>Specifies whether to render icons for each resource.</td></tr>
<tr><td><code>Show Levels</code></td><td>The number of levels shown when the tree is initially rendered.

Valid values are:
■ 1: Show top level nodes only; all other nodes are initially collapsed
■ 2: Expand the first level of child nodes
■ 3: Expand the second level of child nodes
■ All: Expand all nodes

Note: This option applies only if the tree is rendered with the Style property set to Collapsed Tree. If the Style property is set to Expanded Tree then all nodes are shown expanded regardless of the value of this property.</td></tr>
</table>

Table 12–3 (Cont.) Navigation Tree Task Flow Parameters

Parameter	Description
`Show Root`	Specifies whether to render the start node in the tree. Valid values are: ■ **Do Not Show Root:** Do not render the start node ■ **Show Root:** Render the start node ■ **Show Root As Box:** Render the start node as the header in a box
`Start Path`	The level in the navigation model at which to start the navigation. You can enter a path or an EL expression or click the **Select Path** icon to select the start node. Valid values are: ■ **Start at the Currently Selected Page Path** ■ **Start at This Level of the Currently Selected Page Path** ■ **Select Page Path** For more information, see Section 12.3.2.3.2, "Selecting the Start Path for Your Navigation."
`Style`	The style of the navigation. Valid values are: ■ **Collapsed Tree:** Render the given levels (as specified by the **Show Levels** property) as initially collapsed ■ **Expanded Tree:** Render all tree nodes, expanded to show all children ■ **List:** Render a flat list of top-level resources. If any of the top-level resources are folders, the content of those folders are provided in dropdown menus. **Note:** Selecting the **List** option overrides the **Show Levels** and **Show Root** properties.

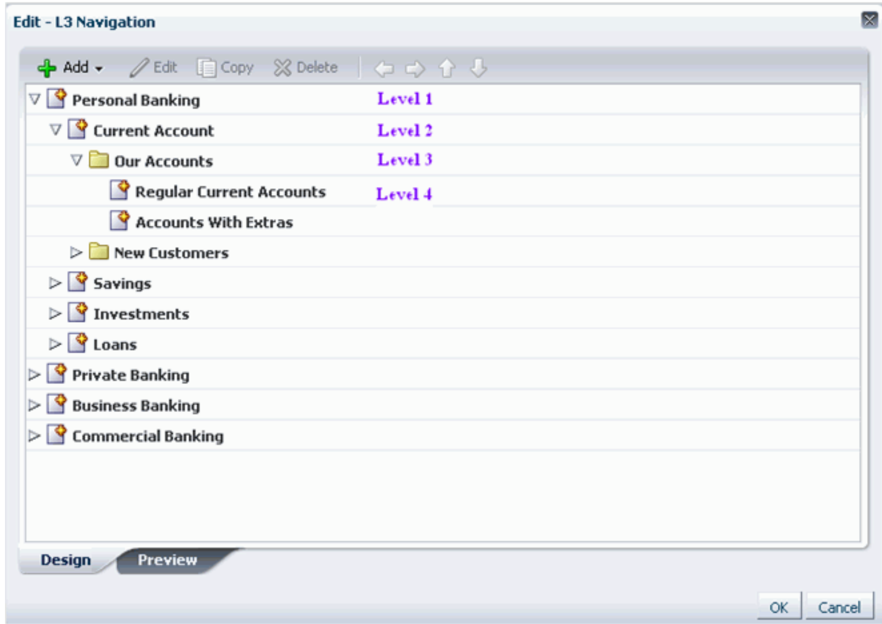
12.3.2.3 Using Properties to Configure Navigation Task Flow Instances

This section includes the following subsections:

- Section 12.3.2.3.1, "Sample Navigation Model"
- Section 12.3.2.3.2, "Selecting the Start Path for Your Navigation"
- Section 12.3.2.3.3, "Rendering Navigation as a Tree"
- Section 12.3.2.3.4, "Rendering Navigation as a Menu"
- Section 12.3.2.3.5, "Rendering Navigation as Breadcrumbs"
- Section 12.3.2.3.6, "Linking Navigation Task Flows"

12.3.2.3.1 Sample Navigation Model The following sections use examples based on the sample navigation model shown in Figure 12–27.

Figure 12–27 The Sample Navigation Model



12.3.2.3.2 Selecting the Start Path for Your Navigation

To select the start path for your navigation:

1. Create your navigation model, as described in Section 12.2, "Building a Navigation Model."

2. Add the Navigation Menu task flow to your application's page template, as described in Section 12.3.1, "Adding Built-in Navigation Task Flows to Page Templates."

3. In the **Parameters** tab of the Component Properties dialog, next to the **Start Path** field, click the **Select Path** icon.

4. In the Select Start Path dialog, select:

   - **Start at the Currently Selected Page Path** to use the currently selected page as the starting point of the navigation. This populates the **Start Path** property with the following EL expression:

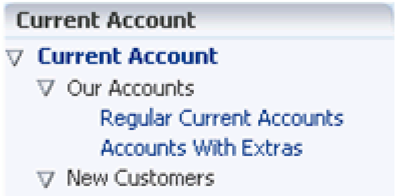
     ```
     #{navigationContext.navigationModel['modelPath=path'].currentSelection.pret
     tyUrl}
     ```

     where *path* is the path to the navigation model XML file (omitting the trailing `.xml`), for example:

     ```
     #{navigationContext.navigationModel['modelPath=/oracle/webcenter/portalapp/
     navigations/myNavigation'].currentSelection.prettyUrl}
     ```

     In our banking application example, if this option is selected, when the user navigates to the Current Accounts page, the navigation looks as shown in Figure 12–28.

Figure 12–28 Start at the Currently Selected Page Path



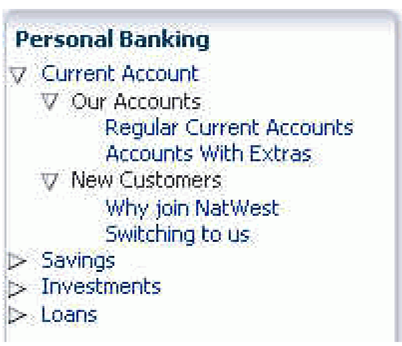
- **Start at This Level of the Currently Selected Page Path** to use the *n*th level of the path to the currently selected page as the starting point of the navigation (where *n* is the number specified in the field next to this option). This populates the **Start Path** property with the following EL expression:

  ```
  #{navigationContext.navigationModel['modelPath=path'].currentSelection.prettyUrlPath[level]}
  ```

  where `path` is the path to the navigation model XML file (omitting the trailing `.xml`) and `level` is the number specified in the field.

  In our banking application example, if this option is selected with the value of 1, when the user navigates to the Personal Banking page, and then the Current Accounts page, the navigation starts at the first level of this path, that is, Personal Banking (Figure 12–29).

Figure 12–29 Start at Specified Level of the Currently Selected Page Path



- **Select Page Path** to use a specific page as the starting point of the navigation. This populates the **Start Path** property with the path to the selected page.

12.3.2.3.3 Rendering Navigation as a Tree

To render your navigation model as a tree:

1. Create your navigation model, as described in Section 12.2, "Building a Navigation Model."
2. Add the Navigation Menu task flow to your application's page template, as described in Section 12.3.1, "Adding Built-in Navigation Task Flows to Page Templates."
3. Select the **Start Path** for the navigation when it is rendered on the page, as illustrated in Section 12.3.2.3.2, "Selecting the Start Path for Your Navigation."
4. From the **Show Levels** dropdown list, select how many levels to expand when the tree is initially rendered with the **Collapsed Tree** style.

Note: If the navigation is rendered using the **Expanded Tree** style, this option is ignored and the navigation is rendered will all nodes fully expanded.

---

5. From the **Show Root** dropdown list, select whether to display the start node in the tree.

   For example, if the start node is Current Account, select:

   - **Show Tree Root** to include the Current Account node in the tree (Figure 12–30).

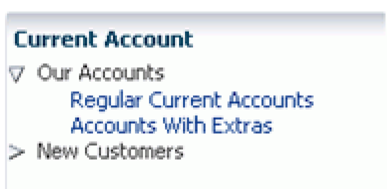
Figure 12–30 Show Tree Root

   - **Do Not Show Root** to not include the Current Account node (Figure 12–31).

Figure 12–31 Do Not Show Root

   - **Show Root As Box** to include the Current Account node as the header of a box that contains the rest of the navigation(Figure 12–32).

Figure 12–32 Show Root As Box



6. From the **Style** dropdown list, select what style to use for the tree.

   - **Collapsed Tree** displays the tree initially collapsed according to the levels specified by the Show Levels property.
   - **Expanded Tree** displays the tree with all levels completely expanded.
   - **List** displays the tree as a flat list of the top-level resources. If any of the top-level resources are folders, they are displayed as dropdown menus that display the contents of the folders.

     Using our banking example, if the start node is Personal Banking, a tree navigation with the List style looks like Figure 12–33.

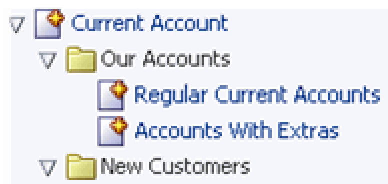
Figure 12–33 List Style Tree with No Folders

However, if the start node is Current Account (which contains two folders), it looks like Figure 12–34.

Figure 12–34 List Style Tree with Folders

7. Select **Show Icons** to display the icons associated with the navigation items in the tree (Figure 12–35).

Figure 12–35 Show Icons



12.3.2.3.4 Rendering Navigation as a Menu

To render your navigation model as a menu:

1. Create your navigation model, as described in Section 12.2, "Building a Navigation Model."
2. Add the Navigation Menu task flow to your application's page template, as described in Section 12.3.1, "Adding Built-in Navigation Task Flows to Page Templates."
3. Select the **Start Path** for the navigation when it is rendered on the page, as illustrated in Section 12.3.2.3.2, "Selecting the Start Path for Your Navigation."
4. From the Style dropdown list, select how you want to display the first level of navigation items in the menu. Using our sample banking application, we can illustrate the different options for this property:
   - **Tabs**

Figure 12–36 Tabs Menu Navigation Style

   - **Bar**

Figure 12–37 Bar Menu Navigation Style

- **Buttons**

Figure 12–38 Buttons Menu Navigation Style

- **Choice**

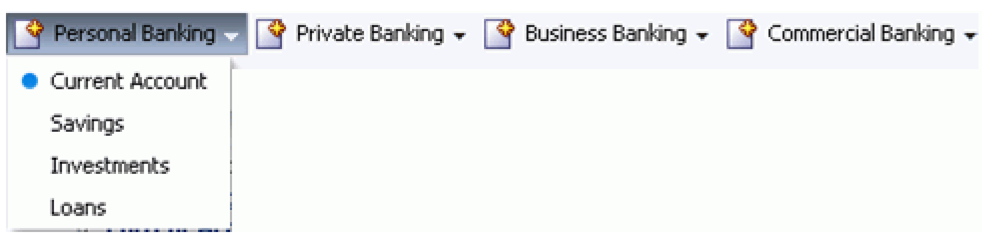
Figure 12–39 Choice Menu Navigation Style

- **List**

Figure 12–40 List Menu Navigation Style

- **Menu**

Figure 12–41 Menu Navigation Style



5. From the **Second Level Style** dropdown list, select the style to use for the second level of resources in the navigation.

   > **Note:** Menu navigations can render only two levels of resources.

6. Select **Show Icons** to display the icons associated with the navigation items in the menu.

12.3.2.3.5 Rendering Navigation as Breadcrumbs

To render your navigation model as breadcrumbs:

1. Create your navigation model, as described in Section 12.2, "Building a Navigation Model."

2. Add the Navigation Menu task flow to your application's page template, as described in Section 12.3.1, "Adding Built-in Navigation Task Flows to Page Templates."
3. Select the **Start Path** for the navigation when it is rendered on the page, as illustrated in Section 12.3.2.3.2, "Selecting the Start Path for Your Navigation."
4. Select Show Root to display the start node in the breadcrumbs.
5. From the Display Style dropdown list, select whether to display the breadcrumbs vertically or horizontally, for example Figure 12–42 shows breadcrumbs displayed horizontally.

Figure 12–42 Horizontal Breadcrumbs

Figure 12–43 shows breadcrumbs displayed vertically.

Figure 12–43 Vertical Breadcrumbs

12.3.2.3.6 Linking Navigation Task Flows You may want to include more than one area of navigation in your portal. For example, you might want to include tabs along the top of the page, displaying the top level of your navigation model, and a second tree structure down the side of the page. You can link the navigation task flows together so that the tree navigation reflects the selected navigation item in the tabbed menu.

The following procedure shows how to do this using our banking example.

To link navigation task flows:

1. Create your navigation model, as described in Section 12.2, "Building a Navigation Model."
2. Add the Navigation Menu task flow to a region along the top of your application's page template, as described in Section 12.3.1, "Adding Built-in Navigation Task Flows to Page Templates."
3. Add the Navigation Tree task flow to a region along the side of your application's page template, as described in Section 12.3.1, "Adding Built-in Navigation Task Flows to Page Templates."
4. Hover the mouse over the Navigation Menu task flow and, in the menu that pops up, click the **Edit** icon (wrench) for the task flow.

   Tip: Ensure that you click the **Edit** icon for the task flow and not the one for the region that contains the task flow.

5. In the Component Properties dialog, click the **Parameters** tab.
6. From the **Navigation** dropdown list, select the desired navigation model, or enter an EL expression.
7. In the **Start Path** parameter, enter `/` to start at the root of the navigation model.
8. From the **Style** dropdown list, select **Tabs**.

9. From the **Second Level Style** dropdown list, select **Do Not Display**.

   This restricts this part of the navigation to display only the top level of the navigation model. The rest of the navigation model is displayed in the tree navigation.

10. Click **OK**.

11. Hover the mouse over the Navigation Tree task flow and, in the menu that pops up, click the **Edit** icon (wrench) for the task flow.

    Tip: Ensure that you click the **Edit** icon for the task flow and not the one for the region that contains the task flow.

12. In the Component Properties dialog, click the **Parameters** tab.

13. From the **Navigation** dropdown list, select the same navigation model as is used for the Navigation Menu task flow, or enter the same EL expression.

14. Next to the **Start Path** field, click the **Select Path** icon.

15. In the **Select Start Path** dialog, select **Start at the Currently Selected Page Path** and click **OK**.

    This ensures that the tree navigation displays the navigation for whatever has been selected in the menu navigation.

16. From the **Show Root** dropdown list, select **Do Not Show Root**.

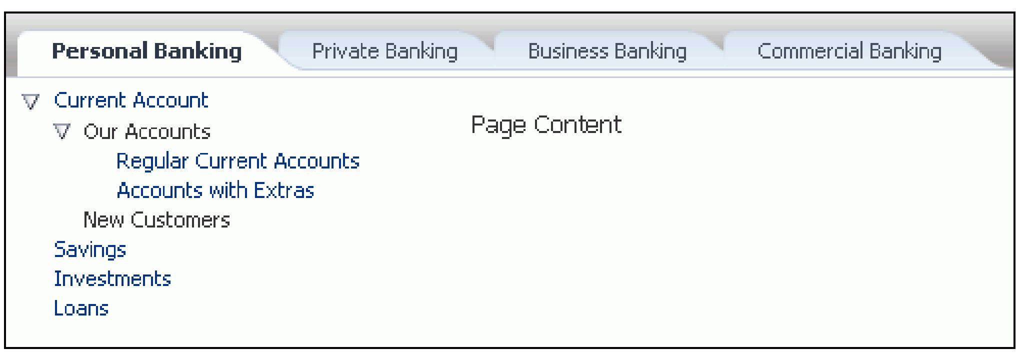
    The root of the navigation model is displayed in the tabs at the top of the page, so there is no need to duplicate it here.

17. Click **OK**.

18. Save and close the page template.

    Figure 12–44 shows how the above procedure might work for our banking example. Selecting the Personal Banking tab at the top of the page displays the rest of the navigation model (from Personal Banking down) on the side of the page.

Figure 12–44 Linking Navigation Task Flows



12.3.3 Using JDeveloper to Visualize Your Navigation

The navigation task flows provided by Spaces enable you to quickly visualize your navigation in your application. However, you may find that these task flows do not quite match your navigation requirements. If you find this is the case, you can use JDeveloper to edit the page templates you create in Spaces and add the navigation UI directly to the templates using the navigation EL APIs provided by WebCenter Portal. You can then upload these edited page templates back into Spaces. You can also create your page templates entirely in JDeveloper before uploading them to Spaces. The Spaces seeded page templates were created in this way.

The steps to download and upload page templates from Spaces are described in Section 11.5, "Using JDeveloper to Build Resources for the Spaces Application."

For information about specific considerations for creating page templates for use in Spaces, see the section "How to Create and Manage WebCenter Portal: Spaces Page Templates" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

For information about how to programmatically add navigation UI to your page templates using JDeveloper, see the section "Programmatically Adding Navigation to a Page Template" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

13

Working with Page Templates

Out-of-the-box, Oracle WebCenter Portal: Spaces is pre-configured with a range of page templates that users can apply to spaces and pages. Portal designers can change out-of-the-box page templates and create brand new ones to achieve a look, feel, and layout that suits their organization.

This chapter describes how to create, edit, and apply page templates in Spaces. It contains the following sections:

- Section 13.1, "What You Should Know About Page Templates"
- Section 13.2, "Creating a Page Template"
- Section 13.3, "Editing a Page Template"
- Section 13.4, "Customizing a Page Template for a Space"
- Section 13.5, "Managing a Page Template"
- Section 13.6, "Applying a Page Template to a Space"
- Section 13.7, "Choosing the Page Template Resource Catalog"
- Section 13.8, "Using JDeveloper to Build Your Page Templates"

Portal designers with advanced layout requirements can use development tools, such as Oracle JDeveloper, to build page templates and upload them to Spaces.

For generic information about adding and editing different types of resources, see Chapter 11, "Working with the Resources that Compose a Portal or Community."

Audience

This chapter is intended for portal designers with the application permission `Application-Page Templates-Create, Edit, and Delete`.

To build page templates for a particular space, you need the permission `space-Resources-Create, Edit, and Delete Resources` (standard permission model) or `space-Page Templates-Create, Edit, and Delete Page Templates` (advanced permission model).

> **See Also:** For information about roles and permissions, see Chapter 23, "Understanding Security."

13.1 What You Should Know About Page Templates

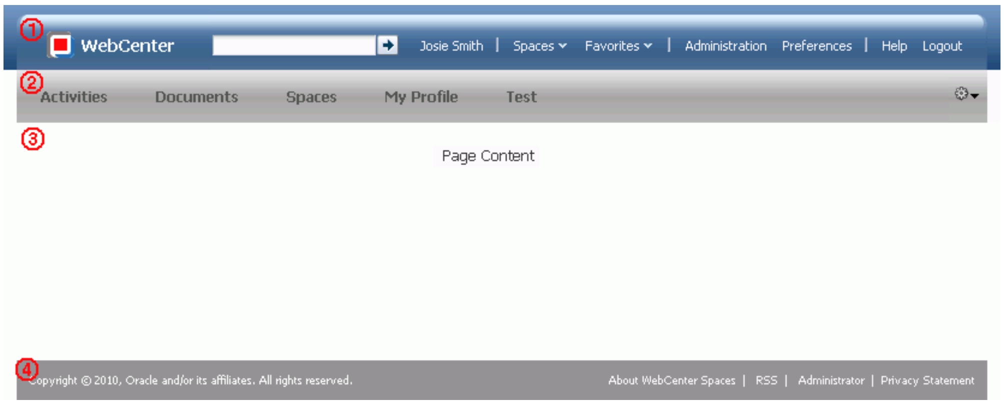
In Spaces, page templates define how individual pages and groups of pages display on a user's screen. When you use page templates to display pages, the pages are always consistent in structure and layout across the application.

A typical page template, shown below, defines the following:

1. Header on top of the page
2. Navigation structure at the top of the page, or in a sidebar, to link to important targets
3. Page content area
4. Footer at the bottom of the page

Everything that surrounds the "page content" area is referred to as the page template.

Figure 13–1 Page Template - Basic Structure



Just like other Spaces resources, portal designers can build page templates that are available to the whole application (application-level resources) and page templates that are scoped to a particular space (space-level resources).

Note: If you create a page template at the space level, the template is available only to that space and not to any subspaces beneath it. To make a page template available to a space and all its subspaces, the template must be created at the application level.

See Also: For more information about page templates, see the section "Using Page Templates" in the *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*.

13.1.1 Out-of-the-Box Page Templates

Spaces provides several out-of-the-box page templates:

- **Collaborative with Top Navigation**—A page template designed for use with collaborative spaces.

  Navigation: Above the main content area

  Layout: Flow. Components in the main content area take as much space as they need and are not stretched to fill the available space. If the page content does not fit in the viewable area, the vertical browser scrollbar is automatically displayed.

  Skin: Spaces FX

- **Fusion Side Navigation**

Navigation: Side bar

Layout: Stretch. Components are stretched to maximize usage of the viewable area. If the page content does not fit in the viewable area, inner scrollbars are used on the components

Skin: Fusion FX

- **Fusion Top Navigation**

  Navigation: Above the main content area

  Layout: Stretch

  Skin: Fusion FX

- **Portal-centric with Top Navigation—**A page template for use with portal-centric spaces.

  Navigation: Above the main content area

  Layout: Flow

  Skin: Spaces FX

- **Public Pages Template—**The default page template for Spaces public pages

- **Side Navigation**

  Navigation: Side bar

  Layout: Flow

  Skin: Spaces FX

  This page template is not compatible with spaces created prior to 11.1.1.4.0

- **Side Navigation (Stretch)**

  Navigation: Side bar

  Layout: Stretch

  Skin: Spaces FX

- **Top Navigation**

  Navigation: Above the main content area

  Layout: Flow

  Skin: Spaces FX

  This page template is not compatible with spaces created prior to 11.1.1.4.0

- **Top Navigation (Stretch)**

  Navigation: Above the main content area

  Layout: Stretch

  Skin: Spaces FX

You cannot directly edit or customize any of the out-of-the-box page templates listed here. If you want to exclude or display different content within one of these page templates, you must make a copy of the template, and then make changes to your copy rather than the original version.

Note: The out-of-the-box page templates are designed to show two levels of the navigation model. If your navigation model includes more than two levels, only the first two levels will be displayed when using the out-of-the-box templates. To display further levels of the navigation model, you must create your own page template or make a copy of the out-of-the-box page template and edit the copy to match your requirements.

13.2 Creating a Page Template

When you create a page template, you use an existing page template as the starting point for the new page template.

To create a page template:

1. Navigate to the **Resources** page of your application or the space in which you want to create the page template, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Page Templates**.
3. On the menu bar, click **Create**.
4. In the Create New Page Template dialog, in the **Name** field, enter a name for the page template.

Figure 13–2 The Create New Page Template Dialog

5. In the **Description** field, enter a description for the page template.

   The description is displayed below the name in the **Resources** page and as a tool tip when selecting a page template. You should ensure that the description helps page designers determine if they want to use this particular page template.
6. From the **Copy from** dropdown list, select an existing page template to use as the starting point for your new page template.

   Tip: You can also create a copy of an existing page template by selecting the existing page template on the **Resources** page, clicking **Edit** and then **Copy** on the menu bar, and providing a name and description for the new page template.
7. Click **Create**.

   The newly created page template is listed on the **Resources** page. The gray circle icon next to the page template indicates that it is not yet published and hence is not available to other users. For information about publishing a page template, see Section 11.4.3, "Showing and Hiding Resources."

13.3 Editing a Page Template

When you create a new page template, you copy an existing page template. To turn this copy into the page template that you want, you must edit it by using Composer or by editing the source code to change the layout and content of the page template as desired.

This section includes the following subsections:

- Section 13.3.1, "Editing a Page Template in Composer"
- Section 13.3.2, "Editing the Source Code of a Page Template"

13.3.1 Editing a Page Template in Composer

The most common way of editing a page template is to use Composer.

To edit a page template in Composer:

1. Navigate to the **Resources** page of your application or the space that contains the page template that you want to edit, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Page Templates**.
3. In the main panel, select the page template that you want to edit.
4. From the **Edit** menu, select **Edit**.

   This opens the page template in Composer where you can edit its layout and content.
5. Within Composer, choose whether to work in Design view or Source view:
   - Design view provides a WYSIWYG rendering of the page template, where controls are directly selectable on each component.
   - Source view provides a combined WYSIWYG and hierarchical rendering of page template components, where controls are available on the header of the hierarchical list. You can specify whether to present the page template source on the top, bottom, left, or right of the WYSIWYG portion of the page template.
6. Your page template must include at least one content region. You can create new content regions in the page template by clicking one of the **Add Box** icons in an existing region. This process is very similar to adding content regions to a page. For more information, see Section 18.4.4, "Adding New Content Regions."
7. Aside from the main content area, the other main feature of a page template is the navigation area. The navigation area of a page provides access to the rest of the portal. Spaces provides several task flows for providing navigation within your portal, you can add these task flows anywhere within the page template. For more information, see Section 12.3.1, "Adding Built-in Navigation Task Flows to Page Templates."

   If these task flows do not quite meet your requirements for navigation, you must develop your page template further in JDeveloper. You can create the main structure for your page template in Spaces and then download it for importing into JDeveloper, or you can create the page template entirely in JDeveloper and then upload it into Spaces. For more information, see Section 13.8, "Using JDeveloper to Build Your Page Templates."

8. You can add content to a page template by adding components from the Resource Catalog. The catalog is a gateway to a wide range of task flows, portlets, web development components, and other types of resources.

   Authorized users can create custom Resource Catalogs and add any variety of the available resources. This means the content of a given Resource Catalog is dependent on the person who designed the catalog. In addition, the Resource Catalog available to application-level page templates may be different from that available for space-level page templates. For more information about Resource Catalogs, including how to create custom Resource Catalogs and how to configure which Resource Catalog to use for page templates, see Chapter 16, "Working with Resource Catalogs."

   To add a component from the Resource Catalog, click the **Add Content** icon in the region to which you want to add the component. Again, the process is very similar to adding components to a page. For more information, see Section 18.5, "Adding a Component to a Page."

9. Spaces provides a range of reusable components that you can add to your page templates. You can customize attributes such as `text`, `label`, `inlinestyle`, and so on, to change the look and feel to suit your page template.

   > **Note:** Oracle does not recommend that you modify values for attributes such as `id`, `action`, `actionListener`, `destination`, because these properties impact the functionality of the component.

   Table 13–1 lists all the Spaces components that are available. For more information about each of these components, see Chapter 21, "Adding Spaces Components to a Page or Page Template."

Table 13–1 Reusable Spaces Components

A to Create Sp	Create Su to I	J to P	R to U
About Space	Create Subspace	Join Space	RSS
About WebCenter	Current User Profile	Leave Space	Search
Add to Favorites	Edit Page	Login	Self Registration
Administration	Email Members	Logout	Share Resource
Change Membership	Email Space Moderators	Manage Pages	Spaces Switcher
Contact Administration	Favorites Menu	Page Links	Status Indicator
Copyright Message	Global Help	Parent Space	Subscription Preferences
Create Page	Home Space	Print Preview	Tags
Create Space	Invite People as Connection	Privacy URL	User Preferences

10. When you have finished editing the page template, click **Save** and then **Close**.

13.3.2 Editing the Source Code of a Page Template

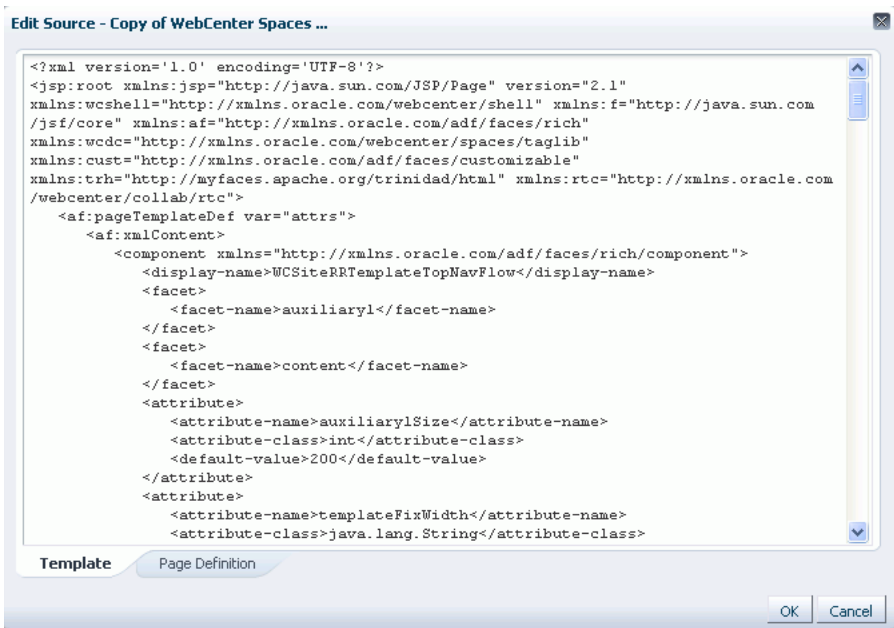
If you prefer working in source code, you can use the **Edit Source** option.

To edit the source code of a page template:

1. Navigate to the **Resources** page of your application or the space that contains the page template that you want to edit, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under Structure, select **Page Templates**.
3. In the main panel, select the page template that you want to edit.
4. From the **Edit** menu, select **Edit Source**.

   The Edit Source dialog (Figure 13–3) displays the source code of the page template.

Figure 13–3 The Edit Source Dialog for a Page Template



5. Edit the code as required.

   The XML syntax in the code is validated and an error message is displayed if you miss any tags or add them incorrectly. Validation is not performed for non-XML files.

   You might prefer to copy the code from the dialog and paste it into an editor of your choice, for example, JDeveloper, where further validation can be performed. After editing the code, you can then copy it and paste it back into the dialog.

   Note: To make more full use of JDeveloper's capabilities for editing page templates, you might prefer to download the page template from Spaces and import it into JDeveloper for editing. For more information, see Section 13.8, "Using JDeveloper to Build Your Page Templates."

   ---

6. Click **OK**.

13.4 Customizing a Page Template for a Space

Page templates created at the application level can also be used in spaces. For example, a portal designer may create several corporate page templates for use in spaces throughout the application. However, you may find that for a particular space, the application-level page template does not quite work and needs a bit of fine tuning.

You could create a copy of the page template within your space and make the changes you require. However, as soon as you create the copy, the new page template is completely separate from the original. Any changes made to the original template are not cascaded down to your copy.

Alternatively, within your space you can customize the application-level page template. The customizations you make apply only to the space in which you perform them. However, the connection to the original page template is retained, so any changes made at the application level are automatically cascaded down to the page template at the space level.

To customize a page template:

1. Navigate to the **Resources** page of the space that contains the page template that you want to edit, as described in Section 11.1.4.2, "Accessing Space-Level Resources."

   Note: You can customize page templates only at the space level. You cannot customize page templates at the application level.

2. In the left navigation panel, under Structure, select **Page Templates**.
3. In the main panel, select the page template that you want to customize.
4. From the **Edit** menu, select **Customize**.
5. Customize the page template as required.
6. When you have finished customizing the page template, click **Save** and then **Close**.

13.5 Managing a Page Template

This section includes the following subsections:

- Section 13.5.1, "Showing and Hiding a Page Template"
- Section 13.5.2, "Setting Properties on a Page Template"
- Section 13.5.3, "Setting Security on a Page Template"
- Section 13.5.4, "Copying a Page Template"
- Section 13.5.5, "Deleting a Page Template"
- Section 13.5.6, "Previewing a Page Template"

13.5.1 Showing and Hiding a Page Template

When you create a page template, by default it is hidden. A hidden page template is not available for use in the application, the Home space, or any other space. To make a page template available, it must be marked as shown. Further, for a page template created at the application level, you can control whether it is available to any, all, or selected spaces in the application.

For generic information about hiding and showing resources, see Section 11.4.3, "Showing and Hiding Resources."

For generic information about resource availability in spaces, see Section 11.4.2, "Setting Properties on a Resource."

13.5.2 Setting Properties on a Page Template

You can control a page template's display attributes and availability by setting the template's properties in the Edit Properties dialog. Setting page template properties follows the same procedure as any other resource. For more information, see Section 11.4.2, "Setting Properties on a Resource."

To view the properties associated with a page template, use the **About** menu option.

13.5.3 Setting Security on a Page Template

You can control whether all users or only specific users or groups can access the page template that you created in your application or space. Setting access to a page template follows the same procedure as any other resource. For more information, see Section 11.4.4, "Setting Security for a Resource."

13.5.4 Copying a Page Template

You can make a copy of a page template by selecting it and choosing **Copy** from the **Edit** menu on the **Resources - Page Templates** page. Copying a page template follows the same procedure as any other resource. For the generic procedure, see Section 11.4.1, "Copying a Resource."

13.5.5 Deleting a Page Template

Provided you are assigned the required permissions, you can delete any custom page template. Deleting a page template follows the same procedure as deleting any other resource. For more information, see Section 11.4.5, "Deleting a Resource."

13.5.6 Previewing a Page Template

Spaces provides a means of previewing a page template, so that you can see what it looks like while still within the **Resources** page, enabling you to make adjustments quickly, if required. Previewing a page template follows the same procedure as previewing other resources. For more information, see Section 11.4.6, "Previewing a Resource."

13.6 Applying a Page Template to a Space

When you create a space, the space inherits the page template defined for the space template that you choose for the space.

> **Note:** If the space template does not specify that a particular page template must be used, the space uses the default page template specified by the Spaces administrator. See Section 5.9, "Choosing a Default Page Template."

If you are the space moderator, or have `Manage Configuration` permission on a space, you can optionally select a different page template for the space. This overrides the space template setting and the application setting. For more information, see Section 53.4.9, "Changing the Page Template for a Space."

13.7 Choosing the Page Template Resource Catalog

The Resource Catalog used by a page template determines which components can be added to the page template.

Spaces provides a Default Page Template Catalog that includes the most commonly required components for page templates. Authorized users can create custom Resource Catalogs for use by page templates. For more information, see Chapter 16, "Working with Resource Catalogs."

By default, a space uses the page template Resource Catalog set by the Spaces administrator for all spaces in the entire application. However, you can override this setting at the space level.

- For information about setting the page template Resource Catalog at the application level, see Section 5.9, "Choosing a Default Page Template."
- For information about setting the page template Resource Catalog at the space level, see Section 53.4.11, "Changing the Resource Catalogs for Pages and the Page Template for a Space."

13.8 Using JDeveloper to Build Your Page Templates

In the majority of cases, you are likely to want to create a page template that is beyond the editing capabilities of Spaces. Specifically, to add more complex navigation UI than is available through the built-in navigation task flows, you will need to add the navigation UI programmatically. To do this, you have several options:

- Use the **Edit Source** option to edit the source code of the page template. You can edit the source code directly in the Edit Source dialog or you can copy the contents of the dialog to JDeveloper for editing and then copy the edited code back into the dialog. For more information, see Section 13.3.2, "Editing the Source Code of a Page Template."
- Download an existing Spaces page template, import the page template into JDeveloper for editing, and then upload it back to Spaces.
- Create a completely new page template in JDeveloper and upload it to Spaces.

The steps to upload and download page templates from Spaces are described in Section 11.5, "Using JDeveloper to Build Resources for the Spaces Application."

Oracle WebCenter Portal provides a special JDeveloper workspace (`DesignWebCenterSpaces.jws`) for developing Spaces resources, such as page templates. The workspace offers a design environment in which to create and edit your page templates, and also enables you to upload your page templates to Spaces for testing. For more information and to download the JDeveloper workspace, see the section "Developing Resources for the Spaces Application" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

As mentioned earlier, specifically for page template, you might find that the functionality for visualizing portal navigation provided within Spaces is not complex enough for the navigation that you want to expose in your application. Using JDeveloper, you can visualize a much more complex navigation UI in your page template, using ADF navigation components and EL expressions. For more information, see the chapter "Visualizing Your Portal Navigation" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

14

Working with Skins

To give individual spaces or the entire Spaces application a distinct personality or to associate with specific branding, portal designers can use skins to achieve the appearance and look and feel that suits their organization.

This chapter describes how to create and manage skins in Spaces. It includes the following sections:

For generic information about adding and editing different types of resources, see Chapter 11, "Working with the Resources that Compose a Portal or Community."

Audience

This chapter is intended for users who want to create and manage skins in their Spaces application.

Portal designers with the application permission `Application-Skins-Create, Edit, and Delete Skins` can manage application-level skins. Space moderators with the permission `Space-Resources-Create, Edit, and Delete Resources` (standard permission model) or `Space-Skin-Create, Edit, and Delete Skins` (advanced permission model) can manage space-level skins. For information about roles and permissions, see Chapter 23, "Understanding Security."

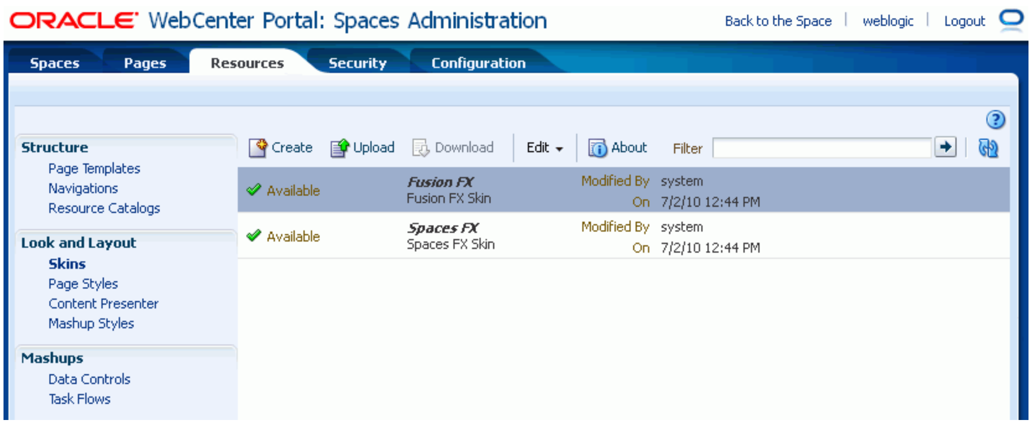
14.1 What You Should Know About Skins

A skin is a resource that defines colors, fonts, and other aspects of various components used on the pages of a space. A skin changes the way the user interface appears, and not how the application functions.

Skins are based on the Cascading Style Sheet (CSS) specification. A skin is made up of various selectors that define the CSS styles or properties of different parts of a component. You can adjust the look and feel of any component by changing its style-related properties. Some selectors, like a background or foreground color or a font style, may be global and affect all components.

Out-of-the-box, Spaces provides certain built-in skins (Figure 14–1). Authorized users can change the appearance of a specific space or the entire application by using built-in skins.

Figure 14–1 Built-in Skins



If built-in skins do not quite match your requirements, you can create custom skins of your own within Spaces to brand your application or specific spaces as desired.

Spaces also gives you the flexibility to use an IDE like Oracle JDeveloper to create new skins or edit custom Spaces skins. You can then upload these skins back into the Spaces application.

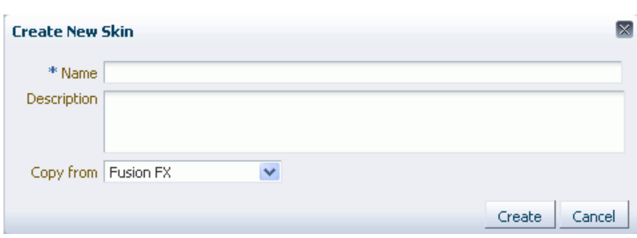
14.2 Creating a Skin

If you have specific branding requirements for the way your application looks, you may want to create a custom skin of your own instead of using built-in skins. In Spaces, you can create skins at two levels—application level and space level.

To create a custom skin:

1. Navigate to the **Resources** page of your Spaces application or the space in which you want to create the custom skin, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under **Look and Layout**, select **Skins**.
3. On the menu bar, click **Create**.
4. In the Create New Skin dialog, in the **Name** field, enter a name for the custom skin (Figure 14–2).

Figure 14–2 The Create New Skin Dialog



5. In the **Description** field, enter a description for the custom skin.

The description is displayed below the skin name on the **Resources** page and as a tool tip when selecting a skin. You should ensure that the description helps users determine if they want to use this particular skin.

6. From the **Copy from** list, select an existing skin to use as the starting point for your new custom skin.

   Tip: You can also create a new custom skin by making a copy of an existing skin, as described in Section 14.4.4, "Copying a Skin."

7. Click **OK**.

   The newly created custom skin is listed on the **Resources** page. The gray circle icon next to the custom skin indicates that it is not yet published and hence is not available to other users. For information about publishing a skin, see Section 14.4.1, "Showing and Hiding a Skin."

   Note: You can also create skins in tools like Oracle JDeveloper that provide you more control and flexibility in skin creation. For information, see Section 14.6, "Using JDeveloper to Build Your Skins."

14.3 Editing a Custom Skin

This section describes how to edit custom skins. It includes the following subsections:

14.3.1 What You Should Know About Skin Editing

Spaces supports two types of skin editing, source code editing and simple editing.

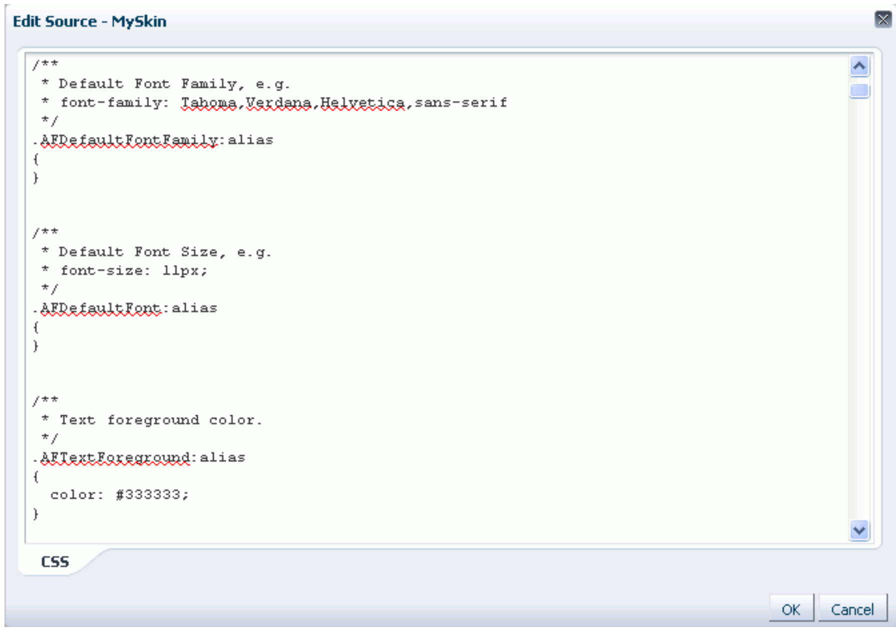
This section includes the following subsections:

14.3.1.1 About Source Code Editing

Source editing enables you to edit the source code of a custom skin in a text editor. This provides a powerful means of editing all the skin selectors available in a skin's CSS file.

Use the Edit Source dialog to edit a custom skin's source code. In this dialog, the source code is presented on the **CSS** tab (Figure 14–3).

Figure 14–3 Editing Skin Selectors



A skin's CSS file supports and contains ADF skin selectors and the skin selectors associated with Composer components. For information about ADF skin selectors, refer to *Oracle Fusion Middleware Tag Reference for Oracle ADF Faces Skin Selectors*. For information about Composer components skin-specific selectors, refer to the section "Style Selectors for Composer Components" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

In addition to ADF and Composer skin selectors, a skin's CSS file contains three Spaces-specific selectors. These include:

- `.WCPageTemplate:alias` - Defines the background color and the image and its position for the main area of the page template below the top banner, as shown in the example below:

```
.WCPageTemplate:alias
{
  background-image:url(/afr/fusion/dbd_centerGradient.png);
  background-repeat:repeat-y;
  background-position:top center;
  background-color: #024296;
  color: white;
}
```

- `.WCContent` - Defines the background color of the area of the page template containing the actual page content.

```
.WCContent
{
  background-color:#EEF3F8;
  border-top:1px solid #BECFE2;
}
```

- `.WCPortletContentMedium:alias` - Defines the background color and image of task flows and portlets in showDetailFrame components.

```
.WCPortletContentMedium:alias
{
```

```
        background-image:url(/adf/images/gradient-275x275-fcfcfc.png);
        background-repeat:no-repeat;
    }
```

While editing the source code of a custom skin, you can add, edit, or delete any skin selector to suit your requirements. For example, if you want to override the default font size, then in your skin's CSS file, you can specify the required size in the skin selector shown in Example 14–1.

Example 14–1 Overriding the Default Font Size in a Skin's CSS File

```
.AFDefaultFont:alias
{
font-size:12px;
}
```

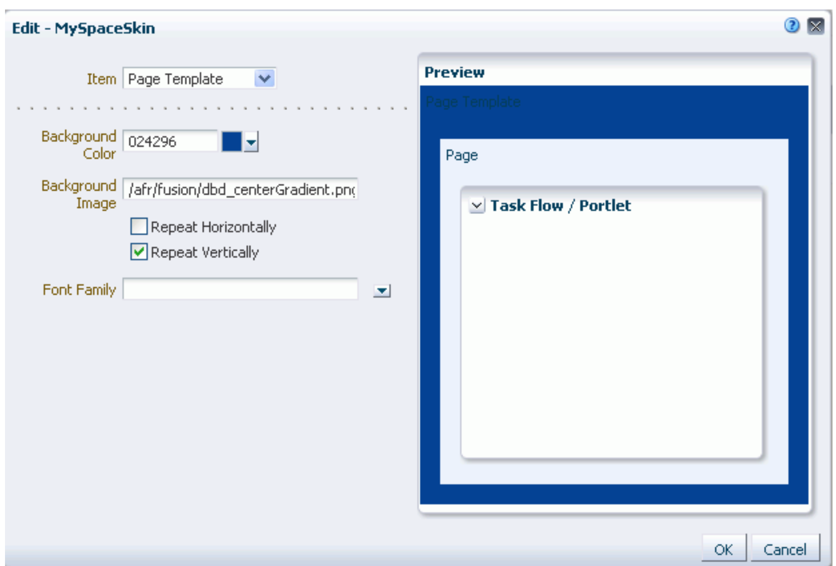
When you edit the code using the Edit Source dialog, the format of the code is validated and an error message is displayed if you miss any tags or add them incorrectly.

For information about how to edit the source code of a skin, see Section 14.3.2, "Editing the Source Code of a Custom Skin."

14.3.1.2 About Simple Editing

Simple editing provides a simple means of editing a skin's basic appearance settings: font, background color, and background image. To perform simple editing, you use the Edit dialog (Figure 14–4).

Figure 14–4 The Edit Dialog



In the Edit dialog, you can define settings for the target areas listed below. Each target area maps to a WebCenter Portal-specific skin selector available in a skin's CSS file (described in Section 14.3.1.1, "About Source Code Editing.")

- **Page Template** - Enables you to define the background color, background image, and font for the template used on a page. In a Skin's CSS file, this target area maps to the `.WCPageTemplate:alias` selector, which is used by all page templates.

- **Page** - Enables you to choose the color and image of the page background. This target area sets the `.WCContent` style selector in the CSS file.
- **Task Flow/Portlet** - Enables you to define the background color and image of task flows and portlets on a page. In the CSS file, this sets the `.WCPortletContentMedium:alias` selector, which defines the background color of Show Detail Frames that use `medium` background.

For information about how to edit the source code of a skin, see Section 14.3.3, "Editing a Custom Skin Using the Edit Dialog."

14.3.2 Editing the Source Code of a Custom Skin

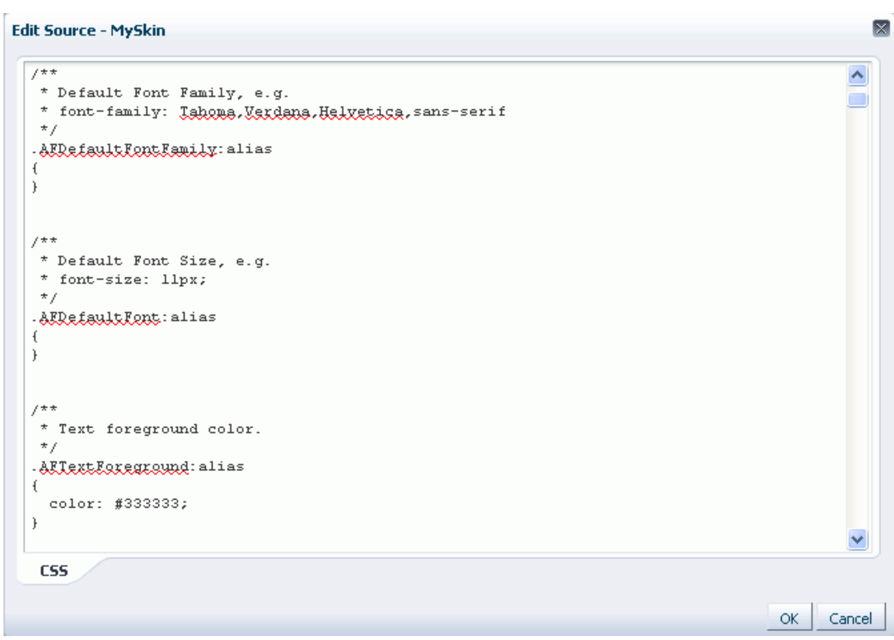
Use the Edit Source dialog to expose the underlying code of a custom skin and make adjustments to the skin selectors that make up the skin.

> **Caution:** You must have a thorough understanding of CSS specification about selectors if you plan to edit skin selectors. You might get into a situation where you are not sure why your style is not getting picked up, whereas it could very well be that the skin you are extending has a selector that is more specific than your selector.

To edit the source code of a custom skin:

1. Navigate to the **Resources** page of your application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under **Look and Layout**, click **Skins**.
3. From the list of skins displayed on the right, select the skin whose source code you want to edit.
4. From the **Edit** menu, select **Edit Source**.
5. In the Edit Source dialog, change the required settings (Figure 14–5).

Figure 14–5 Editing Skin Selectors



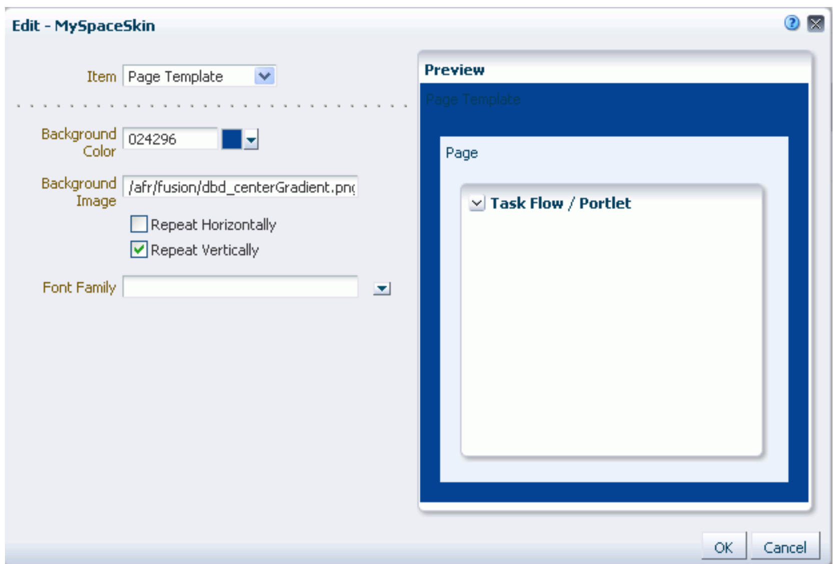
6. Click **OK**.

14.3.3 Editing a Custom Skin Using the Edit Dialog

To perform simple editing of a custom skin using the Edit dialog:

1. Navigate to the **Resources** page of your application or the desired space, as described in Section 11.1.4, "Accessing Resources."
2. In the left navigation panel, under **Look and Layout**, click **Skins**.
3. From the list of skins displayed on the right, select the skin that you want to edit.
4. From the **Edit** menu, select **Edit**.

Figure 14–6 Editing Skin Properties



5. In the Edit dialog, from the **Item** list, select the target area for which you want to update skin properties.

   Select any one of the following options:

   - **Page Template** - Select to choose the background color, background image, and font for the template used on a page.
   - **Page** - Select to choose the color and image of the page background.
   - **Task Flow/Portlet** - Select to choose the background color and image of task flows and portlets on a page.

6. From the **Background Color** list, select the background color you want to use for the target area.

   When you select a background color, its RGB value appears in the **Color** field, and the selected target area is highlighted with that color in the Preview panel on the right.

7. In the **Image** field, enter the URI path of the image you want to use as a background image.

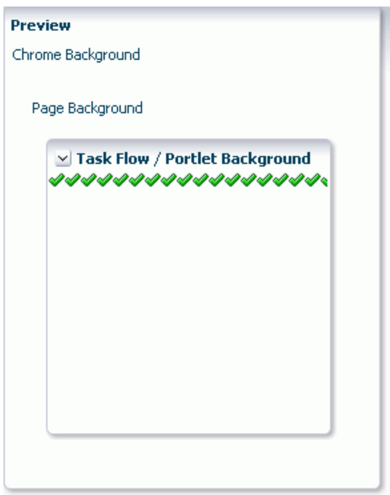
Note: You can either specify an absolute URL (where the URL should also work if entered in a browser address field), or a relative URL that points to an image located somewhere in Spaces. To store an image in Spaces, you must upload the required file using the Documents service, as described in Section 43.8.1, "Uploading Files." You can then obtain the image's URL as described in Section 43.27.1, "Retrieving the URL for a Folder or File."

---

8. You can choose to repeat the background image horizontally and/or vertically. Depending on your requirement, select the following check boxes:

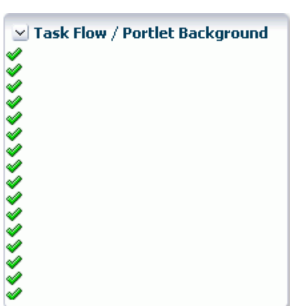
   - **Repeat Horizontally** - Select to show the background image aligned horizontally at the top of the page, with the image repeated across the horizontal bar (Figure 14–7).

Figure 14–7 Repeating an Image Horizontally Across a Target Area



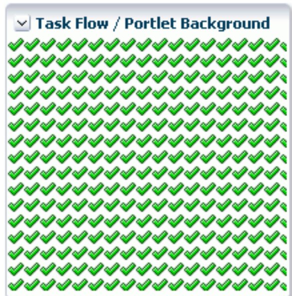
   - **Repeat Vertically** - Select to show the background image aligned vertically on the left side of the page, with the image repeated across the vertical bar (Figure 14–8).

Figure 14–8 Repeating an Image Vertically Across a Target Area



   If you select both these check boxes, copies of the selected image are repeated across the entire target area (Figure 14–9).

Figure 14–9 Repeating an Image Across the Entire Target Area



9. From the **Font Family** list, select the font you want to use for the Page Template area.

   The Font list is displayed only when Page Template is selected as the target area.
10. Click **OK**.

14.4 Managing a Skin

This section describes the tasks involved in managing skins. It includes the following subsections:

- Section 14.4.1, "Showing and Hiding a Skin"
- Section 14.4.2, "Setting Properties on a Skin"
- Section 14.4.3, "Setting Security on a Skin"
- Section 14.4.4, "Copying a Skin"
- Section 14.4.5, "Deleting a Skin"
- Section 14.4.6, "Viewing Information About a Skin"

14.4.1 Showing and Hiding a Skin

When you create a custom skin, by default it is marked as hidden. A hidden skin is not available for use in the application, Home space, or any other space. To make a skin available, you must publish it. Further, for a custom skin created at the application level, you can control whether it is available to all or only selected spaces in the application.

Showing or hiding a skin follows the same procedure as any other resource. For information, see Section 11.4.3, "Showing and Hiding Resources."

For generic information about resource availability in Spaces, see Section 11.4.2, "Setting Properties on a Resource."

14.4.2 Setting Properties on a Skin

A range of properties is associated with custom skins that authorized users can access through the Edit Properties dialog.

This section includes the following subsections:

- Section 14.4.2.1, "What You Should Know About Skin Properties"
- Section 14.4.2.2, "Naming, Describing, and Categorizing a Custom Skin"
- Section 14.4.2.3, "Associating an Icon with a Custom Skin"

- Section 14.4.2.4, "Setting the Availability of an Application-Level Custom Skin"
- Section 14.4.2.5, "Working with a Custom Skin's Attributes"

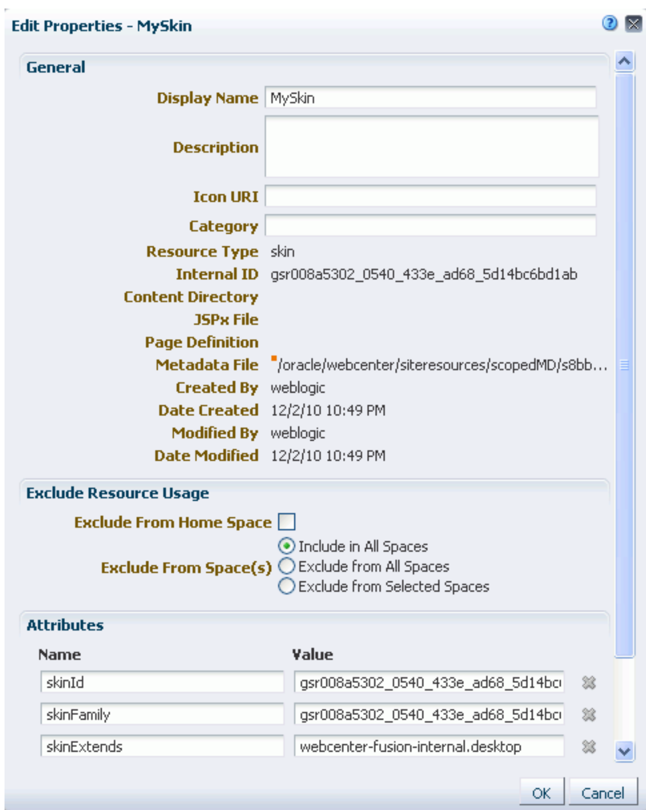
14.4.2.1 What You Should Know About Skin Properties

Use custom skin properties to:

- Enter a display name and description
- Provide an icon for use
- Apply a category to classify a skin
- Specify availability (for application-level skins only)
- Associate attribute name/value pairs, for example, to control whether a page based on a selected page style opens in view or edit mode once it is created

Figure 14–10 shows the Edit Properties dialog of a custom skin. You specify the various properties in the **General**, **Exclude Resource Usage**, and **Attributes** sections.

Figure 14–10 Setting Skin Properties



With each custom skin, three default attributes are associated: `skinId`, `skinFamily`, and `skinExtends`. Table 14–1 provides a description of these attributes.

Note: As an authorized user, you can add, modify, or delete the attributes of a custom skin. However, you must have a thorough understanding of these attributes if you want to manage them.

Table 14–1 Default Attributes of a Skin

Attribute	Description
`skinId`	Specifies the unique identifier of a skin. Typically, it is a combination of the skin family and the render kit, for example `BrightBlue.desktop`.
`skinFamily`	Specifies the family to which a skin belongs. It is an identifier that can be used by a number of skins with different renderkits. For example, you could have a family named `BrightBlue`. It can be used with renderkit `desktop` or `mobile`.
`skinExtends`	Specifies the ID of the skin being extended. For example, suppose you like the `midnight` skin, but want a different font size in that skin. You can configure your skin to extend the `midnight.desktop` skin and then you can edit the source code of your skin to override the font size.

14.4.2.2 Naming, Describing, and Categorizing a Custom Skin

Setting the name, description, and category of a custom skin follows the same procedure as any other resource. For information, see Section 11.4.2.3, "Renaming, Describing, and Categorizing a Resource."

14.4.2.3 Associating an Icon with a Custom Skin

Associating an icon with a custom skin follows the same procedure as any other resource. For information, see Section 11.4.2.4, "Associating an Icon with a Resource."

14.4.2.4 Setting the Availability of an Application-Level Custom Skin

Setting the availability of an application-level custom skin in a space follows the same procedure as any other resource. For information, see Section 11.4.2.5, "Setting the Availability of an Application-Level Resource in Other Spaces."

14.4.2.5 Working with a Custom Skin's Attributes

Setting the attributes of a custom skin follows the same procedure as any other resource. For information, see Section 11.4.2.6, "Working with the Attributes of a Resource."

For information about default skin attributes, see Table 14–1.

14.4.3 Setting Security on a Skin

You can control whether all users or only specific users or groups can access the custom skin that you created in your application or a space. Setting access to a custom skin follows the same procedure as any other resource. For more information, see Section 11.4.4, "Setting Security for a Resource."

14.4.4 Copying a Skin

Spaces enables you to create copies of a skin. You can use this feature when you want to back up a skin or update a skin while keeping the original in use.

Copying a skin follows the same procedure as any other resource. For the generic procedure, see Section 11.4.1, "Copying a Resource."

14.4.5 Deleting a Skin

Provided you are assigned the required permissions, you can delete any custom skin. Deleting a skin follows the same procedure as deleting any other resource. For information, see Section 11.4.5, "Deleting a Resource."

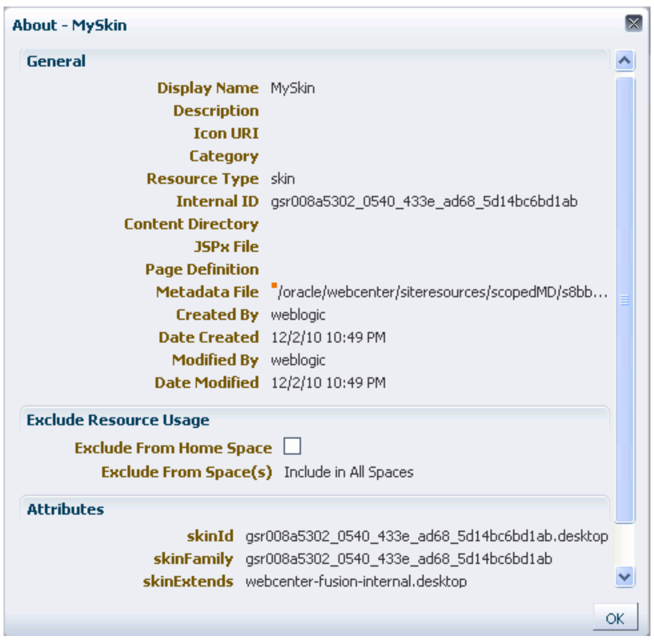
14.4.6 Viewing Information About a Skin

Each skin has an associated About page that summarizes useful information about it (Figure 14–11).

Accessing information about a skin follows the same procedure as any other resource. For information about how to access the About dialog, and for a description of the properties displayed in the dialog, see Section 11.1.5, "Viewing Information About a Resource."

For information about skin-specific default attributes, see Table 14–1.

Figure 14–11 About Dialog of a Skin



14.5 Applying a Skin

As a Spaces administrator, you may customize the default appearance of the application for all users by changing its skin. As a space moderator, you may customize the appearance of your space for all members by changing its skin. Individual users can change the skin applied to their Home space through user preference settings.

This section includes the following subsections:

- Section 14.5.1, "Applying a Skin to the Spaces Application"
- Section 14.5.2, "Applying a Skin to a Space"
- Section 14.5.3, "Applying a Skin to the Home Space"

14.5.1 Applying a Skin to the Spaces Application

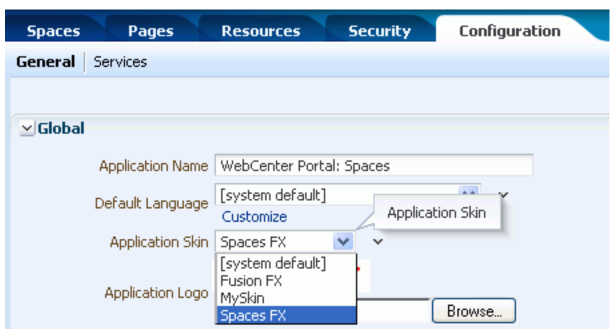
When you set a skin for the Spaces application, the skin is applied to the Home space and all spaces that use the application-level skin setting. The skin is also applied to any new spaces that are created. However, the skin is not applied to existing spaces for which a specific skin has already been set. Also, the skin is not applied to the administration pages. By default, these pages use the `Fusion FX` skin.

To apply a skin to the Spaces application:

1. Open the Spaces Administration page. See Section 4.1, "Accessing the Spaces Administration Page."
2. Click the **Configuration** tab, then the **General** subtab.
3. Do one of the following:
   - Select an **Application Skin** from the list available. (Figure 14–12).

     Note: If the desired skin does not appear in the **Application Skin** list, it may be because it is marked as hidden. A skin must be marked as Available to be available for selection. For information, see Section 14.4.1, "Showing and Hiding a Skin."

     Figure 14–12 Applying a Skin to the Spaces Application

   - Click the **Advanced Edit Options** icon, then select **Expression Builder** to enter an EL expression that determines the default application skin dynamically based on certain criteria.

     For example, you may like the default skin to change depending on which department or organization the logged in user belongs to.
4. Click **Apply**.

   The skin you select is applied to Home space, any new spaces that are created, and all spaces that use the application-level skin setting. The skin is not applied to the spaces that override the application-level skin setting.

14.5.2 Applying a Skin to a Space

When you apply a skin to a space, the skin is applied to all the pages of the space. However, the administration pages are not affected; they always appear in the default skin. For information about applying a skin to a space, see Section 53.4.10, "Changing the Skin for a Space."

14.5.3 Applying a Skin to the Home Space

For information about applying a skin to your personal view of the Home space, see Section 38.5, "Changing the Home Space Look and Feel in Your View."

14.6 Using JDeveloper to Build Your Skins

You may want to create a skin that is beyond the editing capabilities of Spaces, or you may prefer working in JDeveloper. To do this, you have several options:

- Use the **Edit Source** option to edit the source code of the skin. You can edit the source code directly in the Edit Source dialog or you can copy the contents of the dialog to JDeveloper for editing and then copy the edited code back into the dialog. For more information, see Section 14.3.2, "Editing the Source Code of a Custom Skin."
- Download an existing Spaces skin, import the skin into JDeveloper, edit the skin, and then upload it back to the Spaces application.
- Create a completely new skin in JDeveloper and upload it to Spaces.

The steps to upload and download skins from Spaces are described in Section 11.5.2, "Downloading a Resource" and Section 11.5.3, "Uploading a Resource."

Oracle provides a special JDeveloper workspace (`DesignWebCenterSpaces.jws`) for developing Spaces resources, including skins. The workspace offers a design environment in which to create and edit your skins, and also enables you to upload your skins to Spaces for testing. For more information and to download the JDeveloper workspace, see "Developing Resources for the Spaces Application" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

For information about specific considerations for creating skins for use in Spaces, see the chapter "Creating and Managing Skins" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

15

Working with Page Styles

In planning and building your portal, you may find it useful to offer a wide selection of page styles to your users. It may also be useful to restrict page styles so that users build only the types of pages that you intend.

This chapter provides information about default, seeded page styles included with WebCenter Portal: Spaces and the custom page styles that you add your portal.

This chapter includes the following sections:

- Section 15.1, "What You Should Know About Page Styles"
- Section 15.2, "Creating a Custom Page Style"
- Section 15.3, "Editing the Source Code of a Custom Page Style"
- Section 15.4, "Managing Page Styles"
- Section 15.5, "Applying a Page Style"
- Section 15.6, "Using JDeveloper to Build Your Page Style"

> **See Also:** For general information about adding and editing different types of resources, see Chapter 11, "Working with the Resources that Compose a Portal or Community."

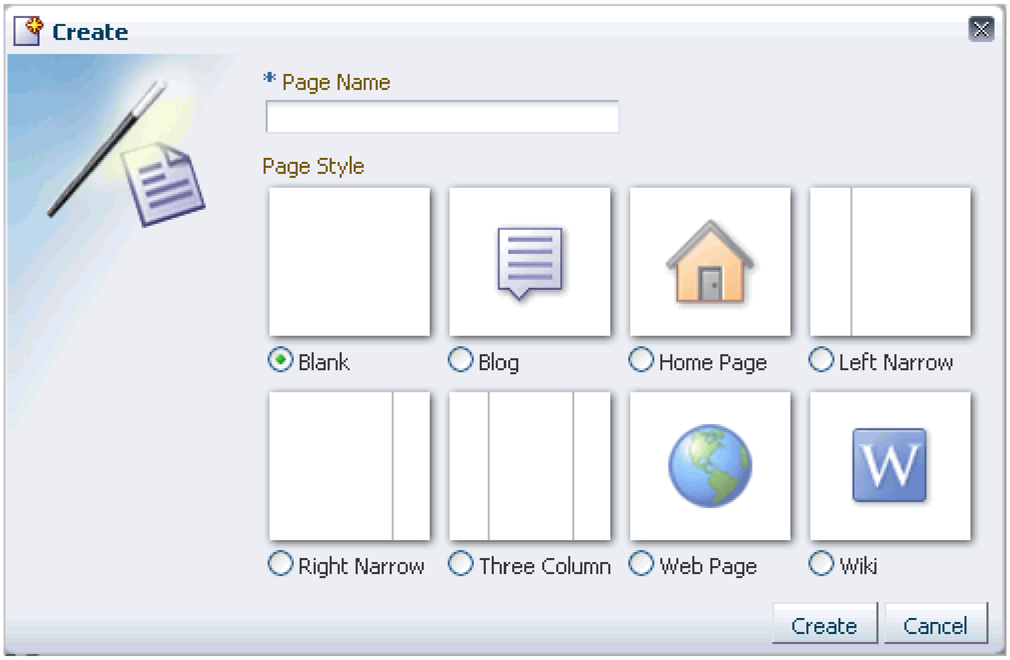
Audience

This chapter is intended for users who want to provide and manage page styles in a Spaces application. By default, users with an application-level role that includes the permissions `Application: Manage All` and `Page Styles: Create, Edit, and Delete Page Styles` or a space role that includes the permissions `Administration: Manage All` and `Resources: Create, Edit, and Delete Resources` can perform the actions described in this chapter.

15.1 What You Should Know About Page Styles

When users create a page, a Create dialog opens with a selection of page styles (Figure 15–1).

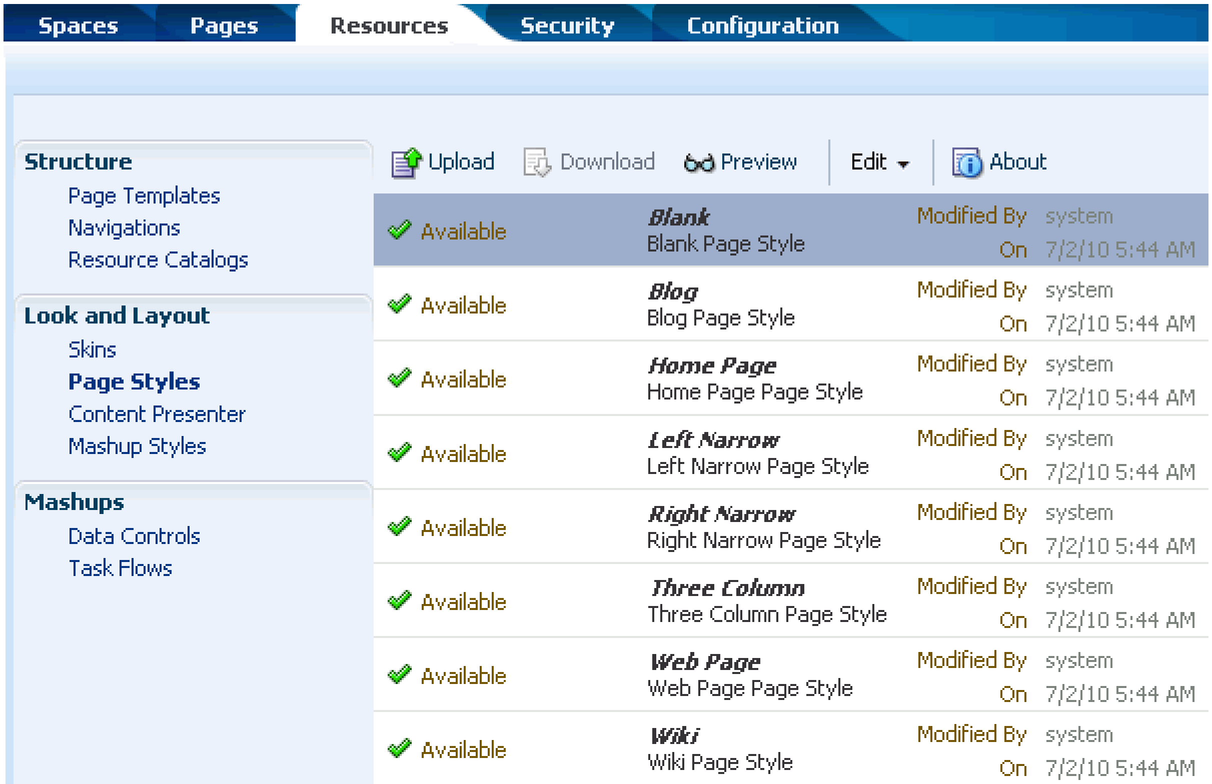
Figure 15–1 Create Dialog



Page styles describe the layout of a newly created page and may also dictate the type of content the page supports. For example, the Wiki page style provides an instant wiki; a Blank page style has few restrictions on the types of content users can add to the pages that are based on it.

All page styles are published to the Create dialog through the Resource Manager (Figure 15–2).

Figure 15–2 Application-Level Resources Manager



Application-level page styles are provided on the **Resources** page accessed through the **Administration** link. space-level page styles are provided on the **Resources** page of the space administration.

The difference between application- and space-level page styles is one of scope:

- Application-level page styles are available to all spaces.
- Space-level page styles are available only to the space in which they reside.

There may be more page styles available on the **Resources** page than are available in a Create dialog. The site administrator and the space moderator determine which page styles are shown in the Create dialog through the following considerations:

- Is the page style shown or hidden?

  For more information, see Section 15.4.1, "Showing and Hiding a Page Style in the Create Dialog."

- Has the page style been configured to appear only in selected spaces (custom application-level page styles only)?

  For more information, see Section 15.4.2, "Setting Properties on a Custom Page Style."

- Has the page style been configured to appear only to selected users or roles (custom page styles only)?

  For more information, see Section 15.4.3, "Setting Security on a Custom Page Style."

The Spaces application offers a range of page styles out of the box (default page styles) and provides a means of copying page styles and editing their source (custom page styles). You can also download custom page styles, bring them into Oracle JDeveloper for additional customization, and upload them back into Spaces. The difference between default and custom page styles is one of flexibility: many of the actions available to custom page styles are not available to default page styles.

Table 15–1 compares the types of actions authorized users can perform on default and custom page styles in WebCenter Portal: Spaces.

Table 15–1 Actions Available to Default and Custom Page Styles

Action	Default	Custom	More Information
Upload	—	Yes	Section 11.5.3, "Uploading a Resource"
Download	No	Yes	Section 11.5.2, "Downloading a Resource"
Preview	Yes	Yes	This control provides a means of previewing the page style. Select a page style and click **Preview** to render the page style in a page.
Copy	Yes	Yes	Section 11.4.1, "Copying a Resource"
Security Settings	No	Yes	Section 15.4.3, "Setting Security on a Custom Page Style"
Delete	No	Yes	Section 15.4.5, "Deleting a Custom Page Style"
Hide/Show	Yes	Yes	Section 15.4.1, "Showing and Hiding a Page Style in the Create Dialog"
Edit Source	No	Yes	Section 15.3, "Editing the Source Code of a Custom Page Style"
Edit Properties	No	Yes	Section 15.4.2, "Setting Properties on a Custom Page Style"
About	Yes	Yes	Section 11.1.5, "Viewing Information About a Resource"

Table 15–2 lists, and describes the default page styles provided with the Spaces application out of the box.

Table 15–2 Default Page Styles

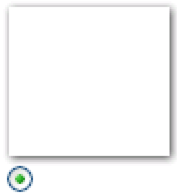
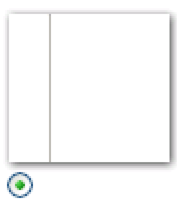
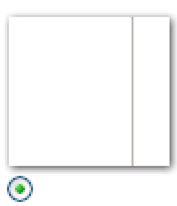
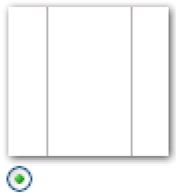
Name	Illustration	Description
Blank		A one-column page with one layout box into which you can add content, including additional layout components.
Blog		A page preconfigured to expose blog controls from the Content Server. This page style becomes available in the Create dialog when the server is integrated with WebCenter Portal: Spaces.
Home Page		A preseeded Home page, based on the Right Narrow Column Layout page style. The Home page style comes prepopulated with task flows and other content.
Left Narrow		A two-column page with two layout boxes into which you can add content, including additional layout components. Layout boxes are positioned side-by-side, with the narrower layout box on the left.
Right Narrow		A two-column page with two layout boxes into which you can add content, including additional layout components. Layout boxes are positioned side-by-side, with the narrower layout box on the right.

Table 15–2 (Cont.) Default Page Styles

Name	Illustration	Description
Three Column		A three-column page with three layout boxes into which you can add content, including additional layout components. Layout boxes are positioned side-by-side, with the narrower layout boxes on the left and right sides.
Web Page		A page that takes a URL value, enabling you to expose external web content in your WebCenter Portal: Spaces application.
Wiki		A page preconfigured to expose wiki controls from the Content Server. This page style becomes available in the Create dialog when the server is integrated with WebCenter Portal: Spaces.

For both application- and space-level page styles, the **About** action opens a dialog that provides information about the selected page style. For more information, see Section 11.1.5, "Viewing Information About a Resource."

15.2 Creating a Custom Page Style

There is no direct way to create a page style in the Spaces application. That is, no **Create** button is available for starting this process. To create a new page style, you must first copy an existing style and then revise its source code in the source code editor or through JDeveloper. Or, you can create a page style in JDeveloper and upload it to Spaces.

For information about revising a page style's source code, see Section 15.3, "Editing the Source Code of a Custom Page Style." For information about copying a page style, see Section 15.4.4, "Copying a Page Style." For information about working with page styles in Oracle JDeveloper, see the section, "Developing and Uploading WebCenter Portal: Spaces Resources," in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

15.3 Editing the Source Code of a Custom Page Style

Source editing enables you to work with the source code of a custom page style. For example, you can upload a page style you create in JDeveloper and perform additional adjustments to it through the Edit Source dialog. You can even create a style from scratch in the Edit Source dialog, but this entails a lot of hand coding, and we do not recommend it.

This section provides information about editing custom page style source and steps you through the process of editing a custom page style. It includes the following subsections:

- Section 15.3.1, "What You Should Know About Editing Page Style Source"
- Section 15.3.2, "Editing Custom Page Style Source"

> **See Also:** For general information about editing a resource, see Section 11.3.2, "Editing the Source Code of a Resource."

15.3.1 What You Should Know About Editing Page Style Source

Use the Edit Source dialog to expose the underlying code of a selected custom page style and make adjustments to it. For example, you can create a new page style in JDeveloper, upload it to Spaces through the Resource Manager, preview it, and edit the source to make adjustments.

In contrast, you can copy a default page style, download the copy to your local drive, bring it into JDeveloper for customization, upload it back into Spaces, and open it in the Edit Source dialog for further adjustments.

You can simply copy a default page style and make adjustments to the copy's source in the Edit Source dialog.

You can even create a page style from the beginning, by copying another page style, and then replacing its code with your own original code through the Edit Source dialog. Note, however, that, due to the heavy hand-coding requirement, we do not recommend this scenario.

In the Edit Source dialog, the custom page style source is presented on two tabs: **Page** and **Page Definition**. **Page** tab content defines the page layout and style. **Page Definition** tab content holds parameter definitions and task flow and data control bindings. Each represents the underlying `*.jspx` page and page definition file that comprise the page style.

Example 15–1 illustrates custom page style encoding. It describes a basic page with a two-column layout proportioned at 35 and 65 percent that is designed to flow. This is an example of a custom page style that was created in JDeveloper, imported into Spaces, and opened in the Edit Source dialog **Page** tab for minor revisions. The relevant code is in **bold**.

Example 15–1 Source Code of a Custom Page Style

```
<?xml version='1.0' encoding='utf-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page"
xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable"
xmlns:f="http://java.sun.com/jsf/core"
xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
xmlns:trh="http://myfaces.apache.org/trinidad/html" version="2.1">
  <jsp:directive.page deferredSyntaxAllowedAsLiteral="true"/>
  <jsp:directive.page contentType="text/html;charset=utf-8"/>
  <f:view>
    <af:document title="#{pageDocBean.title}" id="docrt">
      <af:form usesUpload="true" id="f1">
        <af:pageTemplate value="#{bindings.shellTemplateBinding.templateModel}"
        id="T">
```

```
        <f:facet name="content">
          <pe:pageCustomizable id="pcl1">
            <af:panelGroupLayout id="pgl1" layout="scroll"
            styleClass="replace_with_scheme_name"
            inlineStyle="replace_with_inline_style">
              <trh:tableLayout id="tl1" width="100%">
                <trh:rowLayout id="rl1">
                  <trh:cellFormat id="cf1" width="35%" valign="top">
                    <cust:panelCustomizable id="hm_pnc1" layout="scroll"/>
                  </trh:cellFormat>
                  <trh:cellFormat id="cf2" width="65%" valign="top">
                    <cust:panelCustomizable id="hm_pnc2" layout="scroll"/>
                  </trh:cellFormat>
                </trh:rowLayout>
              </trh:tableLayout>
              <trh:tableLayout id="tl2"/>
            </af:panelGroupLayout>
            <f:facet name="editor">
              <pe:pageEditorPanel id="pep1"/>
            </f:facet>
          </pe:pageCustomizable>
        </f:facet>
      </af:pageTemplate>
    </af:form>
  </af:document>
 </f:view>
</jsp:root>
```

15.3.2 Editing Custom Page Style Source

The following procedure works equally for custom page styles edited at space- and application-levels.

To edit the source of a custom page style:

1. Go to the space- or application-level **Resources** page, and select **Page Styles** from the panel on the left.

   Tip: You can use the following URLs to navigate to the **Resources** page:

   - Application-level **Resources** page:

     `http://`*`host:port`*`/webcenter/spaces/admin/resources`

   - Space-level **Resources** page:

     `http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/resources`

2. Select the custom page style, and then from the **Edit** menu select **Edit Source** to open the selected page style in the Source Editor (Figure 15–3).

Figure 15–3 Source Editor

3. Make changes to the source according to your requirements.
4. When finished, click **OK** to save your changes and close the editor.

15.4 Managing Page Styles

This section provides information about managing your seeded and custom page styles. It includes the following sections:

- Section 15.4.1, "Showing and Hiding a Page Style in the Create Dialog"
- Section 15.4.2, "Setting Properties on a Custom Page Style"
- Section 15.4.3, "Setting Security on a Custom Page Style"
- Section 15.4.4, "Copying a Page Style"
- Section 15.4.5, "Deleting a Custom Page Style"
- Section 15.4.6, "Previewing a Page Style"

15.4.1 Showing and Hiding a Page Style in the Create Dialog

When you create a page style, by default it is marked as *Hidden*. A hidden page style is not available for use anywhere in the application. To make a page style available, it must be marked as *Available*. Further, for a page style created at the application level, you can control whether it is available to any, all, or selected spaces. Finally, you can set access on a selected page style through its security settings.

- For information about a page style's security settings, see Section 15.4.3, "Setting Security on a Custom Page Style."
- For information about a page style's exclusion settings, see Section 11.4.2, "Setting Properties on a Resource."
- For information about hiding and showing application resources, including page styles, see Section 11.4.3, "Showing and Hiding Resources."

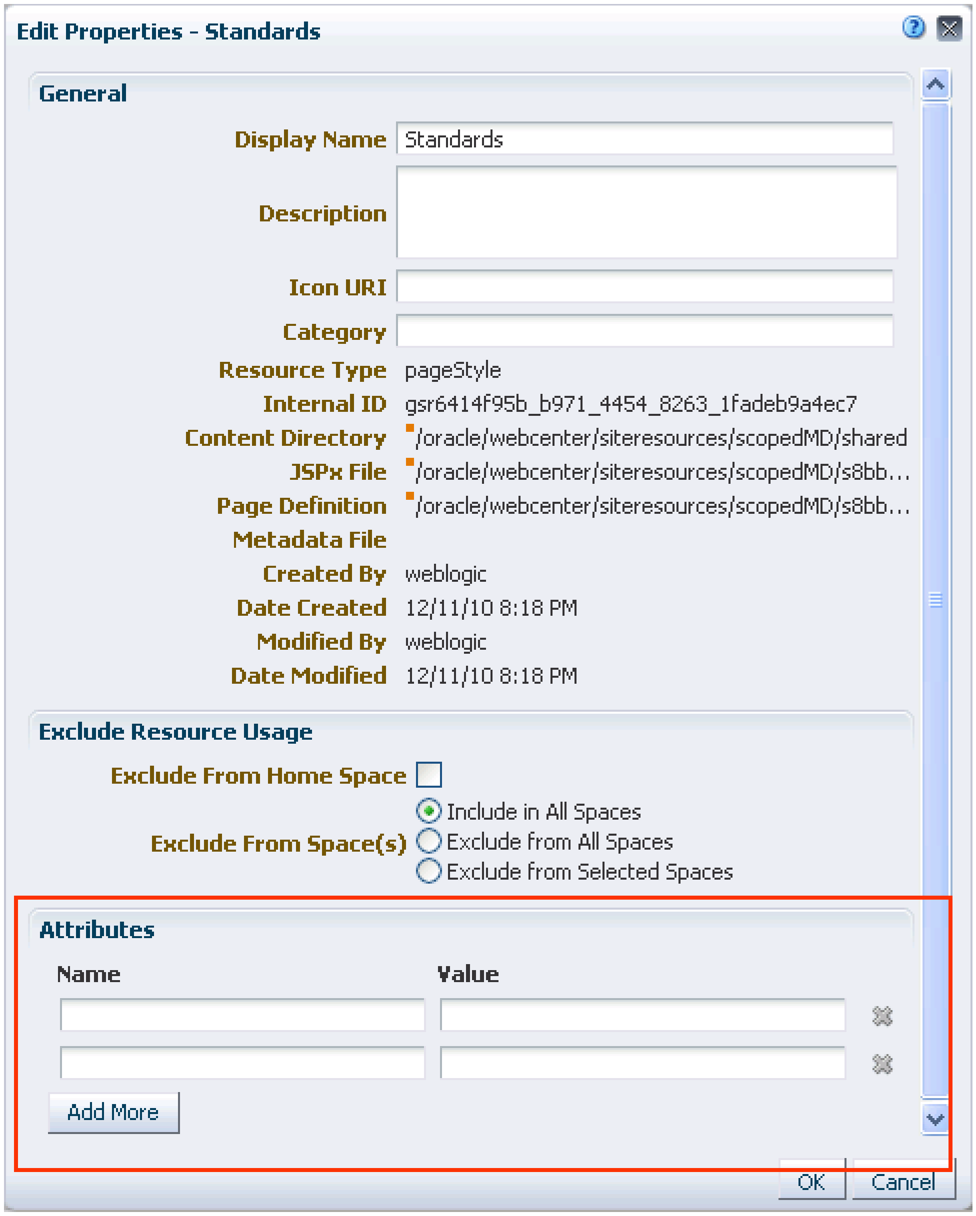
15.4.2 Setting Properties on a Custom Page Style

You can control a custom page style's display attributes and availability by setting its properties in the Edit Properties dialog. Setting page style properties follows the same procedure as any other resource. For more information, see Section 11.4.2, "Setting Properties on a Resource."

> **Tip:** To view the properties associated with a resource, use the **About** option.

In addition to the default attributes exposed through the Edit Properties dialog (Display Name, Description, and the like), you can expose any custom attributes built into a custom page style. The Edit Properties dialog provides a **Custom Attributes** section for entering attribute name/value pairs (Figure 15–4).

Figure 15–4 Attributes Section of Edit Properties Dialog



For example, the following custom attribute is available to all custom page styles:

```
editPageAfterCreation
```

This custom attribute controls whether a newly created page opens in edit or view mode. It takes a value of `true` or `false`:

- Enter `${true}` to open a newly created page in edit mode. This is the default value.
- Enter `${false}` to open a newly created page in view mode.

When you associate this custom attribute with a particular page style, every time a user creates a page based on that style, the attribute value is considered and the page behaves accordingly.

15.4.3 Setting Security on a Custom Page Style

You can control whether all users or only specific users or groups can access the page style that you created in your application or space. Setting access to a page style follows the same procedure as any other resource. For more information, see Section 11.4.4, "Setting Security for a Resource."

15.4.4 Copying a Page Style

You can make a copy of a page style by selecting it and choosing **Copy** from the **Edit** menu on the **Resources** - **Page Styles** page. Copying a page style follows the same procedure as any other resource. For the generic procedure, see Section 11.4.1, "Copying a Resource."

15.4.5 Deleting a Custom Page Style

Provided you are assigned the required permissions, you can delete any custom page style. Deleting a page style follows the same procedure as any other resource. For more information, see Section 11.4.5, "Deleting a Resource."

15.4.6 Previewing a Page Style

You can preview how a page style will look by selecting it on the **Resources - Page Styles** page and clicking **Preview**. For more information, see Section 11.4.6, "Previewing a Resource."

15.5 Applying a Page Style

Once you have made a page style available (see Section 15.4.1, "Showing and Hiding a Page Style in the Create Dialog"), you can apply it to a new page. When you create a page, the page style is shown as one of your options in the Create dialog, depending on where you have exposed it (for example, at the application level, in a space, in a selection of spaces, or in the views of selected users, enterprise roles, or groups). To apply a page style, select it in the Create dialog.

> **Tip:** For information about accessing the Create dialog, see Section 17.2, "Creating a Page."

15.6 Using JDeveloper to Build Your Page Style

If you want to create a page style that is beyond the editing capabilities of the Spaces application, you can download the page style, import it into Oracle JDeveloper for editing, and then upload it back to the Spaces application. You can upload page styles directly to the Spaces application from within JDeveloper or through the Spaces application Resources Manager.

The steps to upload and download page styles from the Spaces application are described in Section 11.5.2, "Downloading a Resource," and Section 11.5.3, "Uploading a Resource."

For information about editing resources and uploading custom resources to the Spaces application through JDeveloper, see the section, "Developing and Uploading WebCenter Portal: Spaces Resources," in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

16

Working with Resource Catalogs

Oracle WebCenter Portal: Spaces provides rich Resource Catalogs, also known as Business Dictionaries, which expose components and connections that Spaces users can add to their pages. You can use a Resource Catalog to populate resources such as page templates, navigation models, pages, and task flows. Spaces applications are preconfigured with three Resource Catalogs out-of-the-box. If these catalogs do not meet your business requirements, you can modify them or create new ones.

This chapter provides information about the default, out-of-the-box Resource Catalogs included in Spaces, and also describes how to create and manage custom Resource Catalogs. It includes the following sections:

- Section 16.1, "What You Should Know About Resource Catalogs"
- Section 16.2, "Creating Resource Catalogs"
- Section 16.3, "Editing a Resource Catalog"
- Section 16.4, "Showing and Hiding a Resource Catalog"
- Section 16.5, "Setting Properties on a Resource Catalog"
- Section 16.6, "Setting Security on a Resource Catalog"
- Section 16.7, "Copying a Resource Catalog"
- Section 16.8, "Deleting a Resource Catalog"
- Section 16.9, "Using JDeveloper to Build Your Resource Catalog"
- Section 16.10, "Configuring Resource Catalogs in Your Application"

For generic information about adding and editing different types of resources, see Chapter 11, "Working with the Resources that Compose a Portal or Community."

Audience

This chapter is intended for users who want to provide and manage Resource Catalogs in their Spaces application.

Portal designers with the application permission `Application-Resource Catalogs-Create Edit Delete` can manage application-level Resource Catalogs. Space moderators with the permission `Space-Resources-Create Edit Delete` (simple permission model) or `Space-Resource Catalogs-Create Edit Delete` (detailed permission model) can manage space-level Resource Catalogs. For information about roles and permissions, see Chapter 23, "Understanding Security."

16.1 What You Should Know About Resource Catalogs

The Resource Catalog is displayed when you edit a page or page template in Composer and click Add Content. You can add resources from the catalog on your page or page template.

As a Spaces user, you can use a Resource Catalog to populate pages in Composer.

As an administrator or delegate, you can also use a Resource Catalog to populate the following artifacts in the Resources Manager:

- Page templates
- Task flows

This section provides an overview of Resource Catalogs and explains how to manage them at runtime. It includes the following subsections:

- Section 16.1.1, "Understanding the Out-of-the-Box Resource Catalogs"
- Section 16.1.2, "Introducing the Resource Catalog Management Page"
- Section 16.1.3, "Understanding the Resource Registry"

16.1.1 Understanding the Out-of-the-Box Resource Catalogs

WebCenter Portal: Spaces provides the following out-of-the-box Resource Catalogs:

- Default Home Space Catalog - The application-level Resource Catalog. You see this catalog when you edit a page or task flow in your Home space.
- Default Space Catalog - The space-level Resource Catalog. You see this catalog when you populate a page or task flow within a space.
- Default Page Template Catalog - The catalog used for page template creation in both your Home space and other spaces. You see this catalog when you edit a page template.

This section describes these catalogs. It includes the following subsections:

- Section 16.1.1.1, "Default Home Space Catalog"
- Section 16.1.1.2, "Default Space Catalog"
- Section 16.1.1.3, "Default Page Template Catalog"

16.1.1.1 Default Home Space Catalog

This catalog is displayed when designing pages and task flows in your application. The Default Home Space Catalog (Figure 16–1) contains items that users may typically want to add to a task flow or a business role page, such as page components, portlets, and WebCenter Portal services task flows.

Figure 16–1 Resource Catalog Used to Populate Pages

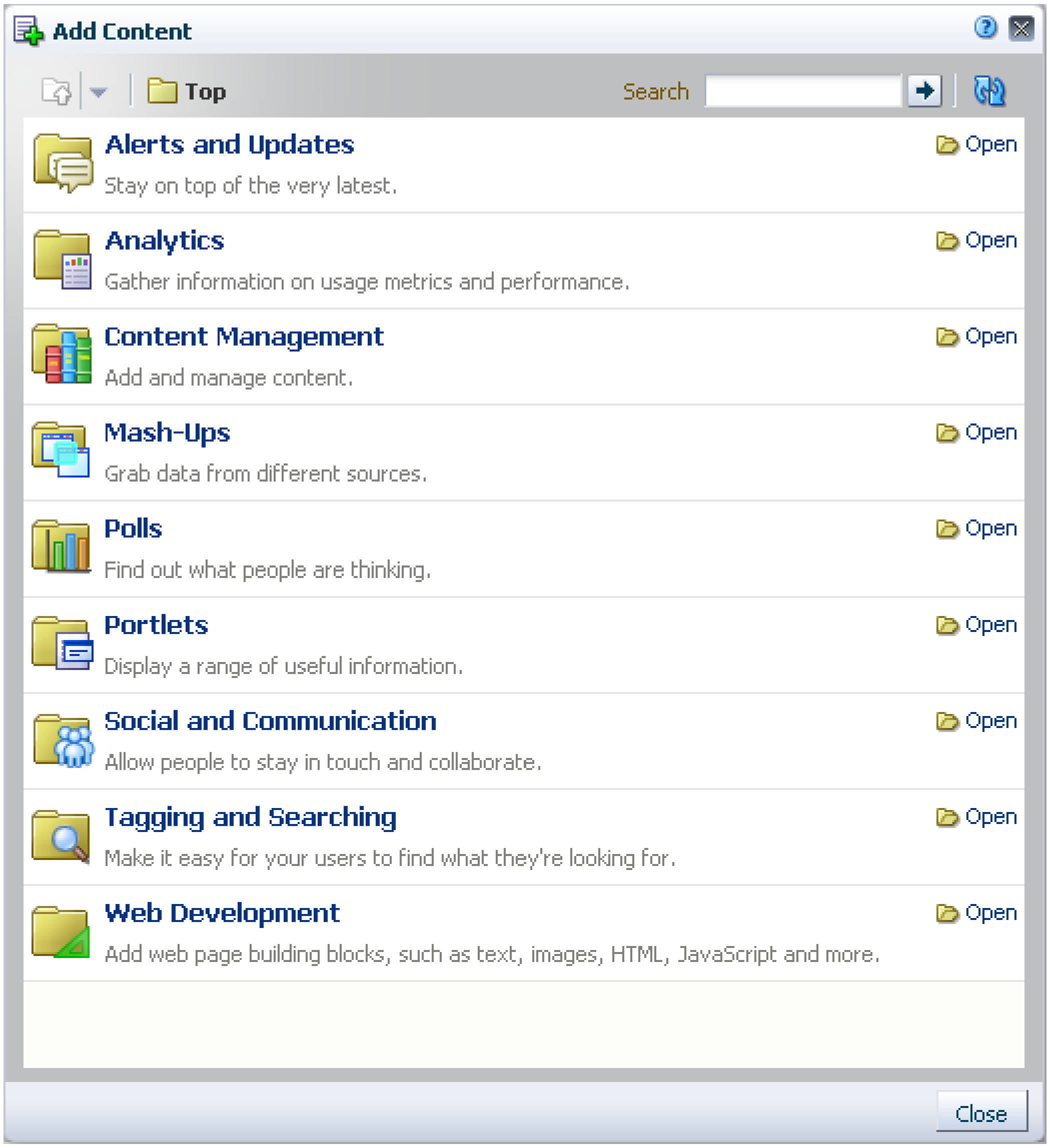


Table 16–1 provides a description of each folder in the default Resource Catalog.

Table 16–1 Resources in the Default Resource Catalog

<table>
<tr><th>Folder Name</th><th>Description</th></tr>
<tr><td>Alerts and Updates</td><td>Includes task flows from the following WebCenter Portal services to track alerts and notifications:
Activity Stream, to view activities of your connections, actions taken in spaces, and business activities. For more information, see Chapter 35, "Tracking Your Connections' Activities."
Announcements, to view current announcements. For more information, see Chapter 61, "Working with the Announcements Service."
Discussion Forums, to list the most frequently used and most recently accessed topics. For more information, see Chapter 62, "Working with the Discussions Service."
Documents, to list recently created or modified documents. For more information, see Section 43.1, "What You Should Know About the Documents Service Task Flows."
Notifications, to view space- and object-level subscriptions. For more information, see Section 39.5, "Working with Notifications Task Flows."
Polls, to view available polls. For more information, see Chapter 69, "Working with the Polls Service."
RSS, to view feeds from external sources and WebCenter Portal services. For more information, see Section 70.3, "Working with the RSS Task Flow."
Worklist, to view all worklist items that require your attention. For more information, see Chapter 72, "Working with the Worklist Service."</td></tr>
<tr><td>Analytics</td><td>Includes the Analytics service task flows. These task flows help to track and display different metrics, such as response times and usage behavior, for the Spaces application.

For more information, see Chapter 57, "Analyzing Usage and Performance Metrics."</td></tr>
<tr><td>Content Management</td><td>Includes the documents task flows, which can be used to access, add, and manage folders and files, or display content in a predefined template.

For more information, see Part X, "Working with Content".</td></tr>
<tr><td>Mash-Ups</td><td>Includes the following resources that enable you to create business mashups:
Data Controls: Folder that includes data controls created for the application at design time and runtime.

For more information about these items, see Chapter 29, "Creating Business Mashups."
Task Flows: Folder that includes task flows created in the Resource Manager at runtime. These are visualizations created by gathering data from various data sources and publishing to different layouts such as charts, tables, and graphs.

For more information, see Chapter 29, "Creating Business Mashups."
Omniportlet: A portlet to publish data from a variety of data sources (including SQL, XML, web services, spreadsheets, and web pages) to several different layouts, such as customizable charts and tables
Pagelet Producers: Folder that includes pagelets deployed in the pagelet producer. For more information, see Section 6.5.2.3, "Registering a Pagelet Producer."</td></tr>
<tr><td>Polls and Surveys</td><td>Includes the Polls service task flows that can be used to create, edit, and take online polls on your application pages. Polls let you survey your audience, check whether they can recall important information, and gather feedback on the efficacy of presentations.

For more information, see Chapter 69, "Working with the Polls Service."</td></tr>
<tr><td>Portlets</td><td>Includes the following resources:
Administrator-level tools for registering and managing external applications and portlet producers.
Portlets, which provide a means of presenting data from multiple sources in a meaningful and related way. Out-of-the-box, this folder contains the Omniportlet and Web Clipping portlets.
For more information, see Chapter 28, "Understanding Portlet Basics."</td></tr>
</table>

Table 16–1 (Cont.) Resources in the Default Resource Catalog

Folder Name	Description
Social and Communication	Includes the following resources to enable social networking and communication among users: ▪ **Lists** folder: Includes individual space lists. The folder is displayed only if it contains resources inside it. For more information about these items, see Chapter 66, "Working with the Lists Service." ▪ **Message Board - Quick View**: WebCenter Portal services task flow used for adding, viewing, updating, hiding, and deleting messages. For more information, see Section 36.4, "Working with Message Board and Feedback Task Flows." ▪ **Message Board**: WebCenter Portal services task flow used for adding, viewing, updating, hiding, deleting, and managing your view of messages. ▪ **Organization View**: WebCenter Portal services task flow used for adding a graphical depiction of the current user's position within the company. which provides quick access to contact and status information about you and your connections. ▪ **Profile - Snapshot**: WebCenter Portal services task flow used for viewing a user photo and status message. For more information, see Chapter 33, "Managing Your Profile." ▪ **Profile**: WebCenter Portal services task flow used for displaying a user's profile details and uploading a photo. ▪ **Profile Gallery**: WebCenter Portal services task flow used for accessing all of your social networking information from one view. ▪ **Connections**: WebCenter Portal services task flow used for viewing and managing your connections, and creating connections lists. For more information, see Section 34.1, "What You Should Know About Connections." ▪ **Connections - Card**: WebCenter Portal services task flow used for photos, status messages, and instant contact options to your connections. ▪ **Connections - Detailed View**: WebCenter Portal services task flow used for photos and quick access to your connections and to features for inviting new connections and organizing your connections into lists. ▪ **Connections - Quick View**: WebCenter Portal services task flow used for photos and quick access to your connections. ▪ **Recommended Connections**: WebCenter Portal services task flow used for viewing and connecting to people considered to be similar to you. ▪ **Similar Items**: WebCenter Portal services task flow used for listing items that are similar to the currently selected item on the page. For more information, see Section 60.2, "Working with Activity Graph Service Task Flows." ▪ **Mail**: WebCenter Portal services task flow used for viewing, responding to, and managing your personal mail. For more information, see Section 67.4, "Working with the Mail Service Task Flow." ▪ **Watched Topics**: WebCenter Portal services task flow used for providing a cohesive view of all the topics you have selected to watch from a particular space or from all spaces. For more information, see Section 62.2, "Working with Discussions Service Task Flows." ▪ **Watched Forums**: WebCenter Portal services task flow used for viewing all discussion forums you have selected to watch from a particular space or from all spaces. ▪ **Forums**: WebCenter Portal services task flow used for viewing Recent Topics, Popular Topics, Watched Topics, and Watched Forums. ▪ **Events**: WebCenter Portal services task flow used for adding calendars that you can use to schedule meetings, appointments, and any other type of occasion. For more information, see Section 63.1, "What You Should Know About the Events Service." ▪ **Blogs**: WebCenter Portal services task flow used to expose a blog on a page along with other services instead of having a dedicated blog page. For more information, see Section 50.4.1, "Creating a Blog Using Blog Task Flows." ▪ **Publisher**: WebCenter Portal services task flow used for publishing messages, files, and URLs to the activity streams of all of your connections or to those connections who have access to a specified space. For more information, see Section 37.3.3.1, "What You Should Know About the Publisher Task Flow."

Table 16–1 (Cont.) Resources in the Default Resource Catalog

Folder Name	Description
Tagging and Searching	Includes the following WebCenter Portal services task flows to enable effective search of Oracle WebCenter Portal and other sources: ■ **Saved Searches** folder: For displaying a list of all searches saved by you or other space members. ■ **All Saved Searches**: For running saved searches within the application. For more information, see Section 58.3, "Working with the Search Service Task Flows." ■ **Similarly Tagged Items**: For displaying a list of links to other pages that have at least one tag in common with the currently-displayed page. ■ **Tags**: For adding a view of the tags you have added to your application and the items you have tagged. For more information, see Section 59.2, "Working with Tags Service Features and Task Flows." ■ **Tag Cloud**: For displaying the tags currently applied to Spaces items. For more information, see Section 59.2, "Working with Tags Service Features and Task Flows." ■ **Tag Cloud Related Resources**: For displaying related resources for a selected tag. For more information, see Section 59.2, "Working with Tags Service Features and Task Flows."
Web Development	Includes the following components that you can use to design your pages: ■ **Data Controls**: Includes data controls created for the application at runtime. For more information, see Section 29.4.1, "Consuming a Data Control in a Task Flow." ■ Box, HTML Markup, Hyperlink, Image, Movable Box, Separator, Text, and Web Page. For more information about these components, see Chapter 20, "Working with Layout Components on a Page."

Note: WebCenter Portal service task flows added from the Resource Catalog do not have a fixed height; they take the height of the content in the task flow.

With the default Spaces configuration, this Resource Catalog is displayed when you create pages at the application level.

When creating pages in a space, the Default Space Catalog is displayed. This catalog is similar to the Default Home Space Catalog, except that its resources display content specific to the space, where applicable.

16.1.1.2 Default Space Catalog

The Default Space Catalog is the same as the Default Home Space Catalog, except for a few resources that display data relevant to the current space, for example, the Personal Documents folder, which displays documents associated with the current space. Table 16–2 describes the resources that are exclusive to the Default Space Catalog.

Table 16–2 Resources that Are Exclusive to the Default Space Catalog

Resource or Folder Name	Description
Similar Spaces	This resource in the Social and Communication folder displays all spaces that are similar to the one you are currently viewing. For more information, see Section 60.2.3, "Working with the Similar Spaces Task Flow."

Table 16–2 (Cont.) Resources that Are Exclusive to the Default Space Catalog

Resource or Folder Name	Description
Lists folder	This resource in the Social and Communication folder enables you to add lists to pages in your space. Lists are useful for many space activities, such as tracking issues, capturing project milestones, publishing project assignments, and much more. However, the Lists service is not available to the Home space. For more information, see Chapter 66, "Working with the Lists Service."
Members	This resource in the Social and Communication folder lists all members in the space. For more information, see Section 54.4, "Working with the Members Task Flow."
Spaces documents	This resource from the Content Management folder exposes a list of folders and files associated with the current space. For more information, see Section 41.2, "What You Should Know About Content Management Selections in the Resource Catalog."

16.1.1.3 Default Page Template Catalog

This catalog is displayed when designing page templates. A page template defines the layout of your portal. It defines the location of content on the page and contains artifacts that display on each page of the portal; for example, a navigation pane to the left of the page, a header or banner with the company logo at the top, and a copyright notice at the bottom of the page. When you build a page template, you should be able to add all such components to it. To address this requirement, Spaces provides the Default Page Template Catalog to be used for page template creation. For more information about page templates, see Chapter 13, "Working with Page Templates."

In addition to all the folders available in the Default Home Space Catalog (Table 16–1), the Default Page Template Catalog also includes the **Template Development** folder. This folder includes a **Navigations** folder and all the resources that are typically used in page templates only, for example logos, navigation components, navigation models, layout components, and copyright statements.

The Navigations subfolder includes three navigation task flows. You can add these task flows, described as follows, to page templates to quickly visualize your portal navigation model:

- Navigation Breadcrumb, to display a series of horizontal or vertical links that show users their current position in the navigation hierarchy.
- Navigation Menu, to display navigational links as a series of tabs, menus, bars, buttons, choices, or as a list.
- Navigation Tree, to display navigational links in a hierarchical structure.

For information about navigation structures, see Chapter 12, "Working with Navigation."

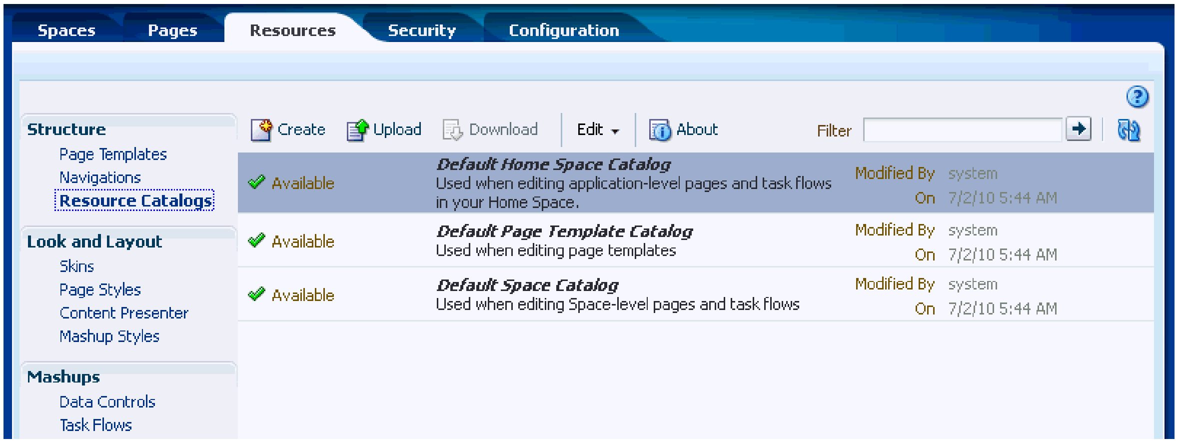
For information about the other resources in the Template Development folder, see Chapter 21, "Adding Spaces Components to a Page or Page Template."

16.1.2 Introducing the Resource Catalog Management Page

If the default catalogs provided in Spaces do not meet your company's requirements, you can create custom Resource Catalogs and offer those to users. The Resource Manager, shown in Figure 16–2, provides options to create and manage custom Resource Catalogs.

Only users with permissions to create, edit, and delete Resource Catalogs can access the Resource Manager.

Figure 16–2 Resource Catalogs Page in the Resource Manager



On this page, you can create, copy, publish, edit, preview, and delete Resource Catalogs. When you publish a custom Resource Catalog, it is available for selection on the application's Configuration page or a space's administration settings.

16.1.3 Understanding the Resource Registry

The Resource Registry is a central repository of all the resources available to the Spaces application. It contains all resources that you can add to Resource Catalogs in the application. In addition to the out-of-the-box resources, it is also updated dynamically to include new resources, such as task flows, data controls, and navigations, as and when they are created in the Resource Manager or deployed as shared libraries from JDeveloper. As a result, a resource that is created and published in the Resource Manager is available for consumption right away.

The Resource Registry (Figure 16–4) is displayed when you click the Add From Library option (Figure 16–3) in the Edit dialog for a Resource Catalog.

Figure 16–3 Add From Library Option to Access the Resource Registry

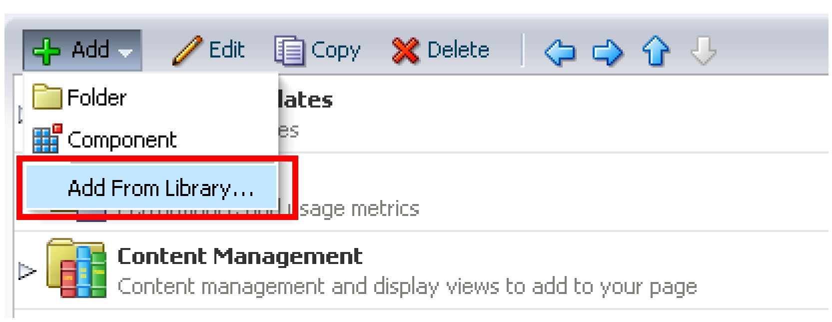


Figure 16–4 Add Resource Catalog Item Dialog (Resource Registry)

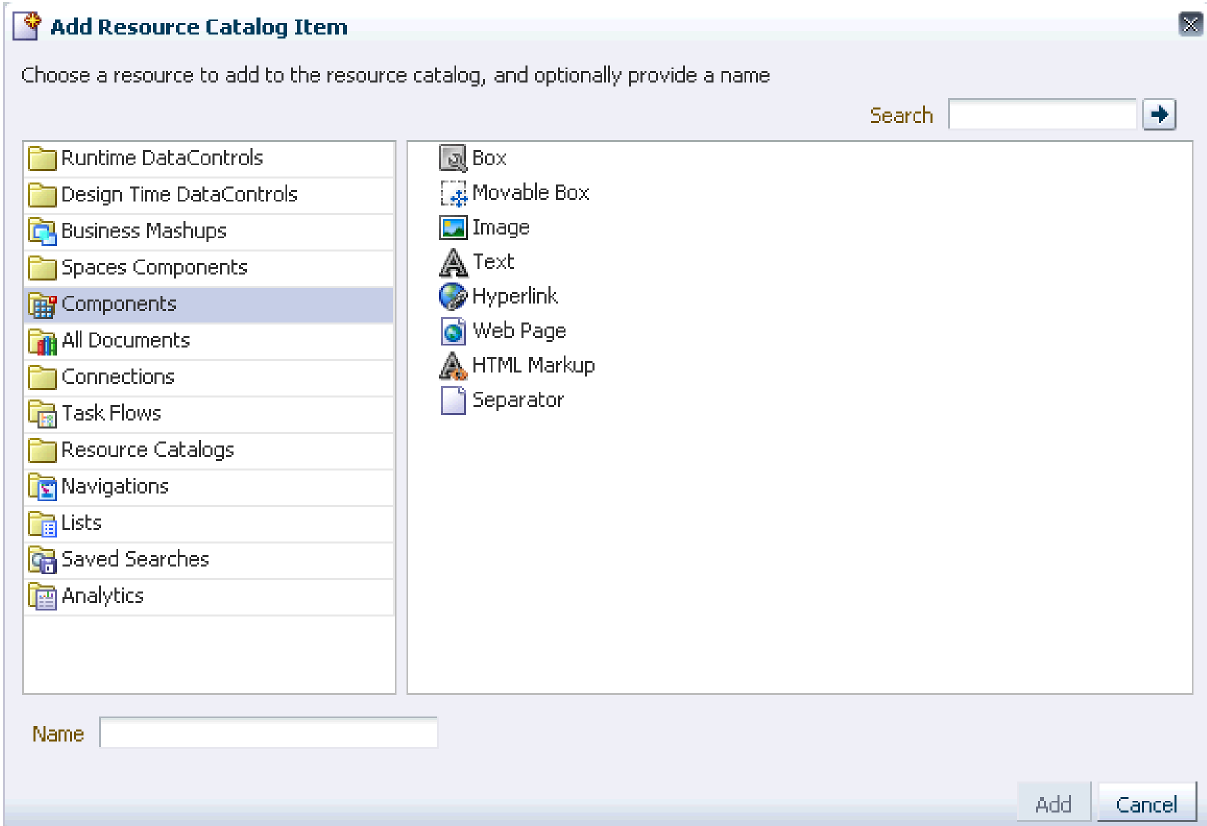


Table 16–3 describes the folders in the Resource Registry.

Table 16–3 Folders in the Resource Registry

Resource Folder	Description
Runtime DataControls	Lists all data controls created at runtime. When you add these data controls in a Resource Catalog, you enable users to consume them in pages or task flows using different visualizations such as tables, graphs, buttons, and so on. For more information, see Section 29.2, "Creating and Managing Data Controls." This folder is empty if there are no runtime data controls in your Spaces instance.
Design Time DataControls	Lists all data controls deployed from JDeveloper. At a minimum, it displays the WebCenter Portal services data controls that are available out-of-the-box. In addition, it also displays data controls that an application developer may have created in JDeveloper and deployed to Spaces. For information about the data controls available for a WebCenter Portal service, refer to the chapter describing that service.
Business Mashups	Lists the task flows created at runtime in the Resources Manager. For more information, see Section 29.3, "Creating and Managing Task Flows." This folder is empty if there are no runtime task flows in your Spaces instance.

Table 16–3 (Cont.) Folders in the Resource Registry

Resource Folder	Description
Spaces Components	Lists components, such as menus, links, copyright message, and so on, that are typically used in page templates. These resources are available out-of-the-box in the Default Page Template Catalog, in a folder named Template Development. For more information, see Chapter 21, "Adding Spaces Components to a Page or Page Template."
Components	Lists a selection of components that you can use to design pages, templates, and task flows. For more information, see Chapter 20, "Working with Layout Components on a Page."
All Documents	Lists all documents that you have access to. For more information, see Part X, "Working with Content".
Portlet Producers	Lists all registered portlet producers. For more information, see Chapter 28, "Understanding Portlet Basics."
Connections	Lists all available repository connections. Many resources, such as portlets, external applications, and some WebCenter Portal services, require a connection to a database schema where relevant information is stored. The chapters describing the various resources and services provide information about whether a connection is required for that resource or service.
Task Flows	Lists all task flows deployed from JDeveloper. At a minimum, it displays the WebCenter Portal services task flows that are available out-of-the-box. In addition, it also displays task flows that an application developer may have created in JDeveloper and deployed to Spaces. For information about the task flows available for a resource or WebCenter Portal service, refer to the chapter describing that service or resource.
Resource Catalogs	Lists all available Resource Catalogs. You can embed multiple Resource Catalogs inside a catalog.
Navigations	Lists all available navigations. These resources are available out-of-the-box in the Default Page Template Catalog. For more information, see Chapter 12, "Working with Navigation."
Lists	Displays all the lists created using the Lists service. For more information, see Chapter 66, "Working with the Lists Service."
Saved Searches	Displays all saved searches. For more information, see Chapter 58, "Working with the Search Service."
Analytics	Displays all the Analytics service task flows. These task flows help to track and display different metrics, such as response times and usage behavior, for the Spaces application. For more information, see Chapter 57, "Analyzing Usage and Performance Metrics."

16.2 Creating Resource Catalogs

You can build a custom Resource Catalog either from scratch or by extending an existing Resource Catalog. Creating a Resource Catalog follows the same procedure as any other resource. For information about creating a Resource Catalog, see Section 11.2, "Creating Resources." For information about copying an existing Resource Catalog, see Section 11.4.1, "Copying a Resource."

The new Resource Catalog is listed on the Resources - Resource Catalogs page. However, the catalog is hidden by default. To make the new Resource Catalog available to the application or space, you must do the following:

- Publish it in the Resource Manager. For more information, see Section 16.4, "Showing and Hiding a Resource Catalog."
- Configure the application or space to use the new catalog as the default one. For more information, see Section 16.10, "Configuring Resource Catalogs in Your Application."

16.3 Editing a Resource Catalog

When you edit a Resource Catalog in the Resource Manager, you are basically managing its resources. The Resource Manager provides the following two options for editing Resource Catalogs:

- Managing resources in the Edit dialog.
- Editing the source code of the Resource Catalog definition file in a text editor.

This section explains both options. It includes the following sections:

- Section 16.3.1, "Managing Resources in the Edit Dialog"
- Section 16.3.2, "Editing the Source Code for a Resource Catalog"

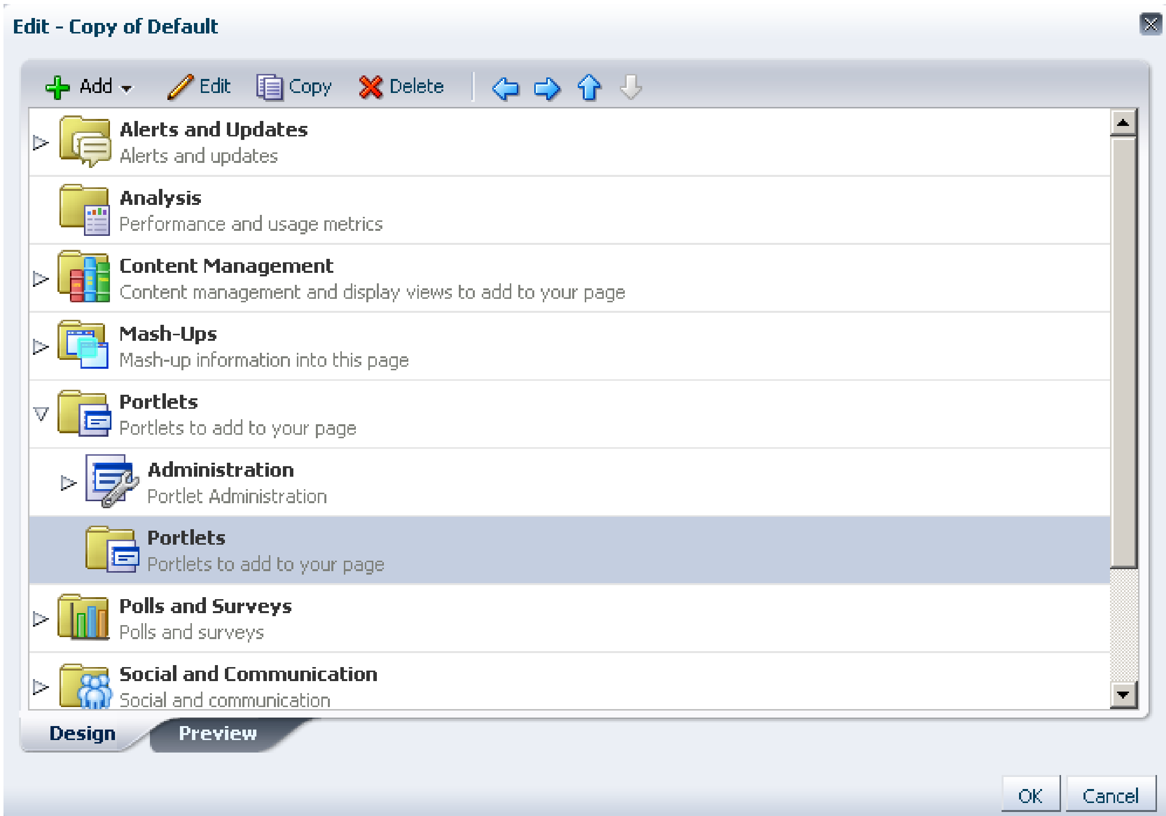
Note: To perform certain advanced editing tasks, you may want to download the Resource Catalog to JDeveloper, edit it, and upload it back to your Spaces instance. For more information, see Section 16.9, "Using JDeveloper to Build Your Resource Catalog."

16.3.1 Managing Resources in the Edit Dialog

The **Edit** option in the Resource Manager opens an Edit dialog (Figure 16–5), which provides various options to manage resources in the selected Resource Catalog.

Note: You cannot edit out-of-the-box catalogs. The Edit option on these catalogs is grayed out.

Figure 16–5 Edit Dialog Used to Edit a Resource Catalog



You can edit a Resource Catalog to:

- Create folders
- Create custom components by providing the XML code
- Add resources from the Resource Registry
- Edit resource properties
- Copy resources
- Delete resources
- Rearrange resources
- Preview the catalog

This section describes the steps to perform these tasks. It includes the following subsections:

- Section 16.3.1.1, "Creating a Folder"
- Section 16.3.1.2, "Adding Resources"
- Section 16.3.1.3, "Creating Custom Components"
- Section 16.3.1.4, "Rearranging Resources"
- Section 16.3.1.5, "Setting Properties on a Resource"
- Section 16.3.1.6, "Copying a Resource"
- Section 16.3.1.7, "Deleting a Resource"

- Section 16.3.1.8, "Previewing the Resource Catalog"

16.3.1.1 Creating a Folder

To organize your catalog better, you can group similar resources together; for example, group all layout components or all resources from a particular service.

To add a folder to a catalog:

1. In the Resource Manager (see Section 11.1.4, "Accessing Resources"), select the Resource Catalog and from the Edit menu, select **Edit**.
2. In the Edit dialog, from the **Add** menu, select **Folder**.

   The Edit Resource Catalog Item dialog displays with two tabs, **Target** and **Options**. The **Target** tab is selected by default.
3. On the **Target** tab, specify a name and description for the folder, and leave the **Visible** option checked to ensure that the folder is displayed in the catalog.
4. Optionally, use the **Options** tab to define display options for the folder. For more information, see Section 16.3.1.5, "Setting Properties on a Resource."
5. Click **OK**.

   You can now add resources inside this folder, or move resources inside it by dragging and dropping them from the top level folder.

16.3.1.2 Adding Resources

This section describes how to populate your catalog using the Resource Registry. For more information, see Section 16.1.3, "Understanding the Resource Registry."

To add a resource:

1. In the Resource Manager (see Section 11.1.4, "Accessing Resources"), select the Resource Catalog and from the Edit menu, select **Edit**.
2. If you have created folders (see Section 16.3.1.1, "Creating a Folder") and want to add resources inside a particular folder, then select the folder in the Edit dialog.
3. From the **Add** menu, select **Add From Library**.
4. In the Add Resource Catalog Item dialog (Figure 16–4), select a folder name in the left pane to display its contents in the right pane, or search for a resource by specifying its name in the Search field.

   For a description of the available resources, see Section 16.1.3, "Understanding the Resource Registry."
5. Select a resource.

   > **Tip:** You can select multiple resources using the standard shortcut keys for selection.

6. Optionally, in the Name field, specify a different name for the resource, if required. You can skip this step to retain the default resource name.

   > **Note:** If you selected multiple resources at a time, you cannot rename them at this point. However, you can edit them after adding them to the catalog. For more information, see Section 16.3.1.5, "Setting Properties on a Resource."

7. Click **Add**.

> **Notes:**
>
> - The Runtime DataControls folder lists the available data controls. You can expand a data control node to display its accessors and methods. However, you can only add the data control as a whole. Adding its accessors, methods, or attributes separately is not supported. You may see catalog errors if you try to add these objects.
> - Avoid adding a data control more than once in a catalog. The data control is added to the catalog as many times, but when you use the catalog to populate a page or task flow, you will not be able to add accessors, methods, or attributes from such data control instances.
> - The Design-Time DataControls folder lists all the WebCenter Portal services data controls. However, adding the ConnectionsNetworkDC and KudosServiceDC data controls at runtime is not supported. Avoid adding these data controls to your page or task flow.

8. Repeat the previous four steps to add more resources from the available folders.
9. Click **OK** in the Edit dialog.

16.3.1.3 Creating Custom Components

The Resource Registry in Spaces provides a large repository of resources that you can add to a catalog. However, if this is not sufficient and your business requires you to add other resources, such as ADF Faces components, custom JSPX, or raw HTML, you can create a custom component and specify the XML code for the component. Using a custom component is the only way to make such components available to a page in Composer.

You may want to create a custom component for the following purposes:

- Create seeded layouts that can be added to a page. You can add a layout component and include a combination of design and container components inside it. The container components provide empty content areas that can be filled later.
- Add external content by including the raw HTML code.
- Define seeded layouts in which to consume data controls. You can then bind the data control to the layout.

To create a custom component:

1. In the Resource Manager (see Section 11.1.4, "Accessing Resources"), select the Resource Catalog and from the Edit menu, select **Edit**.
2. If you have created folders and want to add resources inside a particular folder, select the folder in the Edit dialog.
3. From the **Add** menu, select **Component**.
4. In the Edit Resource Catalog Item dialog, on the **Target** tab, specify a name and description for the new resource, and leave the **Visible** option checked to ensure that the resource is displayed in the catalog.

5. In the XML text area, enter the XML code for the component.

   The following are a few examples of custom components:

   - `Output Text` component:

     ```
     <af:outputText xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
                      value="Weather Forecast for the Day" id="#"/>
     ```

   - Custom navigation:

     ```
     <af:forEach xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
                 var="level_1_menu"

     items="#{SiteStructureContext.defaultSiteStructure.listModel['startNode=/,
     includeStartNode=false']}">
     <af:outputText id="#"
                    xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
                    value="#{level_1_menu.title}"/>
     </af:forEach>
     ```

   - External HTML content:

     ```
     <f:verbatim xmlns:f="http://java.sun.com/jsf/core">
       <![CDATA[
         <object width="640" height="385">
           <param name="movie"
     value="http://www.youtube.com/v/KO2ti-B00gw&hl=en_US&fs=1">
           </param>
           <param name="allowFullScreen" value="true">
           </param>
           <param name="allowscriptaccess" value="always">
           </param>
           <embed src="http://www.youtube.com/v/KO2ti-B00gw&hl=en_US&fs=1"
                  type="application/x-shockwave-flash"
     allowscriptaccess="always"
                  allowfullscreen="true" width="640" height="385">
           </embed>
         </object>]]>
     </f:verbatim>
     ```

     An alternative to this is to create a new task flow in the Resource Manager and add an HTML Markup component inside it.

6. Optionally, use the Options tab to define display options for the folder. For more information, see Section 16.3.1.5, "Setting Properties on a Resource."

7. Click **OK**.

16.3.1.4 Rearranging Resources

To move a resource within a folder, select the resource and click the **Move Up** or **Move Down** icon, shown in Figure 16–6, as many times as necessary until the resource is in the desired location.

Figure 16–6 Up and Down Icons in the Edit Dialog

Tip: You can also reorder resources in a folder by dragging and dropping them at a different position.

To indent one resource (child item) under a folder (parent item), move the child item so that it is immediately below the parent item, select the child item and click the **Indent** icon. The Indent button is grayed out if there is no folder above the selected resource.

To move an indented resource so that it is no longer indented below a folder, select the resource and click the **Outdent** icon.

16.3.1.5 Setting Properties on a Resource

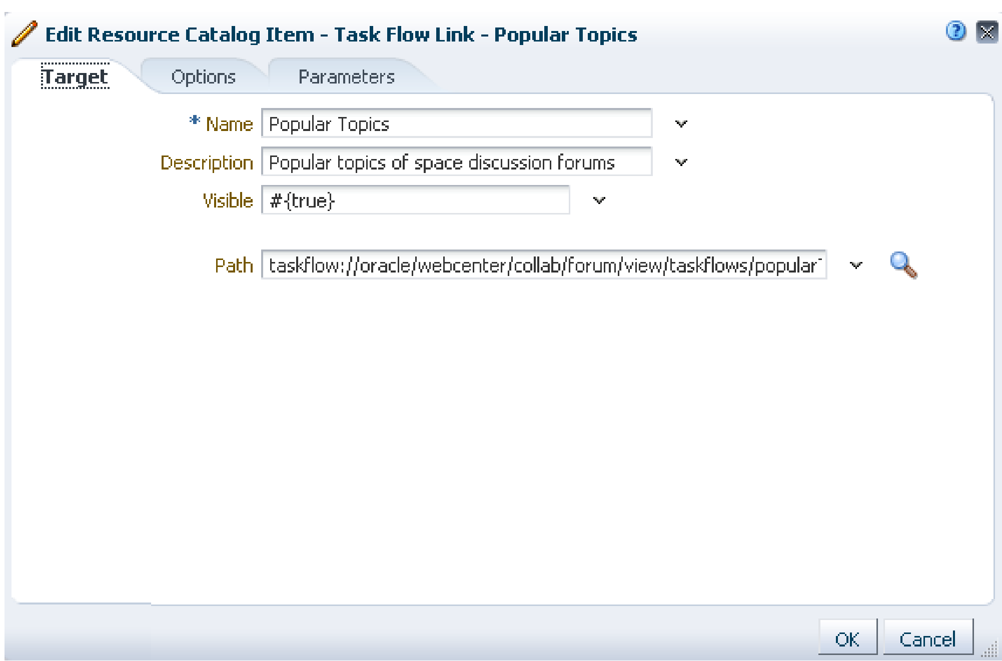
You can edit properties on a resource to set the resource name and description, the icon to be associated with the resource, and to add new properties.

To edit resource properties:

1. In the Resource Manager (see Section 11.1.4, "Accessing Resources"), select the Resource Catalog and from the Edit menu, select **Edit**.
2. If the resource you want to edit is inside a folder in the catalog, expand the folder and select the resource.
3. Click **Edit**.
4. In the Edit Resource Catalog Item dialog, on the **Target** tab (Figure 16–7), define the following attributes:

Note: Each type of resource has different properties associated with it. The Name, Description, and Visible properties are common to all resources in a catalog. However, you may see all or some of the other attributes depending on the type of resource you are editing.

Figure 16–7 Target Tab on the Edit Resource Catalog Item Dialog



- **Name**: Name used for the resource in the catalog.
- **Description**: A short description that appears below the resource name in the catalog.
- **Visible**: Whether the resource must be rendered in the catalog. This field takes `true` or `false` values, or an EL value that can be specified using the Expression Builder option on the dropdown menu.
- **Path**: The URL to access the resource. This field is displayed only for resources of type Link. The URL format is different for the different link types. Table 16–4 describes the supported URL formats.

Table 16–4 URL Format for the Different Resource Types

Resource Type	URL Format
Task Flow	**taskflow://***Path_to_Task_Flow*/*Task_Flow_Definition_File_Name*#*Task_Flow_ID*
Portlet	**portlet://***Producer_ID*/*Portlet_ID*
Content	**content://***Content_Connection_ID*/*Document_ID*

- **Repository**: The name of the connection used to lookup the resource. This field is displayed only for resources that require a repository connection, for example, portlets.
- **Include Catalog**: Select the catalog that you want to nest within the catalog. Contents from the catalog you select here are included directly under the catalog.

  This field is displayed only when you select a nested catalog.
- **Hide Top-Level Folder**: Select to include contents from the selected folder directly under the parent folder; for example, if you select this option for the Data Controls folder, then any data controls created at runtime are displayed directly under Mash-Ups. The Data Controls folder is not displayed. You can preview the catalog to see this change.

  This field is displayed only for custom folders that are populated dynamically at runtime.
- **Factory Class**: The factory class used to create the folder. This field is displayed only for custom folders that are populated dynamically at runtime.

  The factory classes for the folders available in the default catalog are as follows:

  – Task flow: `oracle.webcenter.portalframework.sitestructure.rc.TaskFlowResourceFactory`

  – Portlet: `oracle.webcenter.portalframework.sitestructure.rc.PortletResourceFactory`

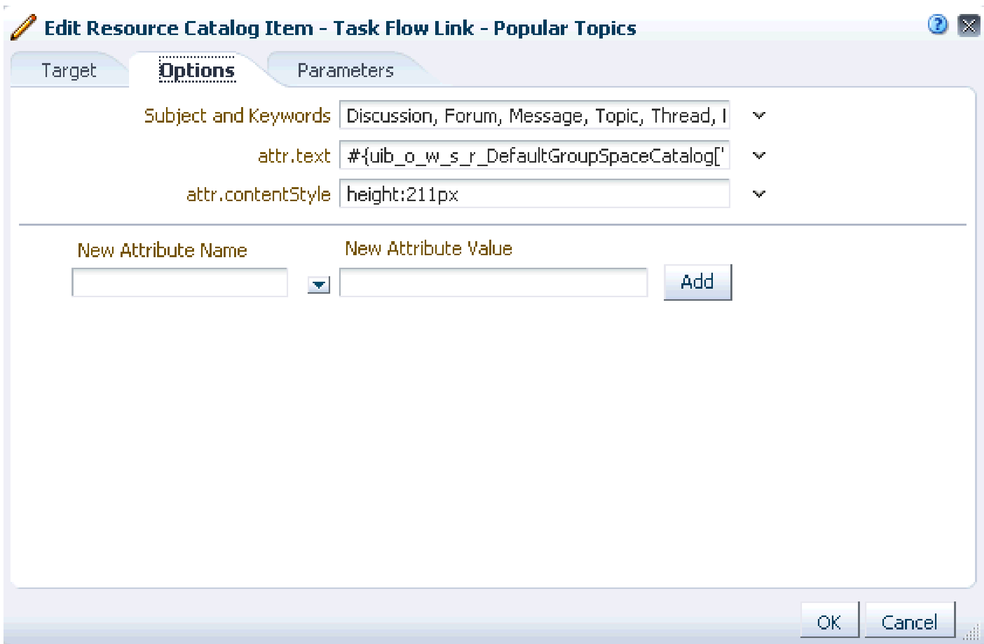
  – Content: `oracle.webcenter.content.model.rc.ContentUrlResourceFactory`

  – Data control: `oracle.webcenter.datacomposer.internal.adapter.datacontrol.DataControlContextFactory`

5. Click the **Options** tab, shown in Figure 16–8, to define display options for the resource.

   You can use this tab to assign attributes to the resource. You can assign any arbitrary attribute to a resource. The tab displays standard attributes such as icon and subject and keywords. In addition to these, you can add you own attributes, which can then be used by the drop handlers registered with Composer in Oracle WebCenter Portal. For example, you can add `attr.*` and `parameter.*` attributes for task flows because their drop handler recognizes them.

Figure 16–8 Options Tab on the Edit Resource Catalog Item Dialog



The fields on the Options tab can be described as follows:

- **Subject and Keywords**: Keywords to facilitate keyword searching of the Resource Catalog.
- **attr.*ATTRIBUTE_NAME***: These are attributes that were explicitly defined on the resource at design time. This field is displayed only for portlets and task flows, which display a chrome around them when consumed in a page. This field is used to set an initial value for an attribute on the task flow or portlet. When the task flow or portlet is consumed in a page, this attribute is exposed along with the enclosing chrome's attributes; for example, `attr.text` defines the default title for the task flow or portlet and `attr.contentStyle` defines the CSS style to be applied. This attribute is not exposed on the chrome if you do not set an initial value for it.
- **parameter.*PARAMETER_NAME***: These are parameters that were explicitly defined on the resource at design time. This field is displayed only for task flows, which are wrapped in a `Show Detail Frame` or `Movable Box` component when consumed in a page. This field is used to set an initial value for a task flow parameter. When the task flow is consumed in a page, this parameter is exposed along with the enclosing `Show Detail Frame` or `Movable Box` component's properties. This parameter is not exposed on the chrome if you do not set an initial value for it.

- New Attribute Name: Select one of the following attributes from the dropdown menu:

  Tool Tip: Use to specify the tool tip to be displayed when you move the mouse over this resource name in the catalog.

  Large Icon URI: Use to specify the path to the icon to be used for the resource.

- New Attribute Value: Specify a value for the selected attribute.

The new attribute is displayed on the Options tab along with the existing properties.

6. Click the Parameters tab to define parameter values for resources that support wiring, for example, portlets and task flows. For details about supported parameters for a resource, refer to the documentation for that resource.

16.3.1.6 Copying a Resource

You can create a copy of an existing resource and modify it.

To copy a resource, select it in the catalog and click **Copy**. A copy of the resource is placed just below it in the resource hierarchy. You can select the copy and alter its attributes and parameters.

16.3.1.7 Deleting a Resource

You can delete resources from any custom Resource Catalog.

To delete a resource:

1. Select a resource and click **Delete**.
2. In the Delete dialog, click **Delete** to confirm deletion.

16.3.1.8 Previewing the Resource Catalog

Click the **Preview** tab in the Edit dialog to see how the Resource Catalog appears to users. The preview shows the order in which the resources will be displayed. It also shows how dynamic folders are executed.

16.3.2 Editing the Source Code for a Resource Catalog

The Resource Manager provides the **Edit Source** option for editing the source code of the catalog definition file. You may want to edit a Resource Catalog's source file to make advanced edits to its code without having to download the file, edit it in JDeveloper, and upload it back into Spaces:

To edit a Resource Catalog's source files:

1. In the Resource Manager (see Section 11.1.4, "Accessing Resources"), select the Resource Catalog and from the Edit menu, select **Edit Source**.

   A simple Edit Source dialog displays the catalog definition.

2. Edit the catalog definition source code as required.

   The format of the code is validated and an error message is displayed if you miss any tags or add them incorrectly. For information about the correct format for catalog definition elements, see "Resource Catalog Properties and Files" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

3. Click **OK**.

16.4 Showing and Hiding a Resource Catalog

When you create a Resource Catalog, by default it is hidden. A hidden Resource Catalog is not available for use in the application, the Home space, or any other space. To publish a Resource Catalog, it must be marked as shown. Further, for a Resource Catalog created at the application level, you can control whether it is available to any, all, or selected spaces in the application.

For generic information about hiding and showing resources, see Section 11.4.3, "Showing and Hiding Resources."

For generic information about resource availability in spaces, see Section 11.4.2, "Setting Properties on a Resource."

16.5 Setting Properties on a Resource Catalog

You can control a Resource Catalog's display attributes and availability by setting the catalog's properties in the Edit Properties dialog. Setting Resource Catalog properties follows the same procedure as any other resource. For more information, see Section 11.4.2, "Setting Properties on a Resource."

16.6 Setting Security on a Resource Catalog

You can control whether all users or only specific users or groups can access the custom Resource Catalogs that you created in the application. Setting access to a Resource Catalog follows the same procedure as any other resource. For more information, see Section 11.4.4, "Setting Security for a Resource."

16.7 Copying a Resource Catalog

You can make a copy of a Resource Catalog by selecting it and choosing **Copy** from the **Edit** menu on the Resources - Resource Catalogs page. Copying a Resource Catalog follows the same procedure as any other resource. For the generic procedure, see Section 11.4.1, "Copying a Resource."

16.8 Deleting a Resource Catalog

You can delete custom Resource Catalogs created at runtime and those that you imported into your application. Deleting a Resource Catalog follows the same procedure as any other resource. For the generic procedure, see Section 11.4.5, "Deleting a Resource."

16.9 Using JDeveloper to Build Your Resource Catalog

You may want to create a Resource Catalog that is beyond the editing capabilities of WebCenter Portal: Spaces, or you may prefer working in JDeveloper. To do this, you have several options:

- Use the **Edit Source** option to edit the source code of the catalog definition file. You can edit the source code directly in the Edit Source dialog or you can copy the contents of the dialog to JDeveloper for editing and then copy the edited code back into the dialog. For more information, see Section 16.3.2, "Editing the Source Code for a Resource Catalog."
- Download an existing Spaces Resource Catalog, import it into JDeveloper, for editing, and then upload it back to Spaces.

- Create a completely new Resource Catalog in JDeveloper and upload it to Spaces.

The steps to upload and download a Resource Catalog from Spaces are described in Section 11.5.2, "Downloading a Resource"and Section 11.5.3, "Uploading a Resource."

Oracle provides a special JDeveloper workspace (`DesignWebCenterSpaces.jws`) for developing Spaces resources, including Resource Catalogs. The workspace offers a design environment in which to create and edit your catalogs, and also enables you to upload them to Spaces for testing. For more information and to download the JDeveloper workspace, see "Developing Spaces Resources" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

> **Note:** When editing a catalog in JDeveloper, if you add a custom resource such as a task flow, you must also deploy the resource to Spaces as a shared library. For more information, see "Deploying Your Own Custom Code and Task Flows in Shared Libraries" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

For information about editing a catalog in design time, see the chapter titled "Creating and Managing Resource Catalogs" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

16.10 Configuring Resource Catalogs in Your Application

Out of the box, your Spaces application is configured with catalogs to be used at the application level. Resource Catalogs are configured for page and page template creation, and for business role page creation. If you want to use custom catalogs in place of the default ones, perform the steps in Section 16.10.1, "Configuring the Application-Level Resource Catalog."

Resource Catalogs are not configured by default at the space level. You can configure the catalogs to be used for page creation and page template creation within a space by performing the steps in Section 16.10.2, "Configuring the Space-Level Resource Catalog."

> **See Also:** Section 5.10, "Choosing Default Resource Catalogs"

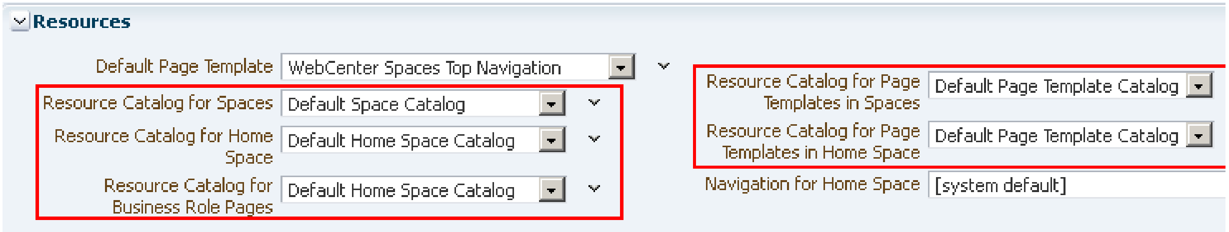
16.10.1 Configuring the Application-Level Resource Catalog

From your Home space, click the **Administration** link at the top of the page, then click the **Configurations** tab. The **Resources** section on the Configuration page, shown in Figure 16–9, displays information about the default catalogs used at different levels in the application. Select a catalog of your choice in each field.

Out-of-the-box, Spaces is configured to use the following catalogs:

- **Default Home Space Catalog** for Home space pages and Business Role pages.
- **Default Page Template Catalog** for page templates in your Home space and other spaces.
- **Default Space Catalog** for pages in a space.

Figure 16–9 Default Resource Catalog Configurations at Different Levels in the Application



16.10.2 Configuring the Space-Level Resource Catalog

By default, the Resource Catalogs for pages and the page templates in a space are inherited from the application-level settings. You can change the Resource Catalogs for a space in the space administration settings. For more information, see Section 53.4.11, "Changing the Resource Catalogs for Pages and the Page Template for a Space."

Part V

Working with Pages

Part V of the User's Guide provides information about creating pages, editing and adding component to develop a page for publishing to the web, working with a page's underlying structure using layout components, and wiring pages, task flows, portlets, and UI components together.

Part V includes the following chapters:

17

Creating and Managing Pages

No matter how you structure your portal, there is always a need for new pages in addition to those that are available out-of-the-box. WebCenter Portal: Spaces provides a variety of prebuilt page styles to simplify page creation. It also offers an embedded page editor for in-place page revision and easy content placement.

This chapter describes how to create and manage your own pages in a space. It includes the following sections:

Audience

This chapter is intended for users with the space-level permission `Basic Services: Edit Page Access, Structure, and Content`. The users with this permission are typically tasked with creating and editing pages, revising page properties, adding page content, and deleting pages from a space.

17.1 What You Should Know About Pages

The Spaces application provides a variety of page types to suit the requirements of your portal. Some pages are seeded, such as *system pages*. These offer a ready set of customizable, utilitarian pages, such as the **Login** page and the **Self Registration** page. Additionally, the services offered by WebCenter Portal: Spaces each have an associated system page to provide a user interface to the service, such as the **Documents** page. system pages are prepopulated with relevant input fields and boilerplate text (for more information about system pages, see Section 7.3, "Working with System Pages").

Another page type, the *business role page*, can be populated with information of relevance to a particular business role, such as salesperson, accountant, or marketing associate, and then pushed into the Home space views of all users who are assigned that role (for more information about business role pages, see Section 7.1, "Working with Business Role Pages").

Personal pages are the pages users create for themselves in their views of the Home space (for more information about personal pages, see Section 32.4, "Working with Pages in the Home Space").

This chapter covers information about pages that are designed to contribute to the knowledge base of the portal. Such pages provide greater flexibility than seeded pages (such as system pages and business role pages), in that you have more control over their content and their availability. You can control user access to such pages and change their properties.

The Spaces application also provides a variety of page layouts (called *styles*) that you can use to create different types of pages with different layouts. A page style may restrict the type of content that you can add to a page, such as web content only, wiki only, blog only, and the like. Page styles also provide layout information that defines the number of columns and content areas on a page. Layouts are initially determined by the style you select when you create the page. Most page styles produce pages with features that enable recrafting the layout through page parameters or page layout tools (for example, Add Tab and Add Box icons). Web Page and Wiki page styles are the exceptions: the default Wiki page style provides neither parameters nor page layout tools; the default Web Page style provides no page layout parameters, but it does include page layout tools in edit page mode. For more information about page styles, see Chapter 15, "Working with Page Styles."

In addition to the preseeded layouts available through page styles, you can create your own layouts using the components available through the Resource Catalog. This chapter provides an overview of that process.

17.2 Creating a Page

If you are granted permission in a space to create pages (see Table 54–2, " Space Permissions - Simple Permission Model"), you can add pages to the space. The pages you create can be viewed by you and anyone to whom you grant access (see Section 17.7, "Controlling User Access to a Page").

To create a page in a space:

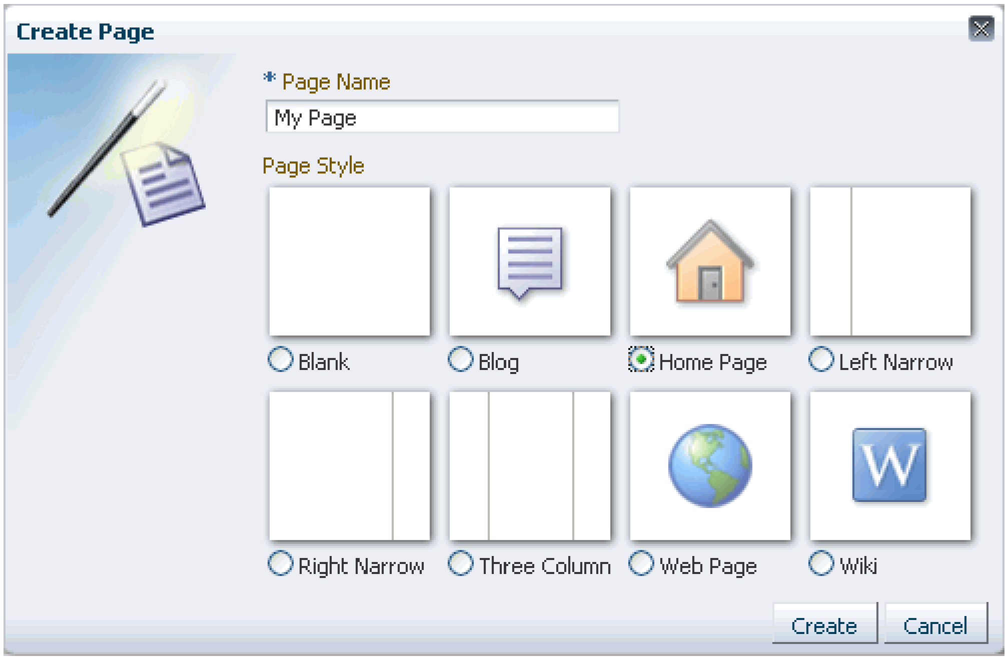
1. Click **Create Page**.

   > **Tip:** The location of the **Create Page** link depends on the page template in use. For example, in a side navigation template, you may access it through an **Actions** menu. You can also find it on the **Personalize Pages** page.

   Spaces will either:

   - Open the Create Page dialog (Figure 17–1).
   - Immediately create a new page with a default style, if specified in the Set Page Defaults dialog (see Section 32.5, "Setting Page Creation Defaults for Personal Pages" for your personal pages in the Home space and Section 53.7.1, "Setting Page Creation Defaults for a Page in a Space" for space moderator settings for all pages in a space).

Figure 17–1 Create Page Dialog



Note: Application administrators can control the options that appear in the Create Page dialog. So, your view may differ from that depicted in Figure 17–1. For more information, see Section 15.4.1, "Showing and Hiding a Page Style in the Create Dialog." Additionally, the application administrator can set an attribute on a custom page style that determines whether a newly created page that is based on that style opens in page edit mode or page view mode. For more information, see Section 15.4.2, "Setting Properties on a Custom Page Style."

---

2. If the Create Page dialog opens, provide a name for the page.

Note: When naming wiki pages, the following characters are not allowed:

```
\ / : [ ] * ' " | ?
```

Letters, numbers, spaces, and periods (.) are allowed.

---

3. Select a page style to define the page structure.

   For detailed information about the seeded page styles, see Section 15.1, "What You Should Know About Page Styles." Note, however, that your application administrator may provide additional custom page styles or restrict page styles to a shorter list.

4. Click **Create**.

   The new page opens in page edit mode (Composer), where you can add content, then **Save** and **Close** the page.

See Also: For information about editing a page, see Chapter 18, "Editing a Page."

17.3 Managing Your Pages

Space moderators and members with page management permissions (see Table 54–2, " Space Permissions - Simple Permission Model") can manage all of the pages in a space on the **Pages** page in the administration settings for the space. For more information, see Section 53.7, "Managing Space Pages."

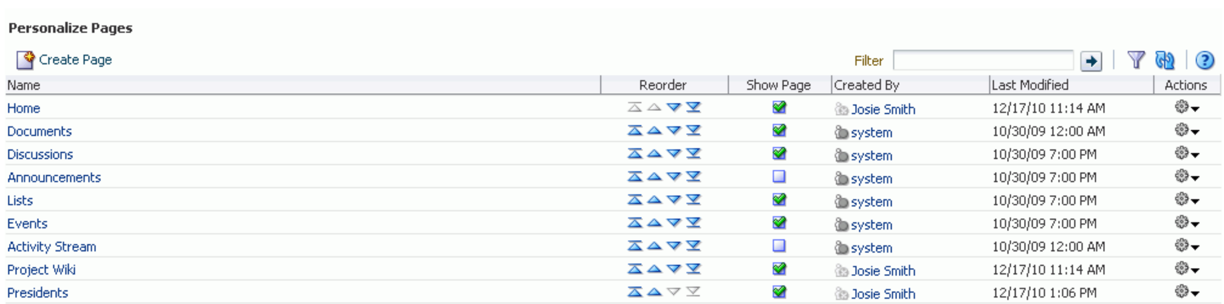
If you own or have privileges to manage a page, you can edit, delete, or set access privileges on a page, However, be aware that performing these actions affects all members in the space as these actions alter the page itself, not only your personalized view. Actions such as reordering or showing and hiding pages is reflected in your "personal" view of the space only.

To manage a page that you own or have permission to manage:

1. In the space, display the **Personalize Pages** page (Figure 17–2).

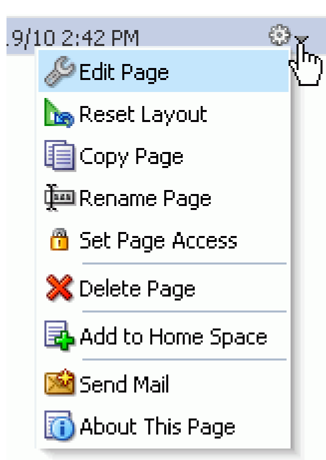
   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

Figure 17–2 Personalize Pages Page



2. On the **Personalize Pages** page, select a page, then select any of the actions available to you on the **Actions** menu for the page (Figure 17–3):

Figure 17–3 Personalize Pages: Page Actions Menu



- **Edit Page**. Open a page that you own or have privileges to edit in the page editor, Composer. See Section 17.4, "Editing a Page."
- **Reset Layout**. Remove all of your user customizations from a selected page. This action removes such personal changes as rearrangement, resizing, or collapsing of task flows in only your view of the page. See Section 51.11.5, "Removing All of Your User Customizations from a Page."
- **Copy Page**. Make a personal copy of a page. See Section 17.5, "Copying a Page."
- **Rename Page**. Rename a page that you own or have privileges to manage. See Section 17.6, "Renaming a Page."
- **Set Page Access**. Add or remove access to a page by user name or role. See Section 17.7, "Controlling User Access to a Page."
- **Delete Page**. Delete a page that you own or have privileges to manage. See Section 17.8, "Deleting a Page."
- **Add to Home Space**. Add a page to your personal view of the Home space. See Section 17.9, "Exposing a Space Page in Your View of the Home Space."
- **Send Mail**. Send a link to a page that you own or have privileges to manage. See Section 17.10, "Sending Mail with a Link to a Page."
- **About This Page**. View information about a page. See Section 17.11, "Viewing Information About a Page."

17.4 Editing a Page

When you edit a page, you can add or remove content, set properties on content and on the page itself, and perform additional customizations that affect the view of everyone who has access to the page.

Depending on how the Home space or space is designed, you can enter page edit mode from a page **Actions** menu or an **Actions** menu next to a page on the **Personalize Pages** page. Or, the page template used for the page may provide an **Edit Page** link.

To edit a page:

1. Open the page in edit mode.
2. Edit the page as desired.

   See Also: For more information, see Chapter 18, "Editing a Page."

3. Click **Save** and **Close** to save your changes and exit page edit mode.

17.5 Copying a Page

When you copy a page, all content from the original page is also copied. The copy opens in page edit mode (Composer) so that you can start immediately making the adjustments you planned for the copy.

Note that a copy does *not* also include the original page's access settings. You must set access on the copy as if it were a new page (see Section 17.7, "Controlling User Access to a Page").

To copy a page in a space for your own purposes:

1. In the space, display the **Personalize Pages** page.

   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and select **Copy Page** to open the Copy Page dialog.
3. Enter a name for the page copy in the **Page Name** field, and click **OK**.

   The copied page opens in page edit mode (Composer).
4. Edit the copy as desired than click **Save** and **Close** to exit Composer.

The new page is available only to you, unless you make it available to others (see Section 17.7, "Controlling User Access to a Page").

17.6 Renaming a Page

If you own or have privileges to manage a page, you can rename the page. However, be aware that renaming a page affects all members in the space as this action alters the page itself, not only your view.

When you rename a page, any pretty URLs that use the old name will be broken. Also note that system pages, such as the **Announcements**, **Lists**, and **Events** pages, cannot be renamed.

See Also: For information about pretty URLs, see Appendix A, "Spaces User Interface URLs."

To rename a page that you own or have privileges to manage:

1. In the space, display the **Personalize Pages** page.

   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and select **Rename Page** to open the Rename Page dialog.
3. Enter a new name for the page, and click the **Save** icon.

17.7 Controlling User Access to a Page

By default, the pages you create in a space are viewable by all space members. In the Home space, the personal pages you create are accessible only to you and the Spaces administrator. You can use page access settings to enable others to view and work with your space pages and personal pages and to remove that access.

When you grant access to one of your personal pages to another user, they must deliberately show the page in their view. The user must take this step for each session because shared pages are not automatically shown on login.

See Also: For information about how to show a hidden page, see Section 51.11.1, "Showing or Hiding Pages in Your View."

This section covers the steps to control the access space members and other users have to a page that you own or have permissions to manage. For more information about establishing security on different types of pages, refer to the following sections:

- Section 7.1.4, "Specifying the Target Audience for a Business Role Page"(application level)
- Section 7.2.3, "Changing Access Permissions on a Personal Page" (application admin level)
- Section 26.1, "Setting Access on a Page Through Page Properties"
- Section 53.7.8, "Changing Access Permissions on a Page in a Space" (space level)

To control the access space members and other users have to a page:

1. In a space or the Home space, display the **Personalize Pages** page.

   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and select **Set Page Access** to open the Set Page Access dialog (Figure 17–4 and Figure 17–5).

Figure 17–4 Set Page Access Dialog: Home Space

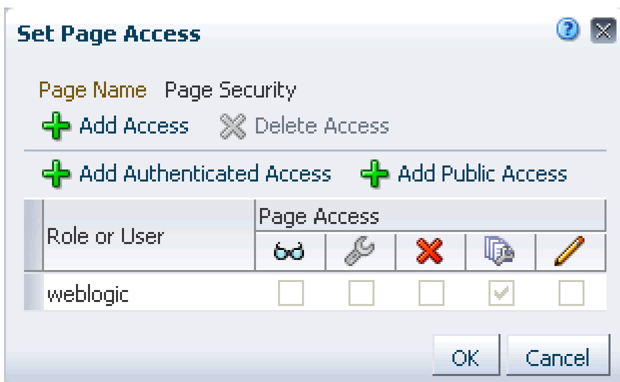
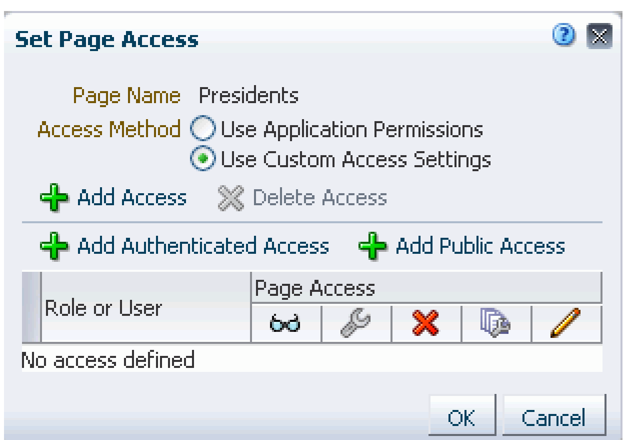


Figure 17–5 Set Page Access Dialog: Space



3. For pages in a space, select the **Access Method**:

   - To specify that the page should inherit access settings from the permissions established for the space, select **Use Application Permissions**, then click **OK** to save your changes and exit the dialog.

See Also: For information about setting global space permissions, see Section 54.2, "Managing Roles and Permissions for a Space."

- To set custom access on the current page, select **Use Custom Access Settings**, and continue with the next steps.

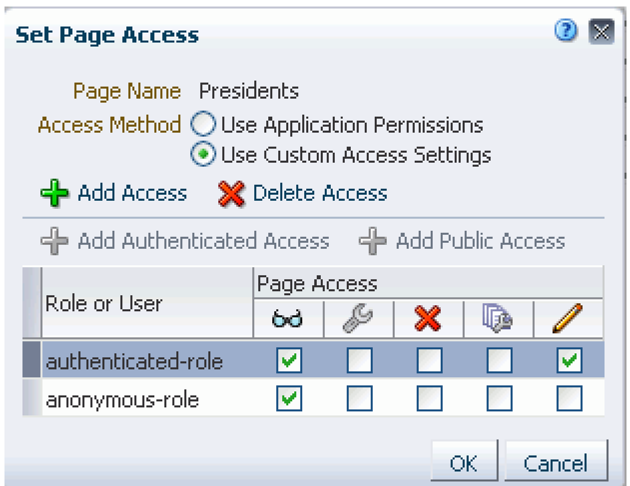
4. To grant page access permissions to all authenticated users (that is, to users who are logged in to Spaces), click **Add Authenticated Access**.

   The role `authenticated-role` is added under **Role or User** with default **Read** access to the page.

5. To grant page access permissions to all public users (hat is, users who have not logged in to Spaces) click **Add Public Access**.

   The role `anonymous-role` is added under **Role or User** with default **Read** access to the page (Figure 17–6).

Figure 17–6 Authenticated and Public User Read Access to a Page



Note: To grant page access to the `anonymous-role` (that is, to enable users who are not logged in to access the space) the space must be public. The space cannot be private or hidden. See Section 53.14.5, "Granting Public Access to a Space."

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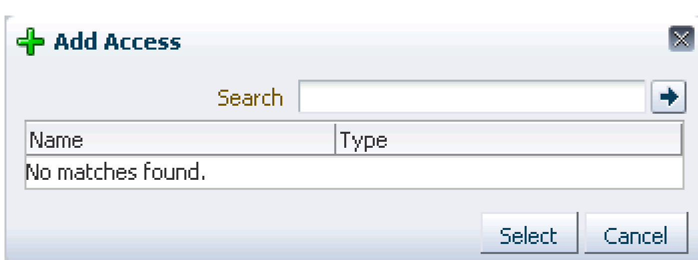
6. To grant page access permissions to selected users, groups, and application roles, click **Add Access** to open the Add Access dialog (Figure 17–7).

Figure 17–7 The Add Access Dialog



7. In the **Search** field, enter a search term or the name of the user, group, or role for whom you want to enable access, and click the **Search** icon. For tips on searching for a user or group in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."

> **Note:** In the Add Access dialog for pages in a space, you can add the default roles `Moderator`, `Participant`, and `Viewer`, and any custom roles that have been created for the space.
>
> For more information about space roles, see Section 54.2, "Managing Roles and Permissions for a Space"

8. Select a user, group, or role by clicking in its row.

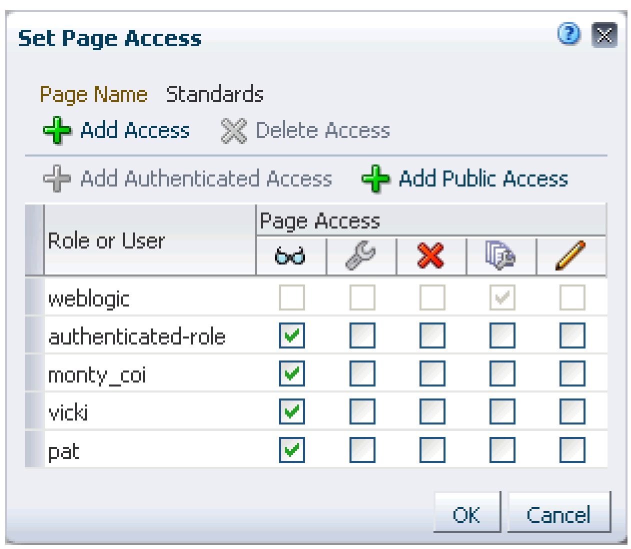
> **Note:** When you select a user name, the permissions you set are granted to that specific user. When you select a group or application role, the permissions you set are granted to all users who are members of that group or who are assigned that role.

To make multiple selections:

- Ctrl-Click to select multiple rows.
- Shift-Click to select a range of rows.

9. Click **Select** to close the Add Access dialog, and populate the Set Page Access dialog with the selected users, group, or roles (Figure 17–8).

Figure 17–8 Set Page Access Dialog



10. In the Set Page Access dialog, set the **Page Access** permissions as desired for each user, group, or role (Table 17–1).

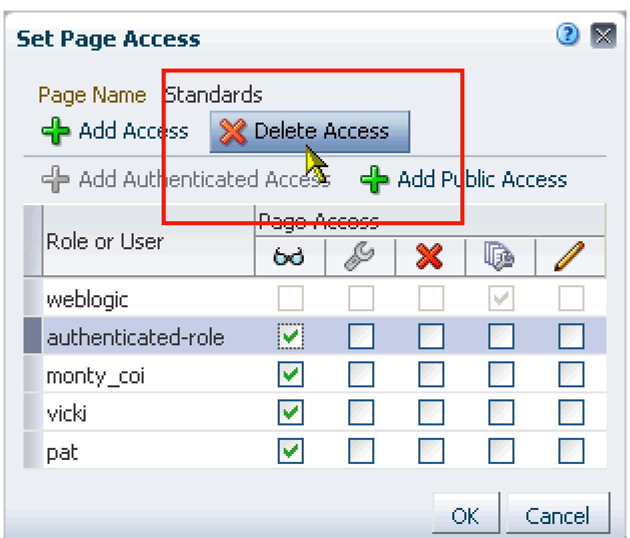
Table 17–1 Page Access Privileges in the Set Page Access Dialog

Icon	Page Access	Role, Group, or User Permissions
	View Page	Access the page for viewing, but cannot perform any other actions on the page.
	Edit Page	Edit the page using Composer. This includes adding, rearranging, and deleting content; renaming the page; and changing page properties, such as the page scheme.
	Delete Page	Delete the page.
	Perform All Page Actions	Perform all actions on the page.
	Personalize Page	Rearrange page content and personalize their own view of task flows on the page, provided the task flow includes personalization settings.

> **Tip:** By default, all authenticated users and user roles that you add to the Set Page Access dialog are granted page view access. The other access privileges must be explicitly granted.

11. If you wish to delete access to the page for a user role, select the user or role from which to revoke page access, and click **Delete Access** (Figure 17–9).

Figure 17–9 Delete Access Button



12. Click **OK** to save your changes and close the Set Page Access dialog.

17.8 Deleting a Page

If you own or have manage permissions on a page, you can delete the page. However, you should be aware that deleting a page affects all members of the space.

To delete a page that you own or have permission to manage:

1. In the space, display the **Personalize Pages** page.

   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and select **Delete Page** to display the Delete Page dialog.
3. Confirm deletion of the page, and click **Delete**.

17.9 Exposing a Space Page in Your View of the Home Space

You can make a space page available for viewing and revising from your view of the Home space according to your permissions on the page. The space name is prepended to the page name, so the *Sales Results* page in the space *Finance* becomes *Finance - Sales Results* in your view of the Home space.

> **Note:** System pages that are exposed in a space, such as Events, Lists, and Announcements, do not provide the option of being exposed in the Home space.

If you delete such a page from your view of the Home space, it remains in its original space. In other words, deleting it simply removes it from your view of the Home space; it does not actually delete the page. If the page is deleted from its parent space, it is unavailable in your view of the Home space. To clear it from your view, you must refresh the page list on the **Personalize Pages** page.

To add a space page to the list of pages in the Home space, visible only to you in your personalized view of the Home space:

1. In the space, display the **Personalize Pages** page.

   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and select **Add to Home Space**.

When you add a space page to your view of the Home space, the page scope remains that of the space.

17.10 Sending Mail with a Link to a Page

If you own or have manage permissions on a page, you can send other space members a link to the page.

To send mail to other space members populated with a link to a page:

1. In the space, display the **Personalize Pages** page.

   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and select **Send Mail** to open your mail application compose window, showing a URL link to the page.

17.11 Viewing Information About a Page

To view information about a page:

1. In the space, display the **Personalize Pages** page.

   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and select **About This Page** to open the Page Information dialog, which shows Name, Created By, Date Created, Last Modified, and Direct URL.

17.12 Personalizing Pages

WebCenter Personalization provides a way to tailor page content and templates to the current user. Using Personalization-related Expression Language (EL) expressions, you can present targeted content or shape the way content is presented by selecting and applying a page template based on whoever is the current user. For example, one user role sees a page through template A, while another user role sees the same page through template B.

There is a wide variety of user and application context that can determine the content a user sees. For example, content can be restricted by role through a security mechanism, such as page hierarchy security. Content can be targeted based on more dynamic user and application context, such as user profile values and session information.

When you use Personalization EL, you personalize the content that is shown based on the user or application context that is being pulled by the EL from a Personalization Conductor Scenario. The Personalization Conductor in turn is dynamically pulling the actual content or page template from a provider source; that is, a content repository, such as Content Server.

For more information about personalization in WebCenter Portal: Spaces, see Chapter 9, "Using Personalization for WebCenter Portal."

The ELs related to the Personalization Conductor are cataloged in Section B.4.11, "EL Expressions Relevant to the Personalization Conductor." The Personalization Conductor is discussed in more detail in the chapter, "Personalizing WebCenter Portal Applications" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

18

Editing a Page

One of the most powerful offerings in a Spaces application is the ability to add and edit page content at application runtime. This capability is delivered through *Composer*, a fully-integrated page editor for revising space pages.

Using Composer, you can change a page layout; add task flows, portlets, documents, and other components to a page; provide values for the properties associated with pages and the objects they contain; and wire pages, task flows, and portlets to each other.

This chapter provides an overview of Composer and describes how to perform basic editorial tasks in the following sections:

- Section 18.1, "Entering and Exiting Composer"
- Section 18.2, "Introducing Design View and Source View"
- Section 18.3, "Providing Page Background Color, Image, and CSS Encoding"
- Section 18.4, "Changing the Page Layout"
- Section 18.5, "Adding a Component to a Page"
- Section 18.6, "Modifying Page Components"
- Section 18.7, "Deleting a Component from a Page"

See Also: The following chapters describe additional tasks in Composer:

- Chapter 19, "Working with Web Development Components on a Page"
- Chapter 20, "Working with Layout Components on a Page"
- Chapter 21, "Adding Spaces Components to a Page or Page Template"
- Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components"

Audience

This chapter is intended for users with the space-level permission `Basic Services: Edit Page Access, Structure, and Content`. The users with this permission are typically tasked with creating and editing pages, revising page properties, adding page content, and deleting pages from a space.

18.1 Entering and Exiting Composer

When you enter page edit mode, you are opening the page in the page editor, *Composer*.

To enter and exit Composer, perform either of the following actions:

- Navigate to the page you want to edit, then press Ctrl+Shift+E (Figure 18–1).

  To navigate to a personal page in the Home space:

  `http://host:port/webcenter/spaces/profile/`*`userName`*`/page/`*`escapedPageDisplayName`*

  > **Tip:** The variable *`userName`* is your user name or the name of the user who owns the page in the Home space. The variable *`escapedPageDisplayName`* indicates the use of an escaped version of the page display name. For example, when you create a page with the name *My Page*, the URL to this page ends with `My+Page`.

  To navigate to a page in a space:

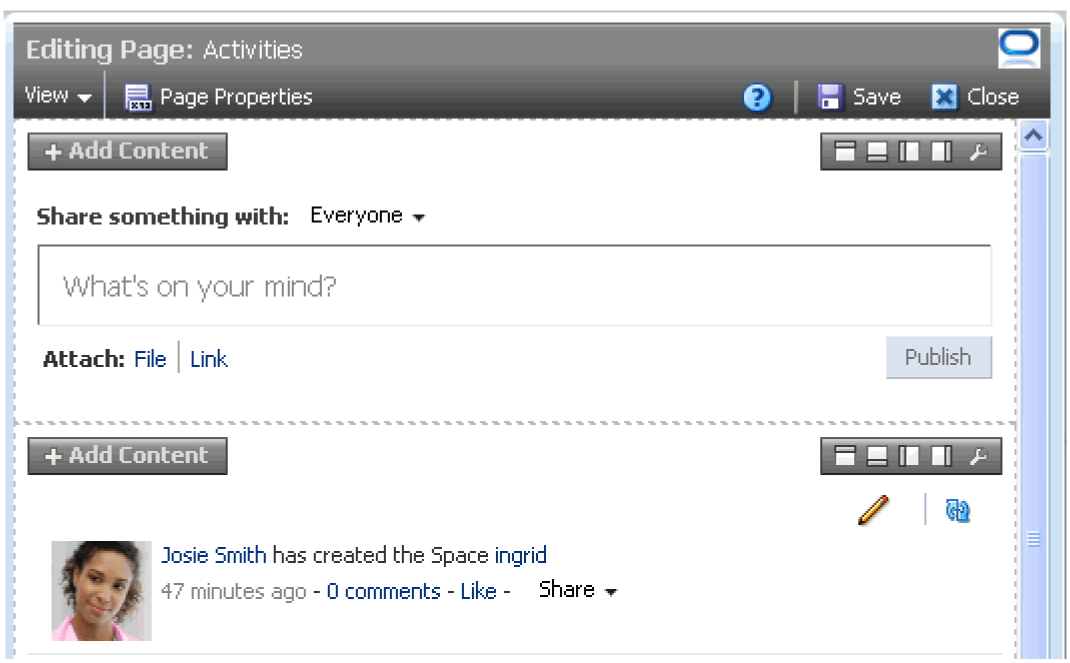
  `http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/page/`*`escapedPageDisplayName`*

- On the **Personalize Pages** page or the space **Pages** page, select the page, then click the **Actions** menu for the page, and select **Edit Page** to open it in Composer (Figure 18–1).

  See Also:

  - Section 17.3, "Managing Your Pages" (to open the **Personalize Pages** page for pages you own or have permission to manage)
  - Section 53.7.4, "Editing a Page in a Space" (to open the **Pages** page if you are the space moderator)

Figure 18–1 Example of a Page in Edit Mode

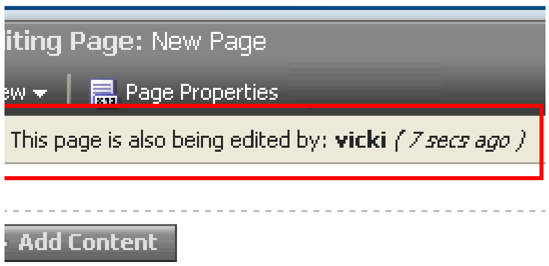


1. Edit the page as desired.
2. Click **Save** to save your changes.
3. Click **Close** to exit page edit mode.

A Few Notes About Concurrent Users

Because users access the Spaces application from the Web, multiple users may attempt to edit the same page at the same time. In such cases, a concurrency warning appears in Composer that alerts each user to the others (Figure 18–2).

Figure 18–2 A Concurrency Warning in Composer



The final state of the page is determined by the last user to save. That is, the last changes saved overwrite the changes made by other concurrent users.

> **Tip:** Time duration is added to the concurrency message only when the first or a subsequent concurrent user has made (but not yet saved) a page customization.

The Spaces application does not support single-user concurrency. That is, one user cannot create multiple, simultaneous application sessions.

Because concurrent page editing by multiple users is supported, there may be occasions when one user deletes a page that another user is editing. In such cases, the user performing the edits sees an error message with each action. For example, a message saying the user does not have permission to edit the page may appear. When the user tries to save changes, a Page Not Found error appears with a link redirecting the user to the Home page. The error message may differ, depending on whether the user is editing a page in a space or the Home space.

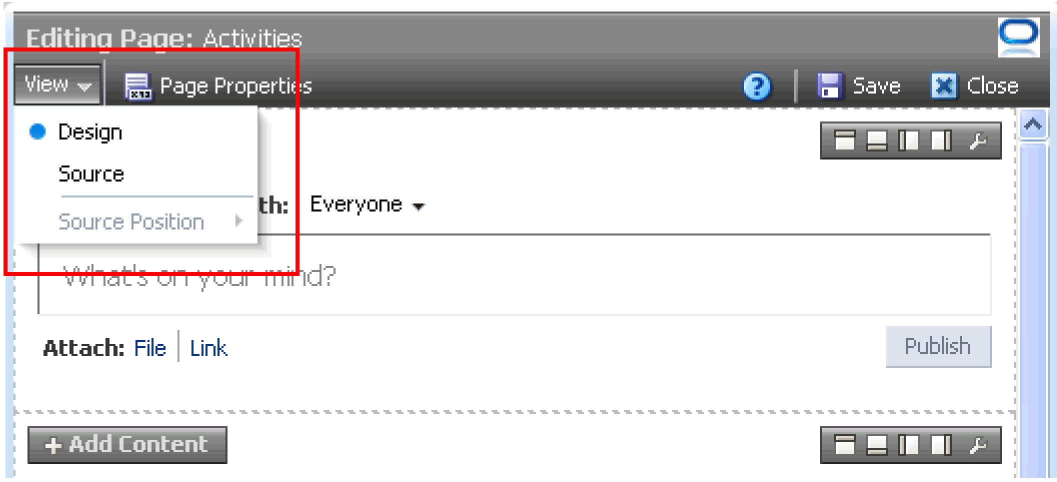
If you view a page while another user is editing it, you may not immediately see the results of those edits in your session. To reliably see any changes, view the page after the other user has saved.

If you revise a component in page view mode while another user deletes the same component in page edit mode, an error page opens. Simply navigate back to the original page. The deleted component does not appear, and you can continue working on other components.

18.2 Introducing Design View and Source View

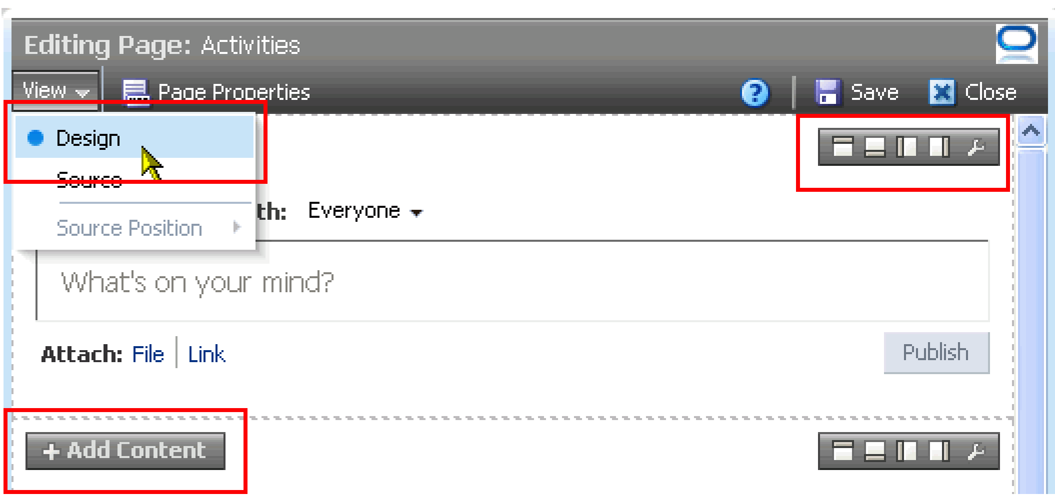
Composer provides two views for working with page content: Design view and Source view. To open either of these views, enter Composer, and select **Source** or **Design** from the **View** menu (Figure 18–3).

Figure 18–3 View Menu in Composer



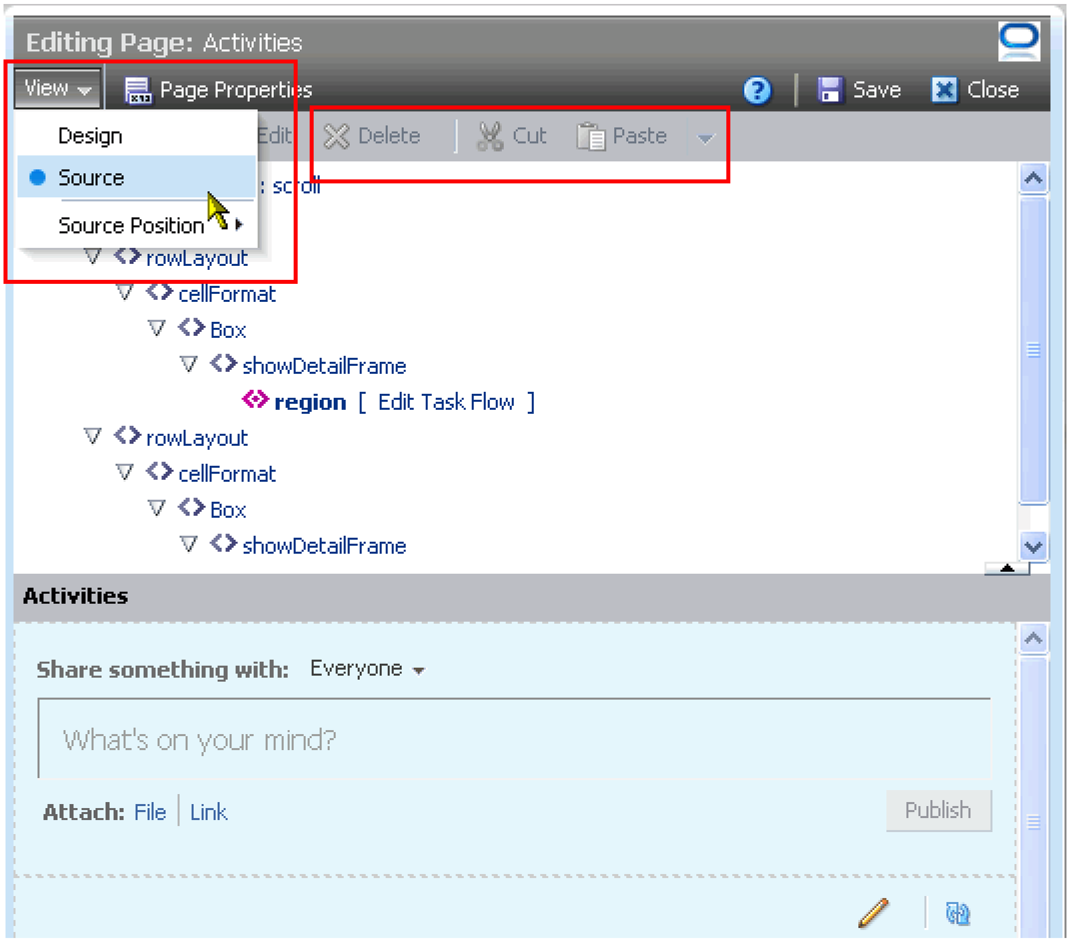
Design view provides a WYSIWYG rendering of the page and its content, where controls are directly selectable on each component (Figure 18–4).

Figure 18–4 Design View of Page Edit Mode



Source view provides a combined WYSIWYG and hierarchical rendering of page components, where controls are available on the header of the hierarchical list (Figure 18–5)

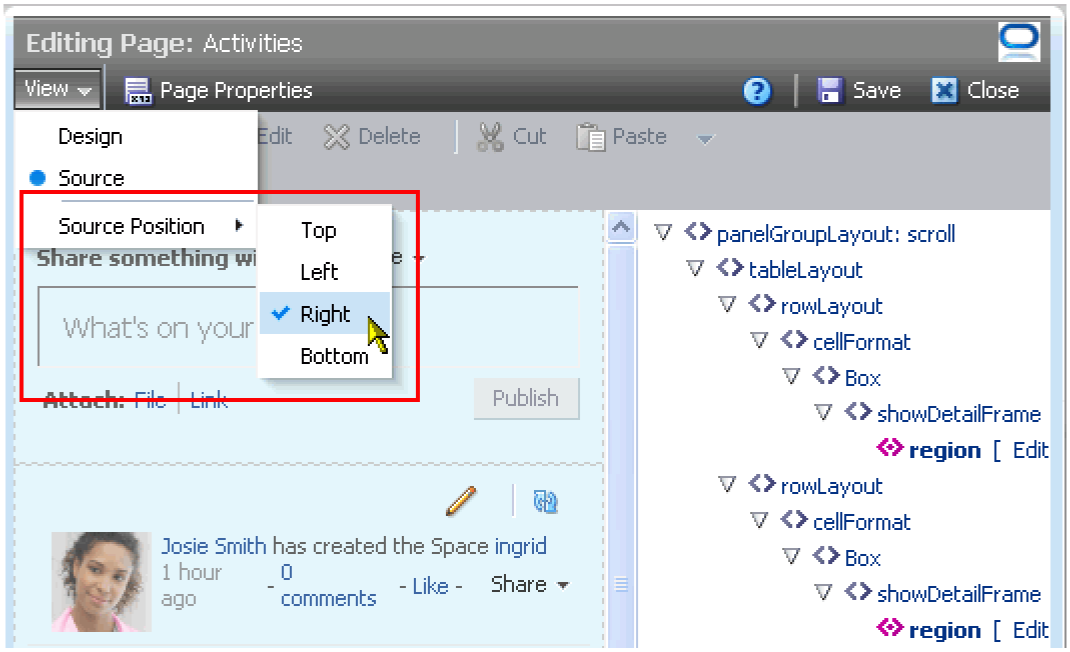
Figure 18–5 Source View of Page Edit Mode



> **Tip:** In Source view, controls on individual components are inactive, but you can click an individual component to select it.

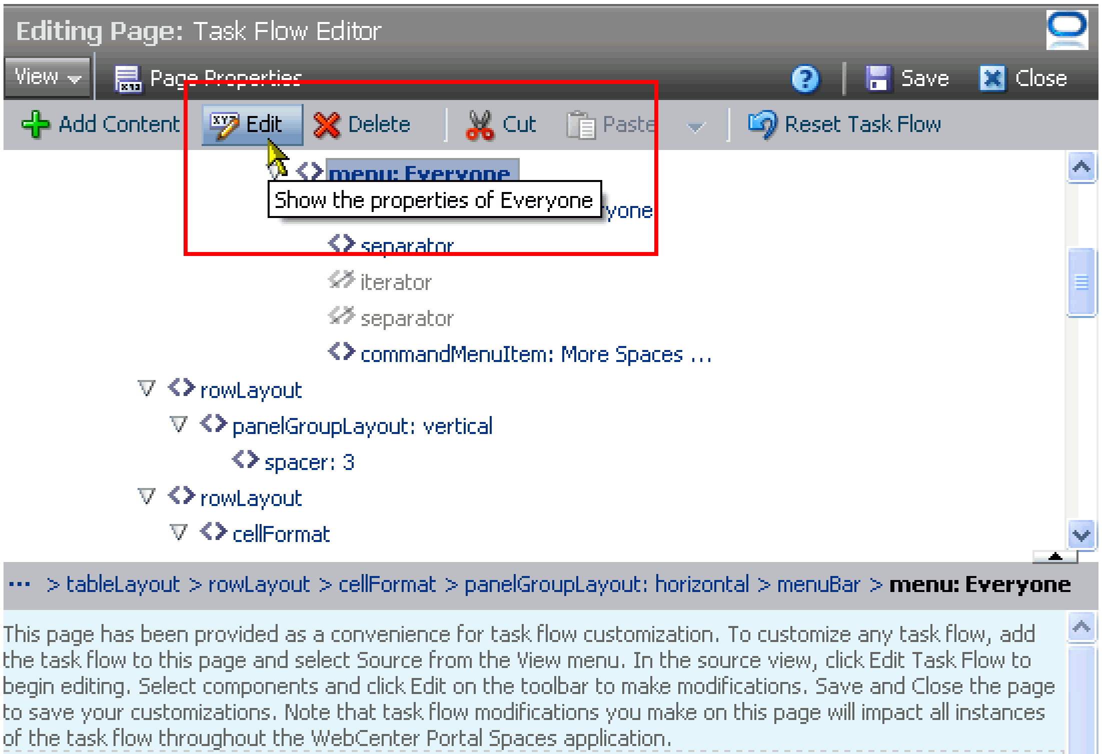
The **Source position** option on the **View** menu is available for specifying whether the page source is presented on the top, bottom, left, or right of the WYSIWYG portion of the page. The **Source position** option is active when the page is open in Source view (Figure 18–6).

Figure 18–6 Source Position Options on View Menu in Page Edit Mode



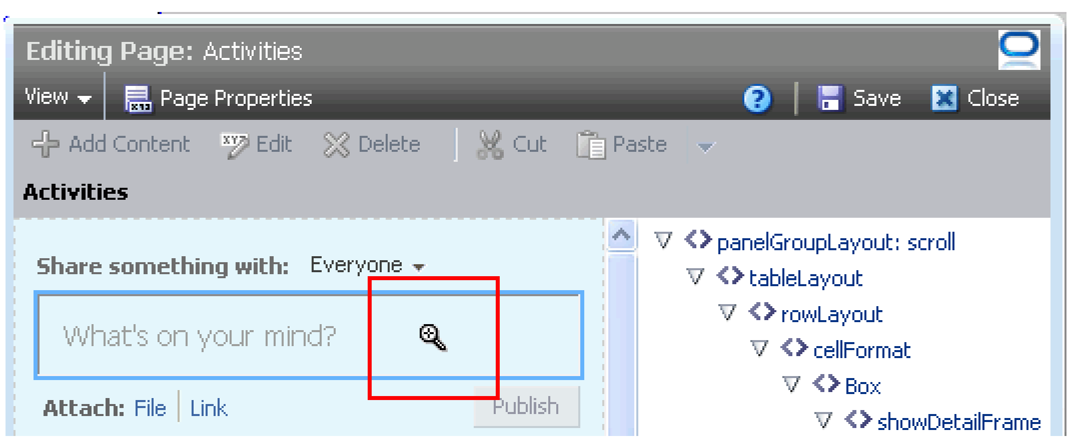
Source view additionally provides access to page components that are otherwise not exposed on the page (for examples, see Chapter 20, "Working with Layout Components on a Page"). Source view enables the selection and configuration of such components. Select a component on the hierarchical list to also select it on the page. Component selection is indicated by an outline. Access the selected component's properties by clicking the **Show the properties of *component name*** icon on the Source view header (Figure 18–7).

Figure 18–7 Show the Properties of Everyone Icon



You can also select components in Source view by clicking them directly on the page. In Source view, your mouse cursor changes to a magnifying glass when you move it over a selectable component (Figure 18–8).

Figure 18–8 Mouse Cursor as Magnifying Glass



18.3 Providing Page Background Color, Image, and CSS Encoding

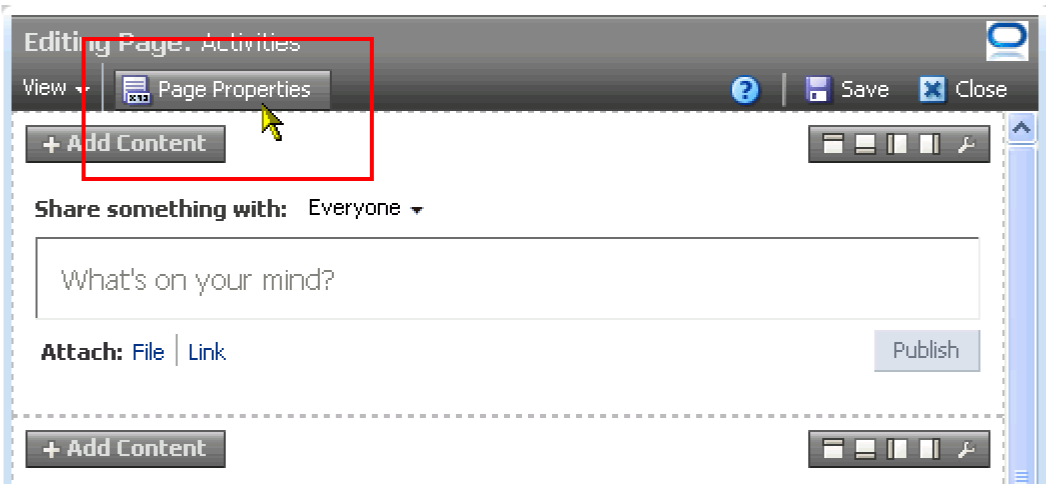
Page properties provide a means of controlling the width of page columns, specifying a page background color and image, and applying additional CSS encoding to the page. Additionally, page properties provide access to page security settings and to page parameters, which you can use in wiring pages to page components.

See Also: For information about page security settings, see Chapter 26, "Securing Pages and Components." For information about page wiring, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

To edit a page's properties:

1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. Click the **Page Properties** button (Figure 18–9).

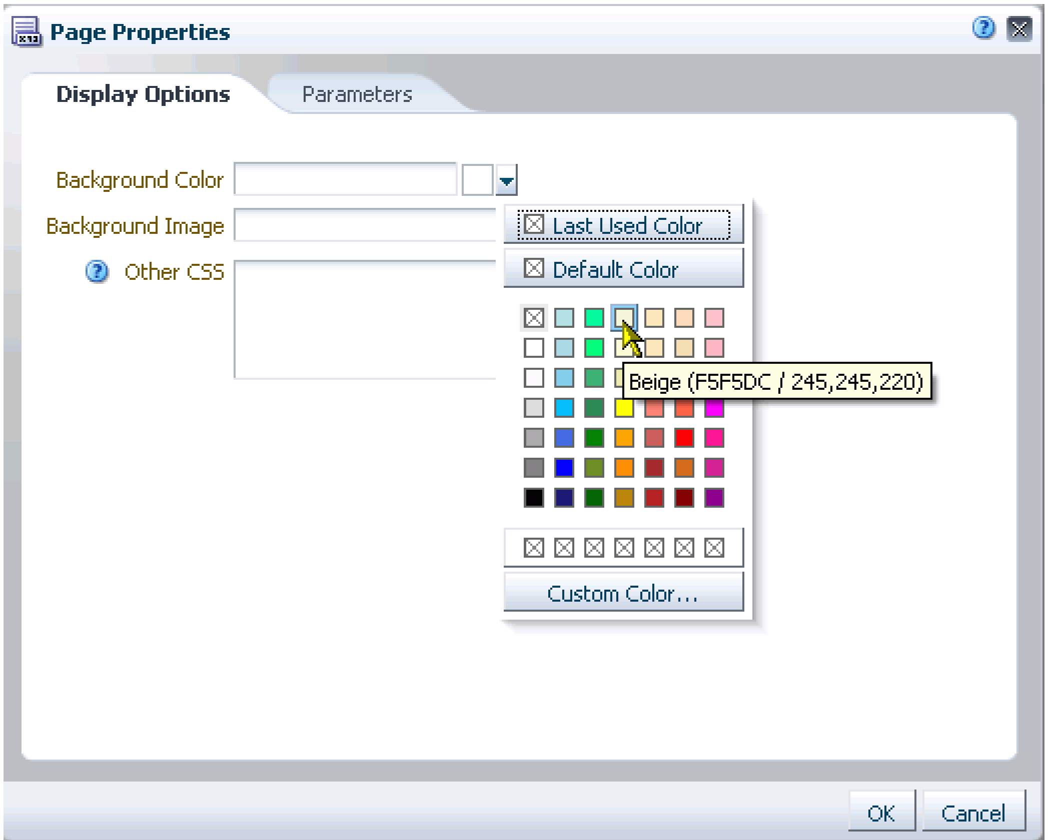
Figure 18–9 Page Properties Button in Page Edit Mode



The Page Properties dialog opens (Figure 18–10).

3. If necessary, click the **Display Options** tab to bring it forward, open the color picker next to **Background Color**, and select a background color for the page in one of the following ways (Figure 18–10):

Figure 18–10 Page Background Color Picker

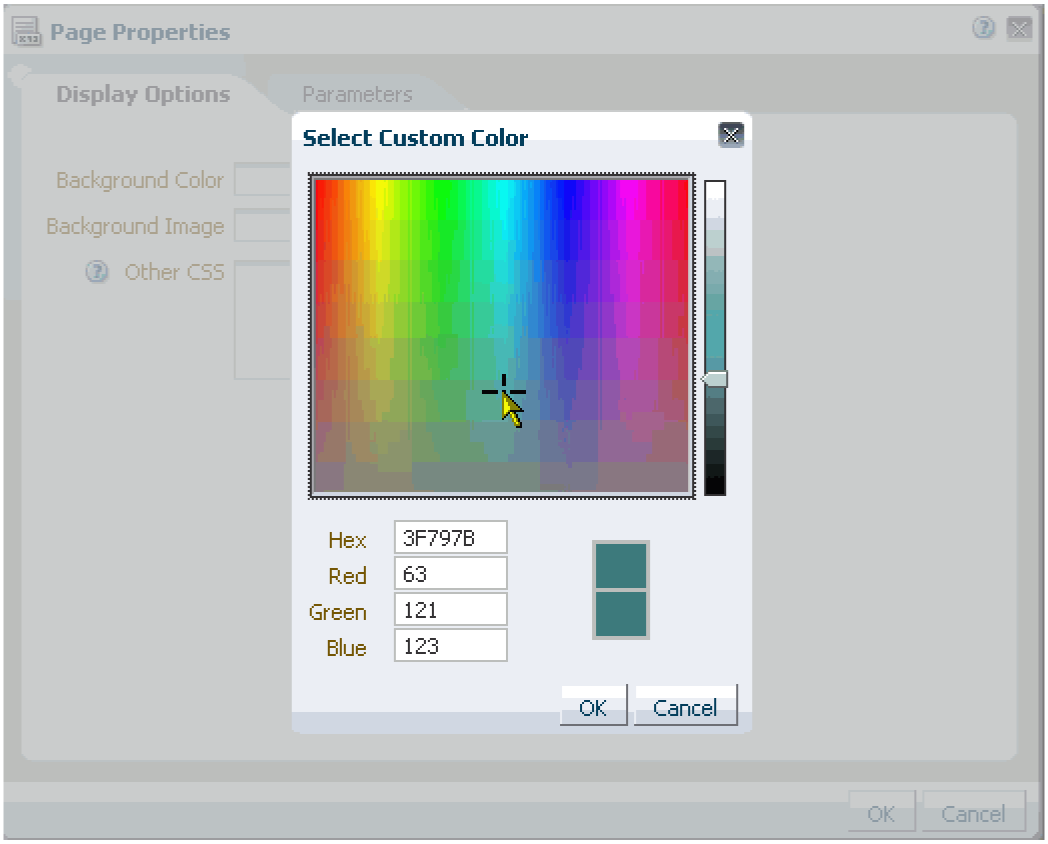


- Select a color by clicking it.
- Enter the color's RGB equivalent in the **Background Color** field.

  Tip: Enter RGB values in the format `RRGGBB` or `#RRGGBB` or `r,g,b`

- Create a custom color by clicking **Custom Color** in the picker and selecting a color and a saturation level using the selector and the slider provided (Figure 18–11).

Figure 18–11 Custom Color Picker



Click **OK** to enter the color value in the **Background Color** field.

4. In the **Background Image** field, enter a full URL or a URL that is relative to the application root.

   For example, enter:

   ```
   http://www.abc.com/image.jpg
   ```

5. In the **Other CSS** field, add any other CSS encoding you care to that is not covered by the other page properties.

   For example, enter:

   ```
   background-position:center;
   ```

   You must use standard CSS syntax for this value to be valid (for more information about **Other CSS**, see Section 18.6.6.3, "Entering Other CSS").

6. Click **OK** to save your changes and apply them to the page.

18.4 Changing the Page Layout

This section describes how to revise the page layout by adjusting underlying page columns and adding tabs and content areas. It includes the following subsections:

- Section 18.4.1, "What You Should Know About Page Layouts"
- Section 18.4.2, "Providing a Page Header and Footer"

- Section 18.4.3, "Adjusting the Widths of Page Columns"
- Section 18.4.4, "Adding New Content Regions"
- Section 18.4.5, "Creating Layered Content Regions Using Tabs"

18.4.1 What You Should Know About Page Layouts

Page layout is defined by the number, placement, and orientation of content regions on a page and the widths of page columns. The initial layout for a page is based on the page style selected when the page is created. While you can modify the layout of an individual page, it is not possible to globally change the page layout of all pages that are built on the same page style.

> **See Also:** Table 15–2, " Default Page Styles" illustrates WebCenter default page styles.

If a page uses parameters to derive its layout, then the page parameters can be used to change the layout. You can add content regions to a page to change the page layout, and add tabs to create layered content regions.

18.4.2 Providing a Page Header and Footer

Many of the seeded page styles have associated page properties that you can use to add a header and footer to a page. These styles include:

- Blank
- Home Page
- Left Narrow
- Right Narrow
- Three Column

Adding a page header adds a content area to the top of the page. Adding a page footer adds a content area to the bottom of the page. Both of these content areas are immune to user customizations, preventing them from being dragged to a new position or otherwise altered in page view mode. Figure 18–12 and Figure 18–13 illustrate a page in edit mode Design view before and after a header and footer are added.

Figure 18–12 A Page Based on the Style Three Column Before a Header or Footer Is Added

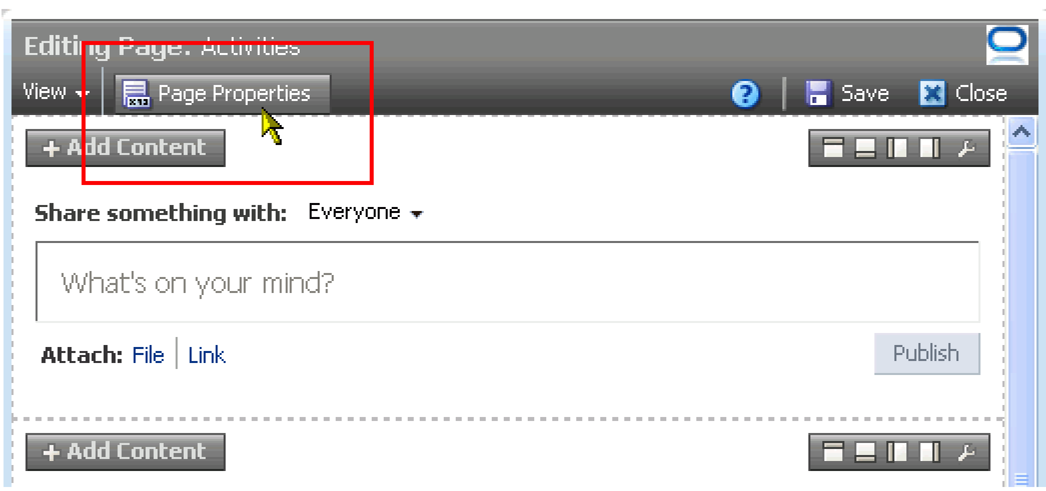
Figure 18–13 A Page Based on the Style Three Column After a Header and Footer Are Added

This section steps you through the process of adding a header and footer to a page that is based on one of these styles.

To add a page header or footer:

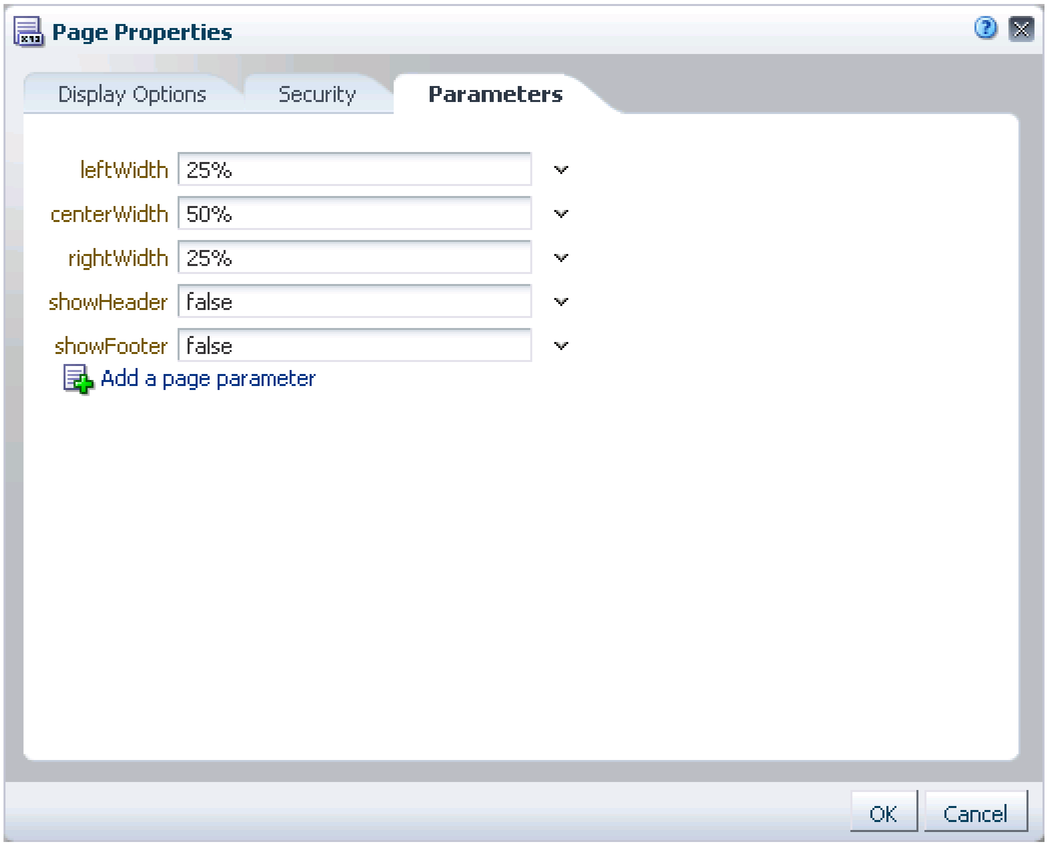
1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. Click **Page Properties** (Figure 18–14) to open the Page Properties dialog.

Figure 18–14 Page Properties Button in Page Edit Mode



3. Click the **Parameters** tab to bring it forward.
4. To add a page header, change the value of `showHeader` to `true`; to add a page footer, change the value of `showFooter` to `true` (Figure 18–15).

Figure 18–15 Default Page Parameters for the Three Column Page Style



5. Click **OK**.
6. Add content as desired to the page header and footer layout Boxes (Figure 18–16).

Figure 18–16 Unpopulated Page with a Header and Footer

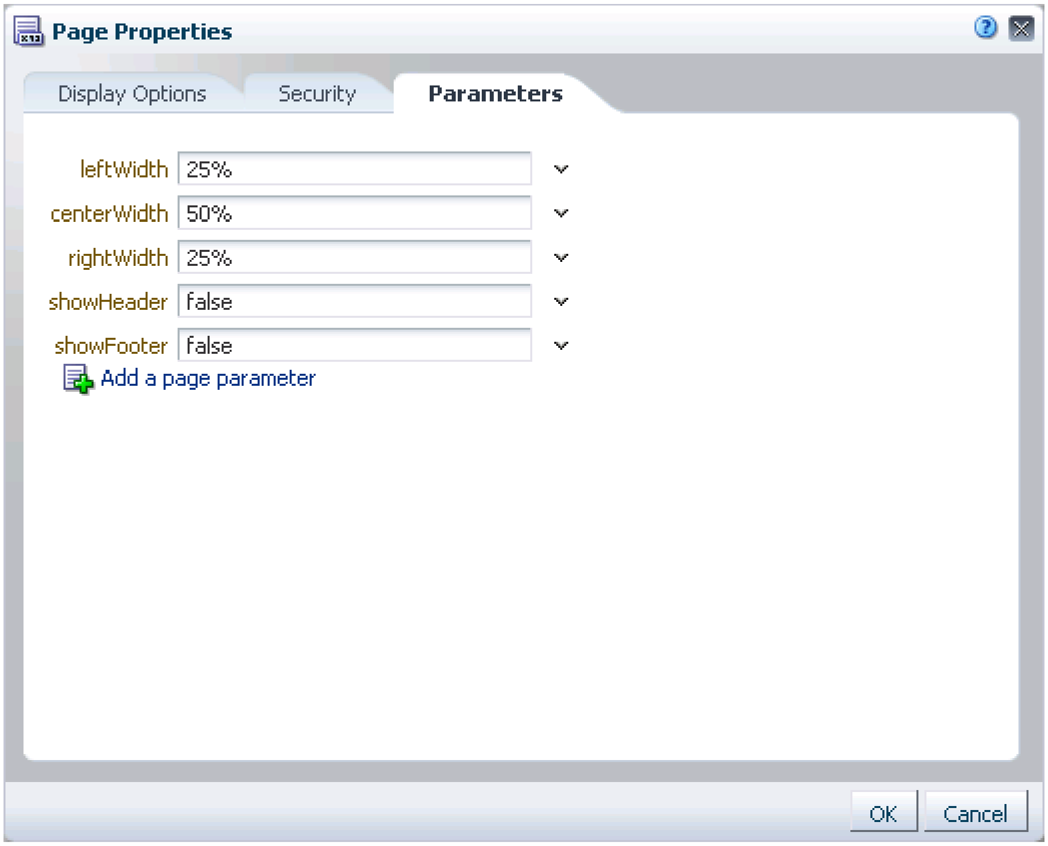
> **See Also:** For information about adding content to a page, see Section 18.5, "Adding a Component to a Page." For information about adding components to a page, such as images, text, HTML, and the like, see Chapter 20, "Working with Layout Components on a Page"

7. Click **Save** and then **Close** to exit Composer.

18.4.3 Adjusting the Widths of Page Columns

Many seeded page styles come with parameters that control the percentage of width allotted to each underlying page column (Figure 18–17).

Figure 18–17 Default Page Parameters for the Three Column Page Style



Like the default widths that are assigned with a given page style, the width values that you enter are fixed values. That is, they do not expand should you add content that exceeds the stated width.

The seeded page styles that provide column width parameters include:

- Blank
- Blog
- Home Page
- Left Narrow
- Right Narrow
- Three Column

The seeded page styles that *do not* provide column width parameters include:

- Web Page
- Wiki

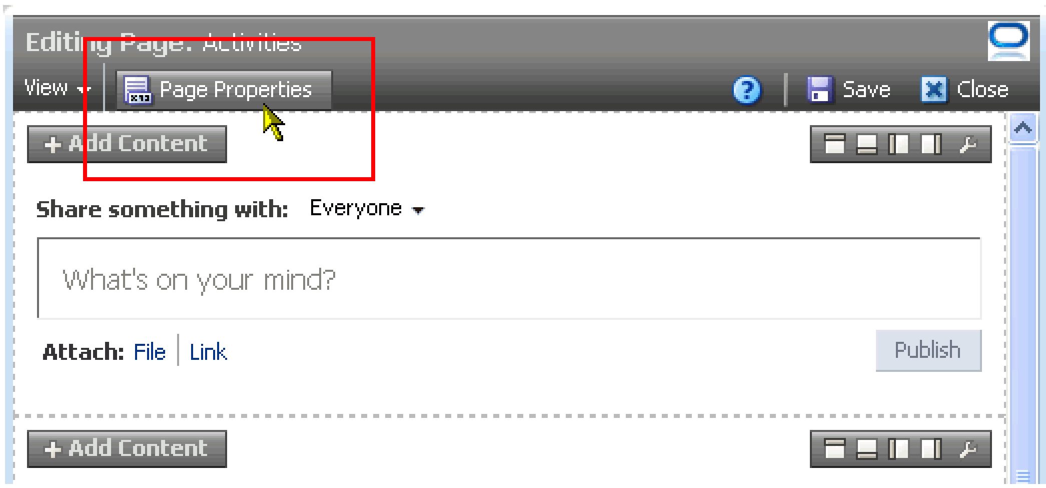
> **See Also:** For illustrations and descriptions of seeded page styles, see Table 15–2, " Default Page Styles".

You can adjust the default values of these parameters to control the width of page layout columns.

To adjust the width of page columns:

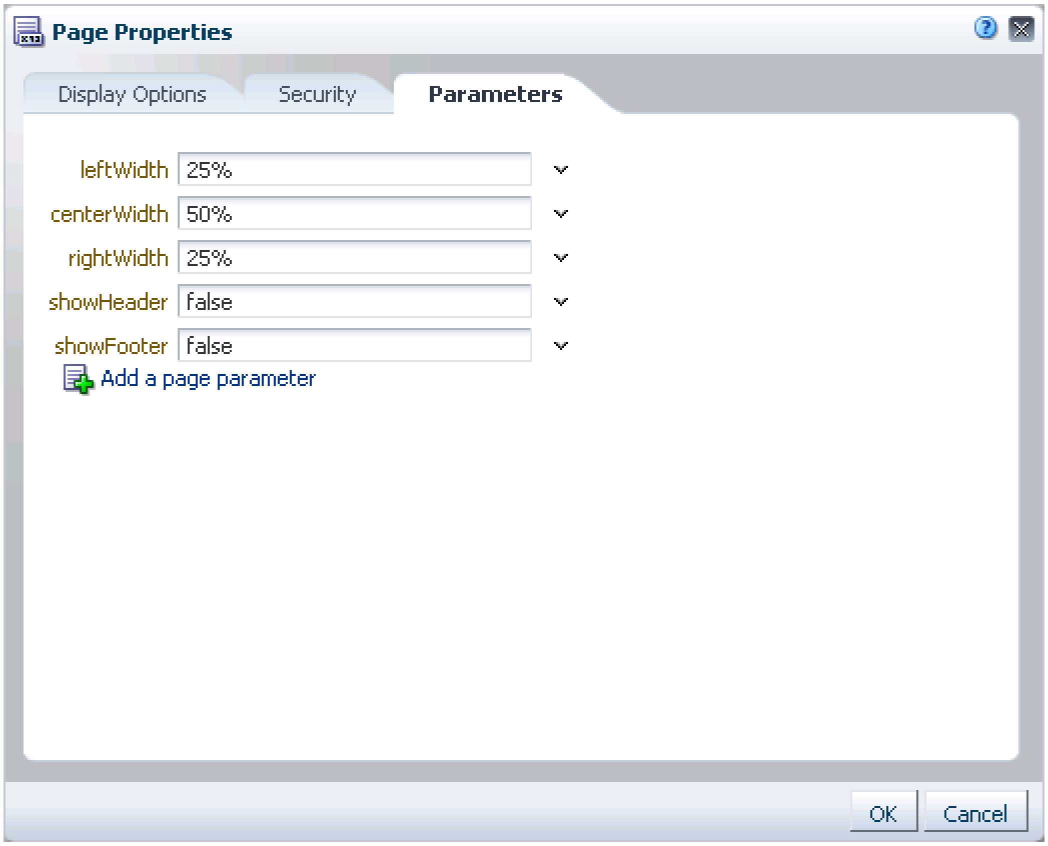
1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. Click **Page Properties** to open the Component Properties dialog (Figure 18–18).

Figure 18–18 Page Properties Button in Page Edit Mode



3. Adjust the `leftWidth`, `centerWidth`, and `rightWidth` parameter values to the desired percentages (Figure 18–19).

Figure 18–19 Default Page Parameters for the Three Column Page Style



4. Click **OK**.
5. Click **Save** and then **Close** to exit Composer.

18.4.4 Adding New Content Regions

You can add content regions to a page by splitting existing Box components on the page. This section describes how. It includes the following subsections:

- Section 18.4.4.1, "Enabling Box Splitting"
- Section 18.4.4.2, "Splitting a Layout Box"

> **See Also:** For information about Boxes and other components, see Chapter 19, "Working with Web Development Components on a Page."

18.4.4.1 Enabling Box Splitting

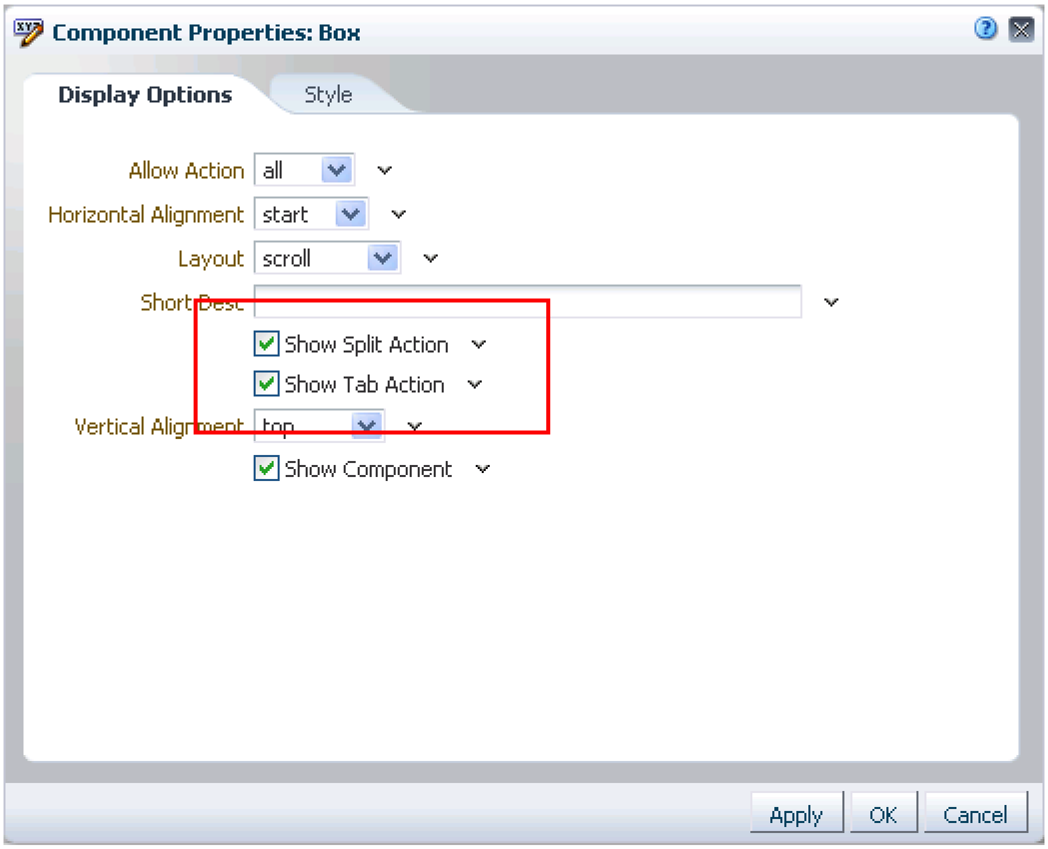
You can create additional content regions by splitting a Box into multiple Boxes. Before you can split a Box, the Box must be configured to allow it.

> **See Also:** You can also create additional content regions by adding more Boxes to a page. For more information, see Section 19.2, "Adding a Web Development Component to a Page."

To enable the splitting of a Box on a page:

1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. Click the **Edit** icon on a Box to open the Component Properties dialog.
3. Click the **Display Options** tab, and elect **Show Split Action** (Figure 18–20).

Figure 18–20 Box Component Display Options



4. Click **OK**.

   Add Box icons appear on the Box's toolbar (Figure 18–21).

Figure 18–21 Add Box Icons

18.4.4.2 Splitting a Layout Box

To split a Box component on a page:

> **See Also:** Before you can split a Box, it must be configured to allow it. For more information, see Section 18.4.4.1, "Enabling Box Splitting."

1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").

2. Go to the Box you want to split, and click the **Add Box** icon that splits the Box in the manner you prefer (Figure 18–22).

Figure 18–22 Add Box Below Icon

Select from:

- Add Box Above
- Add Box Below
- Add Box Left
- Add Box Right

3. Click **Save** and then **Close**.

See Also: For information about setting properties on a Box component, see Section 19.4, "Working with the Box Component"

18.4.5 Creating Layered Content Regions Using Tabs

When page real estate is tight, you can add layered content regions using tabs. Tabs are content regions that each have a tab and sit on top of other tabbed content regions (Figure 18–23).

Figure 18–23 Tabbed Content Regions

Much of the actions you can perform on a tab, such as renaming, reordering, and so on, are available through tab properties. This section describes how to add tabbed content regions and how to perform various actions on tabs through tab properties.

This section includes the following subsections:

- Section 18.4.5.1, "Enabling the Addition of Tabbed Content Regions"
- Section 18.4.5.2, "Adding Tabbed Content Regions"
- Section 18.4.5.3, "Creating a Tab Set"
- Section 18.4.5.4, "Reordering and Renaming Tabs"
- Section 18.4.5.5, "Adding an Icon to a Tab"
- Section 18.4.5.6, "Stretching Tab Content"
- Section 18.4.5.7, "Hiding and Showing Tabs"
- Section 18.4.5.8, "Deleting Tabs"

See Also: For information about working with tab properties, see Section 20.4, "Setting panelTabbed Properties," and Section 20.6, "Setting sidebarItem Properties."

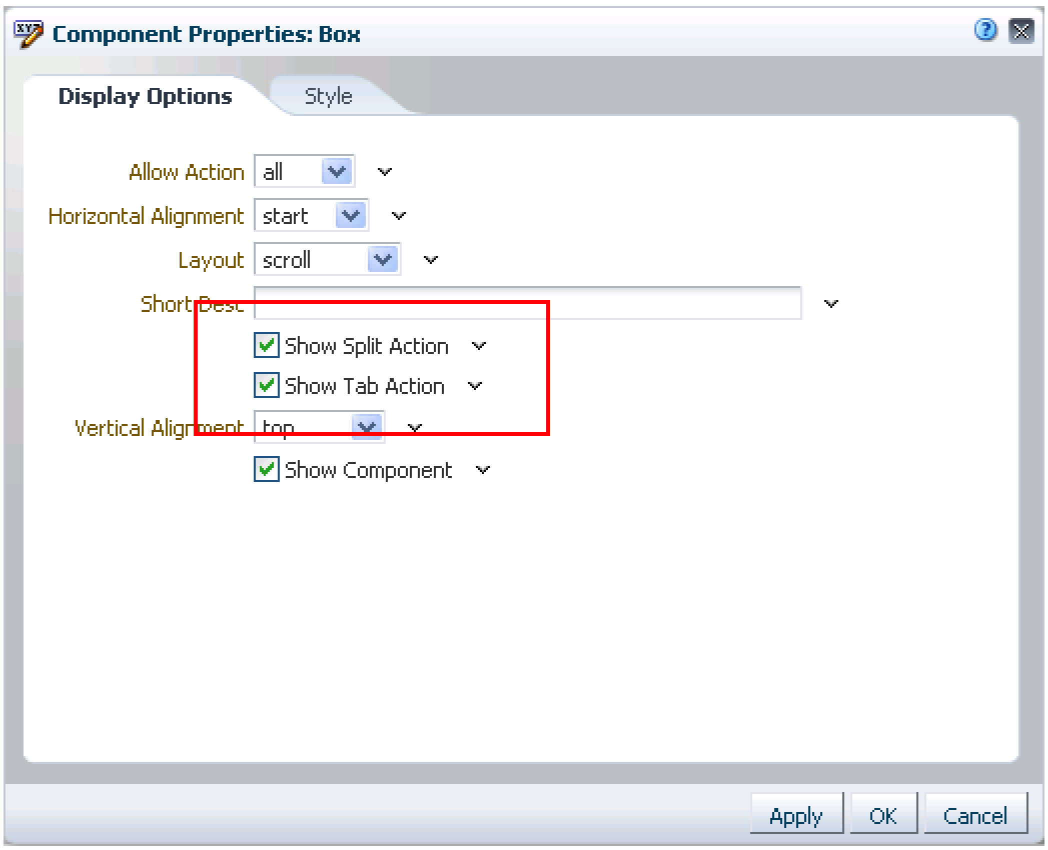
18.4.5.1 Enabling the Addition of Tabbed Content Regions

The creation of tabbed content regions takes place initially on a Box component. Before you can create tabs on a Box, the Box must be configured to allow the creation of tabs.

To enable a Box to support the creation of tabs:

1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. Click the **Edit** icon on a Box to open the Component Properties dialog.
3. Click the **Display Options** tab, then select **Show Tab Action**. (Figure 18–24).

Figure 18–24 Box Component Display Options



4. Click **OK**.

   The **Add a Tab Set or a Tab** icon appears on the Box's toolbar (Figure 18–25).

Figure 18–25 Add a Tab Set or a Tab Icon

18.4.5.2 Adding Tabbed Content Regions

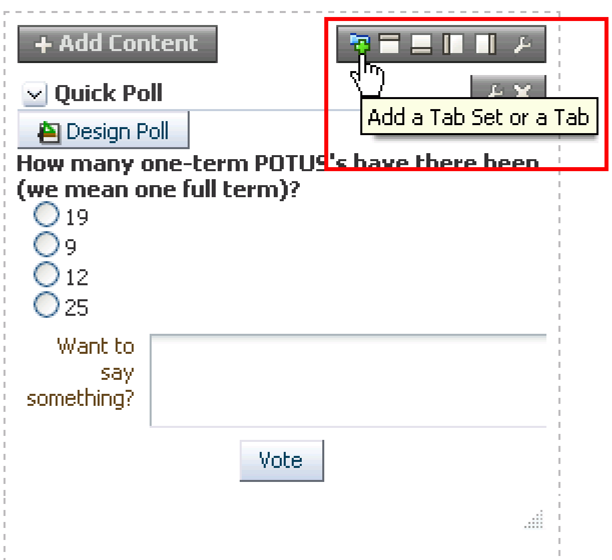
Each tab you add to a page provides its own region to which you can add content. In page edit mode, you will note the **Add Content** button on the tab.

Note: The icon for adding tabs appears on Box components only when the Box is configured to allow the creation of tabs. For more information, see Section 18.4.5.1, "Enabling the Addition of Tabbed Content Regions."

To add tabbed content regions on a page:

1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. In the region (Box component) where you want to add tabs, click the **Add a Tab Set or a Tab** icon (Figure 18–26).

Figure 18–26 Add a Tab Set or a Tab Icon



A tab appears, containing the content present in the layout region on which the tab was created (Figure 18–27).

Figure 18–27 A Newly-Added Tab

3. Continue adding tabs as desired.

   Click **Save** and then **Close** to exit Composer.

   > **See Also:** For information about renaming a tab, see Section 18.4.5.4, "Reordering and Renaming Tabs."

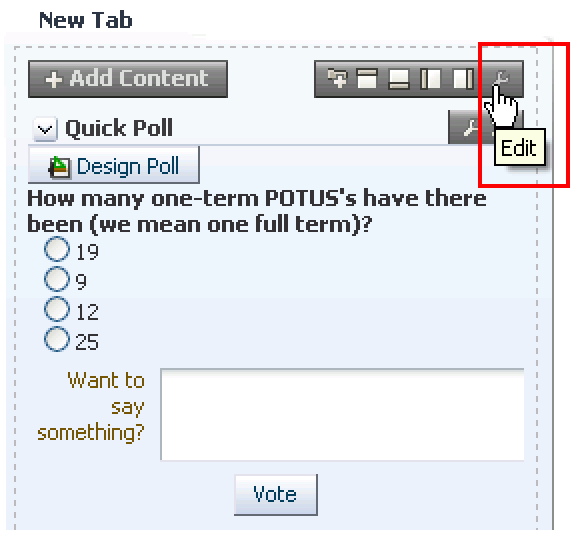
18.4.5.3 Creating a Tab Set

When you intend to create tabs, you are likely to want to create a set of tabs rather than just one. A quick way to accomplish this is available through tab properties.

To create a tab set on a page:

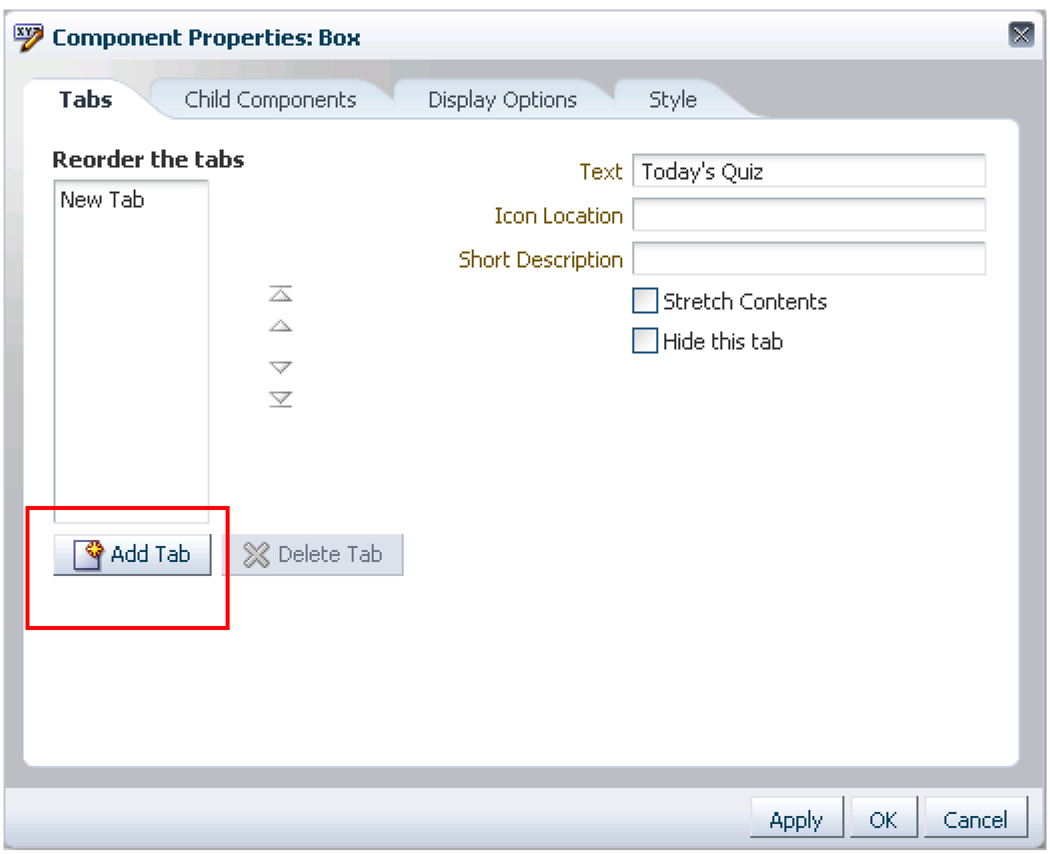
1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. Click the **Edit** icon on the tab you want to include in your tab set (Figure 18–28).

Figure 18–28 Edit Icon on a Tab



3. In the resulting Component Properties dialog, on the **Tabs** tab, click **Add Tab** to add a tab to the list headed **Reorder the tabs** (Figure 18–29).

Figure 18–29 Add Tab Button in Component Properties Dialog



4. Continue in this manner until you have the desired number of tabs.

See Also: For information about renaming a tab, see Section 18.4.5.4, "Reordering and Renaming Tabs."

5. Click **OK** to save your changes and exit the dialog.
6. Click **Save** and then **Close** to exit Composer.

18.4.5.4 Reordering and Renaming Tabs

Once you create a tab, you can use tab properties to change its default name, **New Tab**. You can also use page properties to change the tab order.

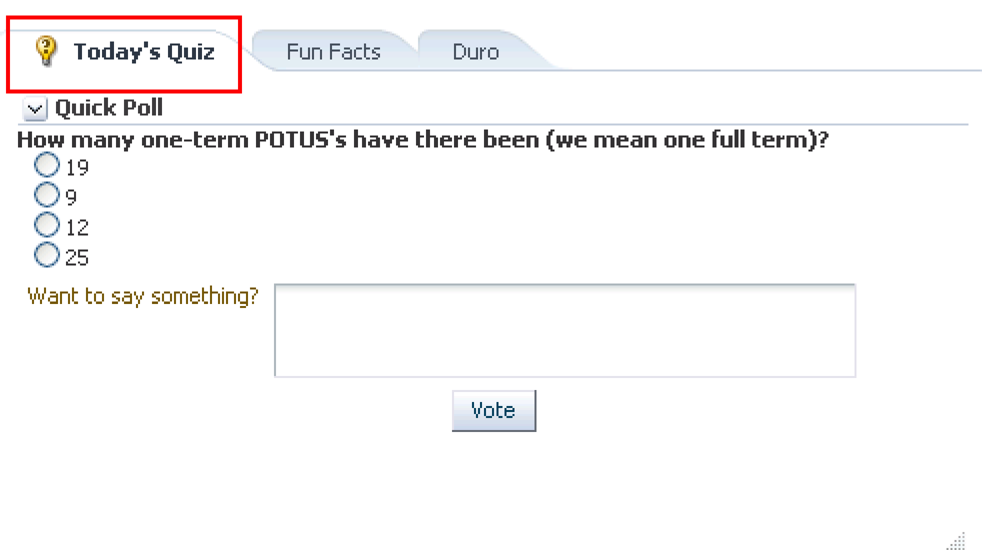
To rename and reorder tabs on a page:

1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. Click the **Edit** icon on the tab you want to rename or reorder.
3. In the resulting Component Properties dialog, bring the **Tabs** tab forward, select the tab you want to rename or reorder in the **Reorder the tabs** list, and do one of the following.
   - To rename the tab, enter the new name in the **Text** field.
   - To reorder the tab, click a **Move** icon to the right of the **Reorder the tabs** list.
4. Click **OK** to save your changes and exit the dialog.
5. Click **Save** and then **Close** to exit Composer.

18.4.5.5 Adding an Icon to a Tab

You may want to add a meaningful icon to a tab to make its purpose obvious to knowledgeable users. Added icons are rendered to the left of the tab display name (Figure 18–30).

Figure 18–30 Icon on a Tab



To add an icon to a tab on a page:

1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").

2. Click the **Edit** icon on the tab to which to add an icon.
3. In the resulting Component Properties dialog, bring the **Tabs** tab forward, select the tab in the **Reorder the tabs** list, and provide the URI of an image in the **Icon Location** field.

   This property supports these various types of URIs:

   - An absolute path to the image, such as:

     `http://oracleimg.com/admin/images/ocom/hp/oralogo_small.gif`

   - A path located relative to the source page, such as

     `bullet.jpg`

   - A path relative to the application's context root, such as

     `/images/error.png`

   - A path relative to the application server, such as

     `//adf-richclient-demo-context-root/images/error.png`

4. Click **OK** to save your changes and exit the dialog.
5. Click **Save** and then **Close** to exit Composer.

18.4.5.6 Stretching Tab Content

Using tab properties, you can stretch a single component to fill the tab's available display area. When you do this, the tab can display only the single component. You cannot add a second component to the tab region.

To stretch tab content on a page:

1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. Click the **Edit** icon on the tab containing the component you want to stretch.
3. In the resulting Component Properties dialog, on the **Tabs** tab, click the **Stretch Contents** check box.
4. Click **OK** to save your changes and exit the dialog.
5. Click **Save** and then **Close** to exit Composer.

18.4.5.7 Hiding and Showing Tabs

You can take a tab out of action by hiding it. Hiding a tab might be preferable to deleting because it leaves you the option of returning it to view. Hidden tabs are listed in tab properties, so you always have access to them.

> **Tip:** If you hide all tabs in a tab set, you can access their properties in Source view of page edit mode (see Section 18.2, "Introducing Design View and Source View"). In Source view, select the tabs parent element, `panelTabbed`, and edit its properties.

To hide or show a tab on a page:

1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. Click the **Edit** icon on a tab in the tab set of interest.

3. In the resulting Component Properties dialog, bring the Tabs tab forward, select the relevant tab under **Reorder the tabs**, and do one of the following:
   - Select the **Hide this tab** check box to hide the tab.
   - Deselect the check box to show a hidden tab.
4. Click **OK** to save your changes and exit the dialog.
5. Click **Save** and then **Close** to exit Composer.

18.4.5.8 Deleting Tabs

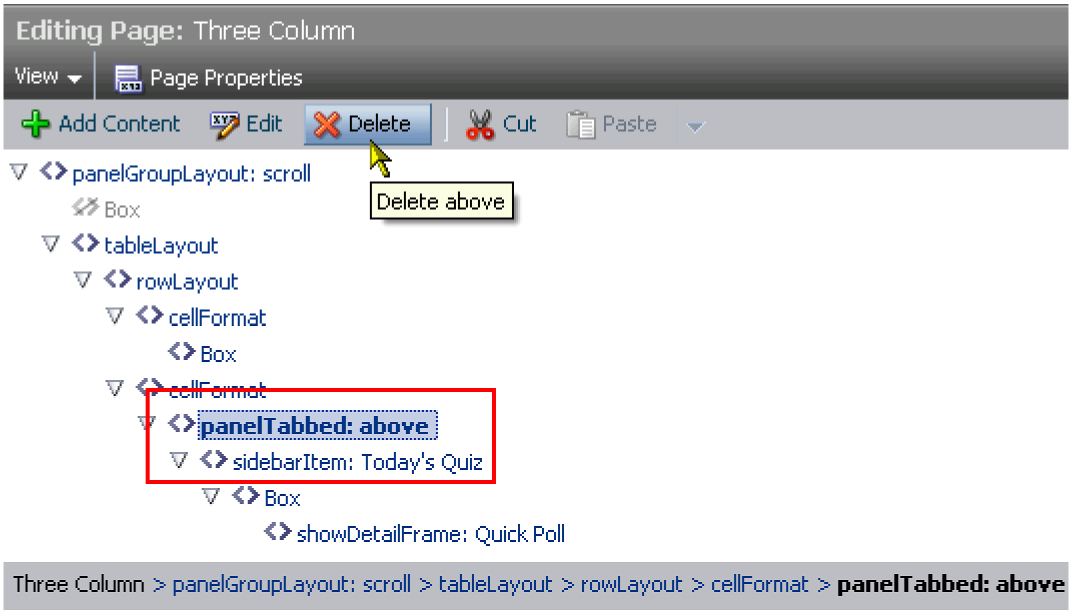
You have a few options for deleting a tab or a tab set. You can do so through Source or Design view in page edit mode, through tab properties, or on the tab itself. When you delete a tab, the contents of the tab are also deleted.

> **Note:** Whether you can delete tabs and how many tabs you can delete may be controlled by the `panelTabbed` property `Tab Removal` (see Section 20.4, "Setting panelTabbed Properties").
>
> You can delete an entire tab set by deleting `panelTabbed`. For example, select `panelTabbed` in Source view and delete it.
>
> When you remove tabs individually through `Box` properties (in Design view), you can remove all but the current tab. When you remove tabs individually through `Box` properties, the current, active tab cannot be deleted.

To delete a tab or a tab set on a page:

1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. Delete the relevant tab or tab set by doing one of the following:
   - To delete a tab set, go to Source view of page edit mode, select the relevant `panelTabbed` element, and click **Delete** (Figure 18–31).

Figure 18–31 Deleting a panelTabbed Element in Source View of Page Edit Mode

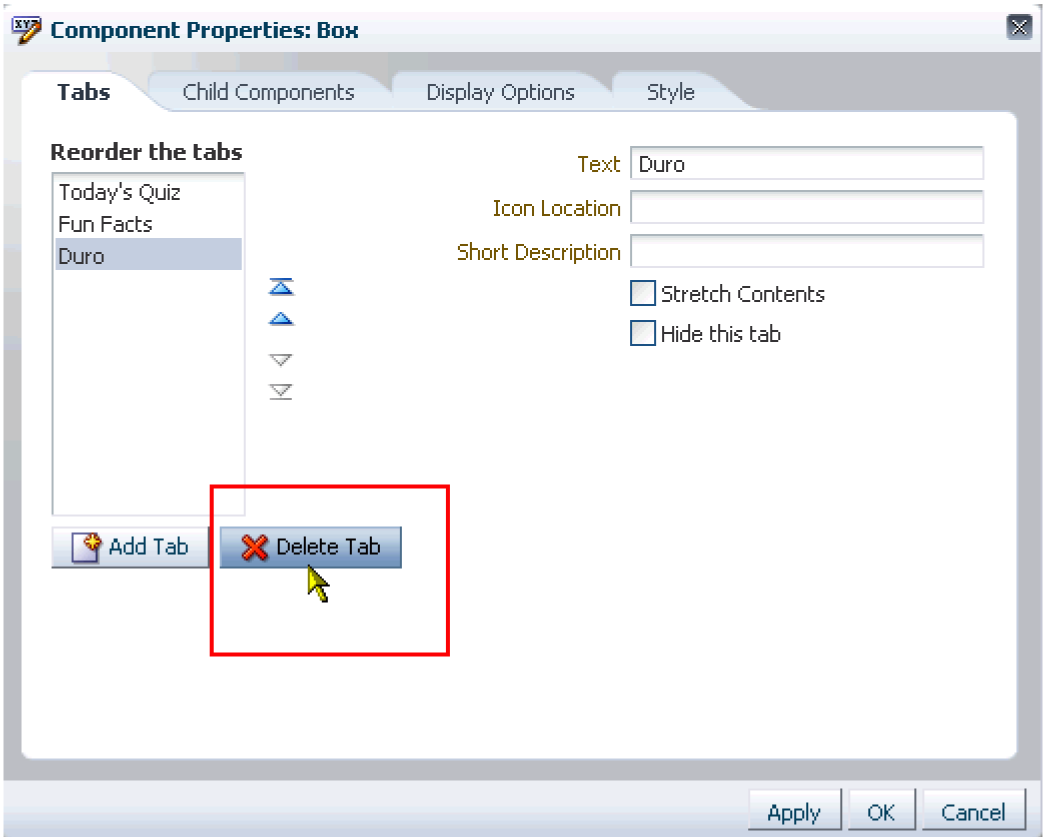


Click **Delete** in the confirmation dialog.

See Also: For more information about page edit mode views, see Section 18.2, "Introducing Design View and Source View."

- To delete one or more tabs, go to Design view of page edit mode, click the **Edit** icon on one of the tabs in the tab set of interest, bring the **Tabs** tab forward, select the tab to delete under **Reorder the tabs**, and click the **Delete Tab** button (Figure 18–32).

Figure 18–32 Delete Tab Button in Box Component Properties Dialog



Click **Delete** in the confirmation dialog.

Tip: You can also access tab set properties by selecting the `panelTabbed` in Source view of page edit mode and clicking the **Edit** button.

3. Click **Save** and then **Close** to exit Composer.

18.5 Adding a Component to a Page

The method for adding a component to a page is the same for every component in the Resource Catalog You can add a component to a page in either of the page edit mode views:

- Section 18.5.1, "Adding a Component to a Page in Design View"
- Section 18.5.2, "Adding a Component to a Page in Source View"

Notes:

- By default, new components are added to the top of their content areas.
- When you add a component to a page, you must wait for the application status indicator to finish processing before taking additional action.
- In a Spaces application, the content of the Resource Catalog varies according to the services that are integrated with the application, the location from which the catalog is opened, and the resources provided by your administrator. For example, the components that appear in the catalog when you open it from the Home space differ from those that appear when you open it from a space.
- If the component you want is not present in the Resource Catalog, you may need to add it. For more information, see Section 16.3.1.2, "Adding Resources."

18.5.1 Adding a Component to a Page in Design View

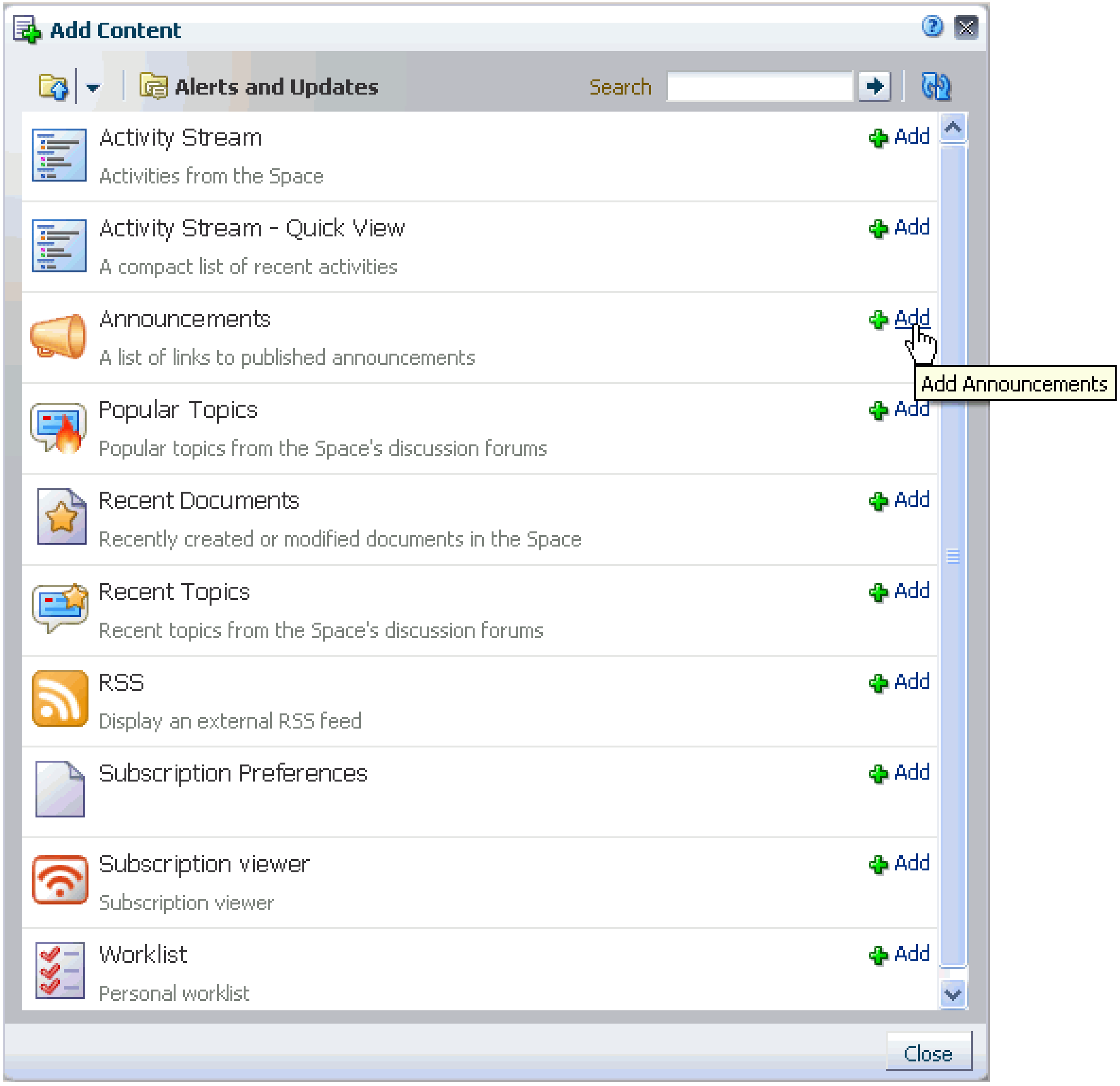
To add a Resource Catalog component in page edit mode Design view:

1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. Click the **Add Content** button on the target region (Figure 18–33) to open the Resource Catalog.

Figure 18–33 Add Content Button on a Box Component

3. Navigate to the component you want to add, and click the **Add** link next to it (Figure 18–34).

Figure 18–34 Add Link in a Resource Catalog



4. Continue to add content, or click **Close** to exit the Catalog.
5. Optionally, drag-and-drop the newly-added component to the desired position on the page, or use the **Move** icons on the component to reposition it.

   Tip: As you drag a component around, a dark box marks the target drop location.

6. Click **Save** and then **Close** to exit page edit mode.

18.5.2 Adding a Component to a Page in Source View

To add a Resource Catalog component in page edit mode Source view:

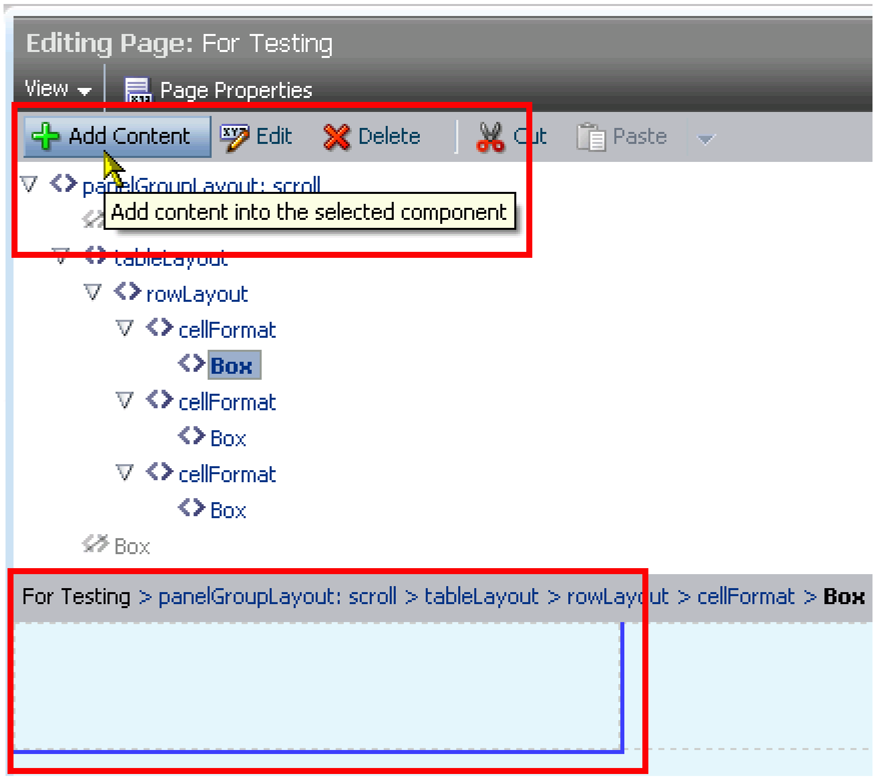
1. Open the page in edit mode (see Section 18.1, "Entering and Exiting Composer").
2. From the **View** menu, select **Source**.

3. From the list of page components, select the component in which to place content.

   Tip: You can also select a component by clicking it in the WYSIWYG section of the page. A selected component is outlined in blue.

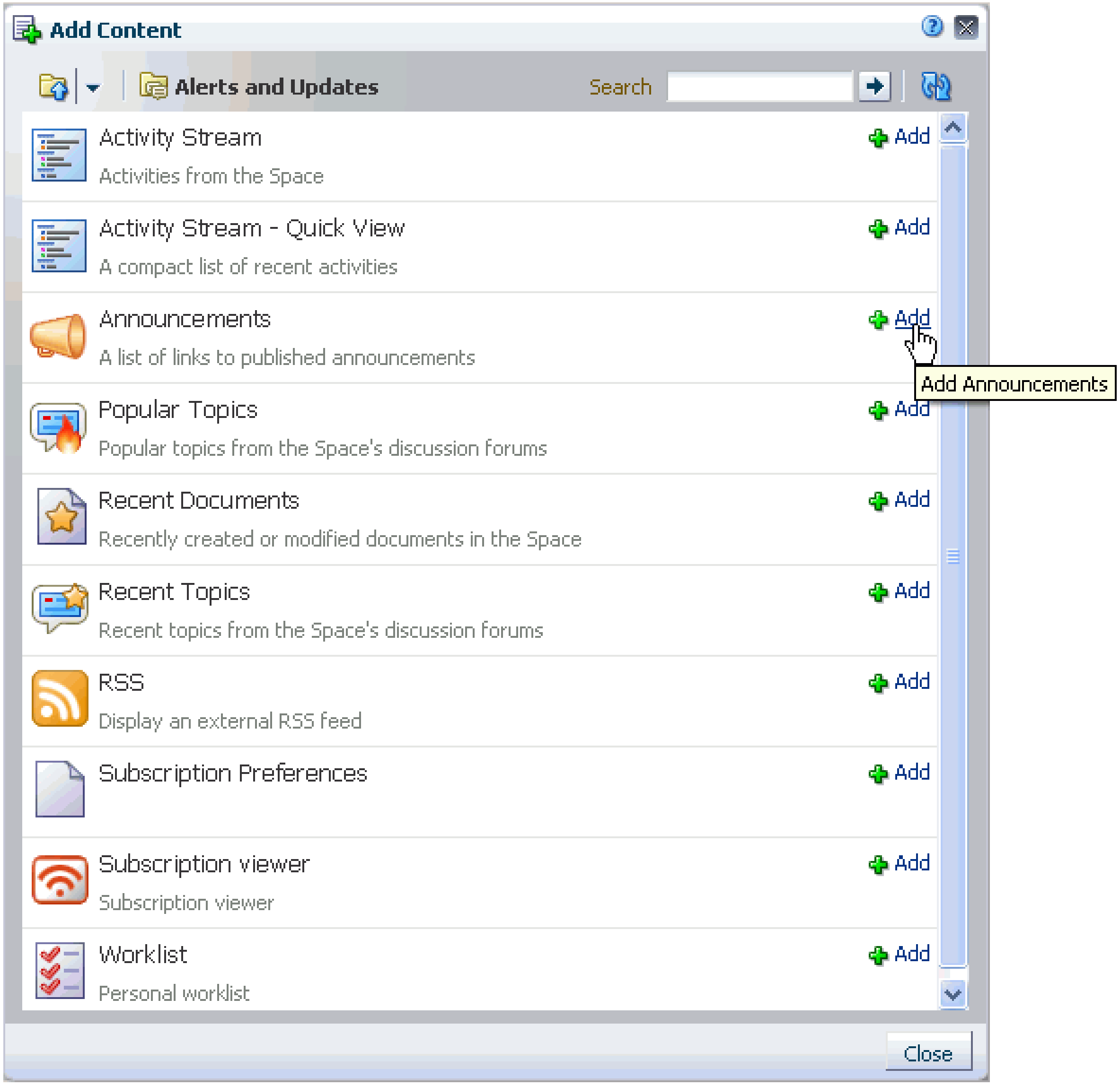
4. Click the **Add Content** button to open the Resource Catalog (Figure 18–35)

Figure 18–35 Selected Box and Add Content Button in Source View



5. Navigate to the component you want to add and click the **Add** link next to it (Figure 18–36).

Figure 18–36 Add Link in a Resource Catalog



6. Continue to add content, or click **Close** to exit the Catalog.
7. Optionally, drag-and-drop the newly-added component to the desired position on the page, or use the **Move** icons on the component to reposition it.

   Tip: As you drag a component around, a dark box marks the target drop location.

8. Click **Save** and then **Close** to exit page edit mode.

18.6 Modifying Page Components

The components that you can add to a page from the Resource Catalog have configurable properties that control the appearance and behavior of the component. The properties available differ from component to component.

This section describes how to customize and set properties on page components:

- Section 18.6.1, "What You Should Know About Component Properties"
- Section 18.6.2, "Setting Properties on a Component"
- Section 18.6.3, "Working with Component Parameters"
- Section 18.6.4, "Working with Component Display Options"
- Section 18.6.5, "Working with Child Components"
- Section 18.6.6, "Working with Style and Content Style Properties"
- Section 18.6.7, "Working with Component Contextual Events"

18.6.1 What You Should Know About Component Properties

You can use component properties to adjust the appearance and behavior of a component instance and to wire components to each other and to page parameters and page definition variables.

> **See Also:** For information about wiring pages and components, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

The Component Properties dialog for a component is divided into multiple tabs:

- **Parameters**—Settings, unique to the component type, that can control such things as the source of the component's content. See Section 18.6.3, "Working with Component Parameters."
- **Display Options**—Settings for determining content orientation, hiding and showing a header, selecting a display method for an actions menu, and the like. See Section 18.6.4, "Working with Component Display Options."
- **Child Components**—A list of all the components contained in the parent component. See Section 18.6.5, "Working with Child Components."
- **Style**—Font, color, and dimension settings on the component that override such values on the parent component, the page, and the application. Style values affect component content and the elements that surround the content, but may or may not be exposed depending on whether or not the component elements (such as the skin) support modifications to these settings. See Section 18.6.6, "Working with Style and Content Style Properties."
- **Content Style**—Font, color, and dimension settings on component content that override such values specified for **Style**. These settings may or may not be exposed depending on whether or not the component elements (such as the skin) support modifications to these settings. See Section 18.6.6, "Working with Style and Content Style Properties."
- **Events**—Contextual events and event handlers for all the components on the current page that can be consumed by the currently selected component. Events are defined occurrences within the current context, and event handlers are the engines that drive the results of that occurrence. See Section 18.6.7, "Working with Component Contextual Events."

18.6.2 Setting Properties on a Component

This section outlines the general steps for setting properties on any page component.

See Also: For information about properties associated with a particular component, see the section that covers that component. For example, see Section 19.4.2, "Setting Box Component Properties" for information about properties associated with the Box component.

Notes:

- When you enter most types of property values in the Component Properties dialog and then click **Apply**, the dialog remains open. With values other than expected value types, the dialog closes, and the page is refreshed to reflect the new value. For example, if a component takes a `java.util.ArrayList` of `java.awt.Color` classes, then the Component Properties dialog closes after you add the value, and the page refreshes with the new properties.
- In addition to entering literal text (*`value`*), you can also enter an Expression Language (EL) expressions (`#{`*`value`*`}`). For information about EL expressions, see Appendix B, "Expression Language (EL) Expressions."
- Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

  EL validation is not performed on non-generic display options.

You can access the Component Properties dialog for a component from either Design or Source view of page edit mode:

- Section 18.6.2.1, "Setting Component Properties in Design View"
- Section 18.6.2.2, "Setting Component Properties in Source View"

18.6.2.1 Setting Component Properties in Design View

To set properties of a component on a page in Design view:

1. Go to the page of interest, and open it in Composer.

   Tip: One way to enter page edit mode (Composer) is to press Ctrl+Shift+E.

2. Click the **Edit** icon (Figure 18–37) on the component of interest to open the Component Properties dialog.

Figure 18–37 Edit Icon on a component

3. Edit component properties, then click **OK**.

18.6.2.2 Setting Component Properties in Source View

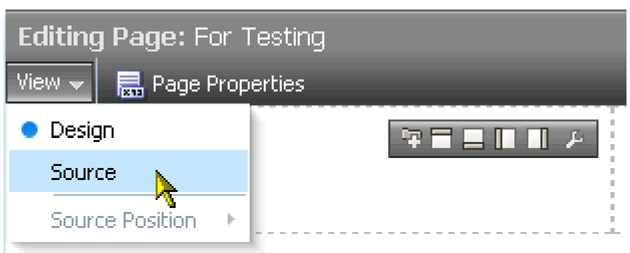
To set component properties in Source view:

1. Go to the page of interest, and open it in Composer.

   > **Tip:** One way to enter page edit mode (Composer) is to press Ctrl+Shift+E.

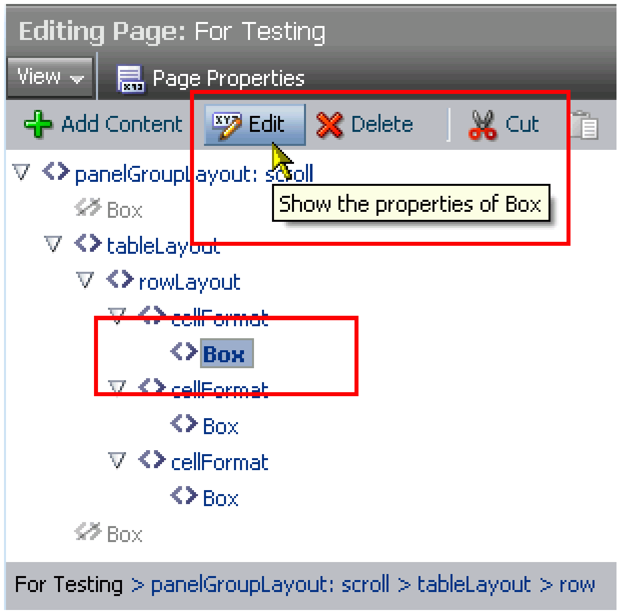
2. From the **View** menu, select **Source** (Figure 18–38).

Figure 18–38 Source Option on View Menu



3. In the list of components, click the component of interest.
4. Click the **Edit** icon in the Source view header (Figure 18–39) to open the Component Properties dialog.

Figure 18–39 Edit Button and Selected Box Component

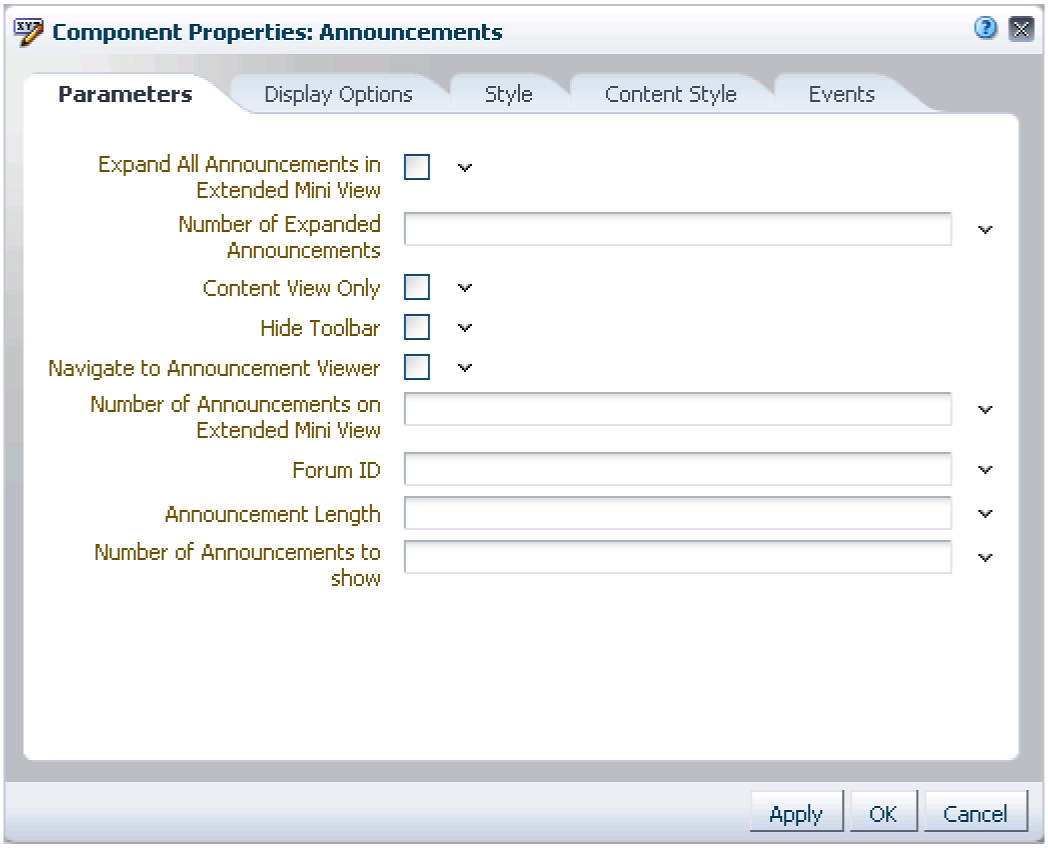


5. Edit component properties, then click **OK**.

18.6.3 Working with Component Parameters

Component parameters appear on the **Parameters** tab of the Component Properties dialog (Figure 18–40).

Figure 18–40 Component Parameters

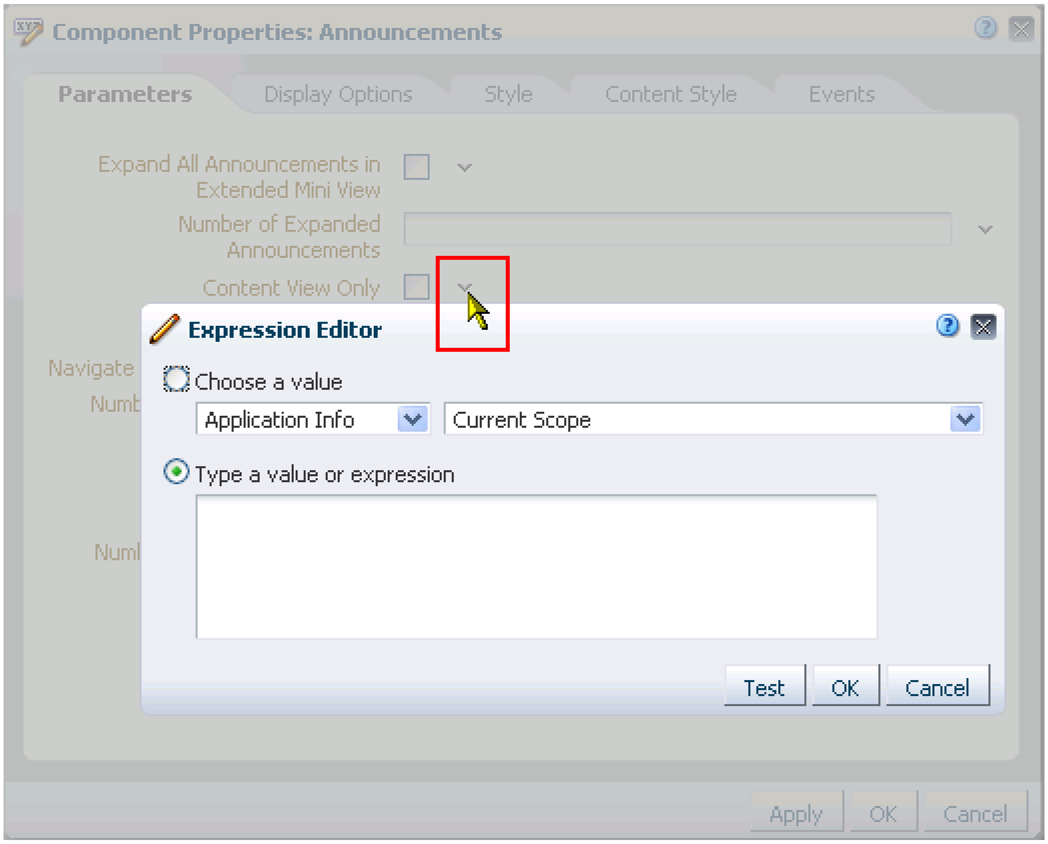


> **See Also:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Component parameters vary from component to component. For example, on some components they provide the opportunity to specify the source and range of task flow content; on other components they present read-only, application-generated identifiers that are used in maintaining a task flow instance's association with its customizations.

Enter parameter values, or click the icon next to a parameter field to select and open the Expression Editor. (Figure 18–41).

Figure 18–41 Expression Builder Icon and Expression Editor



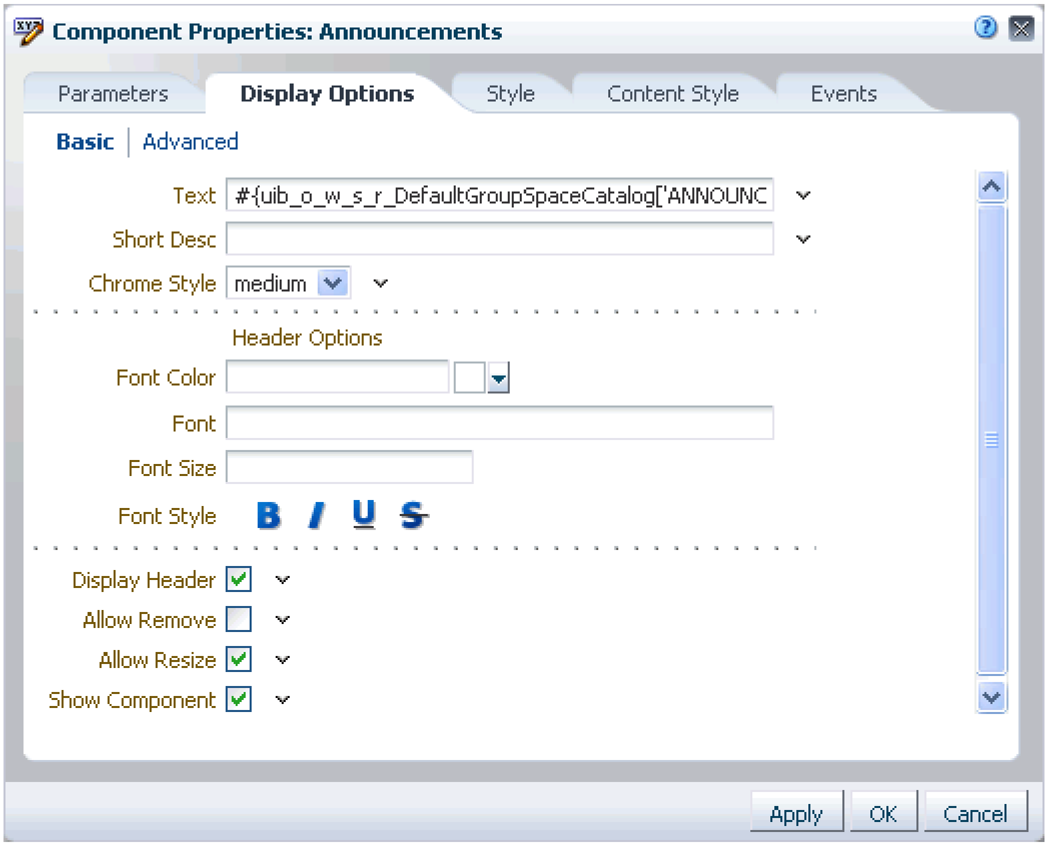
The editor provides a means of entering an expression when a value is discoverable, but otherwise unknown, for example, when you want a parameter value to be the name of the current user or the current application skin.

> **See Also:** For more information about using the editor and for a table of useful EL expressions, see Appendix B, "Expression Language (EL) Expressions."

18.6.4 Working with Component Display Options

The **Display Options** tab in the Component Properties dialog provides access to properties that control a range of display-related behaviors on a given component instance (Figure 18–42).

Figure 18–42 Component Display Options: Basic Properties



> **See Also:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

For example, use the display options on an Image component to specify the image source URL and its optional link target. Use the display options on the Announcement Manager task flow to hide or show a header and enable or disable menus and other options on the header.

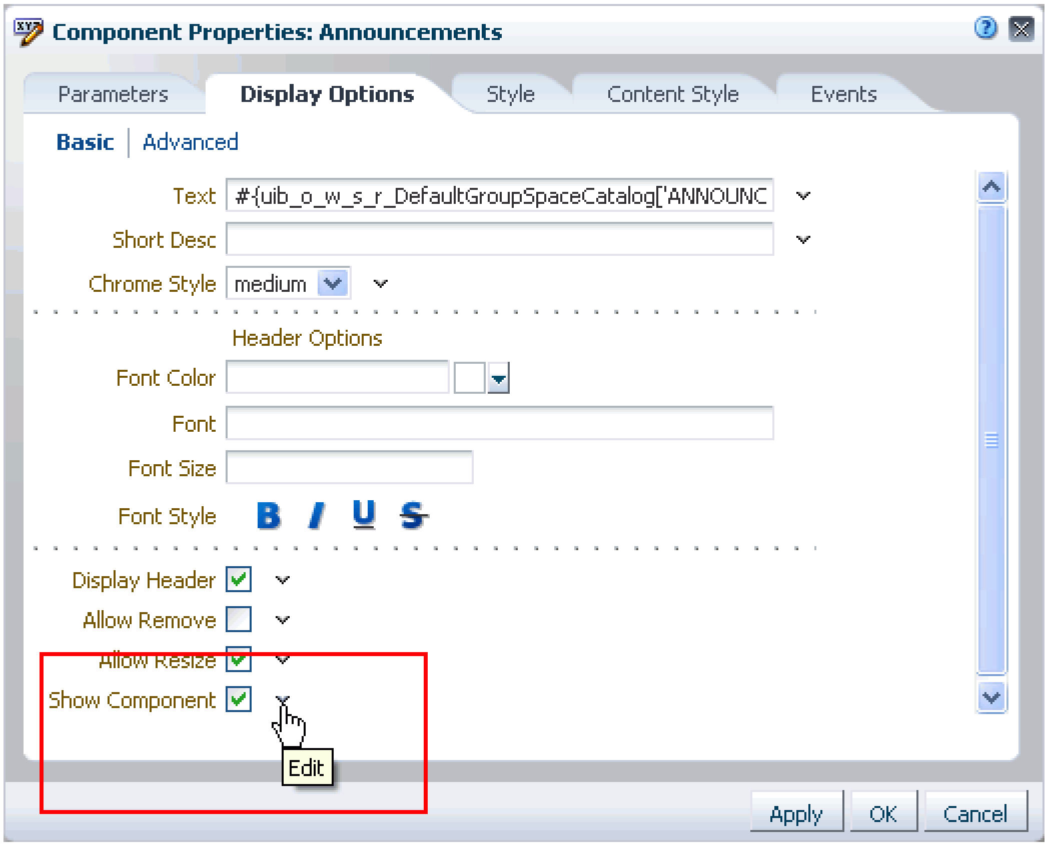
The `showDetailFrame` (Movable Box) component has a **Display Options** tab that is divided into two subtabs: **Basic** and **Advanced**.

This provides a means of separating an otherwise long list of display options into more manageable and relevant groups. Though it is not obvious in Design view of page edit mode, the `showDetailFrame` component is usually wrapped around the task flows provided by the various services. Consequently, the Display Options properties for task flows, and any other component wrapped in a `showDetailFrame`, have **Basic** and **Advanced** subtabs on their **Display Options** tab (see Figure 18–42).

Another consequence of being wrapped in a `showDetailFrame` is commonality of properties on the **Display Options** tab. Task flows and any other components that are wrapped in a `showDetailFrame` share the same Display Options properties.

For many of the properties on the **Display Options** tab, an Expression Editor is available for entering custom values, such as text strings and Expression Language (EL) expressions. You can tell which properties take expressions by the menu icon that displays to the right of a given property (Figure 18–43).

Figure 18–43 Edit Icon for Expression Editor



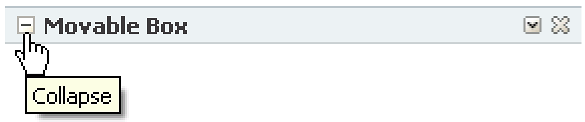
Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1. For more information about ELs in the Spaces application, see Appendix B, "Expression Language (EL) Expressions."

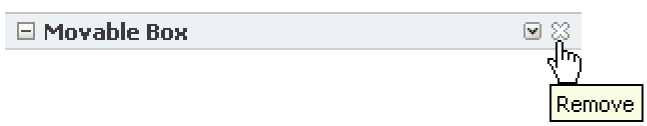
EL validation is not performed on non-generic display options.

Typically, the **Display Options** tab presents settings that affect the display elements surrounding component content (that is, its *chrome*). Chrome includes the header, the **Actions** menu, **Expand** and **Collapse** icons, and the like.

Table 18–1 lists and describes the **Display Options** properties that generally apply to most components. Where there are variations, they are noted in the chapters covering the specific components.

Table 18–1 Display Options Properties

<table>
<tr><th>Property</th><th>Description</th></tr>
<tr><td><code>Allow Minimize</code></td><td>Select whether to show the minimize action on the component header (that is, a Collapse icon on the component chrome).
Select the check box to show the Collapse icon.
Deselect the check box to omit the Collapse icon.
The minimize action collapses the component like a window shade, leaving only its header on view.


When a component is minimized, the icon toggles to an Expand icon, which you can use to restore the full component to view.</td></tr>
<tr><td><code>Allow Move</code></td><td>Select whether to enable users to move the component on the page. Choose from:
enabled—Component can be moved using the Move options (Move Up, Move Down, Move Left, and Move Right) on the component Actions menu.
The Move options that show depend on the orientation of the parent container (horizontal or vertical). Move options are context sensitive. For example, in a vertically-oriented parent container if there are no components above the current task flow the Move Up option does not appear on the Actions menu.
drag and drop only—Component can be moved using drag and drop only.
disabled—Component cannot be moved.</td></tr>
<tr><td><code>Allow Remove</code></td><td>Select whether to show the Remove icon on the component header (that is, the component chrome) when the page is in view mode:
Select the check box to show the Remove icon on the component header in view mode.
Deselect the check box to omit the Remove icon in view mode.


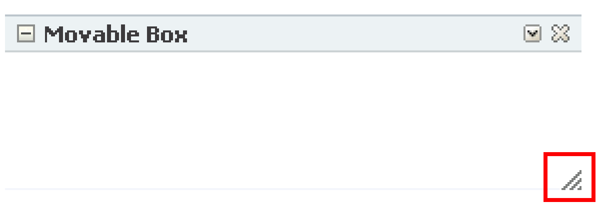
Note that after you select to remove a component in this way in page view mode, you can restore the component only by editing the page and adding another component instance.</td></tr>
<tr><td><code>Allow Resize</code></td><td>Select whether to show a window resizer on a component instance. The window resizer enables you to increase the component height.
Select the check box to show the Resize option on the component.
Deselect the check box to omit the Resize option.

</td></tr>
</table>

Table 18–1 (Cont.) Display Options Properties

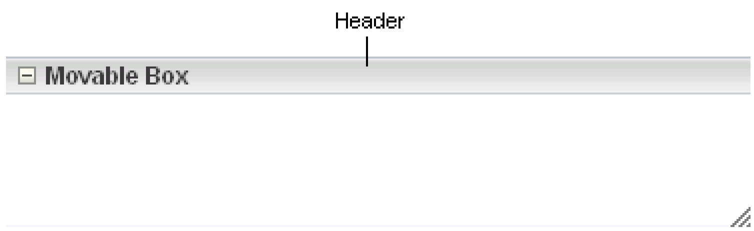
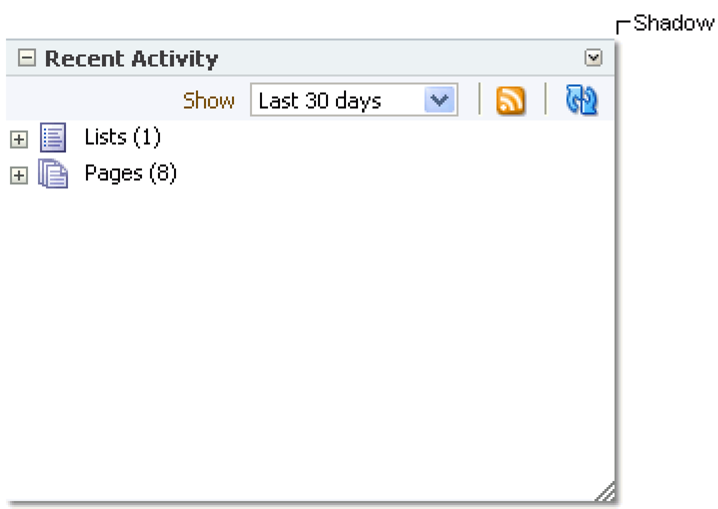
Property	Description
`Chrome Style`	Select to specify a shade for the component background. Enter: ■ light—Light is transparent; the prevailing background color shows through ■ medium—Medium draws an light line below the header area. ■ dark—A graduated shade moving from the bottom of the header area to the top of the component from transparent to dark. ■ coreDefault—A graduated shade slightly lighter than dark
`Display Header`	Select this check box to show a header on the component instance. 
`Display Shadow`	Select to render a shadow behind the component instance. 
`Font`	Specify the font to use for text appearing in the component header. Enter one or more fonts. Separate multiple values with a comma (,), for example `arial,helvetica,sans serif`. Enclose font names that contain spaces in single quotation marks, for example `'Times New Roman'`. The browser tries to use the first value, and uses other values in turn, depending on which font is available to the local system.
`Font Color`	Select a color for the text appearing in the component header. Select a color using one of the following techniques: ■ Select a color by clicking it. ■ Enter the color's RGB equivalent in the **Font Color** field. Enter RGB values in the format `RRGGBB` or `#RRGGBB` or `r,g,b` ■ Create a custom color by clicking **Custom Color** in the picker and selecting a color and a saturation level using the selector and the slider provided.

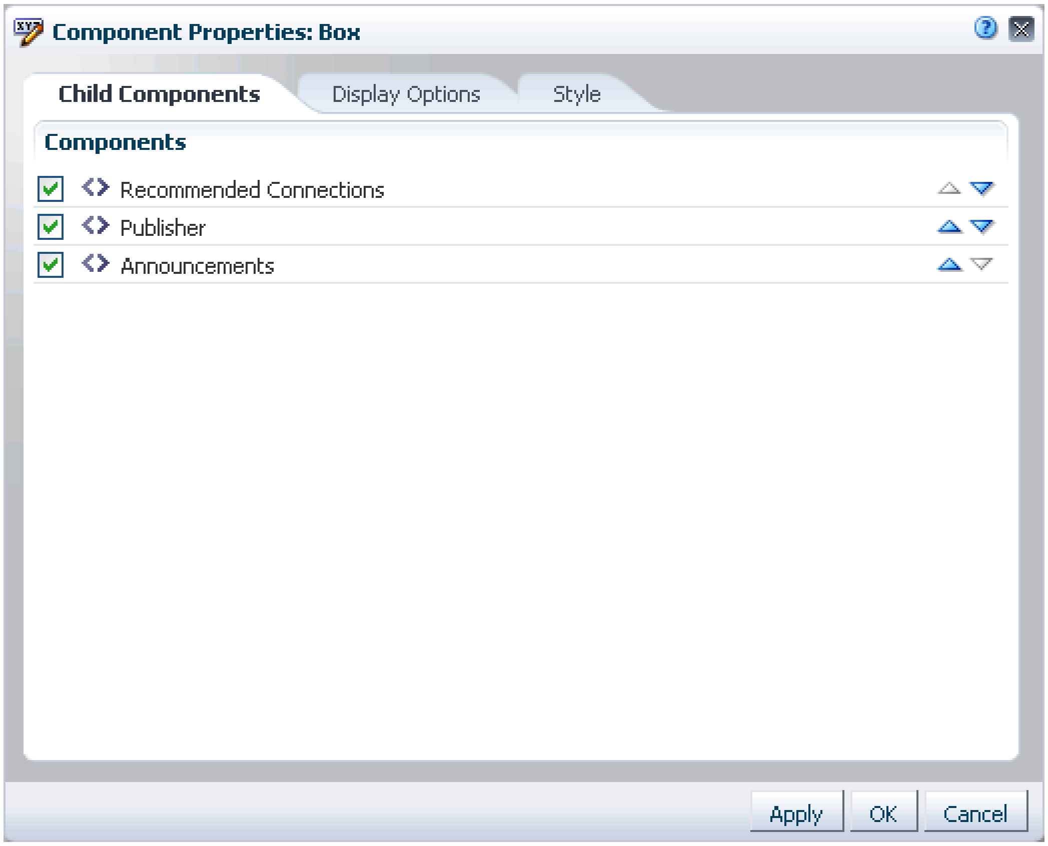
Table 18–1 (Cont.) Display Options Properties

Property	Description
`Font Size`	Specify the size of text appearing in the component header. Enter a value using one of the following types of values: ■ `length`–Sets the font size to a fixed size. For example, enter: `14px`, `1.5em`, and so on ■ `xx-small`, `x-small`, or `small` ■ `medium`–The default ■ `large`, `x-large`, or `xx-large` ■ `smaller`–Sets the font size to a size smaller than the parent element. ■ `larger`–Sets the font size to a size larger than the parent element. ■ `%`–Sets the current font size to a percentage of the font size of the parent element. For example, enter: `75%`
`Font Style`	Select an option for applying a font style to the text in a component header. Choose from: ■ **Bold** ■ *Italic* ■ Underline ■ Strikethrough
`Short Desc`	Provide tooltip text for the component instance. When users roll their mouse pointers over the component instance, the text you enter here pops up.
`Show Actions On Hover`	Select to show actions when users hover their mouse pointers over the component header. ■ Select the check box to show actions only when users hover their mouse pointers over the component header. ■ Deselect the check box to always show actions on the component header. `Display Header` must be selected for this option to apply.
`Show Component`	Option for hiding or showing the component instance on the page ■ Select to show the component. ■ Deselect to hide the component. Once you hide a component in this way, you can show it again using controls available in Composer Source view. In Source view, right-click the hidden component, and select **Show Component** from the resulting context menu.
`Stretch Content`	Select to stretch the content to fill the container, so that the container shows only one component at a time.
`Text`	Enter text to appear in the component header. If you select to hide the header, the value you enter here is ignored.

18.6.5 Working with Child Components

The **Child Components** tab in the Component Properties dialog (Figure 18–44) provides controls for hiding, showing, and rearranging the components that are contained within the current (parent) component.

Figure 18–44 Child Components Tab in Component Properties Dialog



See Also: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The changes you make through the **Child Components** tab are customizations that affect every user's view of the component instance.

This section provides information about how to use the controls on the **Child Components** tab. It includes the following subsections:

- Section 18.6.5.1, "Hiding and Showing Child Components"
- Section 18.6.5.2, "Rearranging Child Components"

18.6.5.1 Hiding and Showing Child Components

Hiding is useful for keeping a component instance out of general view while still maintaining its presence on the page. When you hide a child component through the Component Properties dialog, it is hidden in everyone's view of the page. When you are ready to show the component instance, it is a simple matter to reselect the component to show through the **Child Components** tab.

To hide or show child components:

1. On the **Child Components** tab, either:
   - Deselect the check box to the left of any components you want to hide.
   - Select the check box to the left of any components you want to show.

2. Click **OK** to exit the dialog.
3. Click **Save** and then **Close** to exit Composer.

18.6.5.2 Rearranging Child Components

The **Child Components** tab provides a convenient and efficient way to rearrange the content within a particular container, such as a Box component. When you rearrange child components through the Component Properties dialog, they are rearranged on everyone's view of the page.

> **Tip:** You can also rearrange page components in a way that affects everyone's view by dragging and dropping components while in Composer.

> **Note:** When you use Box controls to split a Box, the rearrange capability is disabled in the Component Properties dialog on the **Child Components** tab. You can still rearrange content in such boxes by dragging and dropping on the page itself.

To rearrange a child component:

1. On the **Child Components** tab, click the up or down arrows next to the component you want to move, depending on where you want to move it.

   > **Tip:** The direction that a child component is moved depends on the orientation of its parent container. For example, if the container is oriented vertically, child components move up (up arrow) or down (down arrow); if the container is oriented horizontally, child components move right (up arrow) or left (down arrow).

2. Click **OK** to exit the dialog.
3. Click **Save** and then **Close** to exit Composer.

18.6.6 Working with Style and Content Style Properties

Style and Content Style properties, available in the Component Properties dialog, provide an opportunity to fine-tune your application look-and-feel at the component level. Enter values for Style and Content Style properties, or specify your own values through the `Other CSS` property that appears on both tabs. The settings that you specify affect component content and the elements that surround the content, but may or may not be exposed depending on whether or not the component elements (such as the skin) support modifications to these settings.

> **See Also:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

This section introduces Style and Content Style properties and provides tables that list and describe them. Additionally, it provides information about how to use the Other CSS property. It includes the following subsections:

- Section 18.6.6.1, "Understanding Style and Content Style Properties"
- Section 18.6.6.3, "Entering Other CSS"

- Section 18.6.6.4, "Using the Other CSS Property to Change Component Borders"

18.6.6.1 Understanding Style and Content Style Properties

Use component Style and Content Style properties to specify color, style, and margin settings on the selected component instance.

Style settings on a component override the style settings on hierarchically superior components, such as the component's parent container, the page, and the application. Content Style settings override Style settings. For example, in a Movable Box components, Style settings control the look and feel of the Movable Box; when Content Style settings are set, those settings control the look and feel of the components contained within the Movable Box. This look and feel may, in turn, be overridden by the Style settings set on those individual components.

> **See Also:** For information about specific components, such as Movable Boxes, see Chapter 20, "Working with Layout Components on a Page."

Note, however, that Content Style properties set for a container, such as a Movable Box, may not take effect if the component inside the container overrides the container Content Style properties by a means other than the component's own Content Style properties. For example, the background color set for a Movable Box that contains a task flow may not take effect if, at design time, instead of being set to inherit from the container, the task flow background color was set with a hard-coded value.

18.6.6.2 Style and Content Style Properties

Table 18–2 lists and describes common component Style and Content Style properties.

Table 18–2 Style and Content Style Properties

Property	Description
`Background Color`	Select a component background color. If you specify a background color for Content Style, then the background color specified for the Style property is not applied.
`Background Image`	Enter the URL to an image you want to render in the component background. Use standard CSS syntax. For example: `url(http://www.abc.com/image.jpg)`
`Color`	Select a default color for any text included in the component instance. For example, imagine that you have added a Text component to a Box component. When you set Box Style properties, the default text color you apply to the Box is also automatically applied to the Text component, unless you also define a Color value for the Text component. Select a color using one of the following techniques: ■ Select a color by clicking it. ■ Enter the color’s RGB equivalent in the **Color** field. Enter RGB values in the format `RRGGBB` or `#RRGGBB` or `r,g,b` ■ Create a custom color by clicking **Custom Color** in the picker and selecting a color and a saturation level using the selector and the slider provided.
`Font`	Specify the font to use for text appearing in the component header. Enter one or more fonts. Separate multiple values with a comma (,), for example `arial,helvetica,sans serif`. Enclose font names that contain spaces in single quotation marks, for example `'Times New Roman'`. The browser tries to use the first value, and uses other values in turn, depending on which font is available to the local system.

Table 18–2 (Cont.) Style and Content Style Properties

Property	Description
`Font Size`	Enter the size of component text relative to either your browser's default font size or the font size of the parent element. Enter one value from the following types of values: ■ `length`–Sets the font size to a fixed size. For example, enter: `14px`. `1.5em`, and so on ■ `xx-small`, `x-small`, or `small` ■ `medium`–The default ■ `large`, `x-large`, or `xx-large` ■ `smaller`–Sets the font size to a size smaller than the parent element. ■ `larger`–Sets the font size to a size larger than the parent element. ■ `%`–Sets the current font size to a percentage of the font size of the parent element. For example, enter: **75%**
`Font Style`	Select the style for the component fonts. Choose from: ■ **Bold** ■ *Italic* ■ Underline ■ Strikethrough The font style you select here applies to any text inside the component.
`Height`	Specify the height of component content. Set a fixed height for component content. You can use any standard CSS unit of measure, such as `pt`, `px`, `pc`, `li`, and so on. Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect. If you want your component to take up 100% of a page, consider creating a page using the Stretch page style and adding the component to it (for more information, see Section 15.1, "What You Should Know About Page Styles"). The Height property works with the `Stretch Content` property, available on the Display Options tab. `Stretch Content` enables a container to stretch its content to the specified height.
`Margin`	Specify the border of space to draw around the component. Enter one of the following types of values: ■ An absolute value. Include your preferred unit of measurement. For example: `2px` Use only those units of measurement supported in standard CSS, such as `pt`, `px`, `pc`, `li`, and so on. ■ A percentage of the margin of a parent component (provide a percent sign with your value, such as `10%`). ■ `auto`: Set the value automatically according to browser defaults.

Table 18–2 (Cont.) Style and Content Style Properties

Property	Description
`Other CSS`	Specify additional CSS for the component. Add any other CSS encoding you care to that is not covered by the other Style or Content Style properties. You must use standard CSS syntax for this value to be valid (for more information about Other CSS, see Section 18.6.6.3, "Entering Other CSS"). For example, a setting of `padding:0` removes all padding on a Box component, useful when nesting boxes inside boxes. Compare this with the description of `Style Class`.
`Style Class`	Specify the CSS style class to use for this component. For example, you can use this property to target specific skin settings on an individual Box component. The style class may be defined in your jspx or skinning CSS file. **Note:** Style classes are a set of styles bundled together and given a name. In contrast, values entered for `Other CSS` are individual styles. `Style Class` values are added to a component's `styleClass` attribute. `Other CSS` values are added to a component's `inlineStyle` attribute. This property appears only on the **Style** tab.
`Width`	Specify the width of component content. Set a fixed width for component content. You can use any standard CSS unit of measure, such as `pt`, `px`, `pc`, `li`, `%`, and so on.

18.6.6.3 Entering Other CSS

The `Other CSS` field that appears on **Style** and **Content Style** tabs offers an opportunity to apply CSS styles that are not otherwise provided on the tabs. Use standard CSS syntax (for information about standard CSS syntax, see `http://www.w3.org/TR/CSS2/propidx.html`). Separate multiple entries with a semicolon (;), for example:

```
background: #00FF00 url(http://www.google.com/intl/en_ALL/images/logo.gif)
no-repeat fixed top; font-size: xx-small
```

Note, however, that some CSS styles are not supported by popular browsers. Moreover, some styles are specific to one browser and may not work correctly in another browser.

Note: The **Style** tab provides a `Style Class` property for specifying the CSS style class to use for the component. For more information, see Table 18–2.

Table 18–3 provides a few examples of CSS you can use in the `Other CSS` field.

Table 18–3 Example Values for Other CSS

Value	Description and Examples
`background-repeat`	Specify whether and how the background image should repeat. Enter a value in the format `background-repeat:` *`value`* For example: `background-repeat: repeat` ■ `no-repeat`–Forgo repeating the image. ■ `repeat`–Repeat the image to fill the container. ■ `repeat-x`–Repeat the image horizontally but not vertically. ■ `repeat-y`–Repeat the image vertically but not horizontally.
`background-position`	Set the starting position of a background image. Enter values in the format `background-position:` *`value value`* For example: `background-position: top left` Except as noted, if you specify only one value, the second value defaults to `center`. The first set of value pairs express horizontal and vertical as positions: ■ `top left`, `top center`, or `top right` ■ `center left`, `center center`, or `center right` ■ `bottom left`, `bottom center`, or `bottom right` The second set of value pairs express horizontal and vertical positions as either percentages or units of measure: ■ `x% y%`–The horizontal (x) and vertical (y) positions expressed as a percentage. The top left corner is 0% 0%. The bottom right corner is 100% 100%. If you specify only one value, the second value defaults to 50%. ■ `xpos ypos`–The horizontal (x) and vertical (y) positions expressed as a unit of measurement. The top left corner is 0 0. Units can be pixels (0px 0px) or any other CSS units. If you specify only one value, the second value defaults to 50%. You can mix % and positions.
`font-size`	Enter size of component text relative to either your browser's default font size or the font size of the parent element. Enter a value in the format `font-size:` *`value`* For example: `font-size: xx-small` ■ *`length`*–Sets the font size to a fixed size, for example `font-size: 14px` ■ `xx-small`, `x-small`, or `small` ■ `medium`–The default ■ `large`, `x-large`, or `xx-large` ■ `smaller`–Sets the font size to a size smaller than the parent element. ■ `larger`–Sets the font size to a size larger than the parent element. ■ `%`–Sets the current font size to a percentage of the font size of the parent element, for example, `font-size: 75%`

Table 18–3 (Cont.) Example Values for Other CSS

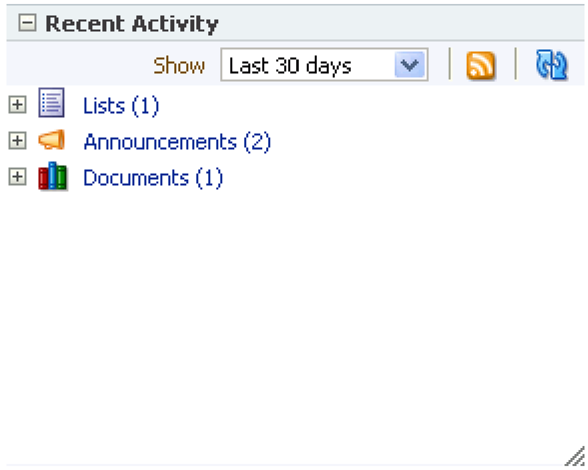
Value	Description and Examples
`padding`	A collective property for setting the white space (or clear space) around a component in one expression. Enter up to four values. Express values in a specific length or as a percentage of the closest element, using the syntax `padding: value value value value` For example: `padding: 5px 10px 5px 10px` Where: ■ One value sets padding for all four sides. For example, `padding: 10px` ■ Two values set padding for top/bottom and left/right. For example, `padding: 10px 15px` ■ Three values set padding for top, left/right, and bottom. For example, `padding: 10px 5% 10px` ■ Four values set padding in turn for top, right, bottom, left. For example, `padding: 5px 10px 15px 20px` Use any standard CSS unit of measure, such as pt, px, pc, li, %, and so on.
`padding-bottom`	Sets the white space (or clear space) at the bottom of the element. Express values in a specific length or as a percentage of the closest element. For example: `padding-bottom: 10px`
`padding-left`	Sets the white space (or clear space) at the left side of the element. Express values in a specific length or as a percentage of the closest element. For example: `padding-left: 2%`
`padding-right`	Sets the white space (or clear space) at the right of the element. Express values in a specific length or as a percentage of the closest element. For example: `padding-right: 1pc`
`padding-top`	Sets the white space (or clear space) at the top of the element. Express values in a specific length or as a percentage of the closest element. For example: `padding-top: 16pt`

18.6.6.4 Using the Other CSS Property to Change Component Borders

One application of the **Other CSS** property is to provide a variety of borders on task flows, portlets, and some components.

For example, Figure 18–45 depicts a Recent Activity task flow without borders.

Figure 18–45 Task Flow Without Borders



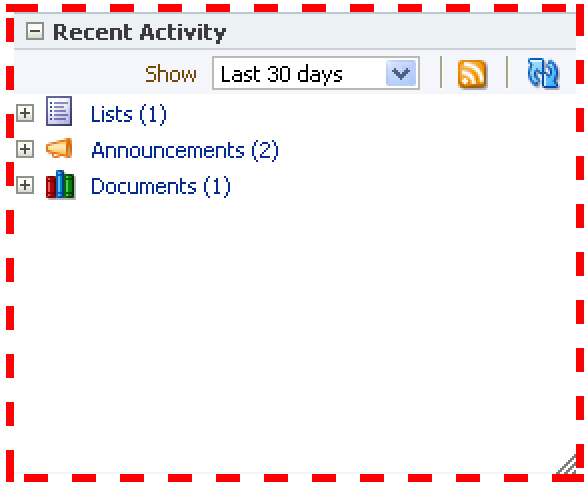
To create borders around the task flow, access its properties (for more information, see Section 18.6.2, "Setting Properties on a Component") and add CSS encoding. For example, enter the following code in the **Other CSS** field on the **Style** tab in the Component Properties dialog:

Example 18–1 Other CSS for Creating Borders

```
border-bottom-width:4px;
border-bottom-color:red;
border-bottom-style:dashed;
border-top-width:4px;
border-top-color:red;
border-top-style:dashed;
border-left-width:4px;
border-left-color:red;
border-left-style:dashed;
border-right-width:4px;
border-right-color:red;
border-right-style:dashed;
```

Figure 18–46 illustrates the result.

Figure 18–46 A Border Created Through the Other CSS Property



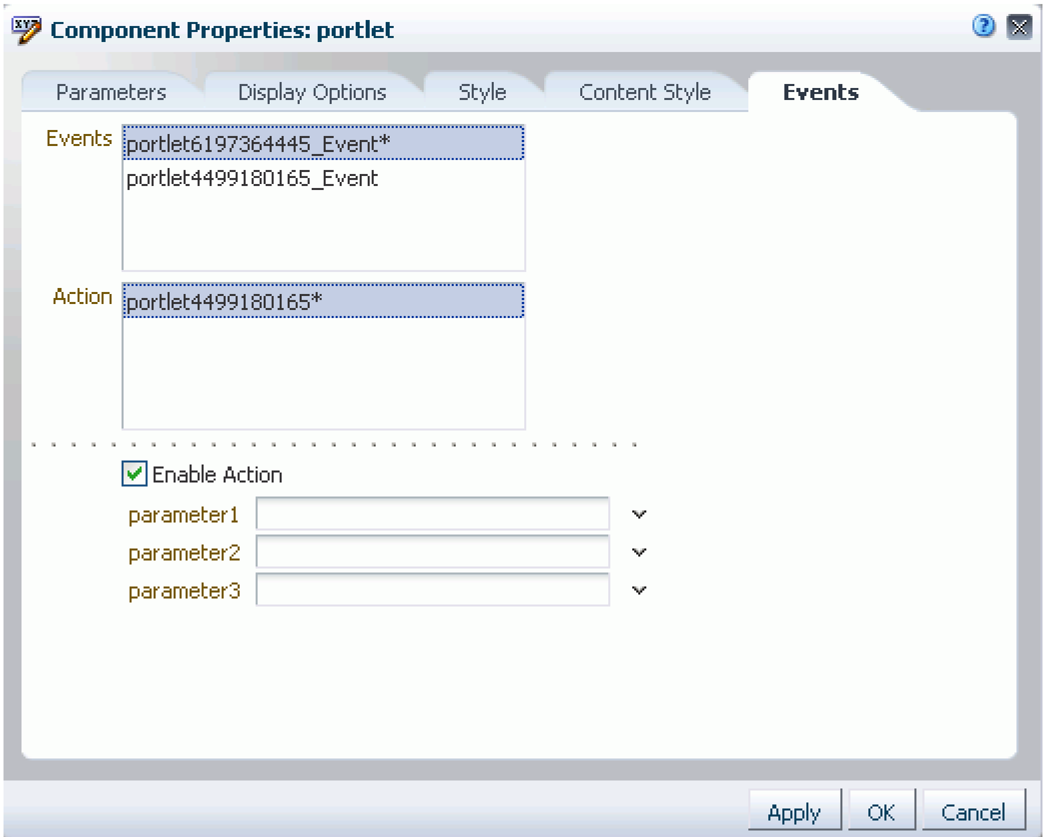
18.6.7 Working with Component Contextual Events

Events are defined occurrences within the current context. Event handlers are the engines that drive the results of that occurrence.

For example, imagine two components: one is the producer of some kind of content (a *payload*) and the other consumes the content. When you wire these components to each other, you can use events to specify that when an event is triggered on the producer, the producer broadcasts a contextual event with a `payLoad` parameter, which the consumer component consumes through an event handler.

The **Events** tab in the Component Properties dialog provides a means of wiring a contextual event to an action handler to enable the passing of values from a producer component to a consumer component when the event is triggered on the producer (Figure 18–47).

Figure 18–47 Events Tab in the Component Properties Dialog



See Also: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Note: Contextual events differ from the business events that can be raised by ADF Business Components. Additionally, contextual events differ from events raised by UI components. Contextual events can be used in association with UI events. In this case, an action listener that is invoked due to a UI event can, in turn, invoke a method action binding that then raises the event.

See Also: For information about business events, see *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*.

Not all components support contextual events because not all components were created to include them; therefore, the **Events** tab does not appear for all components. For events to be available at runtime, event capability must be included in a component when the component is developed.

Table 18–4 lists and describes the properties presented on an **Events** tab.

Table 18–4 Properties on the Events Tab

Property	Description
`Events`	A list of all contextual events associated with components on the current page An event describes the type of action that triggers another action, such as the passing of a value. The events listed in the Events pane were built-in to the component when the component was created. All components do not include events; therefore, all components are not intrinsically capable of being wired to other components.
`Actions`	A list of action handlers associated with the selected consumer component The actions listed in the Actions pane vary according to which consumer component is selected. Actions enable you to associate an event with an event handler, which specifies what should happen when the triggering event occurs. The actions listed in the Actions pane were built-in to the component when the component was created.
`Enable Action`	A check box for enabling or disabling the selected event and action When you select this check box, a list of selected action handler parameters appears.
List of selected action handler parameters	Fields for entering values to use to deliver the payload from the producer component to the consumer component whenever the event occurs Enter parameter values, or click the **Edit** icon next to a parameter field to open the Expression Editor. For more information, see Section B.1, "Introducing the Expression Builder" Parameter fields appear only when the `Enable Action` check box is selected.

For information about wiring components, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

18.7 Deleting a Component from a Page

The controls for deleting a component are located on the component itself in Composer Design view and on the header of the hierarchical list pane in Source view. This section describes how to delete components in both Design view and Source view:

- Section 18.7.1, "Deleting a Component in Design View"
- Section 18.7.2, "Deleting a Component in Source View"

18.7.1 Deleting a Component in Design View

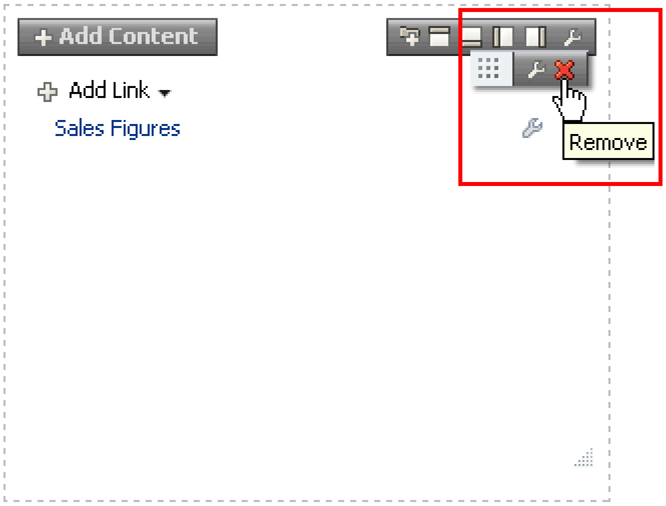
To delete a component in Design view:

1. Go to the page where you want to delete a component, and open it in Composer.

   Tip: One way to enter page edit mode is to press Ctrl+Shift+E.

2. If necessary, click the **View** menu, and select **Design**.
3. Click the **Remove** icon on the component header or, if no header is shown, on the component's floating palette (Figure 18–48).

Figure 18–48 Remove Icon on a Links Component



4. In the resulting confirmation dialog, click the **Delete** button.

   The component is permanently removed from the page. If the component had any child components, those child components are deleted as well.

18.7.2 Deleting a Component in Source View

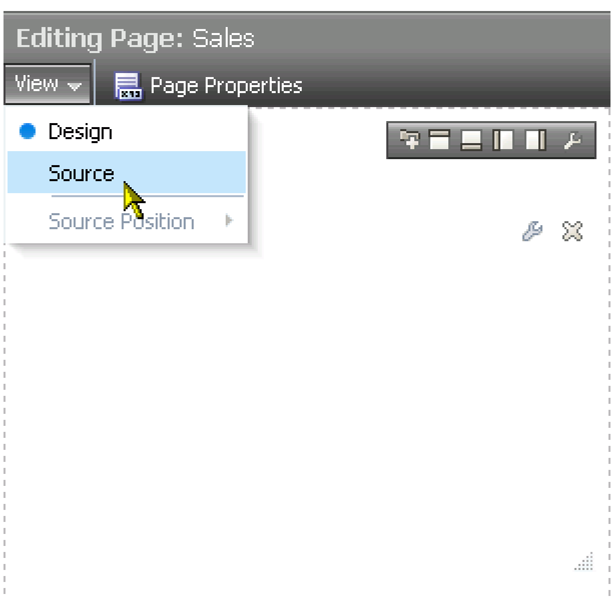
To delete a component in Source view:

1. Go to the page where you want to delete a component, and open it in Composer.

   > **Tip:** One way to enter page edit mode is to press Ctrl+Shift+E.

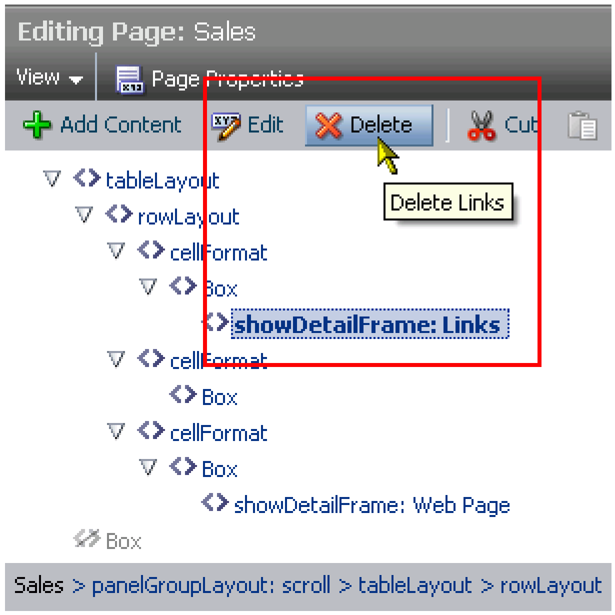
2. From the **View** menu, select **Source** (Figure 18–49).

Figure 18–49 Source Option on View Menu



3. In the list of components, select the component to delete.
4. Click the **Delete** button on the list header (Figure 18–50).

Figure 18–50 Delete Button in Source View



5. In the resulting confirmation dialog, click the **Delete** button.

   The component is permanently removed from the page. If the component had any child components, those child components are deleted as well.

19

Working with Web Development Components on a Page

This chapter describes how to work with the components in the **Web Development** section of the default Resource Catalog. It includes the following sections:

Audience

This chapter is intended for users granted the application-level permission `Pages: Create, Edit, and Delete Pages` or the space-level permission `Basic Services: Edit Page Access, Structure, and Content`.

Your application administrator has the authority to expose or hide application resources and revise default permissions. Tasks discussed in this chapter are not available to you if the relevant resource is hidden or you are not authorized to perform them.

19.1 What You Should Know About Web Development Components

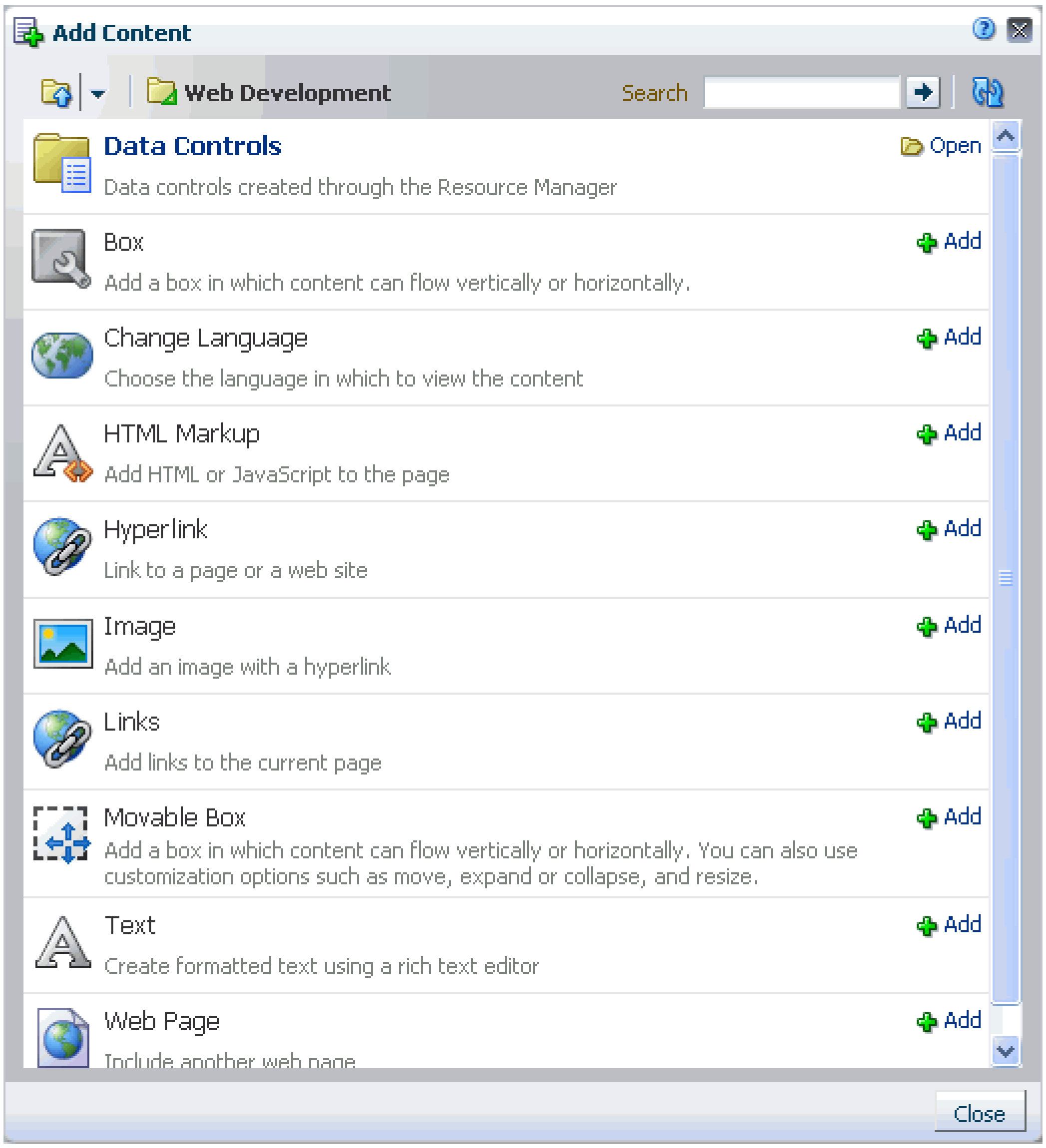
Web Development components add dynamic content to a page, such as images, HTML, and links, as well as components that end users can modify at runtime, such as language selection and areas to add their own content. You can use these components to boost company branding (Image), provide a mission statement (Text), direct users to related information (Links and Hyperlink), and provide areas for users to add or work with content (Box).

19.2 Adding a Web Development Component to a Page

The process of adding a web development component to a page is the same as the process for any Resource Catalog component, as described in Section 18.5, "Adding a Component to a Page."

In the Resource Catalog, click the **Open** link next to **Web Development** to display a selection of web development components (Figure 19–1).

Figure 19–1 Web Development Components in Resource Catalog



Tip: Some components are provided as part of the page infrastructure and are not obviously exposed in the Resource Catalog. An example of this is the `spacer` component. Although you cannot add more of them to a page, you can configure their properties. For more information, see Chapter 20, "Working with Layout Components on a Page."

19.3 Working with Data Controls

When you add a data control, its accessors, or its methods to a page, you can select different options for visualizing the data. For more information, see Section 29.4.1, "Consuming a Data Control in a Task Flow."

19.4 Working with the Box Component

This section provides an overview of the Box component and lists and describes its associated properties. It includes the following subsections:

- Section 19.4.1, "What You Should Know About the Box Component"
- Section 19.4.2, "Setting Box Component Properties"

19.4.1 What You Should Know About the Box Component

To add a Box component to a page, see Section 19.2, "Adding a Web Development Component to a Page."

A Box is a content area that you can use to place other components on the page. Unlike its counterpart, Movable Box, a Box cannot be moved around the page at application runtime, though its content can be rearranged. The Box component is the landing place for the task flows, portlets, and other components that you add to a page.

Common activities on this component are setting the background color and changing the padding, performed in the Component Properties dialog on the **Style** tab. See Chapter 18.6.6, "Working with Style and Content Style Properties."

In page edit mode, a Box is typically rendered as rectangle comprised of dashed lines, an **Add Content** button, and **Add a Tab Set or a Tab**, **Add Box**, **Edit**, and **Delete** icons (Figure 19–2).

Figure 19–2 Box Component

Not all Box controls appear every time. What you see depends on your permissions, whether the Box is the top-most Box (which cannot be deleted, thus no **Delete** icon), whether the Box is stretched (in which case you cannot add other Boxes to it, thus no controls for doing so), and whether Box properties are set to show or omit certain controls (for more information, see Table 19–1, " Box Component Display Options").

You can place content within a Box, and you can place one or more Boxes within a Box (unless the Box is configured to stretch its content, that is, the Box property `Layout` equals `stretch`). You can configure Box properties to display content horizontally, vertically, or stretched. You can specify the display of a scrollbar or set the Box to devote all its area to a single component (stretched). You can use Box controls to add Boxes above, below, or to either side of a given Box and to add a tab or a tab set within the Box.

> **See Also:** For information about adding tab sets and configuring tabs, see Section 18.4.5, "Creating Layered Content Regions Using Tabs."

You could, if you like, add one Box to a page, and use its controls to add all the Boxes and tabs you require, rather than adding multiple Boxes from the Resource Catalog for that purpose.

19.4.2 Setting Box Component Properties

> **See Also:** For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

Box component properties provide a means of enabling or disabling the display of an **Actions** menu, a tab creation icon, and Box split icons; specifying the alignment and orientation of Box content; rearranging Box components; and providing tooltip text on the Box.

Box component properties include a **Child Components** tab with options for hiding, showing, and rearranging the Box content. For more information, see Section 18.6.5, "Working with Child Components."

A **Style** tab is available for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance—primarily the styles provided by the application skin. Box style properties are common to many other components. Commonly shared Style properties are listed and described in Section 18.6.6, "Working with Style and Content Style Properties."

Table 19–1 lists and describes Box component display options.

Table 19–1 Box Component Display Options

Property	Description
`Allow Action`	Enables or disables the display of various actions on the Box and on the components you add to the box: ■ `all`—Show the **Add Content** button on the Box, show the **Add Box** icons, display the **Actions** menu on all child components that support it, and allow the movement of Movable Boxes into and out of the Box. ■ `none`—Hide the **Add Content** button on the Box, hide the **Add Box** icons, and disable the display of the **Actions** menu on all child components. Additionally, any Movable Boxes inside the Box are frozen and cannot be moved; and users cannot move Movable Boxes into the Box.
`Horizontal Alignment`	Specifies how Box content should align between its left and right boundaries: ■ `start`—Align content with the front position, determined by the reading order of the selected language. This value is provided to accommodate environments that support bidirectional languages. ■ `center`—Align content with the center of the Box. ■ `end`—Align content with the final position, determined by the reading order of the selected language. This value is provided to accommodate environments that support bidirectional languages. ■ `left`—Align content with the left side of the Box. ■ `right`—Align content with the right side of the Box.
`Layout`	Specifies the orientation of Box content: ■ `vertical`—Align Box content in a vertical orientation (that is, as a column of objects). ■ `horizontal`—Align Box content in a horizontal orientation (that is, as a row of objects). When `Layout` is set to `horizontal`, this component cannot be stretched by a parent component that stretches its children. ■ `scroll`—Align Box content vertically with a scrollbar. The scrollbar is rendered when the height/width of its content exceeds the Box's height or width. ■ `stretch`—The Box content stretches to accommodate the specified size of the Box. If no `height` (see Chapter 18.6.6, "Working with Style and Content Style Properties") is specified for the Box, it defaults to a height of 200 pixels, unless the Box is placed inside another stretching component. In this case, the Box height is controlled by its parent (but see `horizontal`). When you select `stretch`, the **Add Content** button is hidden after one component is added to the Box, and you cannot drag and drop content into the Box. Additionally, you cannot split a Box with a `Layout` value of `stretch`. ■ `auto`—The child component is stretched only if the Box is stretched by its parent. If not, the content scrolls.
`Short Desc`	Specifies tooltip text for the Box Tooltip text appears when users roll their mouse pointers over the Box.
`Show Component`	Hides or shows the component on the page: ■ Select to show the component ■ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again using Composer Source view. In Source view, right-click the hidden component and select **Show Component** from the resulting context menu.

Table 19–1 (Cont.) Box Component Display Options

Property	Description
`Show Split Action`	Show or hide the icons that enable splitting a Box into one or more Boxes ■ Select the check box to show **Add Box** icons on the Box ■ Deselect the check box to hide the icons on the Box
`Show Tab Action`	Show or hide the icon that enables adding tabbed regions to a Box ■ Select the check box to show the **Add a Tab Set or a Tab** icon on the Box ■ Deselect the check box to hide the icon on the Box
`Vertical Alignment`	Specifies how Box content should align between its top and bottom boundaries: ■ `top`—Align content at the top of the Box. ■ `middle`—Align content with the middle of the Box. ■ `bottom`—Align content at the bottom of the Box. ■ `baseline`—Align content at the Box baseline, which is slightly above the bottom. `Vertical Alignment` applies only when the layout is horizontal.

See Also: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

19.5 Working with the Change Language Component

See Section 27.3.1, "Adding a Change Language Task Flow to a Page."

19.6 Working with the HTML Markup Component

This section provides an overview of the HTML Markup component and lists and describes its associated properties. It also provides a sample use case for embedding a YouTube video onto a page.

This section includes the following subsections:

- Section 19.6.1, "What You Should Know About the HTML Markup Component"
- Section 19.6.2, "Setting HTML Markup Component Properties"
- Section 19.6.3, "Embedding Video, Music, Slides, and Other Types of Content"

19.6.1 What You Should Know About the HTML Markup Component

To add an HTML Markup component to a page, see Section 19.2, "Adding a Web Development Component to a Page."

The HTML Markup component is a simple editor for adding HTML markup to a page, including JavaScript embedded in HTML `<script>` tags (Figure 19–3).

Figure 19–3 An HTML Markup Component

Enter markup through the editor's component properties:

- Enclose JavaScript in the appropriate HTML markup. The HTML must be valid XHTML.

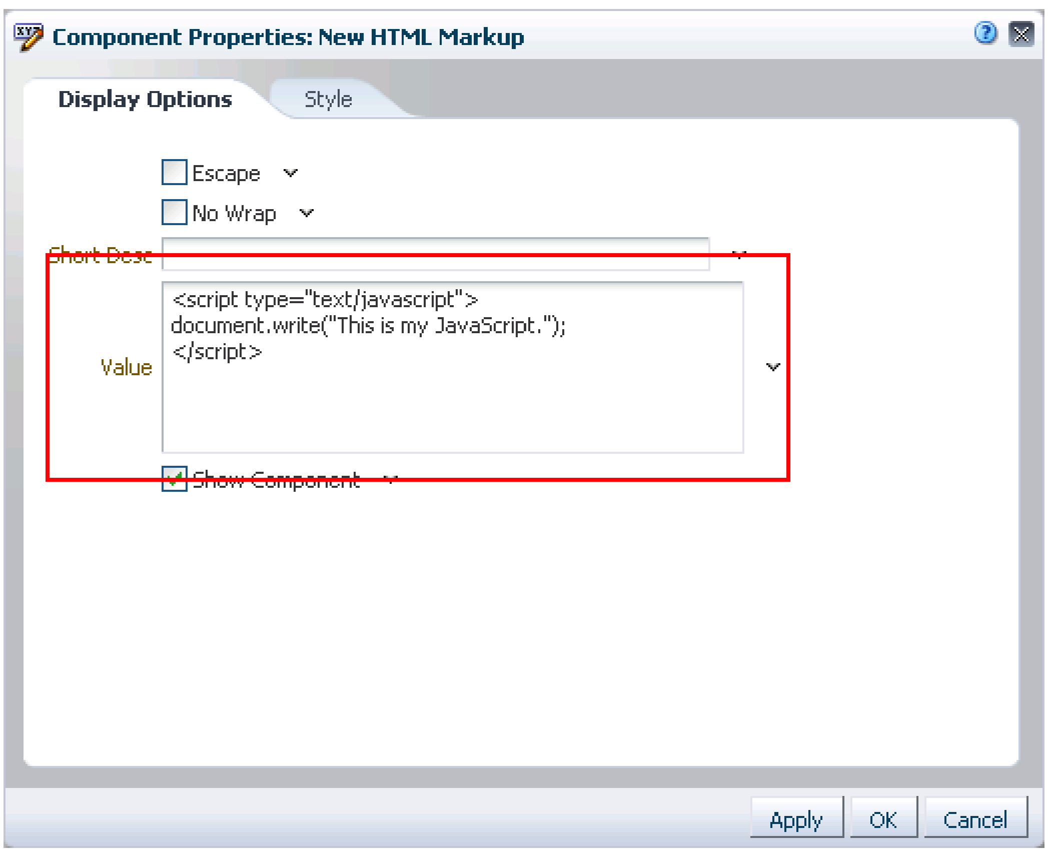
  For example (Figure 19–4):

```
<script type="text/javascript">
     document.write("Welcome to the club");
</script>
```

- If you need to enter non-XHTML, then it must be bracketed appropriately (that is, wrapped in CDATA). For example: `<![CDATA[`*`non-conforming HTML`*`]]>`.
- JavaScript will execute *only* when the page is rendered with a full URL page request. If you navigate to the page from a tab in your portal, the JavaScript will not execute. You can work around this limitation by creating a page style to execute JavaScript when it loads.

WARNING: This component must be used with caution as it can cause pages to break if not used properly. If necessary to resolve errors, you can remove the component in Source view (see Section 18.2, "Introducing Design View and Source View"), or log out and log in again to reset Composer.

Figure 19–4 Sample JavaScript in HTML Markup Display Options



The editor's header appears in page edit mode, but does not appear in page view mode. This enables you to place an individualized message on a page, for example, `Welcome #{securityContext.userName}!`, without cluttering the message with the component header.

> **Tip:** If you enter an EL expression, such as `#{securityContext.userName}`, the output is the value of the expression; in this case, the name of the current user.

19.6.2 Setting HTML Markup Component Properties

> **See Also:** For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

HTML Markup component properties provide a means of entering a brief bit of HTML markup, JavaScript, text, or Expression Language (EL). For example, use the HTML Markup component to embed a personalized message to page visitors, a YouTube video, a Google Gadget, a Pandora Music Station, and the like (for more information, see Section 19.6.3, "Embedding Video, Music, Slides, and Other Types of Content").

In addition to content entry, use the properties on the **Display Options** tab of the Component Properties dialog (Table 19–2) to control text entry behavior and provide tooltip text (in the `Short Desc` property).

HTML Markup component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. HTML Markup style properties are common to many other components, and are listed and described in Section 18.6.6, "Working with Style and Content Style Properties."

Table 19–2 lists and describes HTML Markup component display options.

Table 19–2 HTML Markup Component Display Options

Property	Description
`Escape`	A check box for enabling or disabling literal evaluation of special characters Use this property to make the output *safe* or *not safe*. Safe means that any tags, such as `<script>` are escaped into `<script>` so that they do not run. Not safe means whatever you enter for `value` finds its way onto the page, even if it does something undesirable. ■ Checked (`true`) enables literal evaluation of such characters as angle brackets (< | >) and HTML special characters. For example, when a user enters — it is rendered as —. ■ Deselected (`false`) disables literal interpretation of special characters. For example, when a user enters —, it is rendered as —. False is the default value.
`No Wrap`	A check box for enabling or disabling text wrapping ■ Checked (`true`) disables text wrapping. Users must enter line breaks manually. ■ Deselected (`false`) enables text wrapping. Lines wrap in accordance with the component width. False is the default value.

Table 19–2 (Cont.) HTML Markup Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text for the HTML Markup component When users roll their mouse pointers over the component, this text appears as a tooltip.
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Source view. In Source view, right-click the hidden component, and select **Show Component** from the resulting context menu.
`Value`	A field for specifying the content that this component renders In addition to text, this parameter also accepts HTML, JavaScript, and Expression Language (EL) expressions. For guidelines and examples, see Section 19.6.1, "What You Should Know About the HTML Markup Component," and Section 19.6.3, "Embedding Video, Music, Slides, and Other Types of Content." After you save your changes and close the page editor, the HTML Markup component shows the evaluated value of the markup.

Tip: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

19.6.3 Embedding Video, Music, Slides, and Other Types of Content

You can use the HTML Markup component to publish video, music, Google Gadgets, and other types of content to your application pages. Simply set the `Value` property on the **Display Options** tab to the HTML code you want to embed. For example:

```
<object width="640" height="385">
   <param name="movie"
         value="http://www.youtube.com/v/cAYw2zcSIPw?fs=1&amp;hl=en_US" />
   <param name="allowFullScreen" value="true" />
   <param name="allowscriptaccess" value="always" />
   <embed src="http://www.youtube.com/v/cAYw2zcSIPw?fs=1&amp;hl=en_US"
         type="application/x-shockwave-flash" allowscriptaccess="always"
         allowfullscreen="true" width="640" height="385" />
</object>
```

19.7 Working with the Hyperlink Component

This section provides an overview of the Hyperlink component and lists and describes its unique properties.

This section includes the following subsections:

- Section 19.7.1, "What You Should Know About the Hyperlink Component"
- Section 19.7.2, "Setting Hyperlink Component Properties"

19.7.1 What You Should Know About the Hyperlink Component

To add a Hyperlink component to a page, see Section 19.2, "Adding a Web Development Component to a Page."

Use the Hyperlink component to add a link to a page. The Hyperlink can point to a location that is either internal or external to the application.

A Hyperlink component (Figure 19–5) is comprised of two elements: the link text and the link URL, both of which are added through component properties.

Figure 19–5 Hyperlink Component

Hyperlinks can take both internal and external link targets. For an internal target, you can use a relative directory path. For an external target (a target outside of the Spaces application), always use the full URL.

> **Tip:** An easy way to obtain the relative directory path of a Spaces application page is to navigate to the target page and go through the motions of adding it as a Favorite. By default, the Add Favorite dialog provides the relative URL of the current page. Simply copy this information, and use it to define the Hyperlink target. For information about adding a Favorite to the Spaces application, see Section 40.3, "Adding Favorites."
>
> An easy way to obtain the direct URL to a Spaces application page is to access its About this Page dialog. For more information, see Section 17.11, "Viewing Information About a Page."

Hyperlink component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. Hyperlink style properties are common to many other components. Commonly shared Style properties are listed and described in Section 18.6.6, "Working with Style and Content Style Properties."

19.7.2 Setting Hyperlink Component Properties

> **See Also:** For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

Hyperlink component properties provide a means of specifying link text, target destination, and open behavior.

Table 19–3 lists and describes Hyperlink component display options.

Table 19–3 Hyperlink Component Display Options

Property	Description
`Destination`	A field for entering the hyperlink target URL Enter the web address of the page to link to.
`Open in a new window`	Option for determining link target open behavior ■ Select to open the link target in a new browser tab or window. ■ Deselect to open the link target in the current browser tab or window.
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Source view. In Source view, right-click the hidden component, and select **Show Component** from the resulting context menu.
`Title`	A field for specifying hyperlink text Enter a word or phrase to use as link text.

See Also: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

19.8 Working with the Image Component

There are two places in the Resource Catalog from which to add images:

- The Image component
- Image files from the **Documents** folder

Unlike images from the **Documents** folder, Image components provide controls for associating a link target with the image. You have the option of associating or omitting a link with an Image component.

Tip: Another difference between image files from the **Documents** folder and an Image component is that image files can be discovered in a search, Image components cannot, preventing a return of irrelevant search results.

This section provides an overview of the Image component, and lists and describes its associated properties.

This section includes the following subsections:

- Section 19.8.1, "What You Should Know About the Image Component"
- Section 19.8.2, "Setting Image Component Properties"

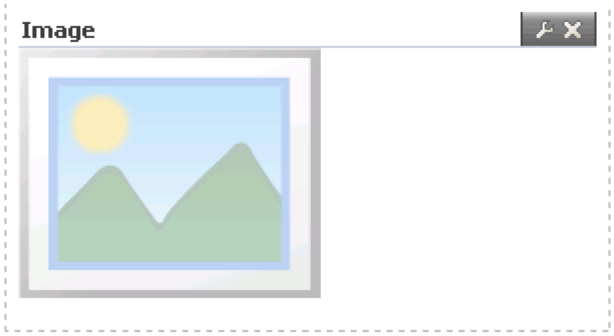
See Also: For information about using images from the Documents service, see Section 43.1, "What You Should Know About the Documents Service Task Flows."

19.8.1 What You Should Know About the Image Component

To add an Image component to a page, see Section 19.2, "Adding a Web Development Component to a Page."

Use the Image component to add a picture, a logo, a linked image, and the like to a page (Figure 19–6).

Figure 19–6 Image Component



Use any web-compatible image from any accessible location. Do not use images from an external server that requires authentication.

> **Tip:** If you want to display an image that is not linked and is returned in a search, consider using the Documents service Content Presenter task flow in lieu of the Image component. For more information, see Section 43.1, "What You Should Know About the Documents Service Task Flows."

19.8.2 Setting Image Component Properties

> **See Also:** For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

Image component properties provide a means of specifying the location of the image file, an optional hyperlink target, `ALT` text, and a target frame for the hyperlink.

Image component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. Image style properties are common to many other components. Commonly shared Style properties are listed and described in Section 18.6.6, "Working with Style and Content Style Properties."

Table 19–4 lists and describes Image component display options.

Table 19–4 Image Component Display Options

Property	Description
`Depressed Icon`	A URL to the image that represents the image in a clicked state. Use any web-compatible image from any internal or publicly-accessible location.
`Destination`	A URL for the Image link target destination. The link target can be a URL that is either internal or external to the application. For an internal target (a Spaces application page), you can use a directory path relative to the application root directory. The runtime behavior differs depending on whether this value is set to an internal or external URL: ■ For an internal URL (for example, `http://`*`host`*`:`*`port`*`/webcenter/spaces/page/myPage)`, clicking the image opens a new window displaying the target page. Clicking the image again opens a new window each time the image is clicked. ■ For an external URL (for example, `http://www.google.com`), clicking the image opens a new window displaying the target site. Clicking the image again refreshes the same window each time the image is clicked.
`Disabled Icon`	A URL to the image that represents the image in a disabled state. Use any web-compatible image from any internal or publicly-accessible location.
`Hover Icon`	A URL to the image that represents the image when a mouse pointer hovers over it. Use any web-compatible image from any internal or publicly-accessible location.
`Icon`	A URL to the image that represents the image in its active, unclicked state. Use any web-compatible image from any internal or publicly-accessible location.
`Icon Position`	A selection of options for placement of the image: ■ `leading`—The image renders at the start of its associated text ■ `trailing`—The image renders at the end of its associated text
`Short Desc`	Image `ALT` text. `ALT` text appears as a tooltip when users roll their mouse pointers over the image.
`Show Component`	An option for hiding or showing the component on the page: ■ Select to show the component ■ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Source view. In Source view, right-click the hidden component, and select **Show Component** from the resulting context menu.

Table 19–4 (Cont.) Image Component Display Options

Property	Description
`Target Frame`	Open behavior for the link target Enter any standard browser target, such as: ■ `_top`—Loads the link target in the current browser window (as opposed to the current frame) ■ `_parent`—Loads the link target in the parent frame of the current frame. ■ `_self`—Loads the link target within the same frame as the frame containing the link. ■ `_blank`—Loads the link target in a new browser tab or window, without closing the original tab or window.
`Text`	An optional text label to accompany the image The `Icon Position` value determines whether the image is placed before or after the text specified here.
`Text And Access Key`	Sets both text and an access key on the image The access key is denoted by a leading ampersand (&). For example, enter &click me to set the text to *click me* and the access key to *c*. An access key provides a keyboard shortcut to an action. In this case, users press Alt-<access_key>, or Alt-Shift-<access_key> to jump to the image's target destination. The keys that users press to engage the access key depend on the requirements of their browsers.

See Also: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

19.9 Working with the Links Component

This section provides information about the Links component, how to set it up, and how to configure its properties. It includes the following subsections:

- Section 19.9.1, "What You Should Know About the Links Component"
- Section 19.9.2, "Configuring the Links Component"
- Section 19.9.3, "Setting Links Component Properties"

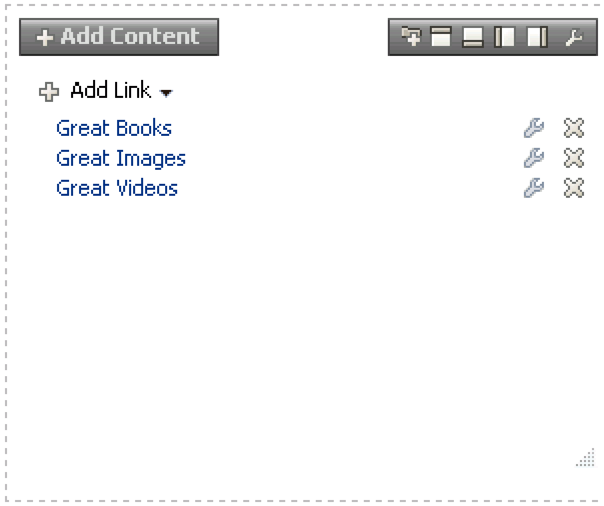
19.9.1 What You Should Know About the Links Component

To add a Links component to a page, see Section 19.2, "Adding a Web Development Component to a Page."

Use the Links component to add a navigation instance to a page. Links component navigation can include links to pages, external web sites, and application content. A browse capability is available to simplify the process of locating link targets. An advanced search feature is also available to assist in locating application objects, such as a Documents service file.

The Links component enables you to add a single instance of navigation to an application page, outside the more formal structure of your portal's navigation (Figure 19–7).

Figure 19–7 Links Component



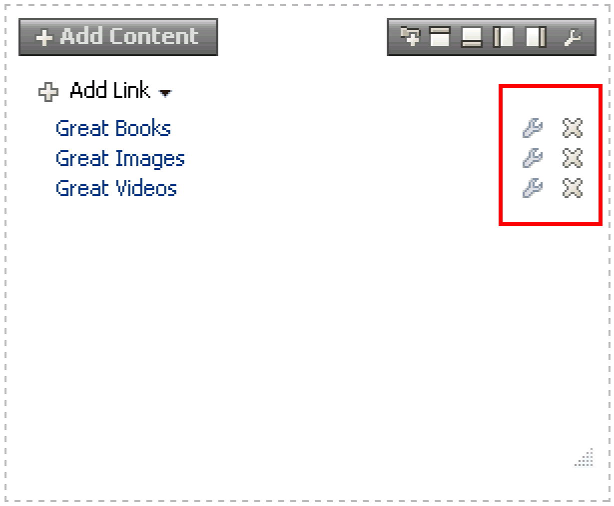
The links component is associated with the page or template on which it is placed. When you put a links component on a page and add some links, those links are associated with the page. That is, the lifecycle of the links component respects the lifecycle of the page or template on which it is placed. For example:

- When a page containing links is copied, all the links are also copied, and the page copy has its own set of links. Modifying links on the original page does not affect the page copy. The same is true for links on page templates.
- When a page is deleted, all links associated with the page are also deleted. The same is true for links on page templates.
- If a space template contains pages with links, creating a new space based on the template effectively creates a clone of the template. Consequently, the new space has links that are separate from the ones in the template.
- When a space is exported or imported, any links associated with space pages are also exported or imported.

The Links component's **Add**, **Edit**, and **Delete Link** UI is available in both page view and page edit modes to users with `Edit Page` permission on the page. Users without `Edit Page` permission see only the added navigation links. Changes in both edit and view modes are visible to all users who can view the page. That is, the addition of links falls outside the constraints of user customization, where changes made in page view mode are visible only to the user who made them.

A control is available for specifying that a link target is opened within the context of the current page template or in place of the page on which it was invoked. There are also controls on each link for configuring a given link's properties and deleting the link (Figure 19–8).

Figure 19–8 Controls on Individual Links



The Links component's properties provide opportunities for controlling the behavior and look and feel of a Links component instance. For more information, see Section 19.9.3, "Setting Links Component Properties."

WARNING: The Links component Parameters `Navigation` and `Start Path` are preconfigured and must not be changed. Changing these parameters can result in breaking the page.

19.9.2 Configuring the Links Component

This section steps you through the process of setting up informal navigation using the Links component. It includes the following sections:

- Section 19.9.2.1, "Adding Navigation Links Using the Links Component"
- Section 19.9.2.2, "Configuring an Advanced Search for Content Links"
- Section 19.9.2.3, "Configuring a Link in the Links Component"
- Section 19.9.2.4, "Reordering Navigation Links"
- Section 19.9.2.5, "Deleting a Link from the Links Component"

19.9.2.1 Adding Navigation Links Using the Links Component

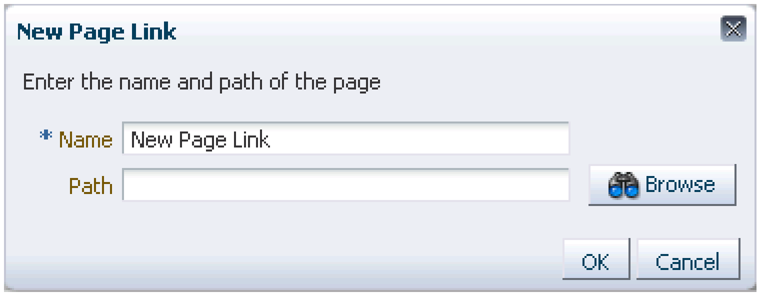
To add links using the Links component:

1. Click the **Add Link** menu (Figure 19–8) and select a link type:
   - **Page Link**—Add a link that targets an application page.
   - **External Link**—Add a link that targets a site that is external to the application.
   - **Content Link**—Add a link that targets a document from a content repository.

To add a Page Link:

   a. Select **Page Link** to open the New Page Link dialog (Figure 19–9).

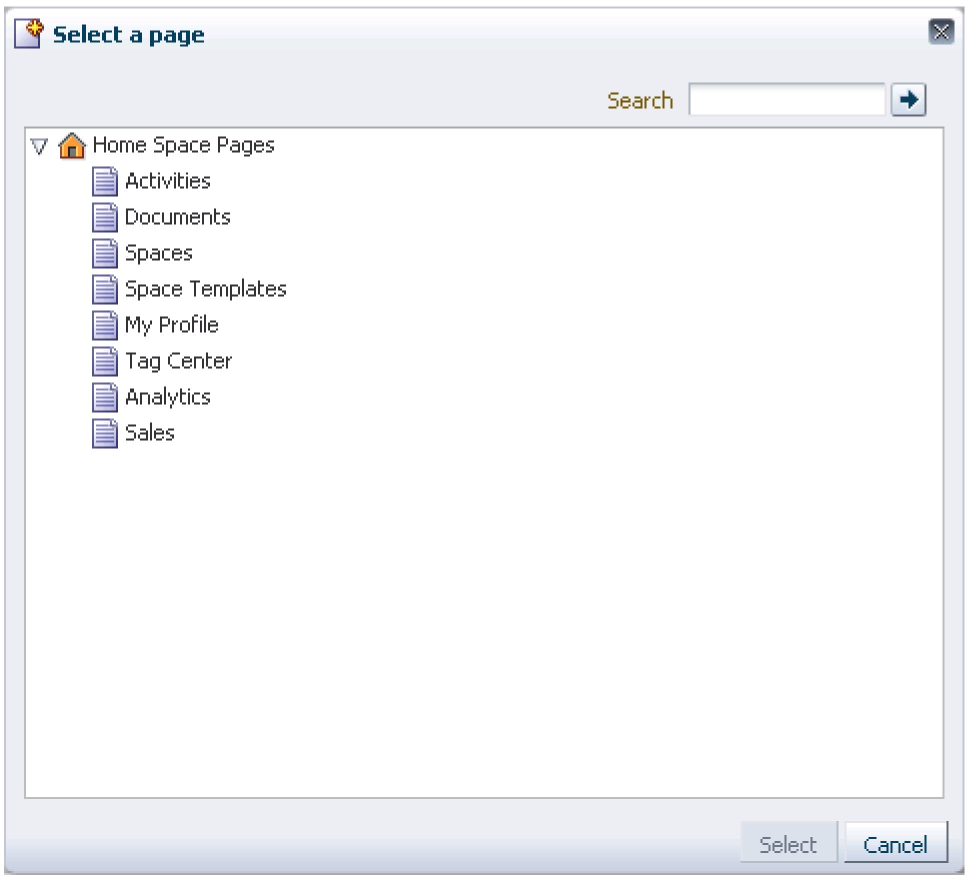
Figure 19–9 New Page Link Dialog



b. In the **Name** field, enter a display name for the link.

c. For **Path**, click **Browse** to open the Select a Page dialog (Figure 19–10).

Figure 19–10 Select a Page Dialog



Home space

****

d. Select a page from the given options, or click **Search** to locate a page on the available list of pages.

> **Tip:** In the Home space, you can select from pages that are available to you in your view of the Home space. In other spaces, you can select from pages that are available within the scope of the current space.

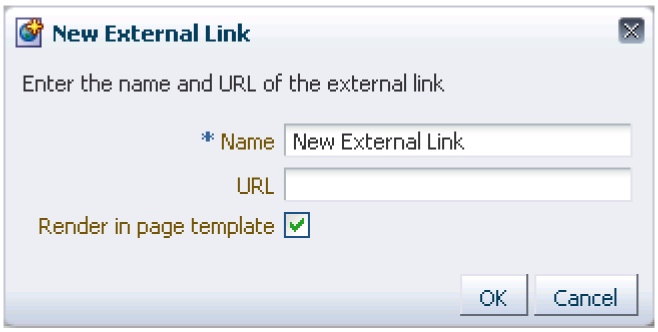
e. Click **Select**.

f. Click **OK**.

To add an External Link:

a. Select **External Link** to open the New External Link dialog (Figure 19–11).

Figure 19–11 New External Link Dialog



b. In the **Name** field, enter a display name for the link.

c. In the **URL** field, enter the URL to the link target, for example:

```
http://www.mywebdestination.com
```

d. Select **Render in page template** to present the link target content within the context of the current page template.

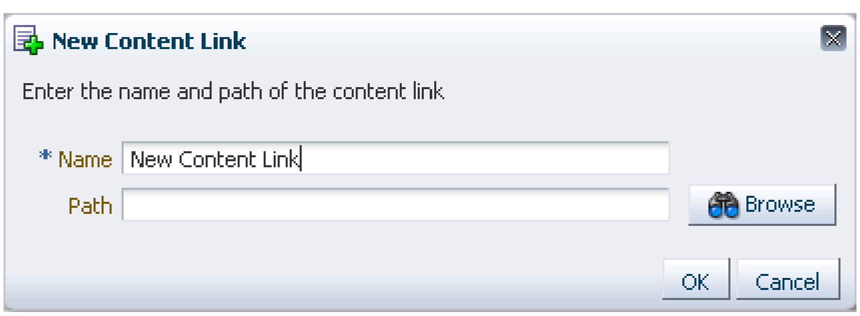
   Deselect this check box to redirect the current page to the link target.

e. Click **OK**.

To add a Content Link:

a. Select **Content Link** to open the New Content Link dialog (Figure 19–12).

Figure 19–12 New Content Link Dialog



b. In the **Name** field, enter a display name for the link.

c. For **Path**, click **Browse** to open the Select Document dialog.

If necessary, you can use the **Filter** feature to locate it. For a more pointed search, click **Advanced**. For more information, see Section 19.9.2.2, "Configuring an Advanced Search for Content Links."

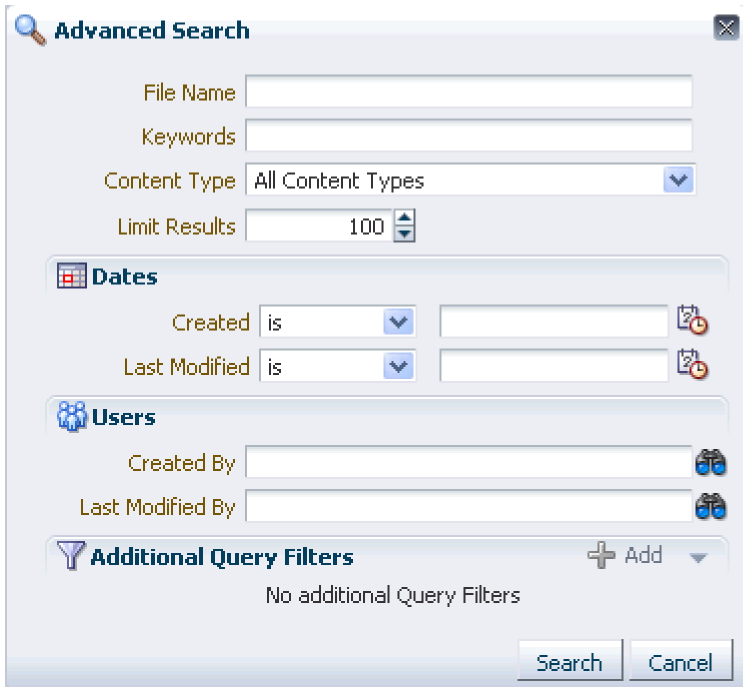
d. Click **Select**.

e. Click **OK**.

19.9.2.2 Configuring an Advanced Search for Content Links

The Links component's Advanced Search feature provides controls for specifying additional search criteria and filters for Content Links searches (Figure 19–13).

Figure 19–13 Advanced Search Dialog

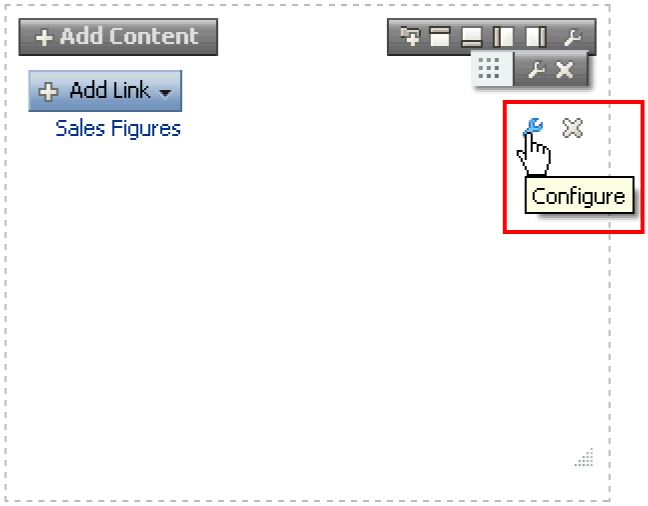


This search is very similar to an advanced document search. For more information, see Section 43.31.2, "Running an Advanced Document Search."

19.9.2.3 Configuring a Link in the Links Component

Users with `Edit Page` permission on the page can access a configure control on a given link to revise the link's name and target. If you can see the **Configure** icon to the right of a link, you are authorized to configure links (Figure 19–14).

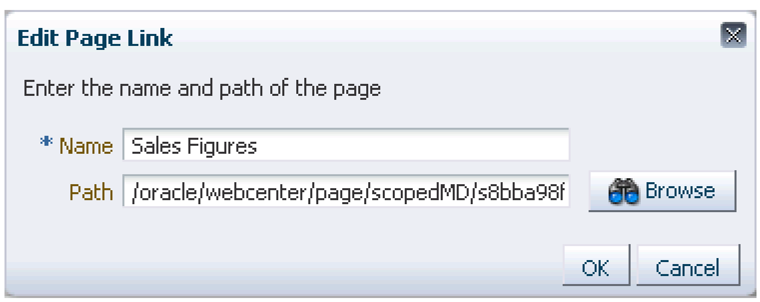
Figure 19–14 Configure Icon on a Link



To configure a link in the Links component:

1. Go to the Links component instance of interest.
2. Click the **Configure** icon to open the Edit *type* Link dialog (Figure 19–15).

Figure 19–15 Edit Page Link Dialog



3. Revise the values as required.

> **Note:** Different link types present different fields and require different values.
>
> For information about the values required by Edit *type* Link fields, see Section 19.9.2.1, "Adding Navigation Links Using the Links Component."

4. Click **OK**.

19.9.2.4 Reordering Navigation Links

You can reorder navigation links in a Links component by dragging and dropping:

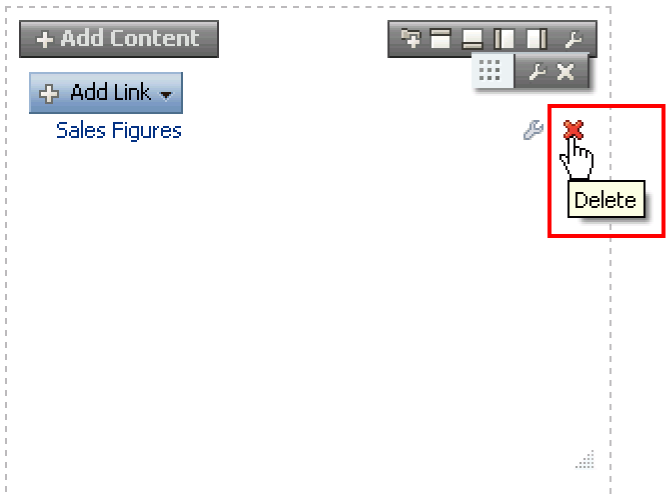
1. Click and hold on a link.
2. Drag the link to its new position on the list.

3. Release the link.

19.9.2.5 Deleting a Link from the Links Component

Authorized users can access a delete control on a given link to remove the link from the Links component. If you can see the **Delete** icon to the right of each link, you are authorized to delete links (Figure 19–16).

Figure 19–16 Delete Icon on a Link



To delete a link from the Links component:

1. Go to the Links component instance of interest.
2. Click the **Delete** icon next to the link of interest.
3. Click the **Delete** button in the confirmation dialog.

19.9.3 Setting Links Component Properties

> **See Also:** For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

The Display Options you set on the Links component affect only the particular instance. Links Display Options are common to many other components. Commonly shared Display Options are listed and described in Section 18.6.4, "Working with Component Display Options."

Links style properties are common to many other components. Commonly shared Style properties are listed and described in Chapter 18.6.6, "Working with Style and Content Style Properties." The styles you set on the Links component override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application skin.

19.10 Working with the Movable Box Component

This section provides an overview of the Movable Box component. It includes the following subsections:

- Section 19.10.1, "What You Should Know About the Movable Box Component"
- Section 19.10.2, "Setting Movable Box Component Properties"

19.10.1 What You Should Know About the Movable Box Component

To add a Movable Box component to a page, see Section 19.2, "Adding a Web Development Component to a Page."

A Movable Box (Figure 19–17) is a container wrapped around a Box that not only enables the placement of content on a page, but also provides a means of moving all of that content at once in both page edit mode and page view mode.

Figure 19–17 Movable Box Component

In page edit mode or page view mode, you can click on a Movable Box header and drag it and all of its content to a new position on a page. Movable Boxes can also be resized.

> **Tip:** Avoid adding a portlet to a Movable Box component. Doing so creates an unnecessary and potentially error-prone redundancy.

19.10.2 Setting Movable Box Component Properties

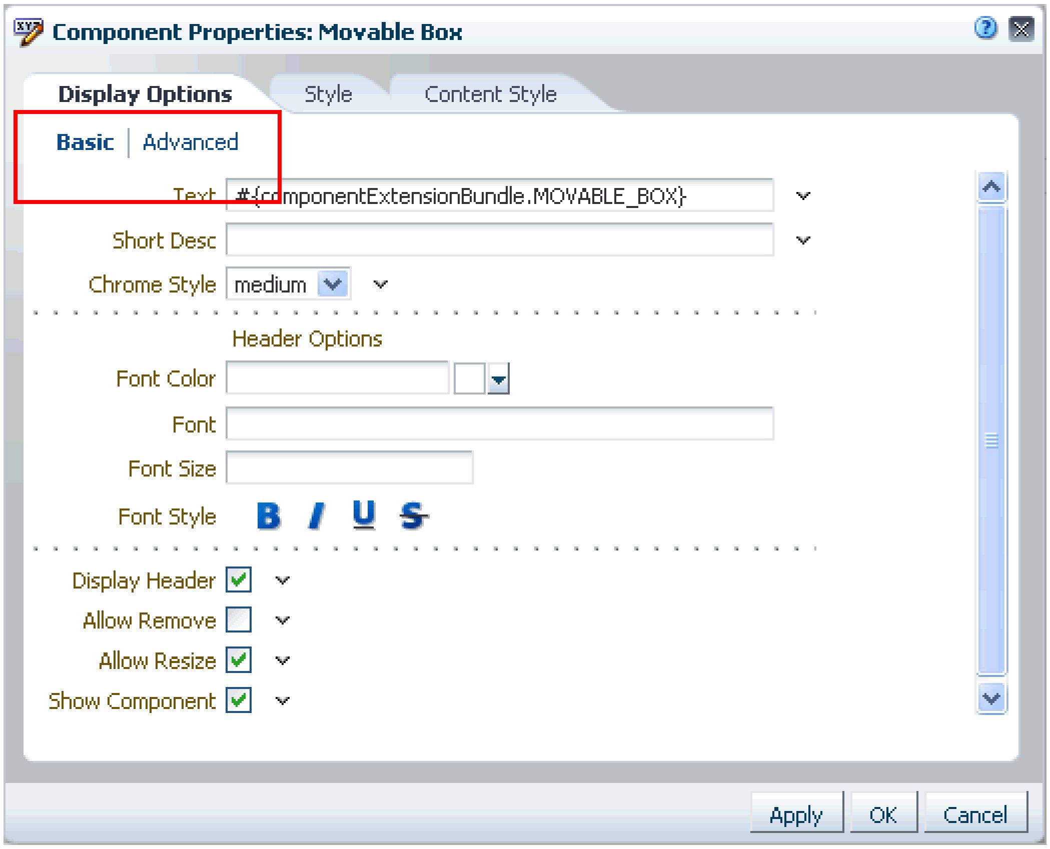
> **See Also:** For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

The Display Options associated with Movable Boxes provide a means of hiding or showing the Movable Box header, providing header text, adding a tooltip to the Movable Box that users see when they roll their mouse pointers over the header, and other like controls.

Movable Box Display Options are common to many other types of components and are listed in Table 18–1, " Display Options Properties".

Movable Box Display Options are presented on two subtabs: **Basic** and **Advanced** (Figure 19–18).

Figure 19–18 Movable Box Component Display Options



By default, each Movable Box encloses a Box component. For information about Box component properties, see Section 19.4.2, "Setting Box Component Properties."

19.11 Working with the Text Component

This section provides an overview of the Text component and lists and describes its associated properties.

This section includes the following subsections:

- Section 19.11.1, "What You Should Know About the Text Component"
- Section 19.11.2, "Setting Text Component Properties"

19.11.1 What You Should Know About the Text Component

To add a Text component to a page, see Section 19.2, "Adding a Web Development Component to a Page."

The Text component provides access to a simple editor you can use to add a brief statement, page instructions, or any other kind of informative content to a page (Figure 19–19).

Figure 19–19 Text Component

The Text component provides a simplified rich text editor, which you can use to enter text, apply text styles, and add links and images (Figure 19–20).

Figure 19–20 Text Component Text Editor

19.11.2 Setting Text Component Properties

> **See Also:** For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

The Display Options associated with the Text component provide a means of hiding or showing the component header, providing header text, adding a tooltip that users see when they roll their mouse pointers over the header, and other like controls.

Text Display Options are common to many other types of components and are listed in Table 18–1, " Display Options Properties".

Text component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and through the application skin. Text style properties are common to many other components. Commonly shared Style properties are listed and described in Section 18.6.6, "Working with Style and Content Style Properties."

19.12 Working with the Web Page Component

This section provides an overview of the Web Page component and lists and describes its associated properties.

This section includes the following subsections:

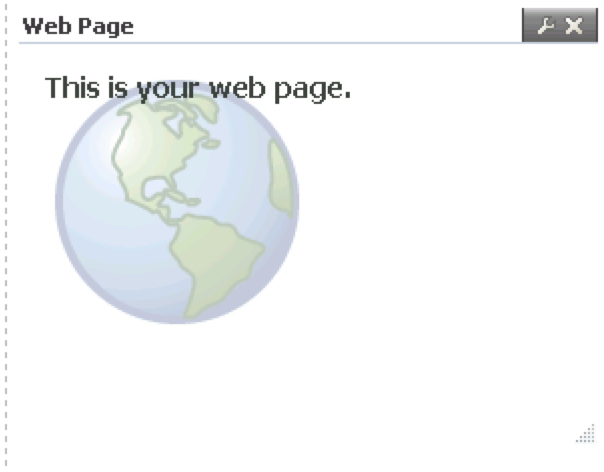
- Section 19.12.1, "What You Should Know About the Web Page Component"
- Section 19.12.2, "Setting Web Page Component Properties"

19.12.1 What You Should Know About the Web Page Component

To add a Web Page component to a page, see Section 19.2, "Adding a Web Development Component to a Page."

The Web Page component provides a means of opening a view onto another web page within the context of a Spaces application page (Figure 19–21).

Figure 19–21 Web Page Component



The content exposed through a Web Page component retains all of the controls associated with the exposed web page. These controls retain their functionality, enabling you to, for example, control the volume of a video, edit a wiki, or post an entry to a blog, depending on the type of content you expose.

You can use internal and external link targets for a Web Page. For an internal target, you can use a relative directory path.

> **Tip:** In the Spaces application, an easy way to obtain the relative directory path of an application page is to navigate to the target page and go through the motions of adding it as a Favorite. By default, the Add Favorite dialog provides the relative URL of the current page. Simply copy this information, and use it to define the Web Page target.
>
> For information about adding a Favorite to the Spaces application, see Chapter 40, "Creating and Managing Your Personal Favorites."

The Web Page component provides a variation on the Web Page page style offered through the Create Page dialog (for more information, see Table 15–2, " Default Page Styles"). The Web Page page style is useful for offering the full external web page experience. In contrast, the Web Page component is useful for including web page content along with other content types on an application page.

Web Page component properties include a **Style** tab with options for setting styles on the component instance. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the application. Web Page style properties are common to many other components. Commonly shared Style properties are listed and described in Chapter 18.6.6, "Working with Style and Content Style Properties."

19.12.2 Setting Web Page Component Properties

See Also: For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

Web Page component properties provide a means of specifying the URL of the content to render in the Web Page area and the `ALT` text to display when users roll their mouse pointers over the component border.

Table 19–5 lists and describes Web Page component display options.

Table 19–5 Web Page Component Display Options

Property	Description
`Short Desc`	A field for entering `ALT` text for the Web Page area Note that, for the Web Page component, the `ALT` text appears only when users hover their mouse pointers over the component border. You can increase the active area by increasing the padding around the component using the `Other CSS` property on the Component Properties **Style** tab. For example, you can enter the following in the `Other CSS` text box: `padding-top:30px;`
`Source`	A field for entering the fully qualified URL to the source Web content to render in the Web Page area For example: `http://www.example.com` Note that `www.example.com` (that is, without `http://`) does not qualify. If a given URL is invalid, your content does not render within the Web Page component. **Note:** Use the component's Style properties to adjust the width and height of the display area (for more information, see Chapter 18.6.6, "Working with Style and Content Style Properties"). If you plan to display the content of another Spaces application page, you can use a relative address. For more information, see Section 19.12.1, "What You Should Know About the Web Page Component."
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Source view. In Source view, right-click the hidden component, and select **Show Component** from the resulting context menu.

See Also: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

20

Working with Layout Components on a Page

This chapter describes the types of layout components that support page infrastructure, but are not available through the Resource Catalog. Such components are exposed through Source view of page edit mode.

Audience

This chapter is intended for users granted the application-level permission `Pages: Create, Edit, and Delete Pages` or the space-level permission `Basic Services: Edit Page Access, Structure, and Content`.

Your application administrator has the authority to expose or hide application resources and revise default permissions. Tasks discussed in this chapter are not available to you if the relevant resource is hidden or you are not authorized to perform them.

20.1 What You Should Know About Layout Components

Some page layout components are not exposed for use in the Resource Catalog. They are associated with the components on a page, and are configurable when you edit a page in Source view (Figure 20–1).

Figure 20–1 Layout Components in Source View

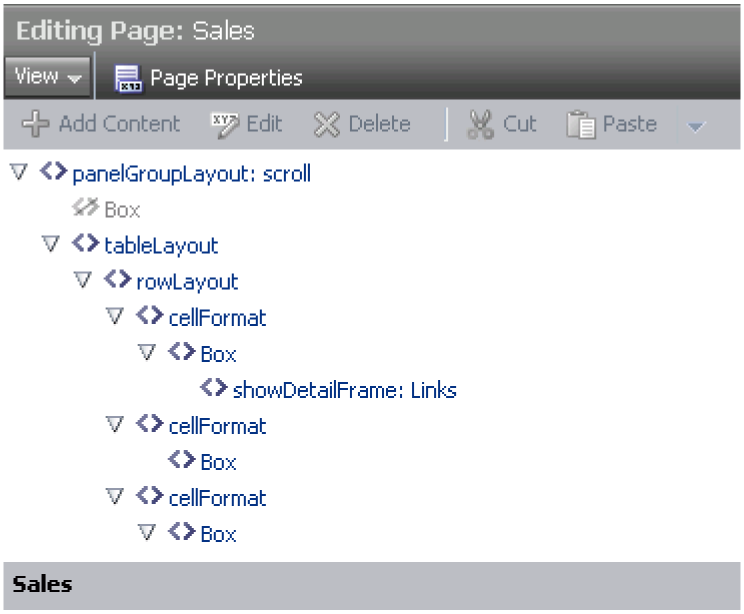


Table 20–1 lists and describes the layout components you are likely to encounter in Source view of page edit mode.

Table 20–1 Layout Components

Layout Component	Description
`panelGroupLayout`	Provides a means of arranging a series of child components vertically or horizontally (no wrapping), or consecutively (wrapping). The `Layout` property determines the arrangement of the child components. For more information, see Section 20.2, "Setting panelGroupLayout Properties."
`panelStretchLayout`	Provides a means of arranging content in defined areas on a page. Useful useful for enabling content to stretch when the browser is resized. For more information, see Section 20.3, "Setting panelStretchLayout Properties."
`panelTabbed`	The parent component of a tab set. For more information, see Section 20.4, "Setting panelTabbed Properties."
`showDetailFrame`	Renders a border, or chrome, around its child component along with a header that contains icons to enable users to perform some operations. These include a menu icon with options for moving the component, along with its content, to new positions on the page. Users can drag and drop `showDetailFrame` components from one `panelCustomizable` component to another on the page. Note that a `showDetailFrame` must be included inside a `panelCustomizable` component for it to be movable. For more information, see Section 20.5, "Setting showDetailFrame Properties."
`sidebarItem`	A child component of a tab set (`panelTabbed`). For more information, see Section 20.6, "Setting sidebarItem Properties."
`spacer`	Provides a means of incorporating some blank space in pages so that the page appears less cluttered than it would if all the components were presented immediately next to each other or immediately below each other. For more information, see Section 20.7, "Setting spacer/Separator Properties."

20.2 Setting panelGroupLayout Properties

See Also: For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

The `panelGroupLayout` component provides a means of arranging a series of child components vertically or horizontally (no wrapping), or consecutively (wrapping). The component's `Layout` property determines the arrangement of child components.

Properties for the `panelGroupLayout` component include a **Child Components** tab with options for hiding, showing, and rearranging component content. For more information, see Section 18.6.5, "Working with Child Components."

Table 20–2 lists and describes the `panelGroupLayout` properties that appear on the **Display Options** tab in the Component Properties dialog.

Table 20–2 panelGroupLayout Display Options

Property	Description
`Halign`	A means of expressing the horizontal alignment of component content Select one of: ■ `start`—align content horizontally, starting from the starting position This is either left or right depending on whether the current context is localized for a left-reading or right-reading language. ■ `center`—align content horizontally, starting from the center ■ `end`—align content horizontally, starting from the ending position This is either right or left depending on whether the current context is localized for a left-reading or right-reading language. ■ `left`—align content horizontally, starting from the left ■ `right`—align content horizontally, starting from the right
`Landmark`	A means of enhancing user accessibility as described by the Web Accessibility Initiative for Accessible Rich Internet Applications (WAI-ARIA). Each option describes the intended role of a content area to assist in using the area as a navigational landmark on the page. Screen readers and other assistive technologies can make use of these landmarks in page navigation. Select an option to clarify the role or purpose of a content area's content: ■ `none`—A content area that is not intended as a page navigational landmark ■ `banner`—A content area containing mostly site-oriented content, rather than page-specific content, such as the company logo or the portal-wide search feature Typically, a banner appears at the top of a page and spans the page width. ■ `complementary`—Supporting content, designed to be complementary to the main content at a similar level on the page, but still meaningful when separated from the main content, such as related documents ■ `contentinfo`—A content area that contains information about the application, such as the copyright or privacy statement. ■ `main`—The main content area of the page ■ `navigation`—A collection of navigational elements (usually links) for navigating the page or related pages. ■ `search`—A content area that contains one or more widgets used to define and execute a search.
`Layout`	A means of specifying the orientation of component content. Choose from: ■ `default`—align content vertically. ■ `horizontal`—align content horizontally ■ `vertical`—align content vertically ■ `scroll`—align content vertically with a scrollbar The scrollbar is rendered when the height/width of component content exceeds the component height or width.
`Short Desc`	A field for entering `ALT` text for the component `ALT` text appears as a tooltip when users roll their mouse pointers over the component.

Table 20–2 (Cont.) panelGroupLayout Display Options

Property	Description
`Show Component`	An option for hiding or showing the component on the page ▪ Select to show the component ▪ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Source view. In Source view, right-click the hidden component, and select **Show Component** from the resulting context menu.
`Theme`	The component style theme to apply to the children of this component. Use this property to change the theme without causing associated skin changes. Application skins are the sources of the themes. Some skins may have no theme definitions. Enter one of: ▪ `dark` ▪ `medium` ▪ `light` No theme (none) is the default.
`Valign`	A means of expressing the vertical alignment of component content. Select one of: ▪ `middle`—content is aligned with the middle of the parent component ▪ `top`—content is aligned with the top of the parent component ▪ `bottom`—content is aligned with the bottom of the parent component ▪ `baseline`—content is aligned with the baseline of the parent component

See Also: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

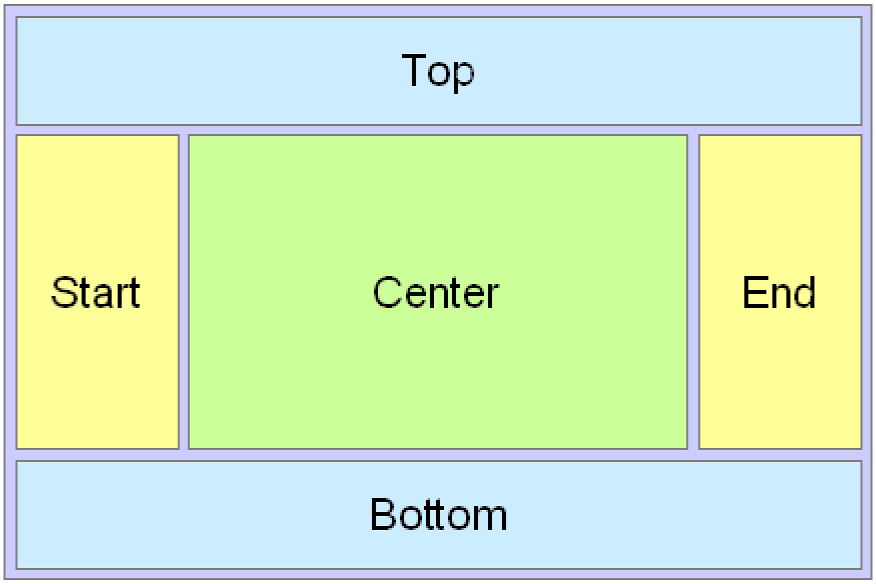
20.3 Setting panelStretchLayout Properties

See Also: For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

The `panelStretchLayout` component provides a means of arranging content in defined areas on a page. This component is useful for enabling content to stretch when the browser is resized.

The `panelStretchLayout` component's defined areas are called *facets* (Figure 20–2).

Figure 20–2 Facets of a panelStretchLayout Component



> **Note:** Figure 20–2 shows the facets when the language reading direction of the application is configured left-to-right. If instead the language direction is right-to-left, the start and end facets are switched.

Facets are controlled by the values you enter for its Display Options properties. When you set the height of the top and bottom facets, any contained components are stretched to fit the height. Similarly, when you set the width of the start and end facets, any components contained in those facets are stretched to that width. If no components are placed in a facet, then the facet does not take up any space.

Table 20–3 lists and describes the `panelStretchLayout` properties that appear on the **Display Options** tab in the Component Properties dialog.

> **Note:** All `panelStretchLayout` height and width facets take the value `auto`; however, using `auto` slows page performance.

Table 20–3 panelStretchLayout Display Options

Property	Description
`Bottom Height`	The height of the bottom facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on. Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect. If you want your component to take up 100% of a page, consider creating a page using the Stretch page style and adding the component to it.
`End Width`	The width of the end facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on.
`Short Desc`	A field for entering tooltip text for the component The tooltip appears when users roll their mouse pointers over the component.

Table 20–3 (Cont.) panelStretchLayout Display Options

Property	Description
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Source view. In Source view, right-click the hidden component, and select **Show Component** from the resulting context menu.
`Start Width`	The width of the start facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on.
`Theme`	The component style theme to apply to the children of this component. Use this property to change the theme without causing associated skin changes. Application skins are the sources of the themes. Some skins may have no themed definitions. Enter one of: ■ `dark` ■ `medium` ■ `light` No theme (none) is the default.
`Top Height`	The height of the top facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on. Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect. If you want your component to take up 100% of a page, consider creating a page using the Stretch page style and adding the component to it.

See Also: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

20.4 Setting panelTabbed Properties

See Also: For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

The `panelTabbed` layout component is the parent component of a tab or tab set. Its unique set of Display Options controls the behind-the-scenes method of tab creation, the source for the tabs dimensions, the tab's position, and the like.

Table 20–4 lists and describes Display Options associated with the `panelTabbed` layout component.

Table 20–4 panelTabbed Display Options

<table>
<tr><th>Property</th><th>Description</th></tr>
<tr><td><code>Child Creation</code></td><td>Specifies when tab content is rendered
<code>immediate</code>—All tab content is rendered as soon as the page is accessed.
<code>lazy</code>—Tab content is rendered when the tab is brought forward and is maintained in cache thereafter. This selection may enhance performance when content is fetched from cache.
<code>lazyUncached</code>—Tab content is rendered when the tab is likely to be brought forward and may be removed when the tab is not forward.</td></tr>
<tr><td><code>Dimensions From</code></td><td>Specifies the source of the dimensions applied to the component
<code>auto</code>—Either <code>parent</code> or <code>disclosedChild</code>, depending on the <code>panelTabbed</code> parent container. If the parent’s <code>Layout</code> attribute is set to <code>stretch</code>, then <code>parent</code> is used; otherwise <code>disclosedChild</code> is used.
<code>disclosedChild</code>—The dimension is taken from the currently active tab.
<code>parent</code>—(default) The dimension is taken from any values specified on the component; if no values are specified, then they are taken from the parent; if no values are specified on the parent, then they are taken from the skin.</td></tr>
<tr><td><code>Position</code></td><td>The position of the tab portion of the <code>panelTabbed</code>
<code>above</code>—(default) Tabs are shown above the tab content area.
<code>below</code>—Tabs are shown below the tab content area.
<code>both</code>—Tabs are shown above and below the tab content area.
In accessibility screen reader mode, the tab position is always <code>above</code>.</td></tr>
<tr><td><code>Short Desc</code></td><td>A field for entering tooltip text for the component

The tooltip appears when users roll their mouse pointers over the component.</td></tr>
<tr><td><code>Show Component</code></td><td>An option for hiding or showing the component on the page
Select to show the component
Deselect to hide the component
Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Source view. In Source view, right-click the hidden component, and select Show Component from the resulting context menu.</td></tr>
<tr><td><code>Tab Removal</code></td><td>Specifies whether some, none, or all tabs can be removed
<code>none</code>—Tabs cannot be deleted from the tab set
<code>all</code>—All tabs can be deleted from the tab set
<code>allExceptLast</code>—All but one the last tab can be deleted from the tab set

Note: The selection <code>allExceptLast</code> renders a Close icon on all except the last tab when users hover their mouse pointers over them. Additional coding is required on the <code>panelTabbed</code> component before the Close action can execute.

Developers must write code to respond to <code>ItemEvent</code> with a listener attached to the <code>showDetailItem</code>’s <code>itemListener</code> attribute. For example:<pre><af:panelTabbed tabRemoval="allExceptLast" id="pt1">
     <af:showDetailItem itemListener="myBean.onRemove" id="sdi1">
…</pre>Write the deletion code in a Java bean named <code>myBean</code> with the method <code>onRemove</code>.</td></tr>
</table>

See Also: For information about working with tabs, see Section 18.4.5, "Creating Layered Content Regions Using Tabs."

20.5 Setting showDetailFrame Properties

> **See Also:** For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

The `showDetailFrame` component renders a border, or chrome, around its child component along with a header that contains icons to enable users to perform some operations. These include a menu icon with options for moving the component, along with its content, to new positions on the page. Users can drag and drop `showDetailFrame` components from one `panelCustomizable` component to another on the page. Note that a `showDetailFrame` must be included inside a `panelCustomizable` component for it to be movable.

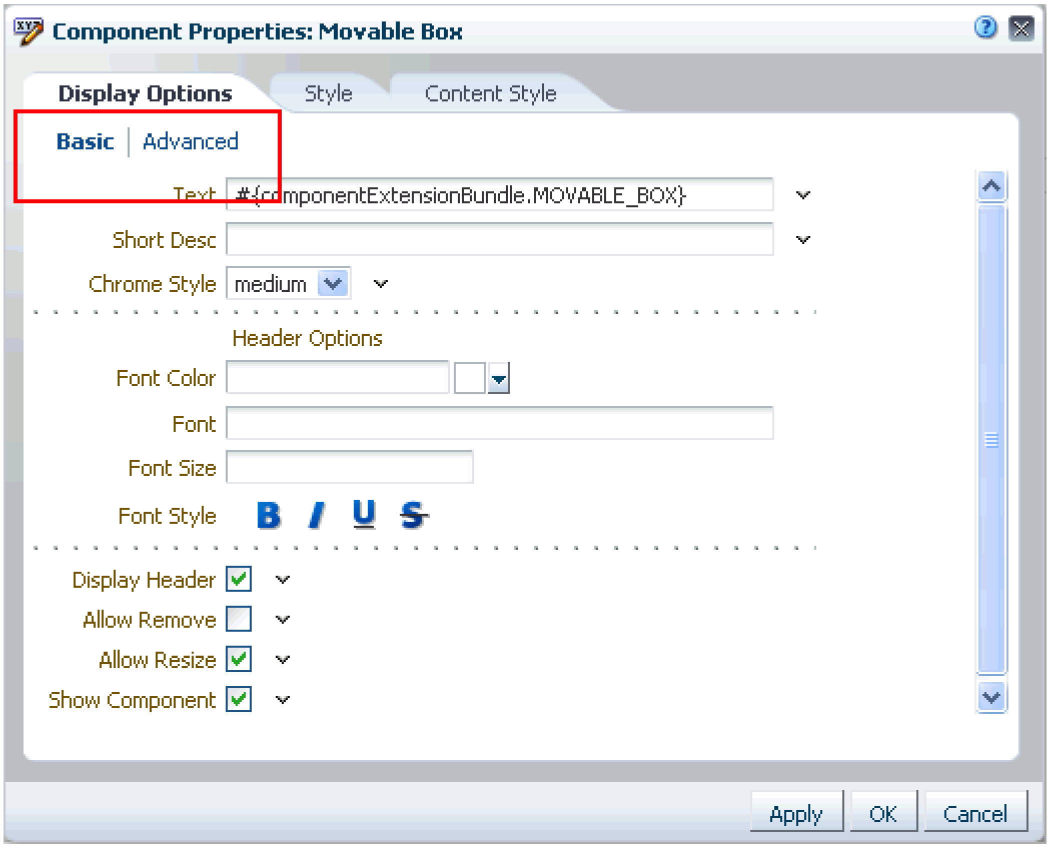
A `showDetailFrame` component enables the following actions:

- Collapse and expand the component
- Move content to different positions on the page
- Rearrange task flows using options on the **Actions** menu
- Edit and save text in a text editor.

The Display Options associated with `showDetailFrame` are common to many other types of components and are listed in Table 18–1, " Display Options Properties" with one exception: the `showDetailFrame` layout component does not expose the property `Allow Child Selection`.

Display Options for `showDetailFrame` are presented on two subtabs: **Basic** and **Advanced** (Figure 20–3).

Figure 20–3 Basic and Advanced Display Options



20.6 Setting sidebarItem Properties

See Also: For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

The `sidebarItem` component is a child component of `panelTabbed` (see Section 20.4). Unlike `panelTabbed`, which provides all of the properties associated with a tab set, sidebarItem provides all of the properties associated with a single tab.

Table 20–5 describes the `sidebarItem` properties that appear on the **Display Options** tab in the Component Properties dialog.

Table 20–5 sidebarItem Display Options

Property	Description
`Disclosed`	Indicates the current active tab, that is, the tab that is forward This value is set by default depending on whether the selected tab is forward. Changes you make to this value have no effect.
`Icon`	The URL to an image Use any Web-compatible image from any accessible location. That is, do not put in a path to an image on an external server that requires authentication. Enter a full URL or a URL that is relative to the application root. Use CSS formatting. For example, enter: `url(http://www.abc.com/image.jpg)`
`Inflexible Height`	The number of pixels the component will use when in a container that allocates size among multiple sibling items If the component requires more than the set limit, its sibling components are pushed to overflow menus. The default is 100 pixels. **Note:** This attribute is valid only when the parent container is a `panelAccordion` component.
`Short Desc`	A field for entering tooltip text for the component The tooltip appears when users roll their mouse pointers over the component.
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Source view. In Source view, right-click the hidden component, and select **Show Component** from the resulting context menu.
`Text`	The text to render on the tab The default value, an EL expression, evaluates to `New Tab`.

See Also: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

20.7 Setting spacer/Separator Properties

See Also: For information about accessing and setting properties for any component on a page, see Section 18.6.2, "Setting Properties on a Component."

The spacer component provides a means of incorporating some blank space in pages so that the page appears less cluttered than it would if all the components were presented immediately adjacent to each other.

Tip: In the Resource Catalog, this component is called a *Separator*.

Table 20–6 lists and describes the spacer properties that appear on the Display Options tab in the Component Properties dialog.

Table 20–6 spacer Display Options

Property	Description
`Height`	A field for specifying the spacer height Use any standard CSS unit of measure, such as pt, px, pc, li, and so on. Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect.
`Short Desc`	A field for entering tooltip text for the component The tooltip appears when users roll their mouse pointers over the component.
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again in Composer Source view. In Source view, right-click the hidden component, and select **Show Component** from the resulting context menu.
`Width`	A field for specifying spacer width Use any standard CSS unit of measure, such as pt, px, pc, li, %, and so on.

See Also: Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21

Adding Spaces Components to a Page or Page Template

Spaces components are prepackaged, fully functional application widgets or tags, such as menus and links, that are available for adding to pages and, most notably, to page templates. Each component provides a ready-to-go piece of the Oracle WebCenter Portal: Spaces user interface (UI).

As a Spaces administrator or space moderator, you can include one or multiple Spaces components in custom Resource Catalogs. In turn, authorized users can add them from the catalog to a page or page template.

> **See Also:** Many of the components discussed in the chapter are included out-of-the-box in the default Resource Catalogs provided for template development. For information about how to add resources to a custom Catalog, see Section 16.3.1.2, "Adding Resources."

This chapter provides an overview of available components, directs you to information about adding and removing components, and lists and describes component properties. It includes the following sections:

Audience

This chapter is intended for administrator-level users who are granted the permissions `Resource Catalogs: Create, Edit, and Delete Resource Catalogs` and, minimally, `Page Templates: Create Page Templates, Edit Page Templates`.

> **See Also:** For information about creating custom page templates through Oracle JDeveloper, see "Working with Page Templates," in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

21.1 Making Spaces Components Available

You may need to take some preliminary steps to ensure that Spaces components are available for placement on your pages and page templates. This section provides an overview of the preliminary steps that may be required before you can start working with these components.

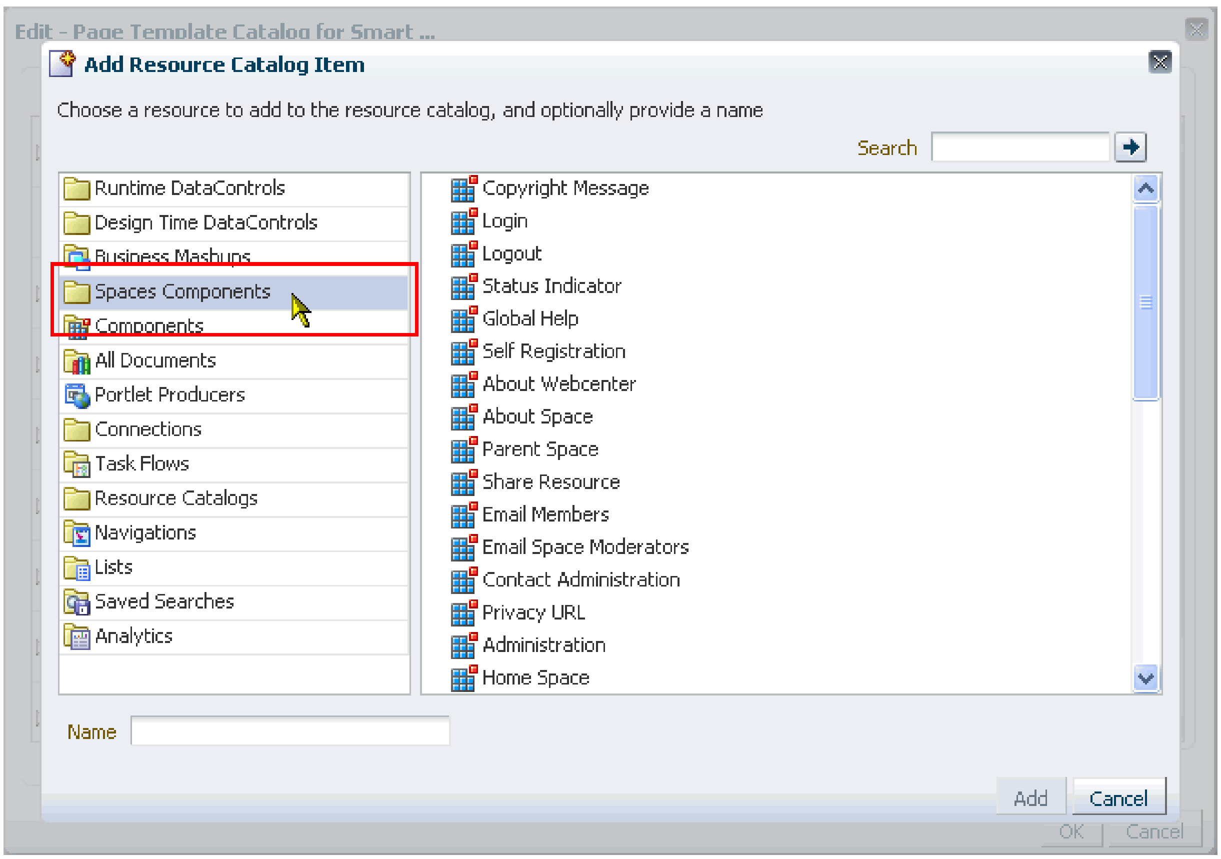
This section includes the following subsections:

- Section 21.1.1, "Adding Spaces Components to a Resource Catalog"
- Section 21.1.2, "Specifying the Resource Catalogs to Use for Space and Page Templates"
- Section 21.1.3, "Adding Spaces Components to a Page Template"
- Section 21.1.4, "Adding Spaces Components to a Page"

21.1.1 Adding Spaces Components to a Resource Catalog

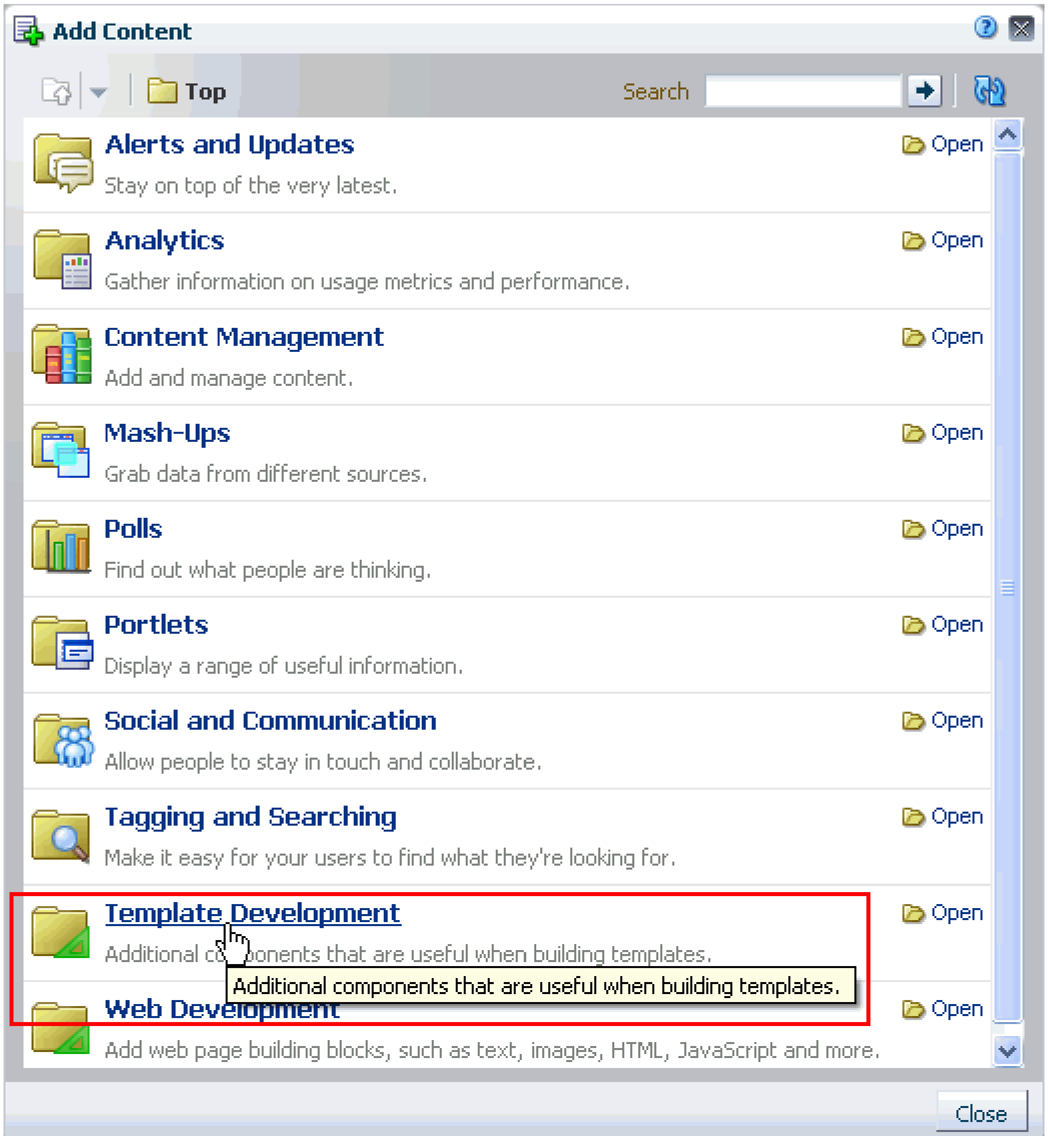
Spaces components are like any other resource you would add to a Resource Catalog. (For information about adding resources to the Resource Catalog, see Section 16.3.1.2, "Adding Resources.") In the library of components that provides resources for building a custom Resource Catalog, many of these components are grouped under the **Spaces Components** category (Figure 21–1).

Figure 21–1 Spaces Components in the Add Resource Catalog Item Dialog



The balance of these components are available by default out-of-the-box in the Default Page Template Catalog that is provided for page template development. In this default catalog, you can find Spaces components under the folder **Template Development**—though keep in mind that Resource Catalog folder names can be customized, and so may be renamed (Figure 21–2).

Figure 21–2 Template Development Folder in Resource Catalog

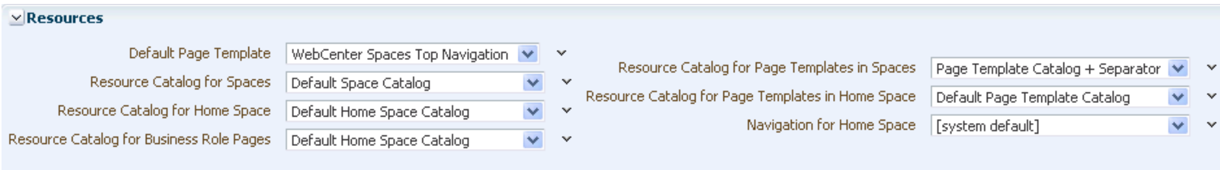


21.1.2 Specifying the Resource Catalogs to Use for Space and Page Templates

Application Administrators

As the application administrator, you can specify the default Resource Catalog to open under any circumstance: for a page, a space, a page template, a space template, and so on. The **General** subpage of the **Configuration** page under the **Administration** page provides a **Resources** section for setting these defaults (Figure 21–3).

Figure 21–3 Resources Section on the Application Administration General Page



Administrative settings apply to the entire application, so, barring lower-level overrides, the default catalog you select is the one all authorized users see when they add content. For more information, see Section 16.10.1, "Configuring the Application-Level Resource Catalog."

Space Moderators

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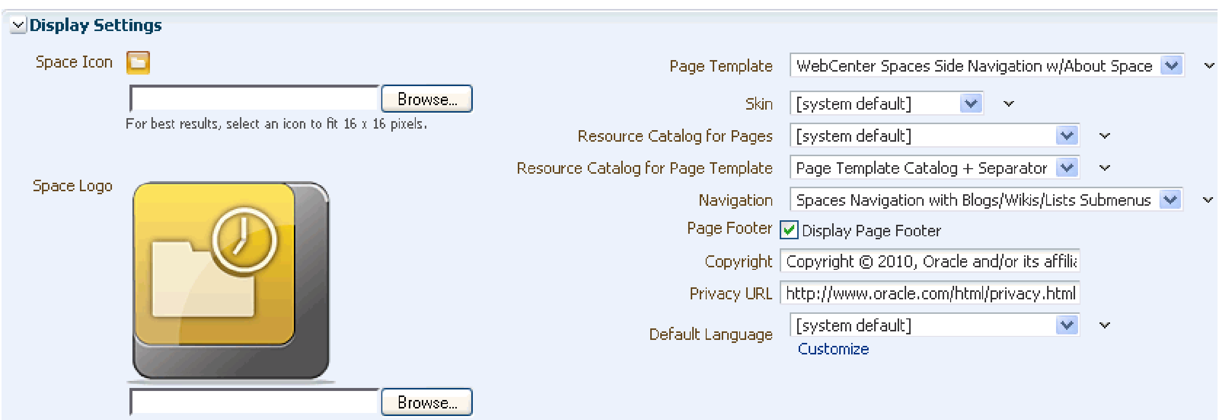
As the space moderator, you can specify the default Resource Catalogs to open when users click **Add Content** for a space page or page template. The **General** page under the **Settings** page provides a **Display Settings** section for setting these defaults (Figure 21–4).

Figure 21–4 Display Settings Section on the Space Settings General Page



Your selection applies only to the space on which it is set. The space-level setting overrides the same setting specified by the application administrator at the application level. For more information, see Section 16.10.2, "Configuring the Space-Level Resource Catalog."

21.1.3 Adding Spaces Components to a Page Template

As with any other component available in a Resource Catalog, you can add Spaces components from the catalog to a page template. For information about adding resources to a page template, see Section 13.3.1, "Editing a Page Template in Composer."

21.1.4 Adding Spaces Components to a Page

Provided Spaces components are available in the Resource Catalog, you can add them to a page in a space or the Home space just as you would any other component. For more information, see Section 18.5, "Adding a Component to a Page."

21.2 Working with Spaces Components

Spaces components have associated properties that you can use to refine the appearance and behavior of a component instance.

This section provides information about the properties associated with each component, and describes each component. It includes the following subsections:

- Section 21.2.1, "Accessing Spaces Component Properties"
- Table 21–1 links to the remaining subsections in this section. It lists all available Spaces components and links to more information about each one. Additionally, it provides the XML code for placing the component in a Resource Catalog in an application built using WebCenter Portal: Framework and the tag to use to place the component on a `.jspx` page.

Table 21–1 Spaces Components

A to Create Sp	Create Su to I	J to P	R to U
About Space	Create Subspace	Login	RSS
About WebCenter	Current User Profile	Logout	Search
Add to Favorites	Edit Page	Mail Space Members	Self Registration
Administration	Favorites Menu	Mail Space Moderators	Share Resource
Change Membership	Global Help	Manage Pages	Spaces Switcher
Contact Administration	Home Space	Page Links	Status Indicator
Copyright Message	Invite People as Connection	Parent Space	Subscription Preferences
Create Page	Join Space	Print Preview	Tags
Create Space	Leave Space	Privacy URL	User Preferences

21.2.1 Accessing Spaces Component Properties

You can access Spaces component properties in page edit mode Source view.

Note: When you enter most types of property values in the Component Properties dialog and then click **Apply**, the dialog remains open. With values other than expected value types, the dialog closes, and the page is refreshed to reflect the new value. For example, if a component takes a `java.util.ArrayList` of `java.awt.Color` classes, then the Component Properties dialog closes and Composer does a full-page-refresh.

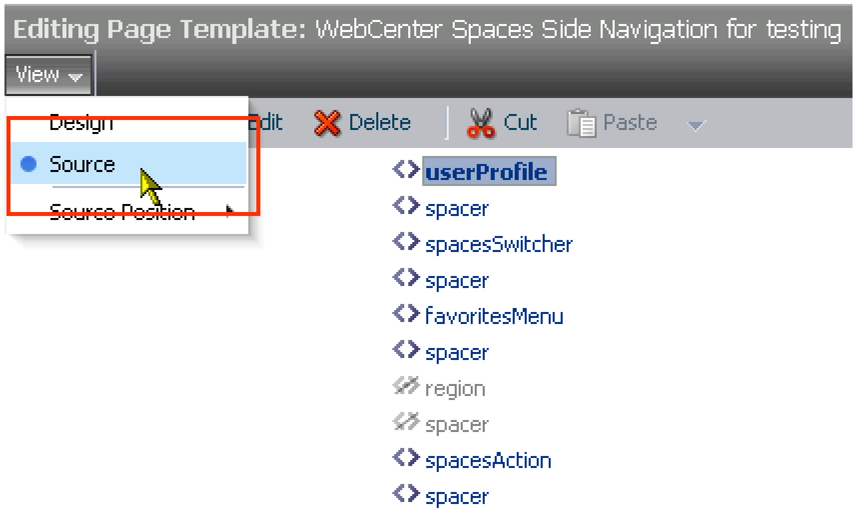
To access Spaces component properties:

1. Edit a template.

   See Also: For more information, see Section 11.3.3, "Editing a Resource by Using the Edit Dialog."

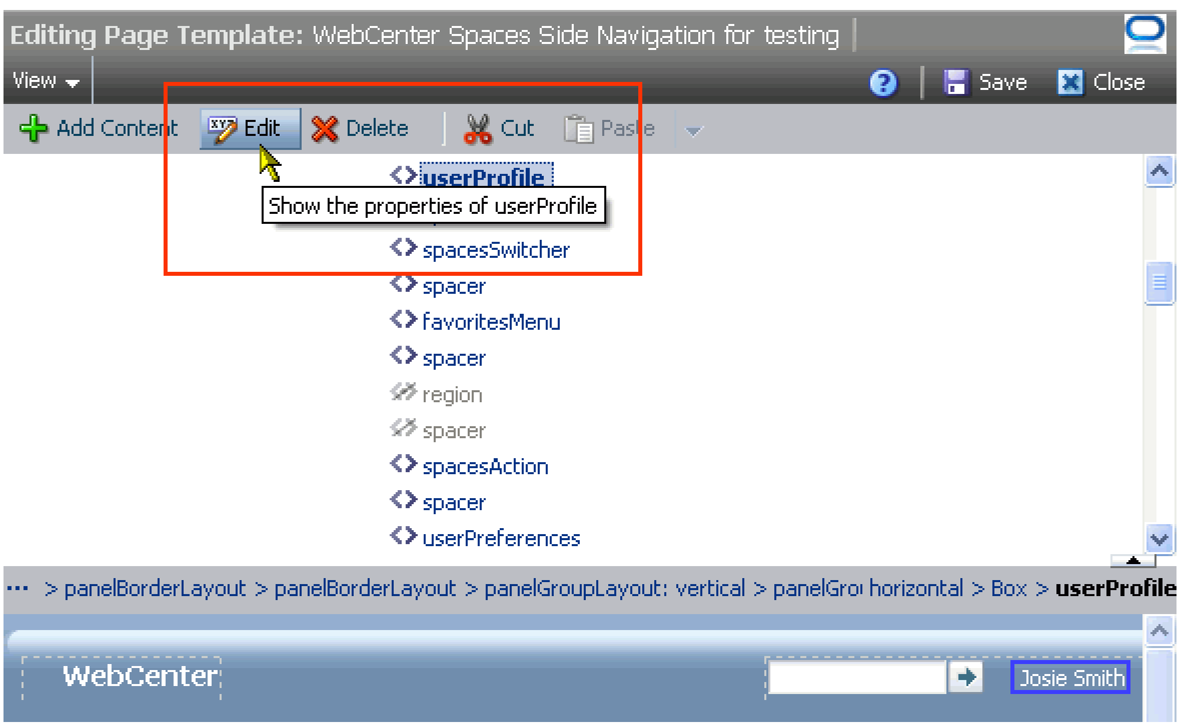
2. In edit mode, select **Source** from the **View** menu (Figure 21–5).

Figure 21–5 Source Option on View Menu



3. Select the component on the page, and click **Edit** to open the Component Properties dialog (Figure 21–6).

Figure 21–6 Show the Properties of userProfile Icon



4. Revise property values as required.

Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1. For more information about ELs in Spaces, see Appendix B, "Expression Language (EL) Expressions."

EL validation is not performed on non-generic display options.

---

5. Click **Save** and then **Close** to exit edit mode.

   Tip: You can try out a change by clicking **Apply** first and observing the result on the page.

21.2.2 About Space

The About Space component is a link that opens a dialog with information about the current space (Figure 21–7).

Figure 21–7 About Space Component

Every space has associated information, called *metadata*. space metadata includes such information as display name, internal identification (GUID), description, current user membership role, user name of the creator, date created, and direct URL. Users click the **About Space** link to access this information.

See Also: For information about the About Space dialog, see Section 51.6, "Viewing Information About a Space."

This section lists and describes the Display Options associated with the About Space component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.2.1, "About Space Component Display Options"
- Section 21.2.2.2, "About Space Component Tag and XML"

21.2.2.1 About Space Component Display Options

Table 21–2 lists and describes the Display Options properties associated with the About Space component.

See Also: The About Space component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–2 About Space Component Display Options

Property	Description
`Depressed Icon`	A URL or relative path to an icon that appears when the component is clicked Use any Web-compatible image from any accessible location. That is, do not put in a path to an image on an external server that requires authentication. Enter a full URL or a path that is relative to the application root.
`Disabled Icon`	A URL or relative path to an image that appears when the component is disabled See `Depressed Icon` for more information.
`Display Type`	The render mode of the component: ■ `link`—Show the component as a link ■ `button`—Show the component as a command button
`Hover Icon`	A URL or relative path to an icon that appears when users hover their mouse pointers over the component See `Depressed Icon` for more information.
`Icon`	A URL or relative path to an icon to represent the active component See `Depressed Icon` for more information.
`Icon Position`	A selection of options for placement of the link's associated icon: ■ `leading`—The icon is positioned at the start of its associated text ■ `trailing`—The icon is positioned at the end of its associated text
`Scope Name`	The name of the space to describe in the dialog The default value is `null` (`defaultScope`), which provides information about the current space. You can also enter a space name in lieu of the default. **Note:** If you enter a space name, be sure to enter the space's *internal* name. The space internal name is the name specified by the **Space URL** on the **General Settings** page of a space's administration settings.
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component
`Text`	Display text for the component The default is `About Space`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.TITLE_SHOW_GROUP_SPACE_INFO}`.
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again through Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

21.2.2.2 About Space Component Tag and XML

The following tag is used to render the About Space component on a `.jspx` page:

```
<wcdc:aboutSpaceLink id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     text="#{uib_o_w_w_r_WebCenter.TITLE_SHOW_GROUP_SPACE_INFO}"/>
```

Example 21–1 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–1 XML Code for the About Space Component

```
<tag>
     <name>aboutSpaceLink</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          AboutSpaceLinkTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>customizationId</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>depressedIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabled</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabledIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>displayType</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>hoverIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>icon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
```

```
            <name>iconPosition</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>inlineStyle</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>shortDesc</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>scopeName</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>styleClass</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.3 About WebCenter

The About WebCenter component is a link that opens a dialog with application version and copyright information (Figure 21–8).

Figure 21–8 About WebCenter Component

This section lists and describes the Display Options associated with the About WebCenter component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.3.1, "About WebCenter Component Display Options"
- Section 21.2.3.2, "About WebCenter Component Tag and XML"

21.2.3.1 About WebCenter Component Display Options

The About WebCenter component shares many of the same Display Options properties with the About Space component. Table 21–3 lists and describes the Display Options properties associated with the About WebCenter component that are not included in Table 21–2, " About Space Component Display Options" or that have different default values.

> **See Also:** The About WebCenter component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–3 About WebCenter Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Display WebCenter Spaces Information`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ABOUT_DESC}`.
`Text`	Display text for the component The default is About Spaces. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ABOUT}`.
`Type`	The component type The default is `aboutWebcenter`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.3.2 About WebCenter Component Tag and XML

The following tag is used to render the About WebCenter component on a `.jspx` page:

```
<wcdc:spacesAction id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     type="aboutWebcenter" displayType="link"
     text="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ABOUT}"
     shortDesc="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ABOUT_DESC}"
     inlineStyle="white-space:nowrap;"/>
```

Example 21–2 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–2 XML Code for the About WebCenter Component

```
<tag>
     <name>spacesAction</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.SpacesActionTag
          </tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
```

```
</attribute>
<attribute>
     <name>binding</name>
     <deferred-value/>
</attribute>
<attribute>
     <name>clientComponent</name>
     <deferred-value>
          <type>boolean</type>
     </deferred-value>
</attribute>
<attribute>
     <name>customizationId</name>
     <deferred-value/>
</attribute>
<attribute>
     <name>depressedIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabled</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabledIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>displayType</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>hoverIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>icon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>iconPosition</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>inlineStyle</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>shortDesc</name>
     <required>false</required>
     <deferred-value/>
</attribute>
```

```
    <attribute>
        <name>styleClass</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>text</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>type</name>
        <required>true</required>
        <deferred-value/>
    </attribute>
</tag>
```

21.2.4 Add to Favorites

The Add to Favorites component is a link users can click to add an application object to their Spaces Favorites (Figure 21–9).

Figure 21–9 Add to Favorites Component

For example, users can use this component to add a page, wiki, blog, list, event, task, template, and so on.

This section lists and describes the Display Options associated with the Add to Favorites component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.4.1, "Add to Favorites Component Display Options"
- Section 21.2.4.2, "Add to Favorites Component Tag and XML"

21.2.4.1 Add to Favorites Component Display Options

The Add to Favorites component shares many of the same Display Options properties with the About Space component. Table 21–4 lists and describes the properties for which Add to Favorites has different default values than those described in Table 21–2, " About Space Component Display Options".

> **See Also:** The Add to Favorites component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–4 Add to Favorites Component Display Options

Property	Description
`Favorite Title`	The display name of the application object to add as a favorite
`Favorite URL`	The URL to use to navigate to the application object
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Add To Favorites`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.TITLE_ADD_FAVORITE_DIALOG}`.
`Text`	Display text for the component. The default is Add to Favorites. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.TITLE_ADD_FAVORITE_DIALOG}`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.4.2 Add to Favorites Component Tag and XML

The following tag is used to render the Add to Favorites component on a `.jspx` page:

```
<wcdc:addToFavorites id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_w_r_WebCenter.TITLE_ADD_FAVORITE_DIALOG}"
     shortDesc="#{uib_o_w_w_r_WebCenter.TITLE_ADD_FAVORITE_DIALOG}"/>
```

Example 21–3 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–3 XML Code for the Add to Favorites Component

```
<tag>
     <name>addToFavorites</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          AddToFavoritesTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
```

```
<attribute>
     <name>customizationId</name>
     <deferred-value/>
</attribute>
<attribute>
     <name>favoriteTitle</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>favoriteURL</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>depressedIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabled</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabledIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>displayType</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>hoverIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>icon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>iconPosition</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>inlineStyle</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>shortDesc</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
```

```
            <name>styleClass</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>__taskFlowId</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.5 Administration

The Administration component is a navigation link that opens the **Administration** page (Figure 21–10).

Figure 21–10 Administration Component

Only application administrators can see this link once it is placed on a page or page template.

> **See Also:** For information about Spaces administration, see Part I through Part VIII in this guide, and see the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

This section lists and describes the Display Options associated with the Administration component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.5.1, "Administration Component Display Options"
- Section 21.2.5.2, "Administration Component Tag and XML"

21.2.5.1 Administration Component Display Options

The Administration component shares many of the same Display Options properties associated with the About Space component. Table 21–5 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Administration component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–5 Administration Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Open WebCenter administration pages`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ADMINISTRATION_DESC}`.
`Text`	Display text for the component The default is `Administration`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ADMINISTRATION}`.
`Type`	The component type The default is `administration`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.5.2 Administration Component Tag and XML

The following tag is used to render the Administration component on a `.jspx` page:

```
<wcdc:spacesAction id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     type="administration" displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ADMINISTRATION}"
     shortDesc="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ADMINISTRATION_DESC}"/>
```

In the Resource Catalog, the Administration component uses the same XML code as the About WebCenter component. For more information, see Section 21.2.3.2, "About WebCenter Component Tag and XML."

21.2.6 Change Membership

The Change Membership component is a link users can click to request a change to their space role (Figure 21–11).

Figure 21–11 Change Membership Component

See Also: For information about changing a space membership, see Section 51.12, "Changing Your Role in a Space."

This section lists and describes the Display Options associated with the Change Membership component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.6.1, "Change Membership Component Display Options"

- Section 21.2.6.2, "Change Membership Component Tag and XML"

21.2.6.1 Change Membership Component Display Options

The Change Membership component shares many of the same properties with the About Space component. Table 21–6 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Change Membership component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–6 Change Membership Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default value is `Change Membership`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.COMMUNITY_CHANGE_MEMBERSHIP}`.
`Text`	Display text for the component The default is `Change Membership`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.COMMUNITY_CHANGE_MEMBERSHIP}`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.6.2 Change Membership Component Tag and XML

The following tag is used to render the Change Membership component on a `.jspx` page:

```
<wcdc:changeSpaceMembership id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     text="#{uib_o_w_s_r_Spaces.COMMUNITY_CHANGE_MEMBERSHIP}"
     shortDesc="#{uib_o_w_s_r_Spaces.COMMUNITY_CHANGE_MEMBERSHIP}"
     inlineStyle="white-space:nowrap;"/>
```

Example 21–4 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–4 XML Code for the Change Membership Component

```
<tag>
     <name>changeSpaceMembership</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          ChangeSpaceMembershipTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
```

```
</attribute>
<attribute>
     <name>binding</name>
     <deferred-value/>
</attribute>
<attribute>
     <name>clientComponent</name>
     <deferred-value>
          <type>boolean</type>
     </deferred-value>
</attribute>
<attribute>
     <name>customizationId</name>
     <deferred-value/>
</attribute>
<attribute>
     <name>depressedIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabled</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabledIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>displayType</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>hoverIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>icon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>iconPosition</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>inlineStyle</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>shortDesc</name>
     <required>false</required>
     <deferred-value/>
</attribute>
```

```
        <attribute>
            <name>scopeName</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>styleClass</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.7 Contact Administration

The Contact Administration component is a link that opens a simple popup window in which users can enter and send a workflow notification to members of the `Administrators` role (Figure 21–12).

Note: The Contact Administration component requires a connection to the Oracle BPEL Server included with Oracle SOA Suite. For more information, see the "Specifying the BPEL Server Hosting Spaces Workflows" section in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Figure 21–12 Contact Administration Component

This section lists and describes the Display Options associated with the Contact Administration component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.7.1, "Contact Administration Component Display Options"
- Section 21.2.7.2, "Contact Administration Component Tag and XML"

21.2.7.1 Contact Administration Component Display Options

The Contact Administrator component shares many of the same properties with the About Space component. Table 21–7 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

See Also: The Contact Administration component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–7 Contact Administrator Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default value is `Contact the Administrator`. The default value is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.CONTACT_ADMINISTRATOR_DESC}`.
`Text`	Display text for the component The default is `Administrator`. The default value is represented by the EL expression `#{uib_o_w_w_r_WebCenter.CONTACT_ADMINISTRATOR}`.
`Type`	The component type The default is `contactAdmin`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.7.2 Contact Administration Component Tag and XML

The following tag is used to render the Contact Administration component on a `.jspx` page:

```
<wcdc:spacesAction id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     type="contactAdmin" displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_w_r_WebCenter.CONTACT_ADMINISTRATOR}"
     shortDesc="#{uib_o_w_w_r_WebCenter.CONTACT_ADMINISTRATOR_DESC}"/>
```

In the Resource Catalog, the Contact Administration component uses the same XML code as the About WebCenter component. For more information, see Section 21.2.3.2, "About WebCenter Component Tag and XML."

21.2.8 Copyright Message

The Copyright Message component renders the following text string:

```
Copyright © 2010, Oracle and/or its affiliates. All rights reserved.
```

Figure 21–13 shows an example of the Copyright Message component rendered within the user interface.

Figure 21–13 Copyright Message Component

This section lists and describes the Display Options associated with the Copyright component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.8.1, "Copyright Message Component Display Options"

- Section 21.2.8.2, "Copyright Message Component Tag and XML"

21.2.8.1 Copyright Message Component Display Options

The Copyright Message component shares many of the same properties with the About Space component. Table 21–8 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Copyright Message component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–8 Copyright Message Component Display Options

Property	Description
`Inline Style`	A field for entering CSS style values to define the appearance of the component The default inline style is `white-space:nowrap;`.
`Type`	The component type The default is `copyrightMessage`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.8.2 Copyright Message Component Tag and XML

The following tag is used to render the Copyright Message component on a `.jspx` page:

```
wcdc:outputText id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     type="copyrightMessage" inlineStyle="white-space:nowrap;"/>
```

Example 21–5 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–5 XML Code for the Copyright Message Component

```
<tag>
     <name>outputText</name>
     <tag-class>oracle.webcenter.webcenterapp.spacescomponents.internal.view.
          taglib.OutputTextTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
          <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
```

```
        </attribute>
        <attribute>
            <name>clientComponent</name>
            <deferred-value>
                <type>boolean</type>
            </deferred-value>
        </attribute>
        <attribute>
            <name>customizationId</name>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>type</name>
            <required>true</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>inlineStyle</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>shortDesc</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.9 Create Page

The Create Page component is an icon and a link that users click to open the Create Page dialog (Figure 21–14).

Figure 21–14 Create Page Component

See Also: For information about creating pages, see Chapter 17.2, "Creating a Page."

This component is useful for providing an on-the-spot means of creating pages in the current space or Home space. Only authorized users can see and use the **Create Page** link.

This section lists and describes the Display Options associated with the Create Page component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.9.1, "Create Page Component Display Options"
- Section 21.2.9.2, "Create Page Component Tag and XML"

21.2.9.1 Create Page Component Display Options

The Create Page component shares many of the same properties with the About Space component. Table 21–9 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Create Page component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–9 Create Page Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Create a new page`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.TOOLTIP_MANAGE_PAGES_CREATE_PAGE}`.
`Task Flow Id`	The component's unique identifier, for example `wcdc4082953494`
`Text`	Display text for the component The default is `Create Page`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_CREATE_PAGE}`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.9.2 Create Page Component Tag and XML

The following tag is used to render the Create Page component on a `.jspx` page:

```
<wcdc:createPage id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_w_r_WebCenter.LABEL_CREATE_PAGE}"
     shortDesc="#{uib_o_w_w_r_WebCenter.TOOLTIP_MANAGE_PAGES_CREATE_PAGE}" />
```

Example 21–6 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–6 XML Code for the Create Page Component

```
<tag>
     <name>createPage</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          CreatePageTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
```

```
        <name>binding</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>clientComponent</name>
        <deferred-value>
            <type>boolean</type>
        </deferred-value>
    </attribute>
    <attribute>
        <name>customizationId</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>depressedIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabled</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabledIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>displayType</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>hoverIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>icon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>iconPosition</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>inlineStyle</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>shortDesc</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>styleClass</name>
```

```
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>__taskFlowId</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.10 Create Space

The Create Space component is a link users click to open the Create a Space wizard (Figure 21–15).

Figure 21–15 Create Space Component

This component is useful for providing an on-the-spot means of creating a space. Only authorized users can see and use the **Create Space** link.

> **See Also:** For information about creating spaces, see Part XI, "Planning and Building a Space".

This section lists and describes the Display Options associated with the Create Space component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.10.1, "Create Space Component Display Options"
- Section 21.2.10.2, "Create Space Component Tag and XML"

21.2.10.1 Create Space Component Display Options

The Create Space component shares many of the same properties with the About Space component. Table 21–10 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Create Space component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–10 Create Space Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Create a Space`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.HEADING_CREATE_COMMUNITY}`.
`Text`	Display text for the component The default is `Create a Space`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.HEADING_CREATE_COMMUNITY}`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.10.2 Create Space Component Tag and XML

The following tag is used to render the Create Space component on a `.jspx` page:

```
<wcdc:createSpace id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_s_r_Spaces.HEADING_CREATE_COMMUNITY}"
     shortDesc="#{uib_o_w_s_r_Spaces.HEADING_CREATE_COMMUNITY}"/>
```

Example 21–7 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–7 XML Code for the Create Space Component

```
<tag>
     <name>createSpace</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          CreateSpaceTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>customizationId</name>
          <deferred-value/>
```

```
</attribute>
<attribute>
     <name>depressedIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabled</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabledIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>displayType</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>hoverIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>icon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>iconPosition</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>inlineStyle</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>shortDesc</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>styleClass</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>__taskFlowId</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>text</name>
     <required>false</required>
     <deferred-value/>
```

```
    </attribute>
</tag>
```

21.2.11 Create Subspace

The Create Subspace component is a link that opens a dialog for creating a subspace (Figure 21–16).

Figure 21–16 Create Subspace Component

A subspace is a space that is hierarchically lower than its parent space. The Create Subspace component is useful for providing an on-the-spot means of creating subspaces in the current space. Only authorized users can see and use the **Create Subspace** link.

> **See Also:** For information about creating a subspace, see Section 56.3, "Creating a Subspace."

This section lists and describes the Display Options associated with the Create Subspace component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.11.1, "Create Subspace Component Display Options"
- Section 21.2.11.2, "Create Subspace Component Tag and XML"

21.2.11.1 Create Subspace Component Display Options

The Create Subspace component shares many of the same properties with the About Space component. Table 21–11 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Create Subspace component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–11 Create Subspace Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Create a Subspace`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.HEADING_CREATE_SUB_COMMUNITY}`.
`Text`	Display text for the component The default is `Create a Subspace`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.HEADING_CREATE_SUB_COMMUNITY}`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.11.2 Create Subspace Component Tag and XML

The following tag is used to render the Create Subspace component on a `.jspx` page:

```
<wcdc:createSubSpace id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_s_r_Spaces.HEADING_CREATE_SUB_COMMUNITY}"
     shortDesc="#{uib_o_w_s_r_Spaces.HEADING_CREATE_SUB_COMMUNITY}"/>
```

Example 21–8 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–8 XML Code for the Create Subspace Component

```
<tag>
     <name>createSubSpace</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          CreateSubspaceTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>customizationId</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>depressedIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabled</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabledIcon</name>
```

```
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>displayType</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>hoverIcon</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>icon</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>iconPosition</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>inlineStyle</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>shortDesc</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>scopeName</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>styleClass</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>__taskFlowId</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.12 Current User Profile

The Current User Profile component is the name of the current user linked to the user's **Profile** page (Figure 21–17).

Figure 21–17 Current User Profile Component

Users click the name to open a Profile page with the user's profile details.

> **See Also:** The Profile page is a customizable business role page that appears in all authenticated users' Home spaces. For more information about business role pages, see Section 7.1, "Working with Business Role Pages." For more information about Profiles, see Chapter 33, "Managing Your Profile."

This section lists and describes the Display Options associated with the Current User Profile component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.12.1, "Current User Profile Component Display Options"
- Section 21.2.12.2, "Current User Profile Component Tag and XML"

21.2.12.1 Current User Profile Component Display Options

The Current User Profile component shares many of the same properties with the About Space component. Table 21–12 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Current User Profile component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–12 Current User Profile Component Display Options

Property	Description
`Short Desc`	A field for entering a tooltip to display when users hover their mouse pointers over the component The default is the current user's name. The default is the rendered value of the EL expression `#{security.userDisplayName}`.
`Text`	Display text for the component The default is the current user's name. The default is the rendered value of the EL expression `#{security.userDisplayName}`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.12.2 Current User Profile Component Tag and XML

The following tag is used to render the Current User Profile component on a `.jspx` page:

```
<wcdc:userProfile id="#"
```

```
xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
displayType="link" inlineStyle="white-space:nowrap"
text="#{security.userDisplayName}" shortDesc="#{security.userDisplayName}" />
```

Example 21–9 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–9 XML Code for the Current User Profile Component

```
<tag>
    <name>userProfile</name>
    <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
        UserProfileTag</tag-class>
    <body-content>empty</body-content>
    <attribute>
        <name>id</name>
    </attribute>
    <attribute>
        <name>rendered</name>
        <deferred-value>
            <type>boolean</type>
        </deferred-value>
    </attribute>
    <attribute>
        <name>binding</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>clientComponent</name>
        <deferred-value>
            <type>boolean</type>
        </deferred-value>
    </attribute>
    <attribute>
        <name>customizationId</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>depressedIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabled</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabledIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>displayType</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>hoverIcon</name>
        <required>false</required>
```

```
            <deferred-value/>
        </attribute>
        <attribute>
            <name>icon</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>iconPosition</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>inlineStyle</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>shortDesc</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>styleClass</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
    </tag>
```

21.2.13 Edit Page

The Edit Page component is a link that users click to take the current page into page edit mode (Figure 21–18).

Figure 21–18 Edit Page Component

Only users who are authorized to edit the current page can see and use the **Edit Page** link.

> **See Also:** For information about editing pages, see Chapter 18, "Editing a Page."

This section lists and describes the Display Options associated with the Edit Page component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.13.1, "Edit Page Component Display Options"
- Section 21.2.13.2, "Edit Page Component Tag and XML"

21.2.13.1 Edit Page Component Display Options

The Edit Page component shares many of the same properties with the About Space component. Table 21–13 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Edit Page component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–13 Edit Page Component Display Options

Property	Description
`Short Desc`	A field for entering a tooltip to display when users hover their mouse pointers over the component The default is `Edit the Page`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.PAGE_CONTEXT_EDIT_PAGE_DESC}`.
`Task Flow Id`	The component's unique identifier, for example `wcdc4082953494`
`Text`	Display text for the component The default is `Edit Page`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.PAGE_CONTEXT_EDIT_PAGE}`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.13.2 Edit Page Component Tag and XML

The following tag is used to render the Edit Page component on a `.jspx` page:

```
<wcdc:editPage id="#" xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_w_r_WebCenter.PAGE_CONTEXT_EDIT_PAGE}"
     shortDesc="#{uib_o_w_w_r_WebCenter.PAGE_CONTEXT_EDIT_PAGE_DESC}" />
```

Example 21–10 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–10 XML Code for the Edit Page Component

```
<tag>
     <name>editPage</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          EditPageTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
```

```
</attribute>
<attribute>
     <name>binding</name>
     <deferred-value/>
</attribute>
<attribute>
     <name>clientComponent</name>
     <deferred-value>
          <type>boolean</type>
     </deferred-value>
</attribute>
<attribute>
     <name>customizationId</name>
     <deferred-value/>
</attribute>
<attribute>
     <name>depressedIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabled</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabledIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>displayType</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>hoverIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>icon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>iconPosition</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>inlineStyle</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>shortDesc</name>
     <required>false</required>
     <deferred-value/>
</attribute>
```

```
        <attribute>
            <name>styleClass</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>__taskFlowId</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.14 Favorites Menu

The Favorites Menu component is a menu with options for opening the Add to Favorites and Manage Favorites dialogs (Figure 21–19).

Figure 21–19 Favorites Menu Component

> **See Also:** For information about Favorites in Spaces, see Chapter 40, "Creating and Managing Your Personal Favorites."

This section lists and describes the Display Options associated with the Favorites Menu component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.14.1, "Favorites Menu Component Display Options"
- Section 21.2.14.2, "Favorites Menu Component Tag and XML"

21.2.14.1 Favorites Menu Component Display Options

The Favorites Menu component shares many of the same properties with the About Space component. Table 21–14 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Favorites Menu component has Style properties you can use to change the component’s look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–14 Favorites Menu Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Manage your favorites`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_FAVORITES_DESC}`.
`Task Flow Id`	The component's unique identifier, for example `wcdc4082953494`
`Text`	Display text for the component The default is `Manage your favorites`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_FAVORITES_DESC}`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.14.2 Favorites Menu Component Tag and XML

The following tag is used to render the Favorites Menu component on a `.jspx` page:

```
<wcdc:favoritesMenu id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     displayType="link" inlineStyle="white-space:nowrap;"
     styleClass="WCLinkMenu" text="#{uib_o_w_w_r_WebCenter.LABEL_FAVORITES_DESC}"
     shortDesc="#{uib_o_w_w_r_WebCenter.LABEL_FAVORITES_DESC}" />
```

Example 21–11 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–11 XML Code for the Favorites Menu Component

```
<tag>
     <name>favoritesMenu</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          FavoritesMenuTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>customizationId</name>
```

```
          <deferred-value/>
     </attribute>
     <attribute>
          <name>depressedIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabled</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabledIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>displayType</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>hoverIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>icon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>iconPosition</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>inlineStyle</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>shortDesc</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>styleClass</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>__taskFlowId</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>text</name>
          <required>false</required>
```

```
        <deferred-value/>
    </attribute>
</tag>
```

21.2.15 Global Help

The Global Help component is a link that users click to access Spaces online Help topics (Figure 21–20).

Figure 21–20 Global Help Component

> **See Also:** For more information, see Section 32.9, "Accessing WebCenter Portal: Spaces Online Help."

This section lists and describes the Display Options associated with the Global Help component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.15.1, "Global Help Component Display Options"
- Section 21.2.15.2, "Global Help Component Tag and XML"

21.2.15.1 Global Help Component Display Options

The Global Help component shares many of the same properties with the About Space component. Table 21–15 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Global Help component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–15 Global Help Component Display Options

Property	Description
`Short Desc`	A field for entering a tooltip to display when users hover their mouse pointers over the component The default is `Help for WebCenter Spaces`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_HELP_DESC}`.
`Text`	The component label The default is `Help`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_HELP}`.
`Type`	The component type The default is `globalHelp`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.15.2 Global Help Component Tag and XML

The following tag is used to render the Global Help component on a `.jspx` page:

```
<wcdc:spacesAction id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     type="globalHelp" displayType="link"
     text="#{uib_o_w_w_r_WebCenter.LABEL_HELP}"
     shortDesc="#{uib_o_w_w_r_WebCenter.LABEL_HELP_DESC}"
     inlineStyle="white-space:nowrap"/>
```

In the Resource Catalog, the Global Help component uses the same XML code as the About WebCenter component. For more information, see Section 21.2.3.2, "About WebCenter Component Tag and XML."

21.2.16 Home Space

The Home Space component is a link that users click to navigate to their view of the Home space (Figure 21–21).

Figure 21–21 Home Space Component

> **See Also:** For information about Home spaces, see Chapter 32, "Exploring the Home Space."

This section lists and describes the Display Options associated with the Home Space component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.16.1, "Home Space Component Display Options"
- Section 21.2.16.2, "Home Space Component Tag and XML"

21.2.16.1 Home Space Component Display Options

The Home Space component shares many of the same properties with the About Space component. Table 21–16 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Home Space component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–16 Home Space Component Display Options

Property	Description
`Text`	Display text for the component The default is `Personal Space`.
`Type`	The component type The default is `personalSpace`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.16.2 Home Space Component Tag and XML

The following tag is used to render the Home Space component on a `.jspx` page:

```
<wcdc:spacesAction id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     type="personalSpace" displayType="link" text="Personal Space"
     inlineStyle="white-space:nowrap;"/>
```

In the Resource Catalog, the Home Space component uses the same XML code as the About WebCenter component. For more information, see Section 21.2.3.2, "About WebCenter Component Tag and XML."

21.2.17 Invite People as Connection

The Invite People as Connection component is a link that opens a page where users can invite other users to connect (Figure 21–22).

Figure 21–22 Invite People as Connection Component

> **See Also:** For information about Connections, see Chapter 34, "Creating Your Social Network."

This section lists and describes the Display Options associated with the Invite People as Connection component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.17.1, "Invite People as Connection Component Display Options"
- Section 21.2.17.2, "Invite People as Connection Component Tag and XML"

21.2.17.1 Invite People as Connection Component Display Options

The Invite People as Connection component shares many of the same properties with the About Space component. Table 21–17 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

See Also: The Invite People as Connection component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–17 Invite People as Connection Display Options

Property	Description
`Short Desc`	A field for entering a tooltip to display when users hover their mouse pointers over the component The default is `Invite People`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_INVITE_PEOPLE}`.
`Text`	The component label The default is `Invite People`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_INVITE_PEOPLE}`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.17.2 Invite People as Connection Component Tag and XML

The following tag is used to render the Invite People as Connection component on a `.jspx` page:

```
<wcdc:invitePeopleAsConnection id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_s_r_Spaces.LABEL_INVITE_PEOPLE}"
     shortDesc="#{uib_o_w_s_r_Spaces.LABEL_INVITE_PEOPLE}"/>
```

Example 21–12 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–12 XML Code for the Invite People as Connection Component

```
<tag>
     <name>invitePeopleAsConnection</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          InvitePeopleAsConnectionTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
```

```
        <deferred-value>
            <type>boolean</type>
        </deferred-value>
    </attribute>
    <attribute>
        <name>customizationId</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>depressedIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabled</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabledIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>displayType</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>hoverIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>icon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>iconPosition</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>inlineStyle</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>shortDesc</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>styleClass</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>__taskFlowId</name>
```

```
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.18 Join Space

The Join Space component is a link that initiates the process of becoming a member of a space, usually the current space (Figure 21–23).

Figure 21–23 Join Space Component

> **See Also:** For information about joining a space, see Section 51.9, "Joining a Space."

This section lists and describes the Display Options associated with the Join Space component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.18.1, "Join Space Component Display Options"
- Section 21.2.18.2, "Join Space Component Tag and XML"

21.2.18.1 Join Space Component Display Options

The Join Space component shares many of the same properties with the About Space component. Table 21–18 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Join Space component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–18 Join Space Component Display Options

Property	Description
`Short Desc`	A field for entering a tooltip to display when users hover their mouse pointers over the component The default is `Join Space`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.GROUP_SPACES_MANAGE_JOIN_SPACE}`.
`Text`	The component label The default is `Join Space`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.GROUP_SPACES_MANAGE_JOIN_SPACE}`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.18.2 Join Space Component Tag and XML

The following tag is used to render the Join Space component on a `.jspx` page:

```
<wcdc:joinSpace id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_s_r_Spaces.GROUP_SPACES_MANAGE_JOIN_SPACE}"
     shortDesc="#{uib_o_w_s_r_Spaces.GROUP_SPACES_MANAGE_JOIN_SPACE}" />
```

Example 21–13 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–13 XML Code for the Join Space Component

```
<tag>
   <name>joinSpace</name>
   <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
        JoinSpaceTag</tag-class>
   <body-content>empty</body-content>
   <attribute>
       <name>id</name>
   </attribute>
   <attribute>
       <name>rendered</name>
       <deferred-value>
            <type>boolean</type>
       </deferred-value>
   </attribute>
   <attribute>
       <name>binding</name>
       <deferred-value/>
   </attribute>
   <attribute>
       <name>clientComponent</name>
       <deferred-value>
            <type>boolean</type>
       </deferred-value>
   </attribute>
   <attribute>
       <name>customizationId</name>
       <deferred-value/>
   </attribute>
   <attribute>
       <name>depressedIcon</name>
       <required>false</required>
       <deferred-value/>
   </attribute>
   <attribute>
       <name>disabled</name>
       <required>false</required>
       <deferred-value/>
   </attribute>
   <attribute>
       <name>disabledIcon</name>
```

```
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>displayType</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>hoverIcon</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>icon</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>iconPosition</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>inlineStyle</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>shortDesc</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>scopeName</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>styleClass</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.19 Leave Space

The Leave Space component is a link for requesting a removal of a user's own membership in the current space (Figure 21–24).

Figure 21–24 Leave Space Component

> **See Also:** For information about requesting an end of membership, see Section 51.13, "Cancelling Your Space Membership."

This section lists and describes the Display Options associated with the Leave Space component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.19.1, "Leave Space Component Display Options"
- Section 21.2.19.2, "Leave Space Component Tag and XML"

21.2.19.1 Leave Space Component Display Options

The Leave Space component shares many of the same properties with the About Space component. Table 21–19 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Leave Space component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–19 Leave Space Component Display Options

Property	Description
`Short Desc`	A field for entering a tooltip to display when users hover their mouse pointers over the component The default is `Leave Space`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_LEAVE_SPACE}`.
`Text`	The component label The default is `Leave Space`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_LEAVE_SPACE}`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.19.2 Leave Space Component Tag and XML

The following tag is used to render the Leave Space component on a `.jspx` page:

```
<wcdc:leaveSpace id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     text="#{uib_o_w_s_r_Spaces.LABEL_LEAVE_SPACE}"
     shortDesc="#{uib_o_w_s_r_Spaces.LABEL_LEAVE_SPACE}"
     inlineStyle="white-space:nowrap;"/>
```

Example 21–14 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–14 XML Code for the Leave Space Component

```
<tag>
     <name>leaveSpace</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          LeaveSpaceTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>customizationId</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>depressedIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabled</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabledIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>displayType</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>hoverIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>icon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
```

```
            <name>iconPosition</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>inlineStyle</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>shortDesc</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>scopeName</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>styleClass</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.20 Login

The Login component is a link for navigating to the application Login page (Figure 21–25).

Figure 21–25 Login Component

The Login link appears only to users who are not logged in. That is, if a user is logged in this link is hidden.

This section lists and describes the Display Options associated with the Login component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.20.1, "Login Component Display Options"
- Section 21.2.20.2, "Login Component Tag and XML"

21.2.20.1 Login Component Display Options

The Login component shares many of the same properties with the About Space component. Table 21–20 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Login component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–20 Login Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Login`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGIN}`.
`Text`	Display text for the component The default is `Login`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGIN}`.
`Type`	The component type The default is `login`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.20.2 Login Component Tag and XML

The following tag is used to render the Login component on a `.jspx` page:

```
<wcdc:spacesAction id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     type="login" displayType="link" inlineStyle="white-space:nowrap"
     text="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGIN}"
     shortDesc="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGIN}"/>
```

In the Resource Catalog, the Login component uses the same XML code as the About WebCenter component. For more information, see Section 21.2.3.2, "About WebCenter Component Tag and XML."

21.2.21 Logout

The Logout component is a link for logging out of the application (Figure 21–26).

Figure 21–26 Logout Component

The **Logout** link appears only to logged in users. That is, if a user is logged out, this link is hidden.

This section lists and describes the Display Options associated with the Logout component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.21.1, "Logout Component Display Options"
- Section 21.2.21.2, "Logout Component Tag and XML"

21.2.21.1 Logout Component Display Options

The Logout component shares many of the same properties with the About Space component. Table 21–21 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Logout component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–21 Logout Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Logout of WebCenter Portal`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGOUT_DESC}`.
`Text`	Display text for the component The default is `Logout`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGOUT}`.
`Type`	The component type The default is `logout`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.21.2 Logout Component Tag and XML

The following tag is used to render the Logout component on a `.jspx` page:

```
<wcdc:spacesAction id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     type="logout" displayType="link" inlineStyle="white-space:nowrap"
     text="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGOUT}"
     shortDesc="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGOUT_DESC}"/>
```

In the Resource Catalog, the Logout component uses the same XML code as the About WebCenter component. For more information, see Section 21.2.3.2, "About WebCenter Component Tag and XML."

21.2.22 Mail Space Members

The Mail Space Members component is a link that opens a simple send-mail window (Figure 21–27).

Figure 21–27 Mail Space Members Component

Such messages are sent to the in-boxes of all members of the current space.

This section lists and describes the Display Options associated with the Mail Space Members component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.22.1, "Mail Space Members Component Display Options"
- Section 21.2.22.2, "Mail Space Members Component Tag and XML"

21.2.22.1 Mail Space Members Component Display Options

The Email Members component shares many of the same properties with the About Space component. Table 21–22 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

Table 21–22 Mail Space Members Component Display Options

Property	Description
`Text`	The default is `Send Mail to Members`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_SEND_EMAIL_TO_MEMBERS}`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.22.2 Mail Space Members Component Tag and XML

The following tag is used to render the Mail Space Members component on a `.jspx` page:

```
<wcdc:emailMembersLink id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     text="#{uib_o_w_w_r_WebCenter.LABEL_SEND_EMAIL_TO_MEMBERS}"/>
```

Example 21–15 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–15 XML Code for the Mail Space Members Component

```
<tag>
     <name>emailMembersLink</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          EmailMembersLinkTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
```

```
                <type>boolean</type>
            </deferred-value>
        </attribute>
        <attribute>
            <name>binding</name>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>clientComponent</name>
            <deferred-value>
                <type>boolean</type>
            </deferred-value>
        </attribute>
        <attribute>
            <name>customizationId</name>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>disabled</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>displayType</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>shortDesc</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>scopeName</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
    </tag>
```

21.2.23 Mail Space Moderators

The Mail Space Moderators component is a link that opens a simple send-mail window (Figure 21–28).

Figure 21–28 Mail Space Moderators Component

Such messages are sent to the in-boxes of all users assigned the role `Moderator` for the current space.

This section lists and describes the Display Options associated with the Mail Space Moderators component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.23.1, "Mail Space Moderators Component Display Options"
- Section 21.2.23.2, "Mail Space Moderators Component Tag and XML"

21.2.23.1 Mail Space Moderators Component Display Options

The Mail Space Moderators component shares many of the same properties with the About Space component. Table 21–23 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Mail Space Moderators component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–23 Mail Space Moderators Component Display Options

Property	Description
`Text`	The default is `Send Mail to Moderators`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_SEND_EMAIL_TO_MODERATORS}`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.23.2 Mail Space Moderators Component Tag and XML

The following tag is used to render the Mail Space Moderators component on a `.jspx` page:

```
<wcdc:emailModeratorsLink id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     text="#{uib_o_w_w_r_WebCenter.LABEL_SEND_EMAIL_TO_MODERATORS}"/>
```

Example 21–16 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–16 XML Code for the Mail Space Moderators Component

```
<tag>
     <name>emailModeratorsLink</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          EmailModeratorsLinkTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
```

```
            </deferred-value>
        </attribute>
        <attribute>
            <name>binding</name>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>clientComponent</name>
            <deferred-value>
                <type>boolean</type>
            </deferred-value>
        </attribute>
        <attribute>
            <name>customizationId</name>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>disabled</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>displayType</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>shortDesc</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>scopeName</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
    </tag>
```

21.2.24 Manage Pages

The Manage Pages component is a link that opens the Manage Pages dialog (Figure 21–29).

Figure 21–29 Manage Pages Component

The Manage Pages dialog lists all of the pages to which the current user has access. Manage Pages provides controls for creating more pages, setting page creation defaults (Home space only), and performing actions on pages, such as editing, renaming, setting access, and the like. Additionally, users can click a listed page name to navigate to that page.

> **See Also:** For information about the types of actions users can perform through Manage Pages, see Section 17.3, "Managing Your Pages."

This section lists and describes the Display Options associated with the Manage Pages component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.24.1, "Manage Pages Component Display Options"
- Section 21.2.24.2, "Manage Pages Component Tag and XML"

21.2.24.1 Manage Pages Component Display Options

The Manage Pages component shares many of the same properties with the About Space component. Table 21–24 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Manage Pages component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–24 Manage Pages Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Logout of WebCenter Portal`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.TITLE_MANAGE_PAGES}`.
`Task Flow Id`	The component's unique identifier, for example `wcdc4082953494`
`Text`	Display text for the component The default is `Logout`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.TITLE_MANAGE_PAGES}`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.24.2 Manage Pages Component Tag and XML

The following tag is used to render the Manage Pages component on a `.jspx` page:

```
<wcdc:managePages id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_w_r_WebCenter.TITLE_MANAGE_PAGES}"
     shortDesc="#{uib_o_w_w_r_WebCenter.TITLE_MANAGE_PAGES}"/>
```

Example 21–17 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–17 XML Code for the Manage Pages Component

```
<tag>
     <name>managePages</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          ManagePagesTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>customizationId</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>depressedIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabled</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabledIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>displayType</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>hoverIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>icon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
```

```
            <name>iconPosition</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>inlineStyle</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>shortDesc</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>styleClass</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>__taskFlowId</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
    </tag>
```

21.2.25 Page Links

The Page Links component is an icon for opening the Links dialog (Figure 21–30).

Figure 21–30 Page Links Component

> **See Also:** For information about linking in Spaces, see Chapter 65, "Working with the Links Service."

The Links dialog enables users to add personal links to related content to the current page and to navigate to those link targets. For more information, see Chapter 65, "Working with the Links Service."

This section lists and describes the Display Options associated with the Page Links component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.25.1, "Page Links Component Display Options"
- Section 21.2.25.2, "Page Links Component Tag and XML"

21.2.25.1 Page Links Component Display Options

Table 21–25 lists and describes the Display Options properties associated with the Page Links component.

Table 21–25 Page Links Component Display Options

Property	Description
`Task Flow Id`	A unique identifier for the component instance **Caution:** Never change this property's default value
`Show Label`	Display text for the component By default, the Page Links component is labeled `Links`.
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again through Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.25.2 Page Links Component Tag and XML

The following tag is used to render the Page Links component on a `.jspx` page:

```
<wcdc:pageLinks id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"/>
```

Example 21–18 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–18 XML Code for the Page Links Component

```
<tag>
     <name>pageLinks</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          PageLinksTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
```

```
            <type>boolean</type>
        </deferred-value>
    </attribute>
    <attribute>
        <name>customizationId</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>showLabel</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>__taskFlowId</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
</tag>
```

21.2.26 Parent Space

The Parent Space component is a link users click to navigate to the top space in a space hierarchy (Figure 21–31).

Figure 21–31 Parent Space Component

See Also: For information about space hierarchies, see Section 56, "Working with a Space Hierarchy."

This section lists and describes the Display Options associated with the Parent Space component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.26.1, "Parent Space Component Display Options"
- Section 21.2.26.2, "Parent Space Component Tag and XML"

21.2.26.1 Parent Space Component Display Options

The Parent Space component shares many of the same properties with the About Space component. Table 21–24 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

See Also: The Parent Space component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–26 Parent Space Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Navigate to Parent Space`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_NAVIGATE_TO_PARENT_SPACE}`.
`Text`	Display text for the component The default is `Navigate to Parent Space`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_NAVIGATE_TO_PARENT_SPACE}`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.26.2 Parent Space Component Tag and XML

The following tag is used to render the Parent Space component on a `.jspx` page:

```
<wcdc:parentSpace id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_w_r_WebCenter.LABEL_NAVIGATE_TO_PARENT_SPACE}"
     shortDesc="#{uib_o_w_w_r_WebCenter.LABEL_NAVIGATE_TO_PARENT_SPACE}"/>
```

Example 21–19 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–19 XML Code for the Parent Space Component

```
<tag>
     <name>parentSpace</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          ParentSpaceTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>customizationId</name>
```

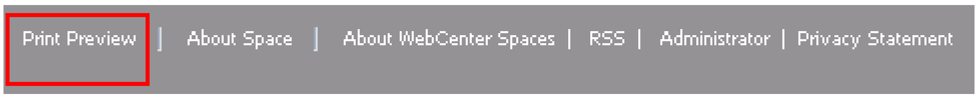
```
        <deferred-value/>
    </attribute>
    <attribute>
        <name>depressedIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabled</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabledIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>displayType</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>hoverIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>icon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>iconPosition</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>inlineStyle</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>shortDesc</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>scopeName</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>styleClass</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>text</name>
        <required>false</required>
```

```
            <deferred-value/>
        </attribute>
    </tag>
```

21.2.27 Print Preview

The Print Preview component is a link users click to open a print preview of the current page in the user's browser (Figure 21–32).

Figure 21–32 Print Preview Component



> **See Also:** For more information, see Section 32.7, "Previewing and Printing an Application Page."

This section lists and describes the Display Options associated with the Print Preview component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.27.1, "Print Preview Component Display Options"
- Section 21.2.27.2, "Print Preview Component Tag and XML"

21.2.27.1 Print Preview Component Display Options

The Print Preview component shares many of the same properties with the About Space component. Table 21–27 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Print Preview component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–27 Print Preview Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Print Preview`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_PAGE_PRINT_PREVIEW}`.
`Text`	Display text for the component The default is `Print Preview`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_PAGE_PRINT_PREVIEW}`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.27.2 Print Preview Component Tag and XML

The following tag is used to render the Print Preview component on a `.jspx` page:

```
<wcdc:printPreview id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     text="#{uib_o_w_w_r_WebCenter.LABEL_PAGE_PRINT_PREVIEW}"
     shortDesc="#{uib_o_w_w_r_WebCenter.LABEL_PAGE_PRINT_PREVIEW}"
     inlineStyle="white-space:nowrap;"/>
```

Example 21–20 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–20 XML Code for the Print Preview Component

```
<tag>
     <name>printPreview</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          PrintPreviewTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>customizationId</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>depressedIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabled</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabledIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>displayType</name>
          <required>false</required>
```

```
            <deferred-value/>
        </attribute>
        <attribute>
            <name>hoverIcon</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>icon</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>iconPosition</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>inlineStyle</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>shortDesc</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>styleClass</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
    </tag>
```

21.2.28 Privacy URL

The Privacy URL component is a link that users click to navigate to the application privacy statement (Figure 21–33).

Figure 21–33 Privacy URL Component

This section lists and describes the Display Options associated with the Privacy URL component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.28.1, "Privacy URL Component Display Options"

- Section 21.2.28.2, "Privacy URL Component Tag and XML"

21.2.28.1 Privacy URL Component Display Options

The Privacy URL component shares many of the same properties with the About WebCenter component. Table 21–28 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Privacy URL component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–28 Privacy URL Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Display privacy statement`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.PRIVACY_STMT_DESC}`.
`Text`	Display text for the component The default is `Privacy Statement`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.PRIVACY_STMT}`.
`Type`	The component type The default is `privacyURL`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.28.2 Privacy URL Component Tag and XML

The following tag is used to render the Privacy URL component on a `.jspx` page:

```
<wcdc:spacesAction id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     type="privacyURL" displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_w_r_WebCenter.PRIVACY_STMT}"
     shortDesc="#{uib_o_w_w_r_WebCenter.PRIVACY_STMT_DESC}"/>
```

In the Resource Catalog, the Privacy URL component uses the same XML code as the About WebCenter component. For more information, see Section 21.2.3.2, "About WebCenter Component Tag and XML."

21.2.29 RSS

The RSS component is a link users click to open the RSS Manager (Figure 21–34).

Figure 21–34 RSS Component

The RSS Manager enables users to subscribe to news feeds from WebCenter Portal: Services. For more information, see Chapter 70, "Working with the RSS Service."

This section lists and describes the Display Options associated with the RSS component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.29.1, "RSS Component Display Options"
- Section 21.2.29.2, "RSS Component Tag and XML"

21.2.29.1 RSS Component Display Options

The RSS component shares many of the same properties with the About Space component. Table 21–29 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The RSS component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–29 RSS Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Open RSS Manager`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_RSS_DESC}`.
`Text`	Display text for the component The default is `RSS`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_RSS}`.
`Type`	The component type The default is `rss`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.29.2 RSS Component Tag and XML

The following tag is used to render the RSS component on a `.jspx` page:

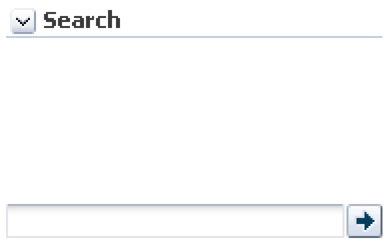
```
<wcdc:spacesAction id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     type="rss" displayType="link" text="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_RSS}"
     inlineStyle="white-space:nowrap;"/>
```

In the Resource Catalog, the RSS component uses the same XML code as the About WebCenter component. For more information, see Section 21.2.3.2, "About WebCenter Component Tag and XML."

21.2.30 Search

The Search component provides a means entering search terms against the application or against a scoped space, depending on how its parameters are configured (Figure 21–35).

Figure 21–35 Search Component



> **See Also:** For more information, see Chapter 58, "Working with the Search Service."

> **Note:** The Search component is a task flow and has no associated XML definition.

Table 21–10 lists and describes the parameters associated with the Search component.

> **See Also:** The Search component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–30 Search Component Parameter

Property	Description
`Search Box Size`	Specifies the width of the Search field to render Enter a number and a unit of measure, such as `400px`.
`Search Scope ID`	The intended scope of the search By default, the current scope is searched. This means that Search components placed on pages in the Home space search the entire application, and Search components placed in a particular space search just that space. To limit the search to a space other than the current space, set this to the intended space's GUID. For information about obtaining a space's GUID, see Section 51.6, "Viewing Information About a Space."

> **See Also:** Parameters in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.31 Self Registration

The Self Registration component is a link users click to open the Self Registration page (Figure 21–36).

Figure 21–36 Self Registration Component

The Self Registration page is a system page that enables users to create their own application login credentials. For more information, see Section 7.3, "Working with System Pages," and Section 32.2, "Registering Yourself with WebCenter Portal: Spaces."

This section lists and describes the Display Options associated with the Self Registration component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.31.1, "Self Registration Component Display Options"
- Section 21.2.31.2, "Self Registration Component Tag and XML"

21.2.31.1 Self Registration Component Display Options

The Self Registration component shares many of the same properties with the About WebCenter component. Table 21–31 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Self Registration component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–31 Self Registration Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Register with WebCenter Spaces`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_SELFREG_DESC}`.
`Text`	Display text for the component The default is `Register`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_SELFREG}`.
`Type`	The component type The default is `selfRegistration`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.31.2 Self Registration Component Tag and XML

The following tag is used to render the Self Registration component on a `.jspx` page:

```
<wcdc:spacesAction id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
```

```
type="selfRegistration" displayType="link"
text="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_SELFREG}"
shortDesc="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_SELFREG_DESC}"
inlineStyle="white-space:nowrap"/>
```

In the Resource Catalog, the Self Registration component uses the same XML code as the About WebCenter component. For more information, see Section 21.2.3.2, "About WebCenter Component Tag and XML."

21.2.32 Share Resource

The Share Resource component renders as **Share Link**. Users click this link to open a popup version of the Publisher task flow for publishing messages, links, and documents (Figure 21–37).

Figure 21–37 Share Resource Component

Messages, links, and documents are published on the user's own Message Board or a space Message Board, depending on the selected recipient. In turn, if activities on the user's Message Board are shared with the user's connections via Activity Stream, then the published message, document, or link is shared with all of the user's connections through their Activity Streams. Messages published to a space are shared with all members of that space through their Activity Streams.

> **See Also:** For information about the Publisher task flow, see Section 37.3.3, "Sharing Items, Files, and URLs Through the Publisher Task Flow."

This section lists and describes the Display Options associated with the Share Resource component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.32.1, "Share Resource Display Options"
- Section 21.2.32.2, "Share Resource Component Tag and XML"

21.2.32.1 Share Resource Display Options

The Share Resource component shares many of the same properties with the About WebCenter component. Table 21–32 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Share Resource component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–32 Share Resource Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Share Link`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter['NAV_TOOLS_ACTIONS_FOLDER_SHARE.TITLE']}`.
`Text`	Display text for the component The default is `Share Link`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter['NAV_TOOLS_ACTIONS_FOLDER_SHARE.TITLE']}`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.32.2 Share Resource Component Tag and XML

The following tag is used to render the Share Resource component on a `.jspx` page:

```
<wcdc:shareResource id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_w_r_WebCenter['NAV_TOOLS_ACTIONS_FOLDER_SHARE.TITLE']}"
     shortDesc="#{uib_o_w_w_r_WebCenter
          ['NAV_TOOLS_ACTIONS_FOLDER_SHARE.TITLE']}"/>
```

Example 21–21 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–21 XML Code for the Share Resource Component

```
<tag>
     <name>shareResource</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          ShareResourceTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
```

```
        <name>customizationId</name>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>depressedIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabled</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>disabledIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>displayType</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>hoverIcon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>icon</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>iconPosition</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>inlineStyle</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>shortDesc</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>scopeName</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>styleClass</name>
        <required>false</required>
        <deferred-value/>
    </attribute>
    <attribute>
        <name>__taskFlowId</name>
```

```
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
    </tag>
```

21.2.33 Spaces Switcher

The Spaces Switcher component provides access to a popup window where users can select a space to which to navigate (Figure 21–38).

Figure 21–38 Spaces Switcher Component

This section lists and describes the Display Options associated with the Spaces Switcher component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.33.1, "Spaces Switcher Component Display Options"
- Section 21.2.33.2, "Spaces Switcher Component Tag and XML"

21.2.33.1 Spaces Switcher Component Display Options

The Spaces Switcher component shares many of the same properties with the About WebCenter component. Table 21–33 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

Table 21–33 Spaces Switcher Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Access spaces and create new ones`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_COMMUNITIES_DESC}`.
`Text`	Display text for the component The default is `Spaces`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_COMMUNITIES}`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.33.2 Spaces Switcher Component Tag and XML

The following tag is used to render the Spaces Switcher component on a `.jspx` page:

```
<wcdc:spacesSwitcher id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     inlineStyle="white-space:nowrap;" styleClass="WCLinkMenu"
     text="#{uib_o_w_s_r_Spaces.LABEL_COMMUNITIES}"
     shortDesc="#{uib_o_w_s_r_Spaces.LABEL_COMMUNITIES_DESC}"/>
```

Example 21–22 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–22 XML Code for the Spaces Switcher Component

```
<tag>
     <name>spacesSwitcher</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          spacesSwitcherTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>customizationId</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>depressedIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabled</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>disabledIcon</name>
          <required>false</required>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>displayType</name>
          <required>false</required>
```

```
            <deferred-value/>
        </attribute>
        <attribute>
            <name>hoverIcon</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>icon</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>iconPosition</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>inlineStyle</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>shortDesc</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>styleClass</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>__taskFlowId</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>text</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.34 Status Indicator

The Status Indicator component is an animated icon that spins when the application is processing information (Figure 21–39).

Figure 21–39 Status Indicator Component

This section lists and describes the Display Options associated with the Status Indicator component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.34.1, "Status Indicator Component Display Options"
- Section 21.2.34.2, "Status Indicator Component Tag and XML"

21.2.34.1 Status Indicator Component Display Options

The Status Indicator component shares many of the same properties with the About WebCenter component. Table 21–34 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Status Indicator component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–34 Status Indicator Component Display Options

Property	Description
`Type`	The component type The default is `statusIndicator`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.34.2 Status Indicator Component Tag and XML

The following tag is used to render the Status Indicator component on a `.jspx` page:

```
<wcdc:spacesAction id="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     type="statusIndicator" displayType="link" />
```

In the Resource Catalog, the Status Indicator component uses the same XML code as the About WebCenter component. For more information, see Section 21.2.3.2, "About WebCenter Component Tag and XML."

21.2.35 Subscription Preferences

The Subscription Preferences component is a link users can click to subscribe to be notified about specific types of activities that occur in the context of the space (Figure 21–40).

Figure 21–40 Subscription Preferences Component

> **See Also:** For more information, see Section 39.3.2, "Setting Space-Level Subscriptions."

This section lists and describes the Display Options associated with the Subscription Preferences component. Additionally, it provides the tag that invokes this component on a .jspx page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.35.1, "Subscription Preferences Component Display Options"
- Section 21.2.35.2, "Subscription Preferences Component Tag and XML"

21.2.35.1 Subscription Preferences Component Display Options

The Subscription Preferences component shares many of the same properties with the About WebCenter component. Table 21–35 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The Subscription Preferences component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–35 Subscription Preferences Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Subscribe`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_SUBSCRIBE_TO_GET_NOTIFICATION}`.
`Text`	Display text for the component The default is `Subscribe`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_SUBSCRIBE_TO_GET_NOTIFICATION}`.

> **See Also:** Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.35.2 Subscription Preferences Component Tag and XML

The following tag is used to render the Subscription Preferences component on a .jspx page:

```
<wcdc:notificationSubscriptionsLink id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     text="#{uib_o_w_w_r_WebCenter.LABEL_SUBSCRIBE_TO_GET_NOTIFICATION}"
     shortDesc="#{uib_o_w_w_r_WebCenter.LABEL_SUBSCRIBE_TO_GET_NOTIFICATION}" />
```

Example 21–23 provides the XML code that represents the component in the Resource Catalog file (SiteTemplateCatalog.xml) in a Framework application.

Example 21–23 XML Code for the Subscription Preferences Component

```
<tag>
     <name>notificationSubscriptionsLink</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.
          taglib.NotificationSubscriptionsLinkTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
```

```
<attribute>
     <name>rendered</name>
     <deferred-value>
          <type>boolean</type>
     </deferred-value>
</attribute>
<attribute>
     <name>binding</name>
     <deferred-value/>
</attribute>
<attribute>
     <name>clientComponent</name>
     <deferred-value>
          <type>boolean</type>
     </deferred-value>
</attribute>
<attribute>
     <name>customizationId</name>
     <deferred-value/>
</attribute>
<attribute>
     <name>depressedIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabled</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabledIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>displayType</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>hoverIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>icon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>iconPosition</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>inlineStyle</name>
     <required>false</required>
     <deferred-value/>
</attribute>
```

```
        <attribute>
             <name>shortDesc</name>
             <required>false</required>
             <deferred-value/>
        </attribute>
        <attribute>
             <name>scopeName</name>
             <required>false</required>
             <deferred-value/>
        </attribute>
        <attribute>
             <name>styleClass</name>
             <required>false</required>
             <deferred-value/>
        </attribute>
        <attribute>
             <name>text</name>
             <required>false</required>
             <deferred-value/>
        </attribute>
        <attribute>
             <name>__taskFlowId</name>
             <required>false</required>
             <deferred-value/>
        </attribute>
   </tag>
```

21.2.36 Tags

The Tags component is an icon that users click to open the Add Tags dialog (Figure 21–41).

Figure 21–41 Tags Component

Add tags to associate personally meaningful search terms to a page or a Spaces item. For more information, see Chapter 59, "Working with the Tags Service."

This section lists and describes the Display Options associated with the Tags component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.36.1, "Tags Component Display Options"
- Section 21.2.36.2, "Tags Component Tag and XML"

21.2.36.1 Tags Component Display Options

Table 21–36 lists and describes the Display Options associated with the Tags component.

See Also: The Tags component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–36 Tags Component Display Options

Property	Description
`Show Component`	An option for hiding or showing the component on the page ■ Select to show the component ■ Deselect to hide the component Once you hide a component in this way, any child components are also hidden. You can show the component again through Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.
`Show Label`	Display text for the component By default, no display text is associated with the **Tag** icon.
`Task Flow Id`	The component's unique identifier, for example `wcdc4082953494`

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.36.2 Tags Component Tag and XML

The following tag is used to render the Tags component on a `.jspx` page:

```
<wcdc:pageTags id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"/>
```

Example 21–24 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–24 XML Code for the Tags Component

```
<tag>
     <name>pageTags</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          PageTagsTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
```

```
            </deferred-value>
        </attribute>
        <attribute>
            <name>customizationId</name>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>showLabel</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
        <attribute>
            <name>__taskFlowId</name>
            <required>false</required>
            <deferred-value/>
        </attribute>
</tag>
```

21.2.37 User Preferences

The User Preferences component is a link that users click to access the Preferences dialog (Figure 21–42).

Figure 21–42 User Preferences Component

User preferences enable users to configure their views of the application to suit their working styles. For more information, see Chapter 38, "Setting Your Personal Preferences."

This section lists and describes the Display Options associated with the User Preferences component. Additionally, it provides the tag that invokes this component on a `.jspx` page and the XML code that defines this component in a Resource Catalog.

This section includes the following subsections:

- Section 21.2.37.1, "User Preferences Component Display Options"
- Section 21.2.37.2, "User Preferences Component Tag and XML"

21.2.37.1 User Preferences Component Display Options

The User Preferences component shares many of the same properties with the About WebCenter component. Table 21–37 lists the properties that have defaults other than those specified in Table 21–2, " About Space Component Display Options".

> **See Also:** The User Preferences component has Style properties you can use to change the component's look and feel. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

Table 21–37 User Preferences Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component The default is `Set user preferences`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_PREFERENCES_DESC}`.
`Text`	Display text for the component The default is `Preferences`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_PREFERENCES}`.

See Also: Display Options properties in the Component Properties dialog provide access to an Expression Language (EL) editor for entering and testing EL values. For more information, see Appendix B, "Expression Language (EL) Expressions."

21.2.37.2 User Preferences Component Tag and XML

The following tag is used to render the User Preferences component on a `.jspx` page:

```
<wcdc:userPreferences id="#" __taskFlowId="#"
     xmlns:wcdc="http://xmlns.oracle.com/webcenter/spaces/taglib"
     displayType="link" inlineStyle="white-space:nowrap;"
     text="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_PREFERENCES}"
     shortDesc="#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_PREFERENCES_DESC}"/>
```

Example 21–25 provides the XML code that represents the component in the Resource Catalog file (`SiteTemplateCatalog.xml`) in a Framework application.

Example 21–25 XML Code for the User Preferences Component

```
<tag>
     <name>userPreferences</name>
     <tag-class>oracle.webcenter.webcenterapp.internal.view.taglib.
          UserPreferencesTag</tag-class>
     <body-content>empty</body-content>
     <attribute>
          <name>id</name>
     </attribute>
     <attribute>
          <name>rendered</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>binding</name>
          <deferred-value/>
     </attribute>
     <attribute>
          <name>clientComponent</name>
          <deferred-value>
               <type>boolean</type>
          </deferred-value>
     </attribute>
     <attribute>
          <name>customizationId</name>
          <deferred-value/>
```

```
</attribute>
<attribute>
     <name>depressedIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabled</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>disabledIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>displayType</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>hoverIcon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>icon</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>iconPosition</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>inlineStyle</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>shortDesc</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>styleClass</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>__taskFlowId</name>
     <required>false</required>
     <deferred-value/>
</attribute>
<attribute>
     <name>text</name>
     <required>false</required>
     <deferred-value/>
```

```
    </attribute>
</tag>
```

21.3 Deleting Spaces Components

This section points to information about removing components from the various venues in which they may appear. It includes the following subsections:

- Section 21.3.1, "Removing Spaces Components from a Resource Catalog"
- Section 21.3.2, "Removing a Spaces Component from a Template"
- Section 21.3.3, "Removing a Spaces Component from a Page"

21.3.1 Removing Spaces Components from a Resource Catalog

You can remove a component from a Resource Catalog as you would any other resource. For more information, see Section 16.3.1.7, "Deleting a Resource."

21.3.2 Removing a Spaces Component from a Template

To remove a Spaces component from a template:

1. Access the template in edit mode as described in Section 13.3, "Editing a Page Template."
2. In Source view, select the Spaces component by clicking it in the hierarchical list of components.

    Tip: In Source view, you can also click the component directly on the page to select it.

3. Click **Delete**.
4. In the resulting confirmation dialog, click **Delete**.

21.3.3 Removing a Spaces Component from a Page

To remove a Spaces component from a page:

1. Access the page in edit mode as described in Section 18.1, "Entering and Exiting Composer."
2. In Source view, select the Spaces component by clicking it in the hierarchical list of components.

    Tip: In Source view, you can also click the component directly on the page to select it.

3. Click **Delete**.
4. In the resulting confirmation dialog, click **Delete**.

22

Wiring Pages, Task Flows, Portlets, and UI Components

Often a page needs information from a component on the page, or a region needs information from another region. While you can pass parameters through the page URL to obtain that information, doing so makes sense only when the parameters are well-known and the inputs are accessible to the page through Expression Language (EL). For more information, see Section 22.4, "Passing Parameter Values Through the Page URL."

Consider the case where you have a task flow with multiple page fragments that contain various interesting values that could be used as input on a page in the flow. For example, consider a page devoted to the display of information specific to the company that a user specifies in an input form. If you were to use parameters to pass the value, the task flow must surface output parameters for the union of each of the interesting values on each and every fragment. This is where component wiring becomes useful. Instead, for each fragment that contains the needed information, you can use component wiring to define a contextual event that is raised when the page is submitted. The page or fragment that requires the information can then subscribe to the various events and receive the information through the event.

Composer provides tools for wiring pages and components through its Page Properties and Component Properties dialogs. This chapter describes the use of these tools in the following sections:

Note: If you navigate away from a page while editing it, unsaved changes are lost.

Audience

This chapter is intended for advanced users who have experience with and knowledge of component wiring. Interested users include those who want to create more complex relationships between a page and its components and between the components themselves.

22.1 What You Should Know About Parameter and Event Wiring

You can use parameters and events to pass values from one component to another, or from a page to a component on that page. Additionally, you can pass values to page components by specifying them in the page's URL.

> **Note:** In this chapter, *component* refers collectively to UI components, such as buttons; web development components, such as hyperlinks; task flows; and portlets.

Value passing is useful for synchronizing the content of a page with its components, or the content of one component to another. For example, you can wire a Parameter Form portlet so that the event of clicking its **OK** button triggers the passing of its user-entered values to another component on the page. One way to apply this model is to pass a user-entered name to a task flow or portlet that displays details relevant to that name.

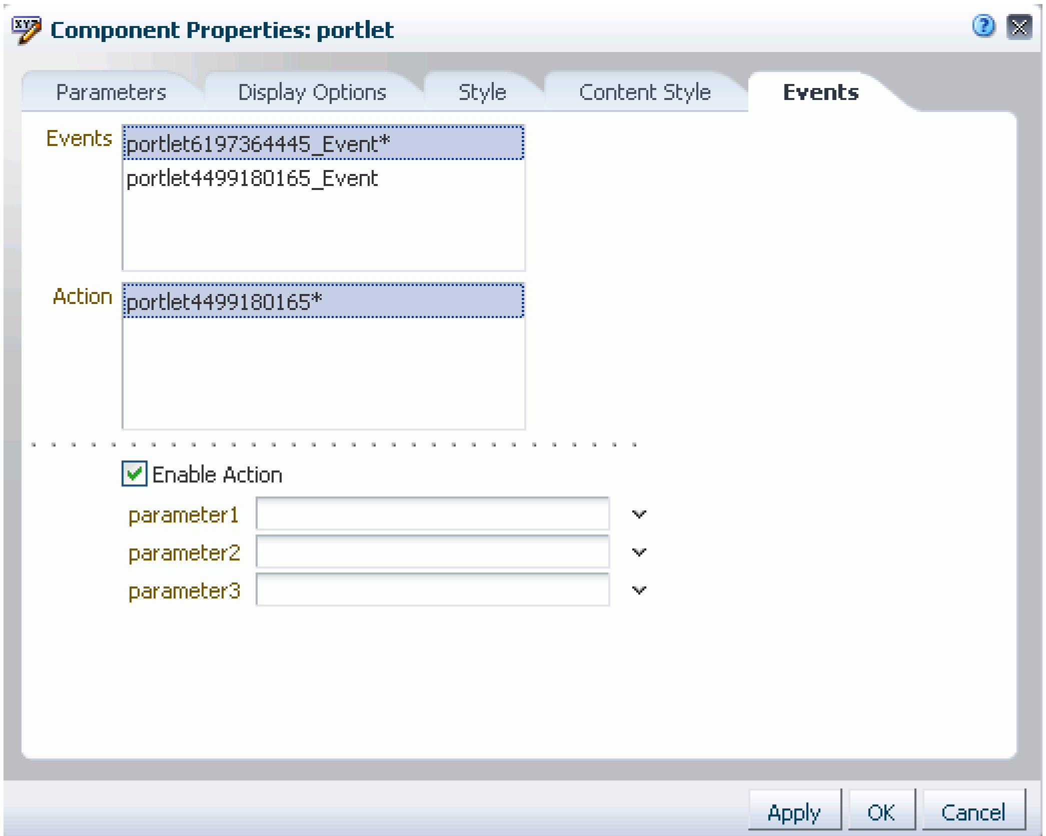
To clarify what it going on in a parameter passing scenario, it helps to think of one component as the producer and the other component as the consumer. The producer component provides the payload that the consumer component consumes. For example, a form portlet is typically a producer. Its payload is the data that users enter into the form. An event defined on the producer triggers the passing of the producer's payload to the consumer. Consumer components use the payload in various ways. For example, as a display string, a master in a master-detail relationship, and the like. How a consumer component uses the payload is specified in an event handler that was defined when the consumer component was created.

The heavy lifting required to produce meaningful parameter and event wiring is performed mostly at application and component design time. When developers build applications and components, they specify events and event maps in page definition files. Consequently, for runtime wiring to work, the components you want to wire must provide support for wiring through elements that were built-in at design time.

> **Note:** *Runtime* refers to the time when users run the application in a real-world environment. Contrast this with *design time*, which refers to the time developers build the application.

Runtime wiring creates a relationship between a producer event and a consumer event handler. You can create these relationships in Composer. Select a component and view its events support on the **Events** tab of the Component Properties dialog (Figure 22–1).

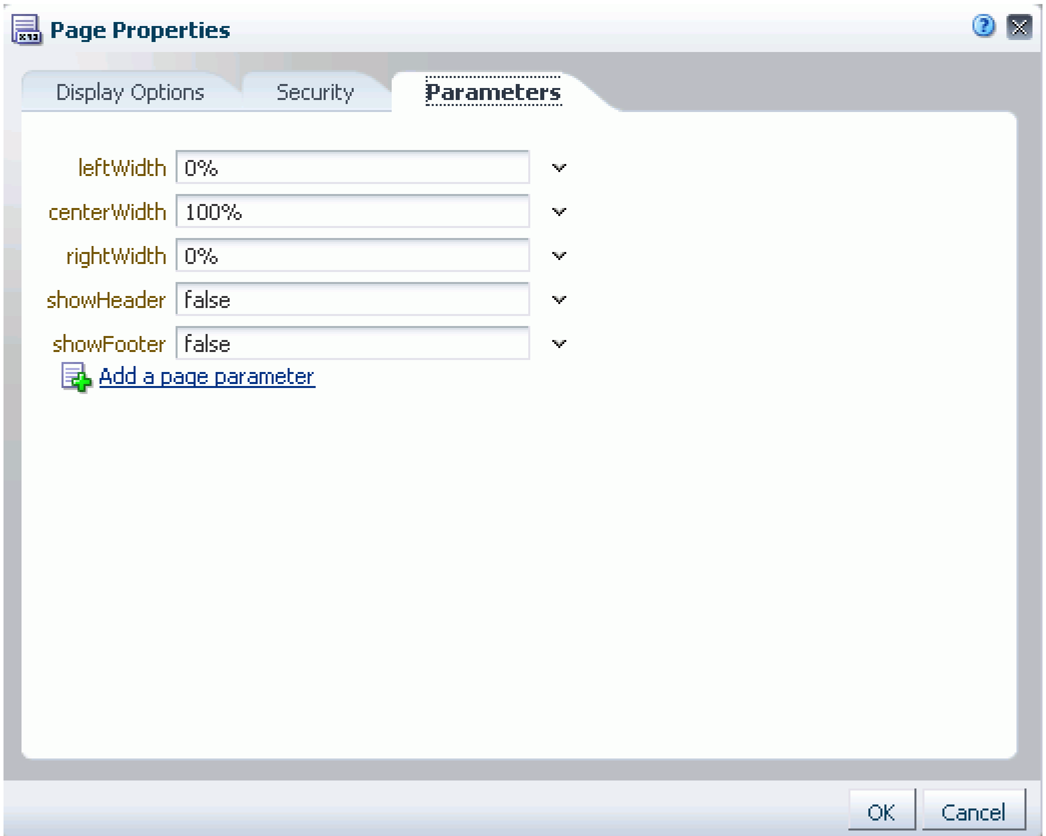
Figure 22–1 Events Tab in the Component Properties Dialog



Once you select and enable an event and an event handler (see the **Action** section in Figure 22–1), you can define the type of payload to deliver when the event is triggered.

Composer additionally provides an opportunity to create page parameters on the **Parameters** tab of the Page Properties dialog (Figure 22–2).

Figure 22–2 Parameters Tab in the Page Properties Dialog



Use the **Parameters** tab to create new page parameters and to revise existing page parameters. You can easily configure page components to consume page parameters, and you can pass values to those parameters through the page URL.

22.2 Wiring One Component to Another

Components with built-in events and event handlers can be wired to each other to enable the passing of values from a producer component to a consumer component. This section describes how to set up such wiring. It includes the following subsections:

- Section 22.2.1, "Wiring a Task Flow to a Task Flow"
- Section 22.2.2, "Wiring a Portlet to a Portlet"
- Section 22.2.3, "Wiring a Portlet to a Task Flow"
- Section 22.2.4, "Wiring a Task Flow to a Portlet"
- Section 22.2.5, "Wiring a UI Component to a Task Flow"

22.2.1 Wiring a Task Flow to a Task Flow

In addition to seeded services and task flows, you can bring custom task flows into the Oracle WebCenter Portal: Spaces application. To bring custom task flows into Spaces, you must first *portletize* them, so that they can be consumed by Spaces across a *portlet bridge*.

Note: When you work with contextual event wiring across a portlet bridge and no payload or a null payload is propagated across the wire from the producer portlet to the consumer, such payloads are delivered as an empty string. If the consumer portlet is required to differentiate between an empty string and null, you can encode the null in the producer portlet payload. The consumer portlet consequently looks for this custom encoding to detect the null payload.

Custom task flows may support events and may include the capability of parameter passing. Events and parameter passing could enable one custom task flow to pass values to other custom task flows on the same page. For example, you could wire custom task flows so that when a user clicks a particular document, an event is raised that triggers parameter passing to the other custom task flows on the page. The passed parameters could cause the other custom task flows to rerender with content relevant to the clicked document.

When a custom task flow is portletized, any portlet events or public render parameters raised by the portletized task flow are automatically delivered to other portletized task flows that declare support for those events or parameters. You can also manually wire portletized custom task flows using Composer's Component Properties dialog. The events and parameters that you configure vary according to the functionality that developers build into custom task flows. The steps provided in this section describe how to perform this manual mapping.

Creating and portletizing custom task flows and using the portlet bridge are all discussed in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*. For information about consuming custom task flows and other custom components in Spaces, see *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

To manually wire a task flow to a task flow:

1. Navigate to the relevant page, and enter page edit mode.

   Tip: One way to enter page edit mode is to press Ctrl+Shift+E.

2. Click the **Edit** icon on the task flow that consumes the payload provided by the producer task flow.

   The Component Properties dialog opens.

3. Click the **Events** tab to bring it forward, and, from the **Events** pane, select an event associated with the producer task flow.

   The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

4. In the **Actions** pane, select the action to execute when the event occurs.

   The **Actions** pane lists all of the event handlers associated with the consumer task flow that are supported by the selected producer task flow. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

5. Select **Enable Action** to enable the selected event and action.

   An asterisk (*) appears next to the selected event and action. Value options appear below the check box.

6. From the displayed value options, select the type of value to use to deliver the payload from the producer task flow to the consumer task flow whenever the event occurs.

   Choose from:

   - **Constant—**Select **Constant**, and enter a constant or EL expression value to pass to the consumer task flow.
   - **EventData—**Select to pass the variable `${payLoad}`, which delivers whatever payload is specified by the producer task flow.

   > **Note:** The value for `${payLoad}` is specified when the task flow is created.

7. Click **Save** at the top right of Composer to save your changes.
8. Click **Close** to exit Composer.
9. Test your wiring by triggering the event.

22.2.2 Wiring a Portlet to a Portlet

When a portlet is added to a page, it is automatically configured to listen to public render parameters and portlet events generated on the page and respond accordingly. This means that in many cases portlets are automatically wired, as long as the name of the public render parameter or publishing event on the producer side matches that of the public render parameter or processing event on the consumer side, or if an appropriate alias has been created to associate parameters or events.

When portlets have not been designed to explicitly work together, you can manually wire portlets as described in the steps below.

> **Note:** You cannot turn off automatic parameter and event listening in the Spaces UI. If you do want to turn off this feature for a particular portlet you must:
>
> 1. Export the space that consumes the portlet.
> 2. In JDeveloper, open the page definition for the page that contains the portlet.
> 3. Edit the portlet binding to set the `listenForAutoDeliveredPortletEvents` and `listenForAutoDeliveredParameterChanges` attributes to false:
>
> ```
> <portlet id="p2_1"
>          ...
>          listenForAutoDeliveredPortletEvents="false"
>          listenForAutoDeliveredParameterChanges="false"
>          ...
> />
> ```
>
> 4. Import the space back into Spaces.

To manually wire a portlet to a portlet:

1. Navigate to the relevant page, and enter page edit mode.

   > **Tip:** One way to enter page edit mode is to press Ctrl+Shift+E.

2. Click the **Edit** icon on the portlet that consumes the payload provided by the producer portlet.

   The Component Properties dialog opens.

3. Click the **Events** tab to bring it forward, and select an event associated with the producer portlet.

   The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

4. In the **Actions** pane, select the action to execute when the event occurs.

   The **Actions** pane lists all of the event handlers associated with the consumer portlet that are supported by the selected producer portlet. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

5. Select **Enable Action** to enable the selected event and action.

   An asterisk (*) appears next to the selected event and action.

6. Provide values for the portlet parameters that now display at the bottom of the **Events** tab.

   Select **Constant**, and enter a composite data value, for example:

   ```
   ${payLoad.ora_wsrp_navigparam_Parameter1}
   ```

   > **Note:** The parameter names and values were specified when the portlet was created.

7. Click **Save** at the top right of Composer to save your changes.

8. Click **Close** to exit Composer.

9. Test your wiring by triggering the event.

22.2.3 Wiring a Portlet to a Task Flow

In this scenario, the portlet is the producer, providing the event payload, and the task flow is the consumer of that payload.

To wire a portlet to a task flow:

1. Navigate to the relevant page, and enter page edit mode.

   > **Tip:** One way to enter page edit mode is to press Ctrl+Shift+E.

2. Click the **Edit** icon on the task flow that consumes the payload provided by the producer portlet.

   The Component Properties dialog opens.

3. Click the **Events** tab to bring it forward, and select an event associated with the producer portlet from the **Events** pane.

   The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

4. In the **Actions** pane, select the action to execute when the event occurs.

The **Actions** pane lists all of the event handlers associated with the consumer task flow that are supported by the selected producer portlet. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

5. Select **Enable Action** to enable the selected event and action.

   An asterisk (*) appears next to the selected event and action. Value options appear below the check box.

6. Select **Constant**, and enter a composite data value for a parameter associated with the producer portlet.

   For example:

   ```
   ${payLoad.ora_wsrp_navigparam_Parameter1}
   ```

7. Click **Save** at the top right of Composer to save your changes.
8. Click **Close** to exit Composer.
9. Test your wiring by triggering the event.

22.2.4 Wiring a Task Flow to a Portlet

In this scenario, the task flow is the producer, providing the event payload, and the portlet is the consumer of that payload.

To wire a task flow to a portlet:

1. Navigate to the relevant page, and enter page edit mode.

   > **Tip:** One way to enter page edit mode is to press Ctrl+Shift+E.

2. Click the **Edit** icon on the portlet that consumes the payload provided by the producer task flow.

   The Component Properties dialog opens.

3. Click the **Events** tab to bring it forward, and select an event associated with the producer task flow in the **Events** pane.

   The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

4. In the **Actions** pane, select the action to execute when the event occurs.

   The **Actions** pane lists all of the event handlers associated with the consumer portlet that are supported by the selected producer task flow. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

5. Select **Enable Action** to enable the selected event and action.

   An asterisk (*) appears next to the selected event and action.

6. Provide values for the portlet parameters that now appear at the bottom of the **Events** tab.

   Select **Constant**, and enter a composite data value, for example:

   ```
   ${payLoad.ora_wsrp_navigparam_Parameter1}
   ```

Note: The parameter names and values were specified when the portlet was created.

7. Click **Save** at the top right of Composer to save your changes.
8. Click **Close** to exit Composer.
9. Test your wiring by triggering the event.

22.2.5 Wiring a UI Component to a Task Flow

In this scenario, the UI component is the producer of the payload, and the task flow is the consumer of the payload.

To wire a UI component to a task flow:

1. Navigate to the relevant page, and enter page edit mode.

   Tip: One way to enter page edit mode is to press Ctrl+Shift+E.

2. Click the **Edit** icon on the task flow that consumes the payload provided by the producer UI component.

   The Component Properties dialog opens.

3. Click the **Events** tab to bring it forward, and select an event associated with the producer UI component in the **Events** pane.

   The **Events** pane lists all of the events that can be raised from any component on the page. An asterisk (*) on an event indicates that an action is handling it.

4. In the **Actions** pane, select the action to execute when the event occurs.

   The **Actions** pane lists all of the event handlers associated with the consumer task flow that are supported by the selected producer UI Component. Only those actions that can be invoked for the event that is selected in the **Events** pane are shown. An asterisk (*) on an action indicates that it is handling an event.

5. Select **Enable Action** to enable the selected event and action.

   An asterisk (*) appears next to the selected event and action. Value options appear below the check box.

6. Select the type of value to use to deliver the payload from the producer UI component to the consumer task flow whenever the event occurs.

   Choose from:

   - **Constant—**Select **Constant**, and enter a constant or EL expression value to pass to the consumer task flow.
   - **EventData—**Select to pass the variable `${payLoad}`, which delivers whatever payload is specified by the producer UI component.

   Note: The value for `${payLoad}` was specified when the UI component was created.

7. Click **Save** at the top right of Composer to save your changes.
8. Click **Close** to exit Composer.

9. Test your wiring by triggering the event.

22.3 Wiring Components and Page Parameters

Page parameters are central to the process of creating enterprise mashups. They enable communication between components and the pages that contain them by providing a means of storing values for passing to page components that have been configured to consume them.

For example, imagine a page that contains stock ticker and stock news components. You want the ticker and the news components to both consume the same parameter value so that they both show information for the same company.

This section describes how to create and consume page parameters in the following subsections:

- Section 22.3.1, "Creating Page Parameters"
- Section 22.3.2, "Consuming Page Parameters"

22.3.1 Creating Page Parameters

Use the **Parameters** tab in the Composer Page Properties dialog to create page parameters.

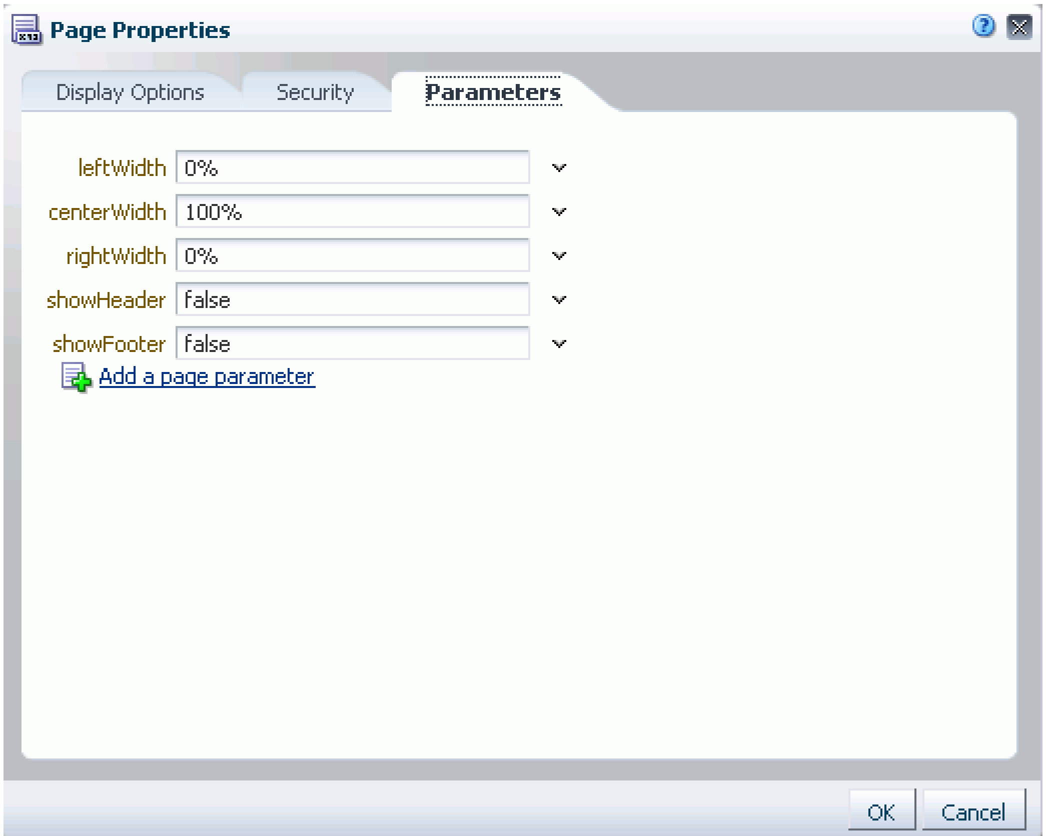
To create page parameters:

1. Navigate to the relevant page, and enter page edit mode.

   Tip: One way to enter page edit mode is to press Ctrl+Shift+E.

2. Click **Page Properties** at the top left of Composer to open the Page Properties dialog (Figure 22–3).

Figure 22–3 Page Properties Dialog



3. Click the **Parameters** tab to bring it forward, and then click the **Add a page parameter** link.

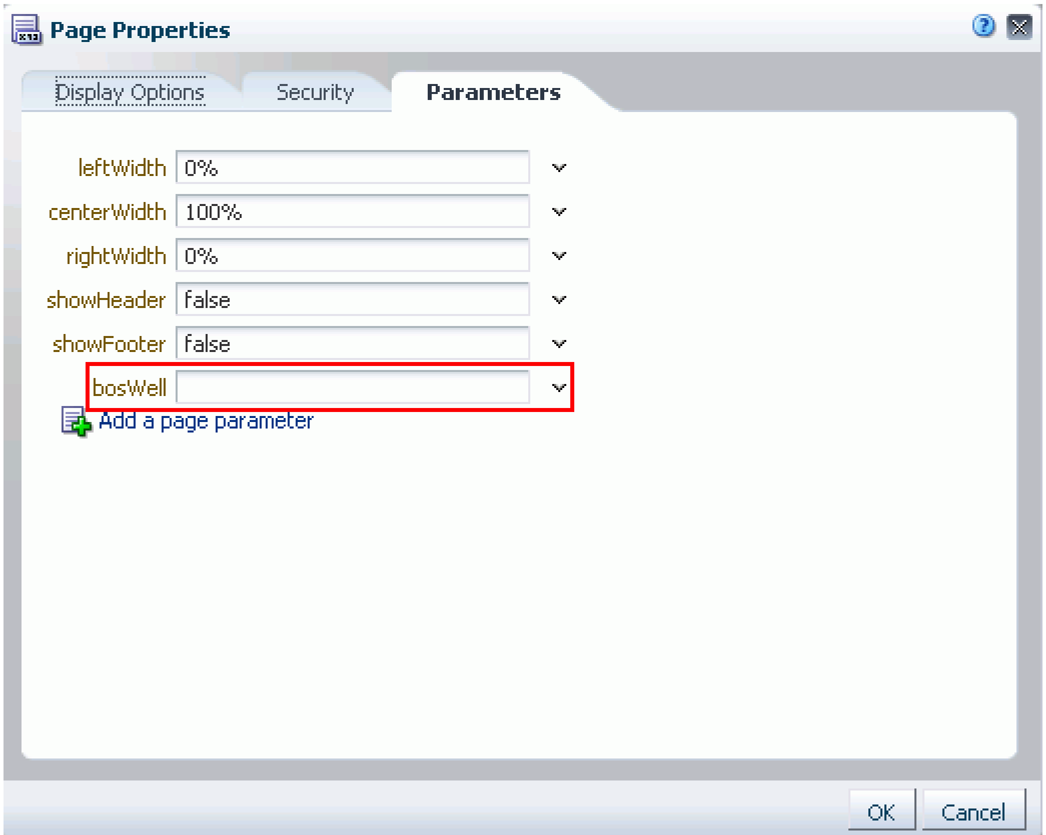
   The Add a Page Parameter dialog opens (Figure 22–4).

Figure 22–4 Add a Page Parameter Dialog

4. Enter a name for the new parameter, and then click **Add Parameter**.

   The parameter displays on the **Parameters** tab with a value entry field and an **Edit** icon for opening the Expressions Editor (Figure 22–5).

Figure 22–5 A New Parameter on the Parameters Tab



5. Open the EL Editor and select from prebuilt values under **Choose a value** or enter a value manually under **Type a value or expression**.

   For example, enter any of the following types of values:

   - **Constant**—Enter a specific, fixed value.
   - **Page Parameter**—Enter a page parameter to enable the page to take values through its URL.
   - **EL Expression**—Enter an EL expression to enable the page to take a value expressed through Expression Language (EL). For information about EL, see Appendix B, "Expression Language (EL) Expressions."

     This option can provide a much more dynamic response. For example, the page could set a page parameter based on a component on the page. In this case, you would want the other components on the page to be refreshed whenever this value changed.

6. Click **Save** at the top right of Composer to save your changes.
7. As desired, repeat these steps to continue adding page parameters.
8. Click **Close** to exit Composer.

22.3.2 Consuming Page Parameters

In addition to wiring components to each other, you can wire them to *page parameters*. Page parameters are user-constructed name/value pairs for use in passing values to page components, such as task flows, portlets, and UI components.

You can create page parameters and configure task flows and portlets to consume them. This section describes how to wire a task flow with a page parameter.

> **Note:** Before you can take the steps outlined in this section, you must create a page parameter and provide it with a value. For more information, see Section 22.3.1, "Creating Page Parameters."

To wire a task flow to a page parameter:

1. Navigate to the relevant page, and enter page edit mode.

   > **Tip:** One way to enter page edit mode is to press Ctrl+Shift+E.

2. Click the **Edit** icon on the task flow to be wired to a page parameter.

   The Component Properties dialog opens.

3. Click the **Parameters** tab to bring it forward.
4. Click the **Edit** icon next to the property that takes the parameter value.

   An editor opens, which you can use to provide the name of the page parameter.

5. Select **Choose a value**.
6. Under **Choose a value**, select **Page Parameter** from the first list, and the name of the relevant page parameter from the second.
7. Click **OK** to exit the editor.
8. Click **OK** to save your changes and exit the Component Properties dialog.

   The task flow is refreshed, now displaying the result of the value passed through the page parameter.

22.4 Passing Parameter Values Through the Page URL

You can provide Expression Language (EL) expressions in lieu of other types of values to component parameters. This is discussed in Appendix B, "Expression Language (EL) Expressions." You can take this capability one step further by passing parameter values with your page URLs.

This section provides one scenario, which you can use as a model for other parameter passing situations.

To pass parameter values through a page URL:

1. Go to the page that contains a component to which you want to pass values through the page URL.
2. Edit the relevant component's properties.
3. Open the EL Editor for the Parameter or Display Option to which you want to pass a value.
4. Under **Type a value or expression**, enter `#{param.val}`.
5. Save your changes.
6. To pass a value to the parameter, append the following to your page URL:

   ```
   ?val=value
   ```

Where *value* represents the value you want to pass, for example, true, medium, or Default.

Part VI

Securing Your Portal

Part VI of the User's Guide provides an overview of security in WebCenter Portal: Spaces applications and describes how to set up the application roles and permissions that determine user access. It describes how to secure individual pages and page components. And it provides information about enabling users to register themselves with the application.

Part VI includes the following chapters:

23

Understanding Security

This chapter provides information about security in the Spaces application. It contains the following sections:

- Section 23.1, "Introduction to Security in Spaces"
- Section 23.2, "Understanding Users"
- Section 23.3, "Understanding Application Roles and Permissions"
- Section 23.4, "Understanding Roles and Permissions within a Space"
- Section 23.5, "Understanding Self-Registration"

Audience

The content of this chapter is intended for Spaces administrators and anyone who wants to understand the application's security model. For detailed instructions, see Chapter 24, "Managing Users, Roles, and Permissions".

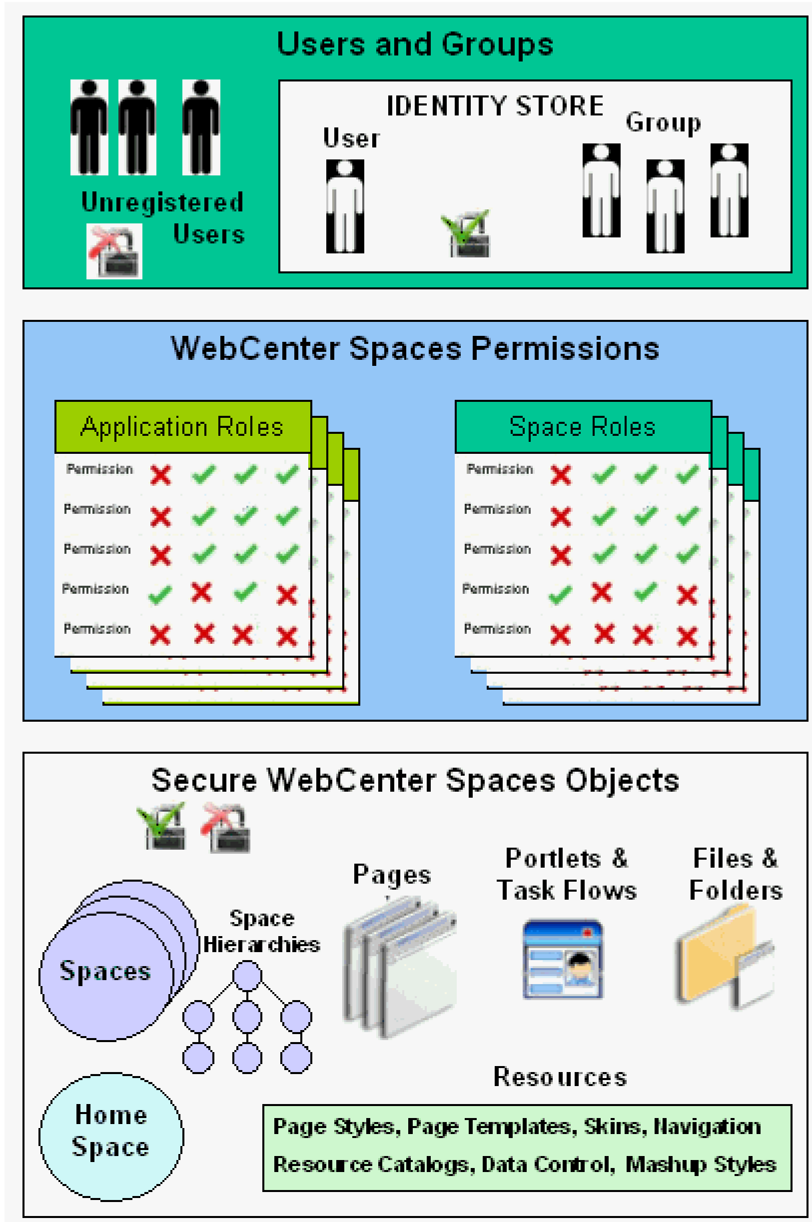
See also "Managing Security" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

23.1 Introduction to Security in Spaces

The Spaces application provides a comprehensive security model that enables you to control what users can see and change on your portal. You can control which users (and groups) have access to individual spaces, space hierarchies, and the Home space, and you can also control exactly what users and groups can see and do by enabling and disabling various permissions.

With a particular space you can restrict user and group access to individual pages, page content (such as task flows, portlets, documents, and folders), and resources (such as page templates, page styles, skins, resource catatlogs, and so on).

Figure 23–1 Spaces Security



User and Groups

A user is a single person in the identity store and a group contains multiple users. In the Spaces application you can grant permissions to individual users and to groups of users.

Unregistered Users and Self-Registration

Self-registration allows unregistered users to create their own login and password for the Spaces application. A user who self-registers is immediately and automatically granted access to Spaces and a new user account is created in the application's identity store. To access a particular space, the user can subscribe to the space. If the subscription request requires moderator approval, the user will need to wait for that approval; otherwise, the user is granted immediate access to the space.

Application Roles and Space Roles

Application roles determine what a user (or group) can see and do in the Home space which, for some administrative functions, can impact the entire Spaces application. Space roles control actions within a particular spaces.

Spaces and Space Hierarchies

Spaces support the formation and collaboration of project teams and communities of interest by providing a dedicated and readily accessible area for relevant services, pages, and content and by supporting the inclusion of specified members.

A space hierarchy consists of a parent space with one or more subspaces. Subspaces can inherit the security (members, roles, and permissions) of their parent.

Home space

The Home space is a shared space that, by default, is accessible to everyone who is logged in. Application roles apply while a user is working within the Home space. In most applications, the Home space focuses on social networking and personal content.

Resources

Various portal resources help define the overall structure, look and feel, and content in spaces, and these include page templates, page styles, skins, navigation models, Resource Catalogs, content presenter display templates, mashup styles, data controls, task flows. Users with appropriate privileges can build and customize portal resources for the entire application, a single space, or a space hierarchy.

Pages

Anyone authorized to edit a page can grant access and permissions to other users and groups. For example, you might grant view-only permissions to everyone in the sales group, edit permissions to sales managers, and manage permissions to a single user. Alternatively, you can specify that the page inherits its access from the application.

Page Content, Files and Folders

Some pages might contain content that you want only a select set of users, or even only one other user, to see. For example, a page aimed at sales people might include two Announcement task flows; one aimed at all sales people and the other at sales managers only. By restricting access to the second Announcement task flow, you can hide management-level announcements from anyone who is not a sales manager.

23.2 Understanding Users

A Spaces user has a login account for the Spaces application—provisioned directly from an existing identity store. See also "Adding Users to the Embedded LDAP Identity Store" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

All users in the identity store are assigned minimal privileges in the Spaces application through the `Authenticated-User` role. The only exception is the Fusion Middleware Administrator (`weblogic` by default). Out-of-the-box, the Fusion Middleware Administrator is the only user assigned full administrative privileges through the `Administrator` role. For more information, read the next section Section 23.3.1.1, "Default Application Roles".

It is the Fusion Middleware Administrator's job to assign each user an appropriate application role. Alternatively, the Fusion Middleware Administrator may choose to assign the `Administrator` role to another user and delegate this responsibility.

Table 23–1 Default Administrator in Spaces

User	Description
Fusion Middleware Administrator (weblogic)	Administrator for the entire application server, sometimes referred to as the super administrator. This user can manage any application on the server, including Spaces.

23.3 Understanding Application Roles and Permissions

Application roles control the level of access a user has to information and services in the Spaces application. Specifically, application roles and their permissions determine what a user can see and do in their *Home space.*

This section includes:

Section 23.3.1, "Understanding Application Roles"

Section 23.3.2, "Understanding Application Permissions"

23.3.1 Understanding Application Roles

Application role assignment is the responsibility of the Spaces administrator. Administrators can assign users a default application role or create additional, custom roles specific to their Spaces application. For more detail, see:

- Section 23.3.1.1, "Default Application Roles"
- Section 23.3.2, "Understanding Application Permissions"

Application roles only apply while a user is working within their Home space. Within all other spaces a different set of roles and permissions apply and it is the space moderator's responsibility to determine suitable role assignments for each of its members. See also Section 54.2, "Managing Roles and Permissions for a Space".

Note: Application roles and permissions defined within Spaces are stored in its *policy store* and, consequently, apply to this Spaces application only. Enterprise roles are different; enterprise roles are stored within the application's *identity store* and do not imply any permissions within the Spaces application. See "Application Roles and Enterprise Roles" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

23.3.1.1 Default Application Roles

The Spaces application provides several default application roles that cannot be deleted (Table 23–2).

Table 23–2 Default Application Roles for Spaces

Application Role	Description	Modify?
Administrator	Users with the `Administrator` role can set application-wide properties for Spaces, create business role pages, configure defaults for discussion forums, mail, and people connection services, register producers and external applications, as well as perform other administrative duties such as editing the login page and the self-registration page. Administrators can also manage users and roles for the Spaces application, delegate or revoke privileges to/from other users, manage spaces and space templates, and also import and export space information. Out-of-the-box, the Fusion Middleware Administrator is the only user assigned full administrative privileges for the Spaces application through the `Administrator` role.	Yes* *Except for Application permissions which are read-only
Authenticated-User	Authenticated users of Spaces are granted the `Authenticated-User` role. Users who login are assigned with this role and, by default, have access to their own Home space, pages that they create, and public pages. These users can also view public spaces, create spaces, and create space templates. This role inherits permissions from the `Public-User` role. In the Spaces application, the `Authenticated-User` role is equivalent to `authenticated-role`—a standard OPSS (Oracle Platform Security Services) role.	Yes
Public-User	Anyone with access to the Spaces application who is not logged in, is granted the `Public-User` role. Such users are anonymous, unidentified, and can see public content only. In the Spaces application, the `Public-User` role is equivalent to `anonymous-role`—a standard OPSS (Oracle Platform Security Services) role.	Yes

23.3.1.2 Custom Application Roles

Custom application roles (sometimes known as user-defined roles) are specific to your Spaces application. When setting up Spaces, it is the Spaces administrator's job to identify which application roles are required, choose suitable role names, and define the responsibilities of each role.

For example, an education environment might require roles such as Teacher, Student, and Guest. While roles such as Finance, Sales, Human Resources, and Support would be more appropriate for a corporate environment.

In the Spaces application, custom application roles inherit permissions from the `Authenticated-User` role.

To learn how to set up applications roles for Spaces users, see Section 24.2.2, "Defining Application Roles"

23.3.2 Understanding Application Permissions

Every application role has specific, defined capabilities known as permissions. These permissions allow individuals to perform specific actions in the Home space. Permissions are categorized as follows and listed individually in the subsequent tables:

- Application
- Spaces
- Space Templates
- Pages
- Content Presenter Templates
- Data Controls
- Discussions
- Links
- Mashup Styles
- Navigations
- Page Styles
- Page Templates
- People Connections
- Resource Catalogs
- Skins
- Task Flows

No permission, except for `Manage All`, inherits privileges from other permissions.

Table 23–3 Application Permissions in Spaces

Category	Application Permissions
Application	**Manage All** - Enables access to all *Spaces Administration* pages: Spaces, Pages, Resources, Security, and Configuration. Through these pages, users can manage application security (users/roles), configure application-wide properties and services, manage resources, create business role pages, manage everyone's personal pages, customize system pages, view spaces accessible to them, as well as export/import spaces and space templates. Some administrative tasks are exclusive to the out-of-the-box `Administrator` role and cannot be performed by granting the `Application-Manage All` permission. These tasks include editing the login page, the self-registration page, and profile gallery pages, as well as the ability to manage *all* spaces, *all* space templates, external applications, and portlet producers. **Manage Configuration** - Same as the `Application-Manage All` permission but excludes security privileges. Users with this permission cannot access the Security page. **View Application** - Enables users to view the Spaces application, and gives user access to the Home space. See also Section 24.2.4, "Granting Permissions to the Public-User Role" and Section 24.2.5, "Granting Permissions to the Authenticated-User Role."

Table 23–3 (Cont.) Application Permissions in Spaces

Category	Application Permissions
Spaces	**Manage All** - Enables access to all Space administration pages (General, Roles, Members, Pages, Content, Subspaces, Services, Services, Custom Attributes). Through these pages users can manage space membership, assign permissions and roles, manage, delete, and export spaces and resources, set space properties, and manage service availability. **Manage Configuration** - Same as the `Spaces-Manage` permission but excludes security privileges. Users with this permission cannot access the Roles and Members pages unless they are a space moderator. **Manage Membership** - Users can manage space membership through Roles and Members pages. **Create Spaces** -Users can create spaces.
Space Templates	**Manage All** - Enables users to manage any space template (through the Space Templates page) and delete templates accessible to them. See also Section 52.3, "Managing Space Templates." **Create Space Templates** - Users can create space templates.
Pages	**Create, Edit, and Delete** - Create, edit and delete pages in your Home space. **Delete** - Delete pages in your Home space. **Edit** - Add or edit personal page content, rearrange content, and set page parameters and properties. **Customize** - Customize your view of pages in the Home space by adding, editing, or removing content. **View** - View pages in the Home space. **Create** - Create or design a new page for your Home space view. These permissions only apply to the Home space. The permissions do not apply to pages that are created within a space. Page permissions within a space are granted on a per space-basis by the moderator. See Section 54.2, "Managing Roles and Permissions for a Space".
Content Presenter Templates	**Create, Edit, and Delete** - Create, edit and delete content display templates for the application through Spaces Administration. **Create** - Create content display templates for the application. **Edit** - Edit application-level content display templates. See also Chapter 42, "Publishing Content Using Content Presenter."
Data Controls	**Create, Edit, and Delete** - Create, edit and delete data controls for the application through Spaces Administration. **Create** - Create data controls for the application. **Edit** - Edit application-level data controls. See also Section 29.2, "Creating and Managing Data Controls."
Discussions	**Create, Edit, and Delete** - Manage categories, forums, and topics on the back-end discussions server. Set discussion forum properties for all spaces. See also Section 23.3.2.2, "Understanding Discussion Server Role Mapping."

Table 23–3 (Cont.) Application Permissions in Spaces

Category	Application Permissions
Links	**Create, and Delete** - Create and delete links between objects, and manage link permissions. **Delete** - Delete a link between two objects. **Create** - Create links between objects, and delete links that you create.
Mashup Styles	**Create, Edit, and Delete** - Create, edit and delete content display templates for the application through Spaces Administration. **Create** - Create content display templates for the application. **Edit** - Edit application-level content display templates. See also Chapter 42, "Publishing Content Using Content Presenter."
Navigations	**Create, Edit, and Delete** - Create, edit and delete navigations for the application through Spaces Administration. **Create** - Create navigations for the application. **Edit** - Edit application-level navigations. See also Chapter 12, "Working with Navigation."
Page Styles	**Create, Edit, and Delete** - Create, edit and delete page styles through Spaces Administration. **Create** - Create page styles for the application. **Edit** - Edit application-level page styles. See also Chapter 15, "Working with Page Styles."
Page Templates	**Create, Edit, and Delete** - Create, edit and delete page templates through Spaces Administration. **Create** - Create page templates for the application. **Edit** - Edit application-level page templates. See also Chapter 13, "Working with Page Templates."
People Connections	**Manage People Connections** -Manage application-wide settings for People Connection services. **Update People Connections Data** -Edit content associated with People Connection services. **Connect with People** -Share content associated with People Connection services with others.
Resource Catalogs	**Create, Edit, and Delete** - Create, edit and delete Resource Catalogs for the application through Spaces Administration. **Create** - Create Resource Catalogs for the application. **Edit** - Edit application-level Resource Catalogs. See also Chapter 16, "Working with Resource Catalogs."
Skins	**Create, Edit, and Delete** - Create, edit and delete skins through Spaces Administration. **Create** - Create skins for the application. **Edit** - Edit application-level skins. See also Chapter 14, "Working with Skins".

Table 23–3 (Cont.) Application Permissions in Spaces

Category	Application Permissions
Task Flows	**Create, Edit, and Delete** - Create, edit and delete task flows based on a mashup style through Spaces Administration. **Create** - Create task flows for the application. **Edit** - Edit application-level task flows. See also Section 29.3, "Creating and Managing Task Flows."

23.3.2.1 Understanding the Default Permissions

Table 23–4 shows the default permissions assigned to out-of-the-box application roles.

✔ - Shows an explicitly granted permission or action.

✙ - Shows an implied permission because of an explicitly granted permission.

Table 23–4 Default Application Roles and Permissions in Spaces

	Default Application Roles		
Permissions	**Administrator**	**Authenticated-User**	**Public-User**
Application			
Manage All	✔		
Manage Configuration	✙		
View Application	✙	✔	✔
Spaces			
Manage All	✔		
Manage Configuration			
Manage Membership			
Create Spaces		✔	
Space Templates			
Manage All	✔		
Create Space Templates		✔	
Pages			
Create, Edit, and Delete	✔		
Delete			
Edit			
Customize			
View			
Create		✔	
Content Presenter Templates			
Create, Edit and Delete	✔		
Create			
Edit			
Data Controls			

Table 23–4 (Cont.) Default Application Roles and Permissions in Spaces

	Default Application Roles		
Permissions	**Administrator**	**Authenticated-User**	**Public-User**
Create, Edit and Delete	✔		
Create			
Edit			
Discussions			
Create, Edit, and Delete	✔		
Links			
Create and Delete	✔		
Delete			
Create			
Mashup Styles			
Create, Edit and Delete	✔		
Create			
Edit			
Navigations			
Create, Edit and Delete	✔		
Create			
Edit			
Page Styles			
Create, Edit and Delete	✔		
Create			
Edit			
Page Templates			
Create, Edit and Delete	✔		
Create			
Edit			
People Connections			
Manage	✔		
Update		✔	
Connect		✔	
Resource Catalogs			
Create, Edit and Delete	✔		
Create			
Edit			
Skins			
Create, Edit and Delete	✔		
Create			

Table 23–4 (Cont.) Default Application Roles and Permissions in Spaces

	Default Application Roles		
Permissions	**Administrator**	**Authenticated-User**	**Public-User**
Edit			
Task Flows			
Create, Edit and Delete	✔		
Create			
Edit			

23.3.2.2 Understanding Discussion Server Role Mapping

Some WebCenter Portal services that need access to "remote" (back-end) resources also require role-mapping based authorization, that is, the Spaces roles that allow users to work with the Discussions service in the Spaces application, must be mapped to corresponding roles on the WebCenter Portal's discussions server.

Spaces uses *application roles* to manage user permissions in the Home space and *space roles* to manage user permissions within a particular space. On the WebCenter Portal's discussions server, a different set of roles and permissions apply.

Users who are working with discussions and announcements in Spaces automatically map to the appropriate discussions server role, shown in Table 23–5 and Table 23–6.

Table 23–5 Discussions Server Roles and Permissions - Application

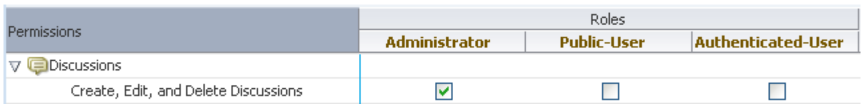
Discussion Server Role	Discussion Server Permissions	Spaces Equivalent Application Permission
`Administrator`	Category Admin	`Discussions-Create, Edit, and Delete` Create, read, update and delete sub categories, forums and topics inside the category for which permissions are granted.

Table 23–6 Discussions Server Roles and Permissions - For a Space

Discussion Server Role	Discussion Server Permissions	Spaces Equivalent Permissions in a Space
`Moderator`	Category Admin Forum Admin	■ `Discussions-Create, Edit, and Delete` Create, read, update and delete forums and topics. ■ `Announcements-Create, Edit, and Delete` Create, read, update and delete announcements.
	Create Message Create Announcement	■ `Discussions-Create, and Edit` Create and edit topics. ■ `Announcements-Create, and Edit` Create and edit announcements.
	Read Forum Create Thread	■ `Discussions-Reply To` Reply to discussion topics.
	Read Forum	■ `Discussions-View` View forums and topics. ■ `Announcements-View` View announcements.

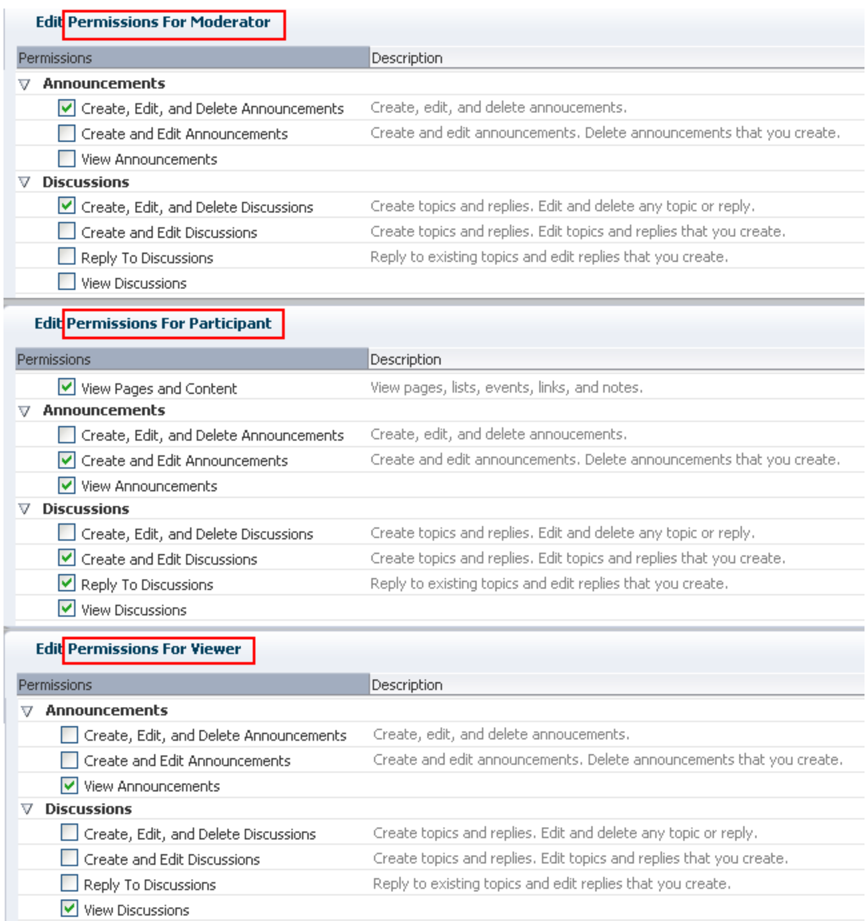
Any user assigned the `Application-Discussions-Create Edit Delete` permission in the Spaces application is automatically added to WebCenter Portal's discussions server and assigned the `Administrator` role with the `Category Admin` permission. Out-of-the box, the Spaces application assigns the `Application-Discussions-Create Edit Delete` permission to the `Administrator` role only, as shown in Figure 23–2.

Figure 23–2 Application Roles - Default Discussion Permissions



Similarly, in a given space, any member assigned discussion and announcement permissions is granted the corresponding permissions on the discussions server. Figure 23–3 shows out-of-the box discussion and announcement permissions for the default roles `Moderator`, `Participant`, and `Viewer`.

Figure 23–3 Space Roles - Default Discussion Permissions



23.3.2.3 Understanding Enterprise Group Role Mapping

In the Spaces application you can assign individual users or multiple users in the same enterprise group to Spaces roles. Subsequent enterprise group updates in the back-end identity store are automatically reflected in the Spaces application. Initially, when you assign an enterprise group to a Spaces role, everyone in the enterprise group is granted that role. If someone moves out of the group, the role is revoked. If someone joins the group, they are granted the role

For Spaces to properly maintain enterprise group-to-role mappings, back-end servers, such as the discussions server and content server, must support enterprise groups too. WebCenter Portal's Discussion Server and WebCenter Content's Content Server versions provided this release both support enterprise groups but previous versions may not. See also Section 24.3, "Troubleshooting Issues with Users and Roles."

23.4 Understanding Roles and Permissions within a Space

When a user becomes a member of an particular space, a different set of roles and responsibilities apply. For details, see Section 54.2, "Managing Roles and Permissions for a Space."

23.5 Understanding Self-Registration

Spaces administrators can enable self-registration for the application. Through self-registration, invited and uninvited users can create their own login and password for the Spaces application. A user who self registers is immediately and automatically granted access to Spaces and a new user account is created in the identity store. See also Chapter 25, "Enabling Self-Registration."

24

Managing Users, Roles, and Permissions

Application roles control the level of access a user has to information and services in the Spaces application. Specifically, application roles and their permissions determine what a user can see and do in their Home space. This chapter describes how to define and grant application roles to Spaces users. It contains the following sections:

- Section 24.1, "Managing Users"
- Section 24.2, "Managing Application Roles and Permissions"
- Section 24.3, "Troubleshooting Issues with Users and Roles"

When a Spaces user becomes a member of a particular space, a different set of roles and responsibilities apply. For details, see Section 54, "Managing Space Members and Roles."

Audience

The content of this chapter is intended for Spaces administrators with the `Application-Manage All` permission.

24.1 Managing Users

Administrators must ensure that all Spaces users have appropriate permissions. To get permissions, users must be assigned to an appropriate application role.

This section tells you how to assign roles and contains the following subsections:

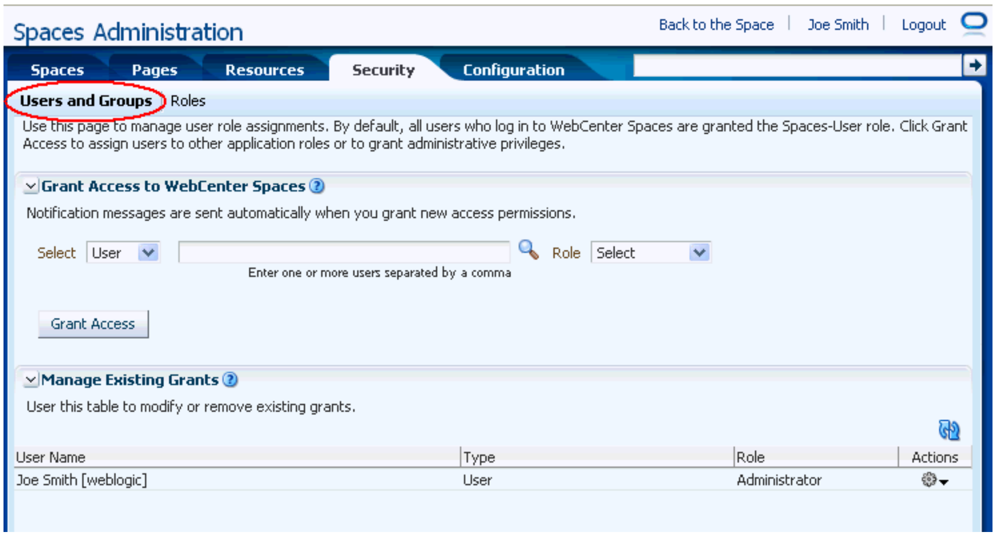
- Section 24.1.1, "What You Need to Know About Managing Users"
- Section 24.1.2, "Assigning Users (and Groups) to Roles"
- Section 24.1.3, "Assigning a User to a Different Role"
- Section 24.1.4, "Giving a User Administrative Privileges"
- Section 24.1.5, "Revoking Application Roles"
- Section 24.1.6, "Adding or Removing Users"

24.1.1 What You Need to Know About Managing Users

From the *Users and Groups* page (Figure 24–1), administrators can manage application roles for all the users who have access to the Spaces application, that is, all users defined in the identity store. From here, you can change user role assignments, grant administrative privileges, and revoke user permissions. To access the Users and Groups page, open WebCenter Portal Administration and then click the Security tab. For details, see Section 4.1, "Accessing the Spaces Administration Page".

Only users granted special (nondefault) application privileges appear in this table. Initially, all users in the Spaces identity store are assigned minimal privileges through the `Authenticated-User` role. Users with the default `Authenticated-User` role are not listed here. See also Section 23.3.1.1, "Default Application Roles."

Figure 24–1 Spaces Administration - Users and Groups Page



24.1.2 Assigning Users (and Groups) to Roles

Initially, all users in the Spaces identity store are assigned minimal privileges through the `Authenticated-User` role. You can assign individual users (or multiple users in the same enterprise group) to a different application role through Spaces Administration.

Updates in your back-end identity store, such as new users or someone leaving an enterprise group, are automatically reflected in the Spaces application. Initially, when you assign an enterprise group to a Spaces role, everyone in the enterprise group is granted that role. If someone moves out of the group, the role is revoked. If someone joins the group, they are granted the role.

Note: For the Spaces application to properly maintain enterprise group-to-role mappings, back-end servers, such as the discussions server and content server, must support enterprise groups too. When back-end servers do not support enterprise groups, the message `"Group [name] not found in the Identity Store"` displays. See also Section 24.3, "Troubleshooting Issues with Users and Roles."

To assign a user (or a group of users) to a different application role:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Security**, then **Users and Groups** (Figure 24–1).

   This page lists users to which additional roles are defined.

3. Select **User** or **Group** from the drop down.

Select **User** to grant permissions to one or more users defined in the identity store. Select **Group** to grant permissions to groups of users.

4. If you know the exact name of the user or group, enter the name in the box provided, separating multiple names with a comma.

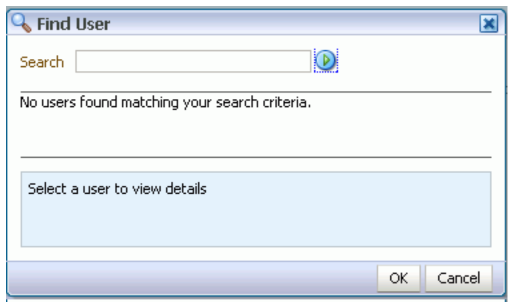
   If you are not sure of the name you can search your identity store:

   a. Click the **Find** icon (Figure 24–2).

Figure 24–2 Find Icon

The Find User (or Find Group) dialog box opens (Figure 24–3).

Figure 24–3 Finding Users and Groups in the Identity Store



   b. Enter a search term for a user or group, then click the **Search** icon.

   For tips on searching for a user or group in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store".

   Users (or groups) matching your search criteria display in the **Select User** dialog box. For more details on which fields are searched, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."

   Tip: ■

   - Use * as a wildcard, for example `*sales`.
   - Leave the search field blank to list all users (or groups) in the identity store.
   - Enter a space between two search terms to search First Name and Last Name, for example `jo sm`, searches for `jo` in First Name and `sm` in Last Name.

   c. Select one or more names from the list.

   To assign roles to multiple users or groups, multi-select all the names required. **Ctrl-Click** rows to select multiple names.

   d. Click **OK**.

   The names that you select display on the **User and Groups** tab.

5. To assign a role, select a **Role** from the drop down (Figure 24–4).

Figure 24–4 Assigning a User Role

Select an appropriate role for the selected users (or groups). Only select **Administrator** to assign full, administrative privileges for the Spaces application.

If the role you want is not listed, create a new role that meets your requirements (see Section 24.2.2, "Defining Application Roles").

When no role is selected, the user assumes the `Authenticated-User` role. See Section 23.3.1.1, "Default Application Roles".

6. Click **Grant Access**.

User/user group names and new role assignment display in the table.

> **Note:** Group names are clickable enabling you to drill down to see user names of the current group members.
>
> A list of members does not display for dynamic group based on Oracle Entitlements Server (OES) roles since OES roles are based on dynamic attributes and therefore do not have any static members. See also "Configuring Dynamic Groups" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

24.1.3 Assigning a User to a Different Role

From time to time, a user's role in the Spaces application may change. For example, a user may move out of sales into the finance department and in this instance, the user's role assignment may change from *Sales* to *Finance*.

> **Note:** You cannot modify your own role or the Fusion Middleware Administrator's role. See Section 23.3.1, "Understanding Application Roles".

To assign a user to a different role:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages.".

2. Click **Security**, then **Users and Groups** (Figure 24–1).

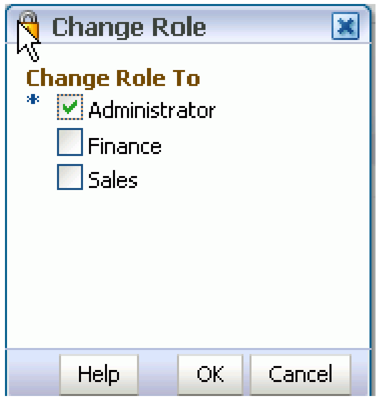
3. In the **Manage Existing Grants** table, scroll down to the user you want.

   Only users with nondefault role assignments are listed in the table. If the user you want is not listed, grant the role required as described in Section 24.1.2, "Assigning Users (and Groups) to Roles."

4. Click the **Actions** icon, then select **Change Role** from the drop down list.

   The Change Role dialog box opens (Figure 24–5).

Figure 24–5 Changing a User's Application Role



5. Select roles as follows:
   - Select **Administrator** to assign full, administrative privileges for the Spaces application.
   - Select select one or more roles from the list available.

     If the role you want is not listed, create a new role that meets your requirements (see Section 24.2.2, "Defining Application Roles").

     At least one role must be selected. To revoke all role assignments, reverting user permissions to the default `Authenticated-User` role, see Section 24.1.5, "Revoking Application Roles".
6. Click **OK**.

New role assignments display in the table.

24.1.4 Giving a User Administrative Privileges

It is easy to give a user full, administrative privileges for the Spaces application through the `Administrator` role. Administrators have the highest privilege level and can view and modify anything in the Spaces application so take care when assigning the `Administrator` role.

Some administrative tasks are exclusive to the `Administrator` role and cannot be performed by granting the `Application-Manage All` permission. These tasks include editing the login page, the self-registration page, and profile gallery pages. See also Section 23.3.1.1, "Default Application Roles."

To give a user administrative privileges:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click **Security**, then **Users and Groups** (Figure 24–1).

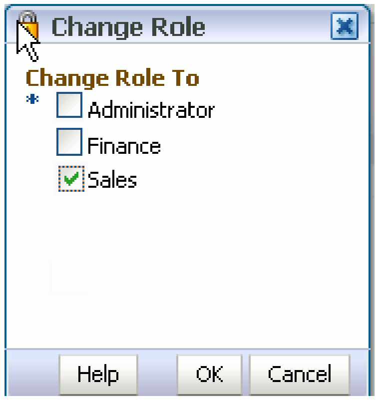
   The Role column indicates which users already have full administrative privileges through the `Administrator` role.
3. Click the **Users and Groups** tab.
4. In the **Manage Existing Grants** table, scroll down to the user you want.

   Only users with nondefault role assignments are listed in the table. If the user you want is not listed, follow steps in Section 24.1.2, "Assigning Users (and Groups) to Roles" to grant the `Administrator` role.

5. Click the **Actions** icon, then select **Change Role** from the drop down list.

   The Change Role dialog box opens (Figure 24–6).

Figure 24–6 Changing a User's Application Role



6. Select **Administrator** to assign full, administrative privileges for the Spaces application.
7. Select **OK**.

The new role assignment displays in the table.

24.1.5 Revoking Application Roles

It is easy to revoke application role assignments that no longer apply. You can revoke roles individually or revoke all application roles assigned to a particular user at once.

Revoking all a user's application roles does not remove that user from the identity store and the user still has access to the Spaces application through the default `Authenticated-User` role.

> **Note:** You cannot revoke your own role assignments or the Fusion Middleware Administrator's role. See Section 23.3.1, "Understanding Application Roles".

To revoke application roles:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages.".
2. Click **Security**, then **Users and Groups** (Figure 24–1).

   This page lists users to which additional roles are defined.
3. In the **Manage Existing Grants** table, scroll down to the user you want.
4. Click the **Actions** icon:
   - Select **Change Role** to revoke one or more, specific application roles. See also Section 24.1.3, "Assigning a User to a Different Role".
   - Select **Delete Role Assignments** to revoke all roles assigned to that user, and then click **Delete** when asked for confirmation.

   Access for that user is revoked immediately.

When you delete all the roles assigned to a particular user, the user is no longer listed on the Users page. The user remains in the identity store and still has access to the Spaces application through the `Authenticated-User` role. See Section 23.3.1.1, "Default Application Roles".

24.1.6 Adding or Removing Users

Spaces administrators cannot add new user data directly to the Spaces identity store or remove user credentials. Identity store management is the responsibility of the systems administrator and takes place through the WLS Administration Console or directly into embedded LDAP identity stores using LDAP commands. See also "Adding Users to the Identity Store Using the WLS Administration Console" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Spaces administrators can, however, enable self-registration for the application. Through self-registration, invited and uninvited users can create their own login and password for the Spaces application. A user who self registers is immediately and automatically granted access to the Spaces application and a new user account is created in the identity store. See also Chapter 25, "Enabling Self-Registration."

24.2 Managing Application Roles and Permissions

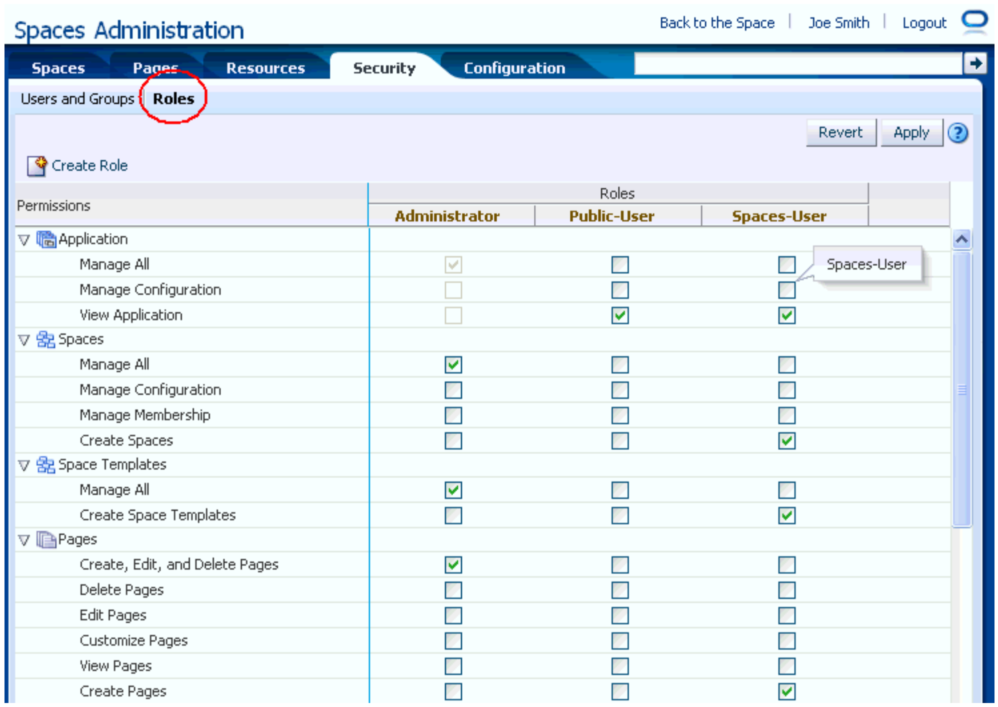
The Spaces application uses application roles to manage permissions for users working in their *Home space*. This section tells you how to manage application roles, and their permissions from Spaces Administration pages. It contains the following subsections:

- Section 24.2.1, "What You Need to Know About Application Roles and Permissions"
- Section 24.2.2, "Defining Application Roles"
- Section 24.2.3, "Modifying Application Role Permissions"
- Section 24.2.4, "Granting Permissions to the Public-User Role"
- Section 24.2.5, "Granting Permissions to the Authenticated-User Role"
- Section 24.2.6, "Deleting Application Roles"

24.2.1 What You Need to Know About Application Roles and Permissions

From the Roles page (Figure 24–7), administrators can manage application roles and permissions. From here, you can edit the permissions assigned to an application role, create new application roles, or delete unused roles.

Figure 24–7 Spaces Administration - Roles Page



Application roles apply when a user is working within their Home space. A different set of roles and permissions apply when a user is working within a particular space. It is the space moderator's responsibility to determine suitable role assignments for each of its members. See also Section 24.2, "Managing Application Roles and Permissions."

The Spaces application provides several default application roles. You cannot delete default application roles but you can modify the default permission assignments for each role. For more information, see Section 23.3, "Understanding Application Roles and Permissions."

24.2.2 Defining Application Roles

Use roles to characterize groups of Spaces users and determine what they can see and do in the Home space.

When defining application roles, use self-descriptive role names and try to keep the role policy as simple as possible. Choose as few roles as you can, while maintaining an effective policy.

Take care to assign appropriate access rights when assigning permissions for new roles. Do not allow users to perform more actions than are necessary for the role but at the same time, try not to inadvertently restrict them from activities they must perform. In some cases, users might fall into multiple roles.

To define a new application role:

1. Open Spaces Administration.

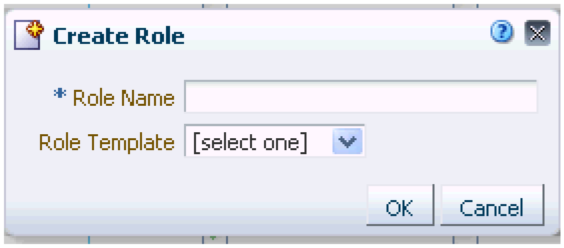
   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Security**, then **Roles** (Figure 24–7).

   Current application roles for the Spaces application display as columns in the table.

3. Click **Create Role** to define a new role for Spaces users.

Figure 24–8 Creating a New Role



4. Enter a suitable name for the role.

   Ensure the role names that are self-descriptive. Make it as obvious as possible which users should belong to which roles. Role names can contain alphanumeric characters, blank spaces, @, and underscores.

5. (Optional) Select a **Template Role**.

   The new role inherits permissions from the template role. You can modify these permissions in the next step.

   Select **Administrator** to create a role that inherits full, administrative privileges. Conversely, select `Public-User` to create a role that *typically* provides minimal privileges. Alternatively, select a custom application role to be your template.

6. Click **OK**.

   The new role appears as a column in the table. The permissions list shows which actions users with this role can perform.

7. To modify user permissions for the role, select or deselect each permission check box.

8. Click **Apply** to save any changes that you make to the role's permissions.

24.2.3 Modifying Application Role Permissions

Administrators can modify the permissions associated with application roles at any time. Application permissions are described in Section 23.3.2, "Understanding Application Permissions".

Application role permissions allow individuals to perform specific actions in their Home space. No permission, except for `Manage All`, inherits privileges from other permissions.

Note: Application permissions cannot be modified for the `Administrator` role. See also Section 23.3.1.1, "Default Application Roles".

To change the permissions assigned to a role:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages.".

2. Click **Security**, then **Roles** (Figure 24–7).

Current application roles for the Spaces application display as columns in the table.

3. Select or deselect **Permissions** check boxes to enable or disable permissions for a role.
4. Click **Apply** to save.

The new permissions are effective immediately.

24.2.4 Granting Permissions to the Public-User Role

Anyone who is not logged in to the Spaces application assumes the `Public-User` role. Out-of-the-box, the `Public-User` role is granted minimal privileges, that is, the `View Application` permissions only.

Caution: Take care when granting permissions to the `Public-User` role. Avoid granting administrative permissions such as `Application-Manage All`, `Application-Manage Configuration`, or any permission that might be considered unnecessary. See also Section 23.3.2, "Understanding Application Permissions."

Granting the View Application Permission

The `View Application` permission allows unauthenticated users to see public Spaces application pages, such as the welcome page, and also content that individual users choose to make public.

When `View Application` permissions are granted to the `Public-User` role:

- Ensure that users understand that any personal page or personal content they choose to make public will become accessible to unauthenticated users outside of the Spaces community, that is, anyone with Web access.
- Consider customizing the default welcome page that displays to public users before they login (Welcome Page). See Section 7.3.2, "Customizing System Pages."

If you do not want unauthenticated users to see Spaces content that is marked 'public', do not grant the `View Application` permission to the `Public-User` role. When public access is disabled, public content cannot be seen by unauthenticated users. Also, the welcome page for Spaces is not displayed; public users are directed straight to a login page. Administrators may customize the default login page, if required. See Section 7.3, "Working with System Pages."

Granting Other Permissions

Be careful when assigning permissions to the `Public-User` role. For security reasons, Oracle recommend that you limit what anonymous users can see and do in the Spaces application.

24.2.5 Granting Permissions to the Authenticated-User Role

Anyone who is logged in to the Spaces application assumes the `Authenticated-User` role. Out-of-the-box, the `Authenticated-User` role is granted minimal privileges, through the following permissions: `View Application`, `Spaces-Create`, `Space Templates-Create`, `Pages-Create`, `Update People Connections Data`, and `Connect with People`.

Other important notes:

- The `Authenticated-User` role always inherits permissions from the `Public-User` role.
- Custom application roles all inherit permissions from the `Authenticated-User` role.

24.2.6 Deleting Application Roles

When an application role is no longer required you should remove it from the Spaces application. This helps maintain a valid role list, and prevents inappropriate role assignment.

Application roles are deleted even when users are still assigned to the them. As you cannot delete any default roles, Spaces users will always have the `Authenticated-User` role.

Note: Default roles cannot be deleted (`Administrator`, `Authenticated-User`, `Public-User`). See Section 23.3.1.1, "Default Application Roles".

To delete an application role:

1. Open Spaces Administration.

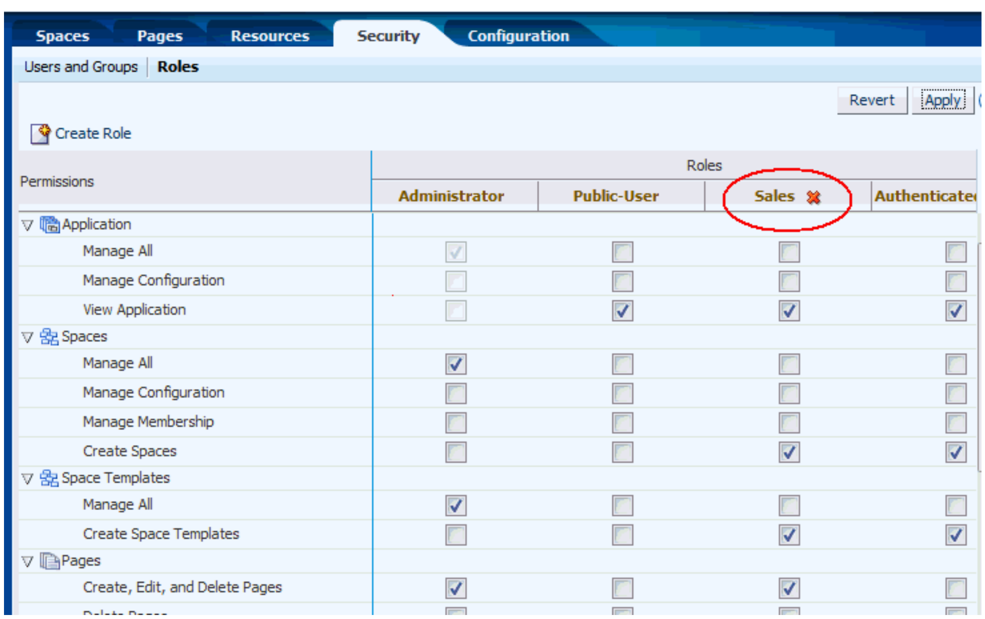
   For details, see Chapter 4, "Accessing Spaces Administration Pages.".

2. Click **Security**, then **Roles** (Figure 24–7).

   Current application roles for the Spaces application display as columns in the table.

3. Select the **Delete Role** icon next to the role you want to delete (Figure 24–9).

Figure 24–9 Deleting an Application Role



4. Click **OK** to confirm that you want to delete the role.

The role is removed from the table. Any users assigned to this role only, assume the default `Authenticated-User` role and do not display on the Users and Groups tab.

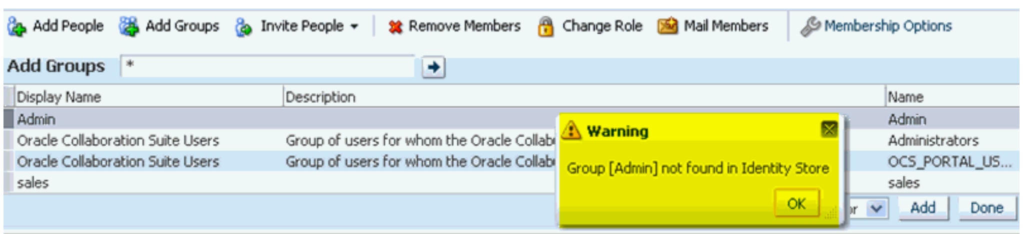
24.3 Troubleshooting Issues with Users and Roles

For the Spaces application to properly maintain enterprise group-to-role mappings, the back-end discussions server and content server must support enterprise groups. WebCenter Portal's Discussion Server and WebCenter Content's Content Server versions provided with Oracle WebCenter Portal 11.1.1.2.0 and later both support enterprise groups but previous versions may not.

If a back-end server **does not** support enterprise groups, an error message similar to that shown in Figure 24–10 displays when you try to add a group.

```
Warning: Group [name] not found in Identity Store
```

Figure 24–10 Error Message Displayed If Back-end Servers Do Not Support Enterprise Groups



Also, an error is logged containing more detailed information as shown here:

```
[2011-03-28T01:03:07.143-07:00] [WC_Spaces] [NOTIFICATION] [WCS-07855]
oracle.webcenter.doclib.internal.spaces.AbstractDoclibRoleMapper] [tid:
pool-1-daemon-thread-1] [userId: monty]
[ecid: a4789a41d7e6bc9f:36de4556:12efb72d049:-8000-00000000000002c0,0:5]
[APP: webcenter#11.1.1.4.0] Adding groups
[oracle.webcenter.security.common.WCGroup@18b96a3] to documents service roles
[Administration, Delete Documents, Create and Edit Documents, View Documents] for
 scope Scope[name=rbgs25mar01, guid=sbf125dd4_cd43_41cc_9d3d_467d06e84100]
[2011-03-28T01:03:09.122-07:00] [WC_Spaces] [ERROR] [WCS-44002]
[oracle.webcenter.security.rolemapping.RoleManager]
[tid: [ACTIVE].ExecuteThread: '3' for queue: 'weblogic.kernel.Default
(self-tuning)'] [userId: monty]
[ecid: a4789a41d7e6bc9f:36de4556:12efb72d049:-8000-00000000000002c0,0]
[APP: webcenter#11.1.1.4.0] The Role Mapping provider encountered an exception
while performing security role mapping for service oracle.webcenter.doclib.
[[oracle.webcenter.security.rolemapping.spi.RoleMappingSPIException: Cannot add
role null and permissions, 15, to the account for the folder, rbgs25mar01 for the
user/group Admin.        at
oracle.webcenter.doclib.internal.spaces.UCMSpacesUtils$2.newException(UCMSpacesUti
ls.java:2595)
```

Note: In previous releases, if a back-end server did not support enterprise groups, users belonging to enterprise groups were individually added to Spaces roles; this behavior has changed.

---

25 Enabling Self-Registration

Spaces administrators can enable self-registration for the application. Through self-registration, invited and uninvited users can create their own login and password for the Spaces application. This chapter describes how to enable self-registration. It contains the following sections:

- Section 25.1, "What You Should Know About Self Registration"
- Section 25.2, "Enabling Anyone to Self-Register"
- Section 25.3, "Enabling Self-Registration By Invitation-Only"

Audience

The content of this chapter is intended for Spaces administrators with the `Application-Manage All` permission.

25.1 What You Should Know About Self Registration

Self-registration allows users to create their own login and password for the Spaces application. A user who self-registers is immediately and automatically granted access to Spaces and a new user account is created in the application's identity store.

If *anyone* is allowed to self-register, that is any public user, a *Register* link or button displays on the Spaces login page. To enable this feature, see Section 25.2, "Enabling Anyone to Self-Register."

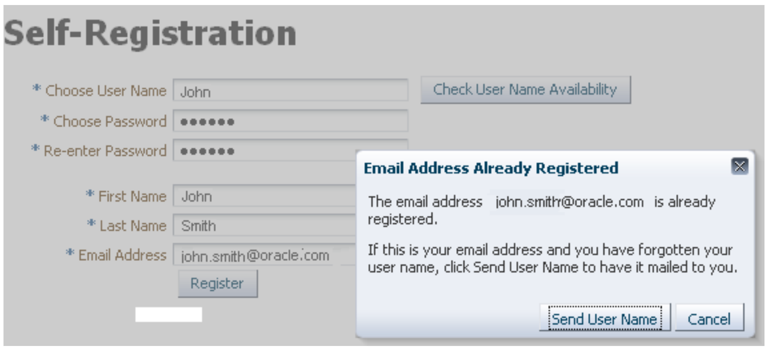
Self-registration by invitation is available too. This feature allows space moderators to send out membership invitations to people who are not currently registered with the Spaces application but might be interested in their space. Before accessing the space, invitees must create an account with the Spaces application and their account details are added to the application's identity store. If approval is required, the moderator must approve their subscription request before gaining access to the space. If the space is public or further approval is not required, then new user gains access to the space immediately. See also Section 25.3, "Enabling Self-Registration By Invitation-Only."

Note: If self-registration is not enabled for the Spaces application, identity store management takes place through the WLS Administration Console (or directly into embedded LDAP identity stores using LDAP commands) and is the responsibility of your systems administrator. See also "Adding Users to the Embedded LDAP Identity Store" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

A self-registration page is supplied out-of-the-box. Users with the `Administrator` role can add new components to the page and change the page layout if required. See Section 7.3, "Working with System Pages."

The self-registration page provided with Spaces offers to send a "user name reminder email" to anyone who tries to register with an email address that has already been used (Figure 25–1).

Figure 25–1 Email Address Already Registered

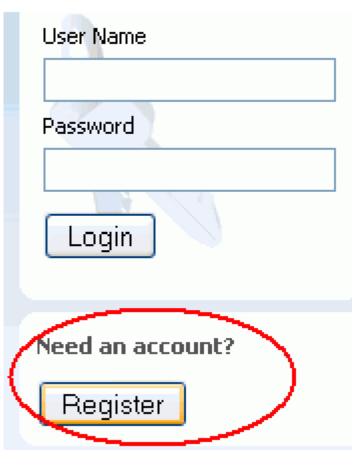


This feature only works if *public credentials* are defined for the external application that is providing authentication for the Mail service in the Spaces application. If users experience issues with this feature, ask your Fusion Middleware Administrator to check the mail server connection and its associated external application connection are configured correctly and that public credentials are defined. See also "Registering Mail Servers" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

25.2 Enabling Anyone to Self-Register

When *anyone* is allowed to self-register (that is, any public user), a **Register** link or button displays on the Spaces login page (Figure 25–2).

Figure 25–2 Self-Registration Available on Login Form



New users must create an account before gaining access to the Spaces application.

Users who self-register are added directly to the Spaces identity store and assigned the `Authenticated-User` application role. Out-of-the-box, users with `Authenticated-User` role have access to their own Home space, pages that they create, and public pages. They are also allowed to view public spaces, join any space that allows self-subscription, and create spaces of their own. If you enable self-registration, consider modifying `Authenticated-User` permissions to suit your exact requirements. See Section 24.2.3, "Modifying Application Role Permissions."

To allow anyone to self-register with Spaces:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Configuration**, then **General**.

3. Select **Allow Public Users to Self-Register** (Figure 25–3).

   When you deselect this option, public users cannot self-register with Spaces. You still enable self-registration on an invitation-only basis if you want. See Section 25.3, "Enabling Self-Registration By Invitation-Only."

Figure 25–3 Allowing Self-Registration Through Invitations

4. Click **Apply**.

See also Section 32.2, "Registering Yourself with WebCenter Portal: Spaces."

25.3 Enabling Self-Registration By Invitation-Only

Out-of-the-box, only registered Spaces users are candidates for space membership. While this might meet the needs of most Spaces applications, some spaces will want to recruit members outside of the Spaces community.

The Spaces administrator can extend space membership to users outside of Spaces by allowing them to self-register on an *invitation-only* basis. When this facility is enabled, space moderators can invite anyone to join their space by sending them a customizable invitation by mail. The invitation includes a secure, self-registration URL which the invited party clicks to accept space membership.

New members recruited in this way must create an account with the Spaces application before gaining access to the space. Users who self-register by invitation are added to the identity store, and to the space's member list.

Note: Users who self-register by invitation will be assigned the default application role too—`Authenticated-User`. Out-of-the box, users with the `Authenticated-User` role have access to their own Home space, pages that they create, and public pages. They are also allowed to view public spaces, join any space that allows self-subscription, and create spaces of their own. When you enable self-registration, consider modifying `Authenticated-User` permissions to suit your exact requirements. See also Section 24.2.3, "Modifying Application Role Permissions."

To allow anyone to self-register with Spaces through invitations:

1. Open Spaces Administration.

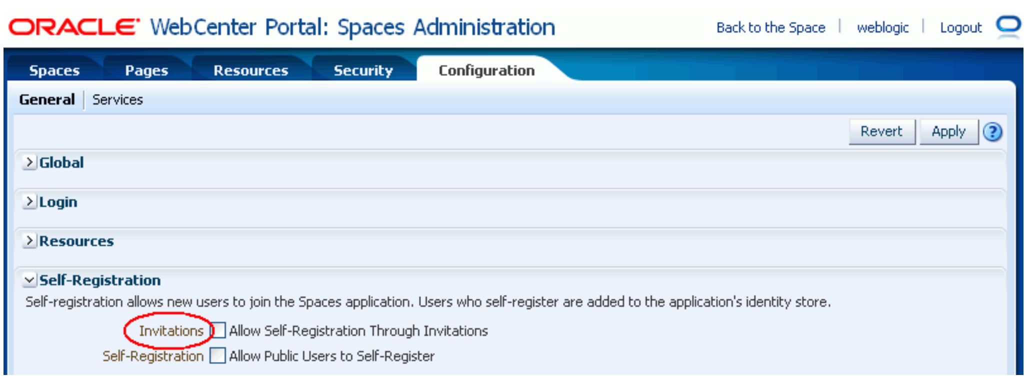
   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Configuration**, then **General**.

3. Select **Allow Self-Registration Through Invitations** (Figure 25–4).

   When you deselect this option, only existing users are candidates for space membership.

Figure 25–4 Allowing Self-Registration Through Invitations



4. Click **Apply**.

After enabling this option, space moderators may invite anyone to become a member of their space. See Section 54.3.4.5, "Inviting a Non-Registered User."

26

Securing Pages and Components

You are authorized to specify who can access any page on which you also have `Edit Page` permission. Among those you authorize to access the page, you can assign varying levels of access, so that some users can edit the page while others can merely view it. If you prefer, you can specify that the page inherits its access settings from the application.

You may want to open a page to many users, but limit the exposure of a particular page component to a specific user, a user group, or to users who are assigned a specific application role. You can accomplish this by associating a security-related EL expression with the component instance.

This chapter provides information about securing pages and page components. It includes the following sections:

- Section 26.1, "Setting Access on a Page Through Page Properties"
- Section 26.2, "Setting Access on a Page Component"

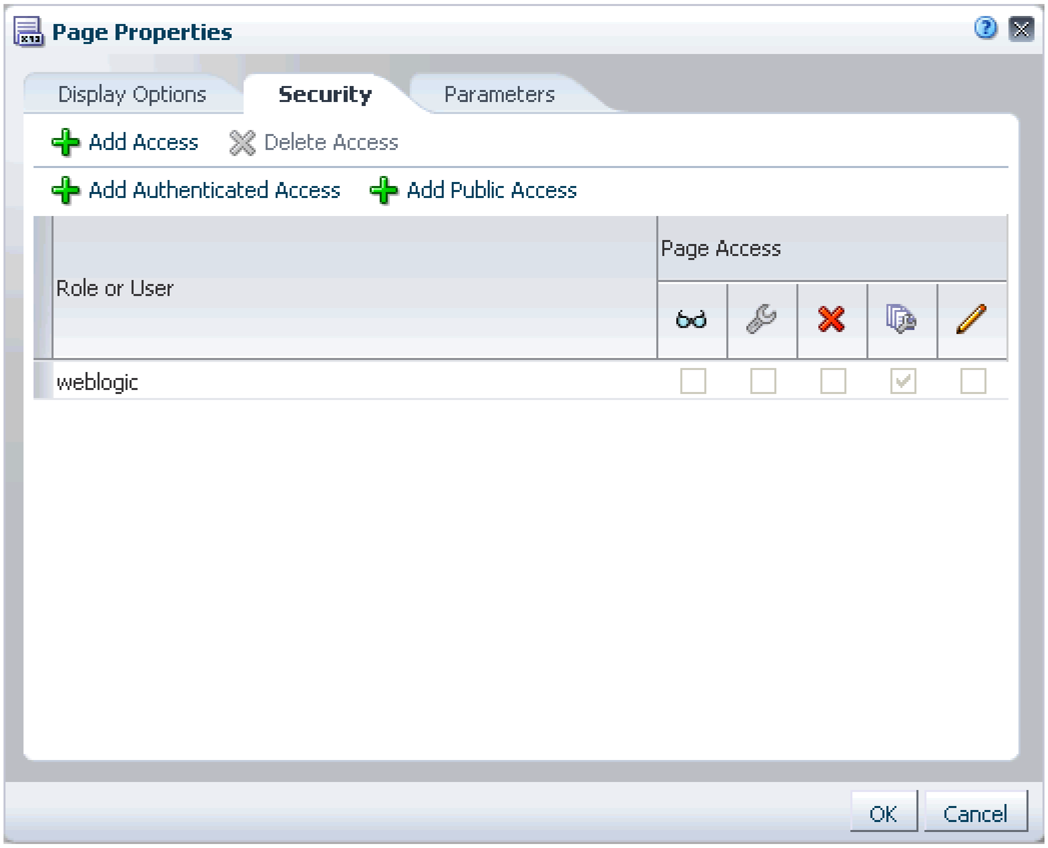
Audience

This chapter is intended for space moderators and participants and for page editors with the `create, edit, and delete` permission on pages and on the services that provide the components to be secured. For more information about application roles and permissions, see Section 24.2, "Managing Application Roles and Permissions."

26.1 Setting Access on a Page Through Page Properties

Page properties include a **Security** tab with controls for specifying access permissions on the current page (Figure 26–1).

Figure 26–1 Home Space Page: Security Tab in Page Properties Dialog



The options that appear on the **Security** tab vary according to whether you are accessing the tab from a space page or a Home space page (Figure 26–1 shows the options for a Home space page).

When you set page security on a space page, you have the additional option of inheriting page access permissions from the application or setting custom page access permissions.

This section describes how to set page access through page properties. It is also possible to set page access through the **Personalize Pages** page, as discussed in Section 17.7, "Controlling User Access to a Page."

Note: Page access permissions set through the Page Properties dialog in Composer are committed after you click **OK** in the Page Properties dialog. Closing Composer without saving does not discard such changes.

Page access permissions set through the **Personalize Pages** page take effect after you click **OK** in the Set Page Access dialog.

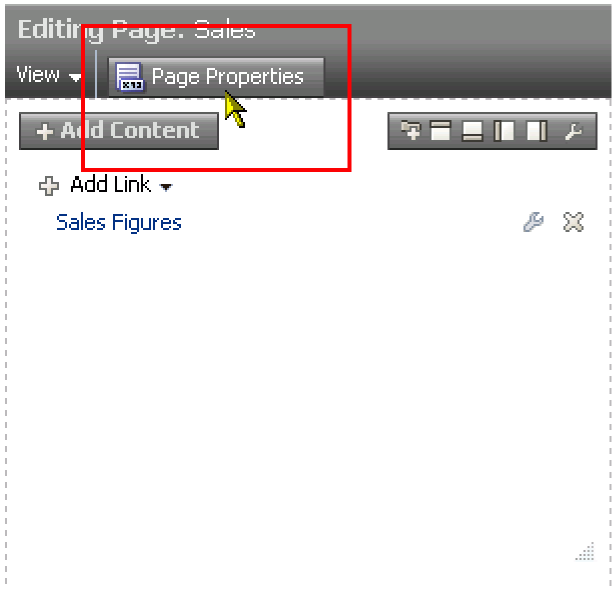
To access the **Security** tab in the Page Properties dialog:

1. Go to the page you want to secure, and open it in Composer.

    See Also: To open a page in edit mode (Composer), press Ctrl+Shift+E.

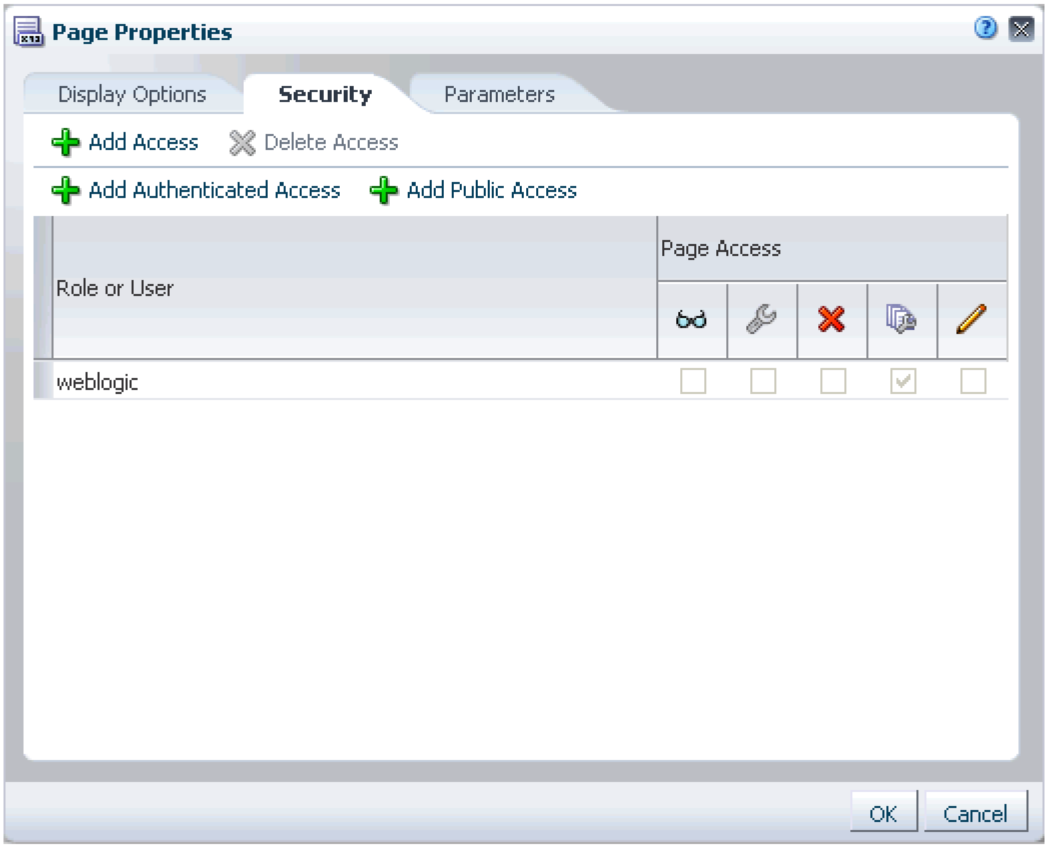
2. Click **Page Properties** (Figure 26–2).

Figure 26–2 Page Properties Button in Page Edit Mode



3. In the Page Properties dialog, click the **Security** tab (Figure 26–3).

Figure 26–3 Home Space Page: Security Tab in Page Properties Dialog



4. Follow the general steps for setting page access in Section 17.7, "Controlling User Access to a Page", beginning with Step 3.

26.2 Setting Access on a Page Component

There may be pages you want to expose to many users that have components you want only a select set of users—or even only one other user—to see. For example, imagine that you have created a space for all sales people. The space's home page includes two Announcements task flow instances: one for all sales people and one for sales managers only. You can secure the second Announcements instance so that only those users assigned the custom role `sales_manager` can see it.

Any component that has an associated `Show Component` property can be secured in this way. Those components that do not have an associated `Show Component` property can be placed inside a component that does, and in this way be secured. For example, you can place an Announcements task flow, which does not have an associated `Show Component` property, inside a Box component, which does. You can set the property on the Box, and that setting will also affect the display of Announcements.

> **See Also:** You can also set security on the custom components that you import through the Resource Manager. For more information, see Section 11.4.4, "Setting Security for a Resource."

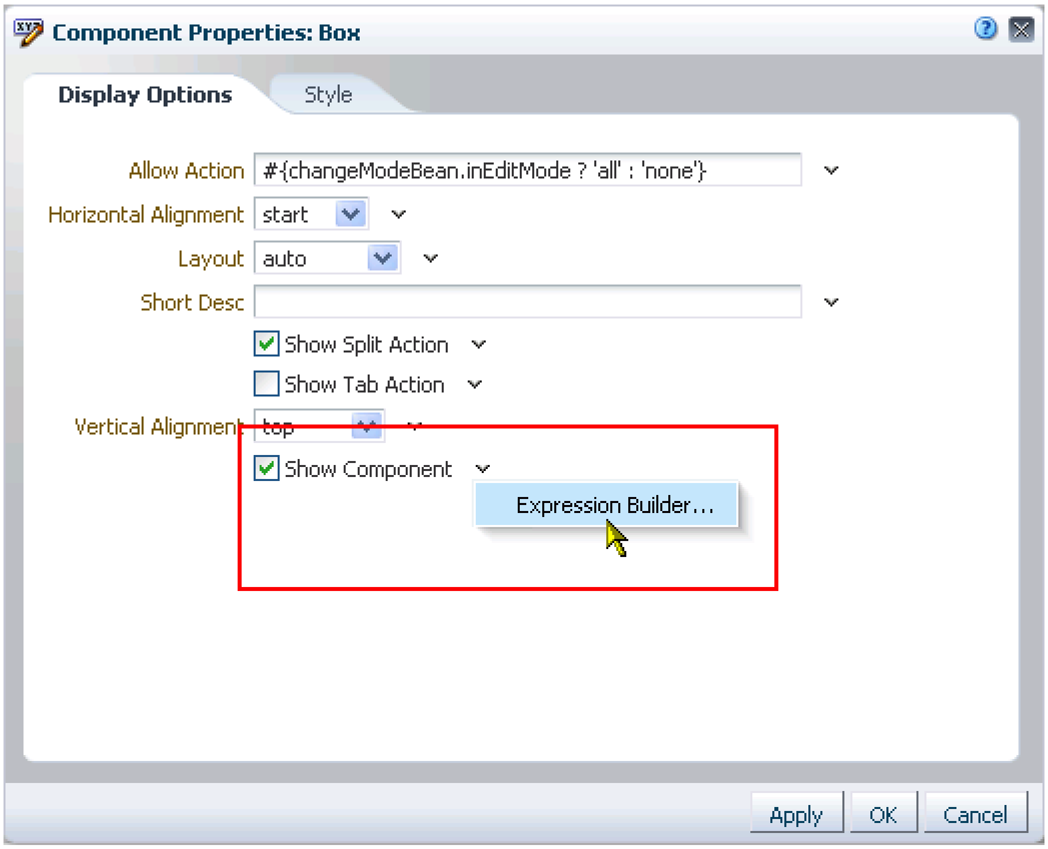
To set access on a component instance:

1. Go to the component instance you want to secure and access its **Display Options** properties.

   See Also: For information about accessing component properties, see Section 18.6, "Modifying Page Components."

2. Open the Expression Builder by clicking the **Edit** icon to the right of the `Show Component` property and selecting **Expression Builder** (Figure 26–4).

Figure 26–4 Expression Builder Option Next to Show Component



3. Under **Type a Value or Expression**, enter one of the following EL expressions:

   - To expose a component only to members of a particular scope who are assigned a particular role in that scope, enter:

     ```
     #{WCSecurityContext.userInScopedRole['role']}
     ```

     where *`role`* is a role name, such as `Moderator`.

     The scope is implicitly resolved to be the current scope:

     – If you use this EL in the *Home space*, it resolves to Home space GUID and roles defined at the application level.

     – If you use this EL in a *space* scope, it resolves to roles defined for the space.

   - To expose a component only to members of a group, enter:

     ```
     #{WCSecurityContext.userInGroup['group_name']}
     ```

In lieu of *group_name*, enter the name of the group, for example `Administrators`.

- To expose a component only to a specific user, enter:

  ```
  #{WCSecurityContext.currentUser['user_name']}
  ```

  In lieu of *user_name*, enter the user name, for example `jdoe`.

See Also: For more information about EL expressions, see Appendix B, "Expression Language (EL) Expressions." For information about EL expressions relevant to security, see Section B.4.3, "EL Expressions Relevant to Application Security."

4. Click **OK** to exit the Expression Builder, and click **OK** to save your changes and exit the Component Properties dialog.
5. Click **Save** and then **Close** to exit Composer.

   The secured component appears only to those users with the name, role, or group you specified.

Part VII

Working with Multilanguage Portals

Part VII of the User's Guide provides information about the languages available with WebCenter Portal: Spaces, how to manage that availability, and how to provide translations of user content.

Part VII includes Chapter 27, "Working with Multilanguage Portals."

27

Working with Multilanguage Portals

If your portal will be viewed by users in more than one country, you can configure it to display localized content based on the user's selected language and locale. For example, if you know your page will be viewed in Italy, you can localize your page so that when Italian is selected (in browser, user preferences, space, or application settings), text strings in the page will appear in Italian.

Additionally, locale selection applies special formatting considerations applicable to the selected locale. For example, whether information is typically viewed from left to right or right to left, how numbers are depicted (such as monetary information), and the like.

This chapter includes the following sections:

- Section 27.1, "What You Should Know About Languages in Spaces"
- Section 27.2, "Configuring Language Options"
- Section 27.3, "Enabling Users to Choose a Language"

27.1 What You Should Know About Languages in Spaces

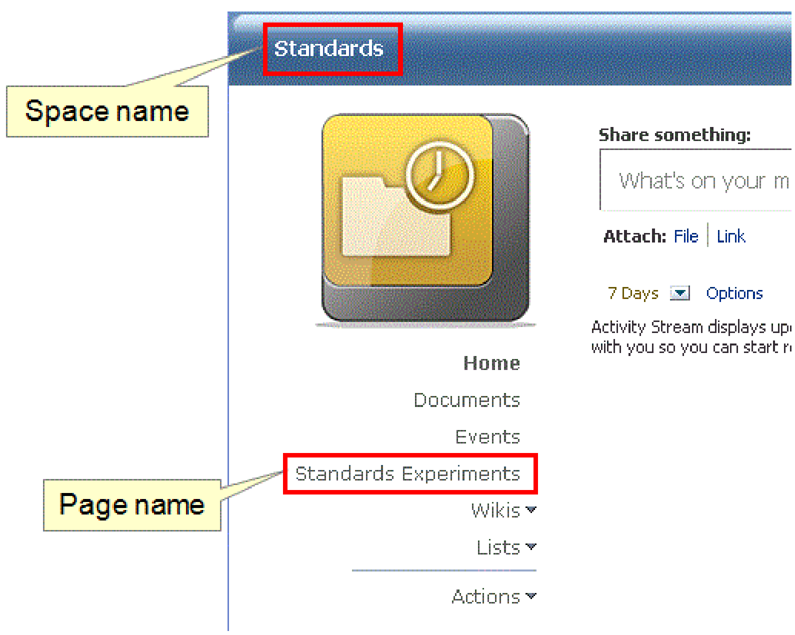
There are three main types of information that are displayed in Spaces:

- User interface (UI) elements, such as field and button labels and seeded boilerplate text

Figure 27–1

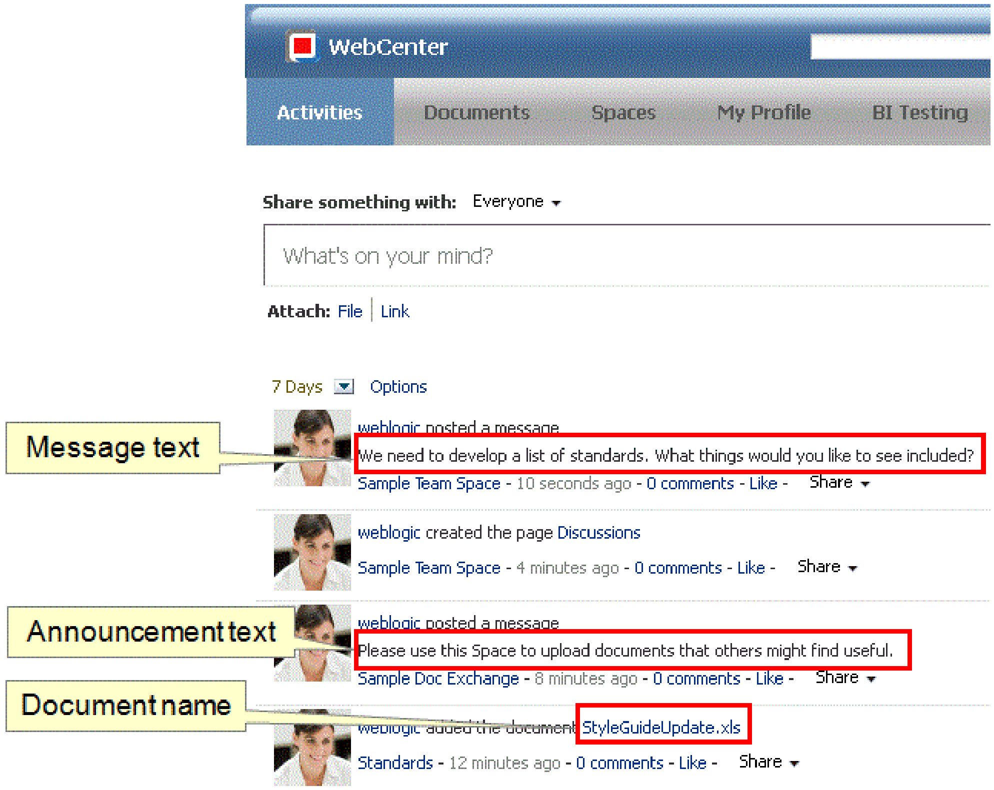
- User-entered metadata, such as space and page names

Figure 27–2



- Content added by users, such as announcements, documents, and discussion forum content

Figure 27–3



Each type of information is handled differently when it comes to translation:

- UI elements include out-of-the-box translations for 27 languages and 100 different locales. If the default UI text is not suited to your company's needs or if your company needs to support additional languages, your Spaces administrator can edit the string files containing this text.
- User-entered metadata can be translated by your Spaces administrator the same way that UI elements are translated, by editing the string files.
- Content added by users is generally displayed in the language used by the contributing user, though there is a way that your Spaces administrator can display translated content using Content Presenter.

For information on translating information and more information for supporting multi-language portals, see *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

27.1.1 Display Language Precedence

The display language controls the language in which translated information is rendered in your browser.

On the Internet, browser settings normally control the display language used for the various web sites a user visits. However, Spaces provides additional controls for language selection at the application, space, and user levels. The order of precedence for Spaces display language settings from weakest to strongest is as follows:

- **Browser setting**—This is the language selected in the user's browser preferences. Browser documentation describes how to change this setting.

- **Public cookie**—This is the session language a public user—that is, a user who is not logged in to Spaces—can select on your portal's **Welcome** page. A session language is retained for the life of the cookie. If the user clears the browser cookies, the session language is also cleared.
- **Application setting**—This is the application default language configured by your Spaces administrator (for more information, see Section 5.2, "Choosing a Default Display Language").
- **User preference setting**—This is the language the user selects through the personal Preferences settings (for more information, see Section 38.2, "Choosing Your Preferred Display Language").
- **Current scope**—This is the language the space moderator sets for a given space (for more information, see Section 53.4.15, "Setting a Space Display Language").

Note: If the server on which Spaces is running does not support the character set of the language preference set in Spaces, the output information related to spaces becomes garbled or displays as question marks.

To work around this issue, users can change the session language or their personal language preference to `English`. This creates new log file information. The log file is typically located at `$WC_DOMAIN/servers/WLS_Spaces/logs`.

27.1.2 Languages Supported Out-of-the-Box by Spaces

Spaces provides runtime translations for 27 languages and 100 different locales.

Table 27–1 Languages Available for Spaces

A to Fi	Fr to No	P to T
Arabic	French	Polish
Brazilian Portuguese	German	Portuguese
Chinese (Simplified)	Greek	Romanian
Chinese (Traditional)	Hebrew	Russian
Czech	Hungarian	Slovak
Danish	Italian	Spanish
Dutch	Japanese	Swedish
English	Korean	Thai
Finnish	Norwegian	Turkish

The list in Table 27–1 includes all the languages available to Spaces out-of-the-box. Users can also select locales associated with particular languages. For example, a user can change the language to Arabic and, within that language group, select from 20 different locales, including Algeria, Bahrain, Djibouti, and so on.

Note: The administrative tier that offers services to Spaces, including such tools as Oracle Enterprise Manager, provides a subset of the languages available to Spaces. These include:

- English
- Brazilian Portuguese
- Chinese (Simplified)
- Chinese (Traditional)
- French
- German
- Italian
- Japanese
- Korean
- Spanish

The Discussions service uses the Jive application. Out-of-the-box, the Jive application bundled with WebCenter Portal supports English and Spanish. It does not support other languages listed in Table 27–1. However, Jive is open to your own translation files. For more information, refer to the Jive documentation site. This information is explicit to the Jive application user interface.

27.2 Configuring Language Options

This section describes how to configure the language options available in Spaces. It includes the following sections:

- Spaces administrators can configure the language displayed by default in Spaces and the languages available to choose from in the Spaces UI. For more information, see Section 5.2, "Choosing a Default Display Language."
- Space moderators can configure the language displayed by default in their specific spaces and the languages available to choose from for their spaces. For more information, see Section 53.4.15, "Setting a Space Display Language."
- Users can select a language preference that applies whenever they are logged in to Spaces. For more information, see Section 38.2, "Choosing Your Preferred Display Language."

27.3 Enabling Users to Choose a Language

This section describes how to enable users to choose a language by adding a Change Language component to a page. It includes the following sections:

- Adding a Change Language Task Flow to a Page
- Setting Change Language Task Flow Properties

27.3.1 Adding a Change Language Task Flow to a Page

You can add the Change Language task flow to any page (in the Home space, in a space, or a business role page) to allow users to choose the language in which to display the UI.

To add a Change Language task flow to a page:

1. Go to the page where you want to add the task flow, and open the page in edit mode.

   See Also: For more information, see Section 18.1, "Entering and Exiting Composer."

2. Click **Add Content** to open the Resource Catalog.
3. Locate the Change Language task flow in the Resource Catalog.

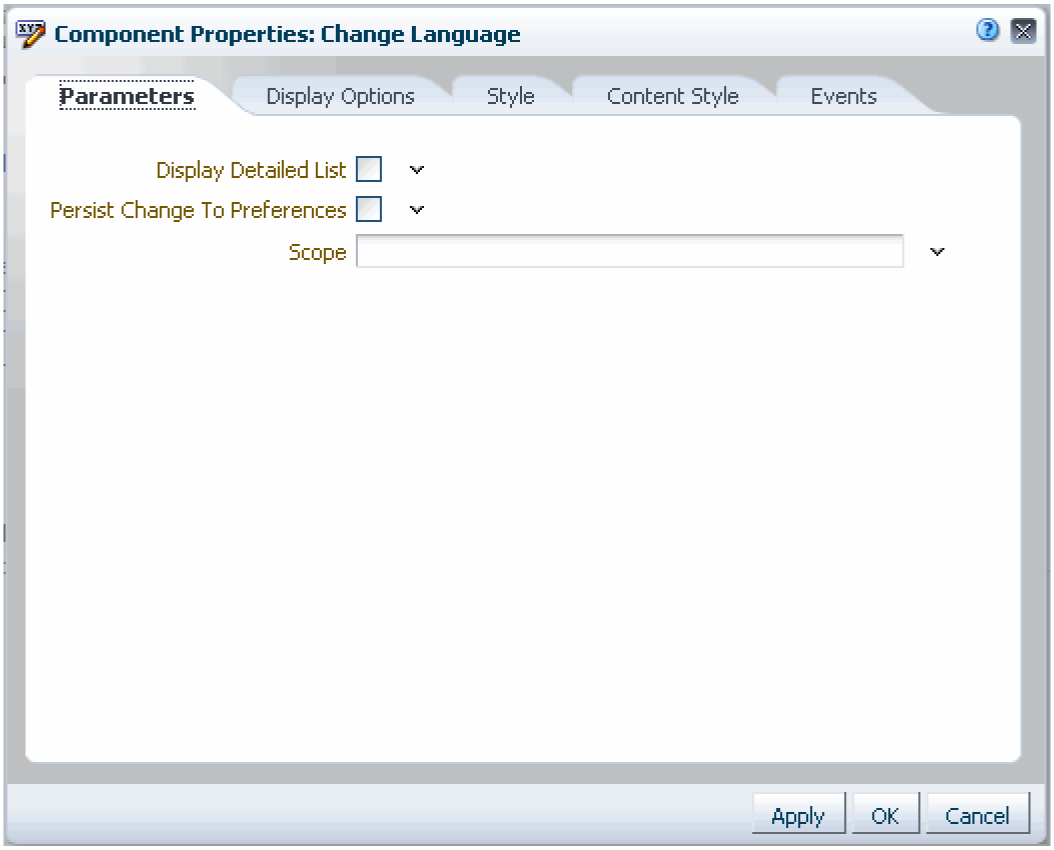
   Note: For more information, see Chapter 16, "Working with Resource Catalogs", specifically Section 16.3.1.2, "Adding Resources" (in the Add Resource Catalog Item dialog, select **Web Development**, then scroll to **Change Language**).

4. Click **Add** next to the Change Language task flow, then **Close** the Resource Catalog.
5. Click **Save**, then **Close**.

27.3.2 Setting Change Language Task Flow Properties

The Change Language task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 27–4).

Figure 27–4 Change Language Task Flow - Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Change Language task flow and describe the properties on the **Parameters** tab:

- Section 27.3.2.1, "What You Should Know About the Change Language Task Flow Properties"
- Section 27.3.2.2, "Change Language Task Flow Parameters"

27.3.2.1 What You Should Know About the Change Language Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 27.3.2.2, "Change Language Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For information about wiring pages and components, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6.4, "Working with Component Display Options" and Section 18.6.6, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

27.3.2.2 Change Language Task Flow Parameters

Table 27–4 describes the parameters that are unique to the Change Language task flow.

Table 27–2 Change Language Task Flow Parameters

Parameter	Description
`Display Detailed List`	Display a detailed list of languages, including locales. Default: Not selected
`Persist Change to Preferences`	Persist the user's language choice to the user's preferences. Default: Not selected
`Scope`	The name or GUID of the scope to which you want this language selection to apply. By default, the language selection is applied to the current scope. This means that a Change Language component placed on a page in the Home space affects the entire application, and a Change Language component placed in a particular space affects just that space. To limit the language selection to a space other than the current space, set this to the intended space's GUID. For information about obtaining a space's GUID, see Section 51.6, "Viewing Information About a Space."

Part VIII

Creating and Managing Portlets and Task Flows at Runtime

Part VIII of the User's Guide provides information about creating visualizations, such as forms, tables, and graphs, by gathering and publishing data from various data sources. It describes these tasks in terms of a data composer and seeded portlets.

Part VIII includes the following chapters:

28 Understanding Portlet Basics

This chapter provides an overview of portlets. It contains the following sections:

- Section 28.1, "What Is a Portlet?"
- Section 28.2, "What Does a Portlet Look Like?"
- Section 28.3, "What Can I Do with Portlets?"
- Section 28.4, "What Kinds of Portlets Can I Use?"

Audience

This chapter is intended for users who want to learn about portlets and how they integrate with Oracle WebCenter Portal.

28.1 What Is a Portlet?

Portlets are reusable web components that can draw content from a variety of different sources. Portlets provide a means of presenting data from multiple sources in a meaningful and related way. Portlets can display excerpts of other web sites, generate summaries of key information, perform searches, and access assembled collections of information from a variety of data sources. Because different portlets can be placed on a common page, you receive a single-source experience, though the content may be derived from multiple sources.

28.2 What Does a Portlet Look Like?

Figure 28–1 shows the sample Lottery portlet on a page in a WebCenter Portal application. Note that the same portlet displayed in a different application could look different, depending on how the portlet styles are defined.

Figure 28–1 The Sample Lottery Portlet

The following list describes some of the elements you might see in a portlet, depending on the application consuming the portlet:

- **Portlet chrome.** The collection of visual elements that surround the portlet, including the header, border, resize handle, and icons.
- **Portlet header.** The area of the portlet that displays the portlet title and the icons that enable interaction with the portlet. The user who added the portlet to the page may have chosen to not display the portlet header.
- **Portlet title.** Text in the portlet header that indicates the purpose of the portlet. You may be able to personalize this title to make it more meaningful for your particular usage.
- **Minimize/Expand icon.** An icon in the portlet header. Clicking the Minimize icon causes the portlet content to collapse so that only the portlet header is displayed. This saves space on the page and reduces clutter without permanently removing the portlet from the page. When the portlet is minimized, the icon becomes an Expand icon that you can click to display the content again.
- **Personalize icon.** An icon in the portlet header. Clicking the Personalize icon enables users to personalize the portlet (that is, make changes that only that user can see).
- **Customize icon.** An icon in the portlet header. Clicking the Customize icon enables users to customize the portlet (that is, make changes that are visible to everyone).
- **Actions icon.** An icon in the portlet header. Clicking the Actions icon displays the Actions menu.
- **Actions menu.** Lists the various other actions that you can perform on the portlet. The actions depend on whether you are logged in, your privileges, the logic of the portlet, and the specifics of how the portlet was placed on the page. Actions include Maximize, Restore, Refresh, and Move Up or Down. If the portlet provides modes such as Help and About, these are also listed in the Actions menu.

If the user who added the portlet to the page chose to not display a portlet header, the Actions menu is displayed on a fade in/fade out toolbar that displays on mouse rollover.

- **Resize handle.** Enables you to make the portlet bigger or smaller.
- **Portlet content.** The actual content of the portlet as determined by the portlet developer.

The appearance of a portlet is determined by the internal logic of the portlet itself, as written by the portlet developer, the attributes specified by the user who added the portlet to the page, and any of your own personalizations. For example, the portlet developer can determine, during portlet creation, whether users can personalize the portlet at runtime. The user who adds the portlet to a page can decide whether the personalize option is displayed in the **Actions** menu. The user at runtime can minimize the portlet so that the content is not even displayed on the page.

28.3 What Can I Do with Portlets?

If your application includes portlets, and you are logged in, you can edit those portlets to make them display the information that you, personally, want to see (this is known as personalization). To personalize a portlet, click the **Personalize** icon in the portlet header. The personalizations you can make depend on how the portlet developer designed the portlet. You can also hide portlets, or remove them entirely from the page. Note that the changes that you make apply only to you. If you delete a portlet, other users can still see it when they view the page (unless they have deleted it themselves).

If you have the appropriate privileges, you can also edit the way the portlet appears to all users (this is known as customization). To customize a portlet, click the **Customize** icon in the portlet header. The changes you make are visible to all users.

If you have the appropriate privileges to edit a page in a WebCenter Portal application, you can add portlets to that page.

> **See Also:** For more information, see Section 18.5, "Adding a Component to a Page."

The portlets you can add depend on the *portlet producers* that have been registered with the application. A portlet producer is the object that owns the portlet and makes it available to an application. If you want to add a particular portlet to a page, but cannot find it in the Resource Catalog, this could mean that the associated producer is not registered with your application. If you have the appropriate privileges, you can register portlet producers yourself through WebCenter Portal Administration.

> **See Also:** For more information, see Section 6.5, "Registering Portlet Producers."

If you do not have the privileges to register portlet producers, you must ask your WebCenter Portal application administrator to register the producer for you.

> **Note:** In Oracle WebCenter Portal: Spaces, avoid adding a portlet to a Movable Box component. The Movable Box component duplicates the `showDetailFrame` that the portlet provides by default. There are no additional benefits to including a portlet in a Movable Box.

28.4 What Kinds of Portlets Can I Use?

There are several different kinds of portlets available to you. Portlets fall into the following categories: prebuilt portlets provided by Oracle and third-party sources; portlets built for you by your own developers; and portlets that you can build yourself. However, you can only use portlets that the WebCenter Portal application administrator has registered with the application. When it comes to adding portlets to a page, a portlet's category and how it was created are irrelevant; all portlets are listed in the Resource Catalog and are available for inclusion.

This section includes the following subsections:

- Section 28.4.1, "Prebuilt Portlets"
- Section 28.4.2, "JSF Portlets"
- Section 28.4.3, "Programmatic Portlets"
- Section 28.4.4, "OmniPortlet"
- Section 28.4.5, "Web Clipping Portlet"
- Section 28.4.6, "Parameter Form and Parameter Display Portlets"

28.4.1 Prebuilt Portlets

Prebuilt portlets include partner portlets and integration solutions.

Partner portlets are available through Oracle's partnerships with leading system integrators, software vendors, and content providers. You can access these portlets by using the keywords `portal` or `portlet` when searching the Oracle PartnerNetwork (OPN) Solutions Catalog, available at:

`http://solutions.oracle.com`

Examples of these include portlets for the following purposes:

- Generating point-to-point driving directions
- Accessing Information Technology (IT) information from a wide variety of sources
- Viewing summary information about news, stocks, and weather

If you think a particular portlet would be useful for your application, ask your WebCenter Portal application administrator to register the appropriate producer for you.

28.4.2 JSF Portlets

JSF portlets expose existing JSF applications and task flows as JSR 286 portlets. They are created using the Oracle JSF Portlet Bridge. The Oracle JSF Portlet Bridge simplifies the integration of JSF applications with WSRP portlet consumers, such as Oracle Portal. Developers create JSF portlets in Oracle JDeveloper using the JSR 286 Java Portlet Wizard or the Portlet Bridge design-time wizard for pages and task flows.

JSF portlets do not require separate source code from that of the JSF application. Since these portlets are created using the Oracle JSF Portlet Bridge, developers need only to maintain one source for both the application and the portlets. Similarly, when the JSF application is deployed, JSF portlets are also deployed with it. Therefore, using the bridge eliminates having to store, maintain, and deploy portlets separately from the application.

28.4.3 Programmatic Portlets

Programmatic portlets are portlets that have been written specifically for your organization to meet a particular requirement not met by the out-of-the-box portlets. WebCenter Portal: Framework provides two declarative wizards for simplifying the creation of standards-based JSR 286 portlets and Oracle PDK-Java portlets. These wizards assist in the construction of the framework within which developers create the portlet.

Some examples of programmatic portlets might be:

- **Photo album portlet.** A portlet that facilitates uploading, storing, and viewing user photos.
- **Shopping cart portlet.** A portlet that facilitates the viewing and purchasing of, for example, company-branded items, such as mouse pads, pens, flash drives, tee shirts, and so on.

Programmatic portlets are written by experienced Java developers who are familiar with the Java Portlet Specification or Oracle PDK-Java.

> **See Also:** For more information about programmatic portlets, see the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

28.4.4 OmniPortlet

OmniPortlet is a data publishing portlet that you add to your application at design time, so that users can customize at runtime. Using a wizard, page designers can publish data from a variety of data sources (including SQL, XML, web services, spreadsheets, and web pages) to several different layouts, such as customizable charts and tables.

OmniPortlet supports proxy authentication, including support for global proxy authentication and authentication for each user. You can specify whether all users automatically log in using a user name and password you provide, each user logs in using an individual user name and password, or all users log in using a specified user name and password.

Some examples of how you might use OmniPortlet are:

- **RSS news feed portlet.** Create a portlet that displays live, scrolling news information to your users from a Really Simple Syndication (RSS) news feed, such as Oracle Technology Network Headlines. You can also include hyperlinks to the news source.
- **Sales chart portlet.** Present up-to-date information about your company's sales results. You can choose to display the data as a pie chart and store the sales information in a remote relational database for later use.

> **See Also:** For more information about OmniPortlet, see Chapter 30, "Working with OmniPortlet."

28.4.5 Web Clipping Portlet

The Web Clipping portlet is a publishing portlet that enables you to integrate any web application with your WebCenter Portal application. It is designed to give you quick integration by leveraging the existing user interface of a web application. With the Web Clipping portlet, you can collect web content into portlets in a single centralized web page. You can use the Web Clipping portlet to consolidate content from web sites scattered throughout a large organization.

To create a Web Clipping portlet, use a web browser to navigate to a web page that contains the desired content. Through the Web Clipping Studio, you can drill down through a visual rendering of the target page to choose the desired content.

See Also: For more information about using Web Clipping, see Chapter 31, "Working with the Web Clipping Portlet."

Note: The Web Clipping portlet is deprecated in Release 11*g* (11.1.1.7.0). Consider using a clipper pagelet using Oracle WebCenter Portal's Pagelet Producer’s Pagelet Producer. For more information, see the "Managing Oracle WebCenter Portal's Pagelet Producer" chapter in the *Oracle Fusion Middleware Administrator’s Guide for Oracle WebCenter Portal*.

28.4.6 Parameter Form and Parameter Display Portlets

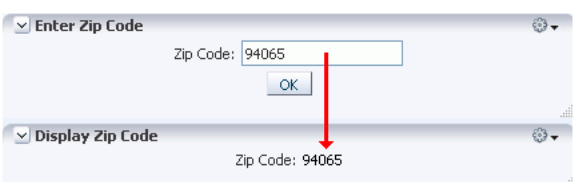
The Parameter Form and Parameter Display portlets provide a quick and easy way to pass values between components. They are provided by the WSRP Tools producer.

The Parameter Form portlet has three output parameters that are set when values are submitted in the form inside the portlet. The parameters can then be used to drive the content of other portlets. You can customize the Parameter Form portlet to determine how many of the three fields are displayed on the form, depending on how many parameters you require.

The Parameter Display portlet enables you to quickly test the wiring from the Parameter Form portlet. However, typically you use the values passed from the Parameter Form portlet to drive the content of some other portlet, for example, to pass a ZIP code to a weather portlet, or a stock symbol to a stock ticker portlet.

Figure 28–2 shows a Parameter Form portlet that has been customized to accept a single value (ZIP code). When a user enters a ZIP code and clicks **OK,** the Parameter Display portlet refreshes to display the same ZIP code.

Figure 28–2 Parameter Form and Display Portlets



See Also: For more information about linking portlets, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

29

Creating Business Mashups

Business mashups are reusable components that you can create or edit at runtime. A mashup can be an ensemble of multiple UI widgets that interact with each other. Each component in a business mashup could be working against a different data source such as SQL, Web Services, or XML. A mashup can display data retrieved from a data source as a graph or table, or write to a data source using a form.

Oracle WebCenter Portal provides a powerful way for developers, administrators, and power users to create mashups in the running portal or social and collaborative application without bringing the system to a halt. A fully-integrated data publisher enables you to perform the following tasks:

- Create data controls to retrieve information from different data sources.
- Create mashups by consuming data controls in task flows or application pages.
- Provide users the flexibility to customize their view of a mashup.

This chapter explains how to perform these tasks. It includes the following sections:

- Section 29.1, "Introducing Business Mashups"
- Section 29.2, "Creating and Managing Data Controls"
- Section 29.3, "Creating and Managing Task Flows"
- Section 29.4, "Creating Data Visualizations"
- Section 29.5, "Business Mashup Examples"

Audience

This chapter is intended for users who want to provide and manage Resource Catalogs in their Spaces application.

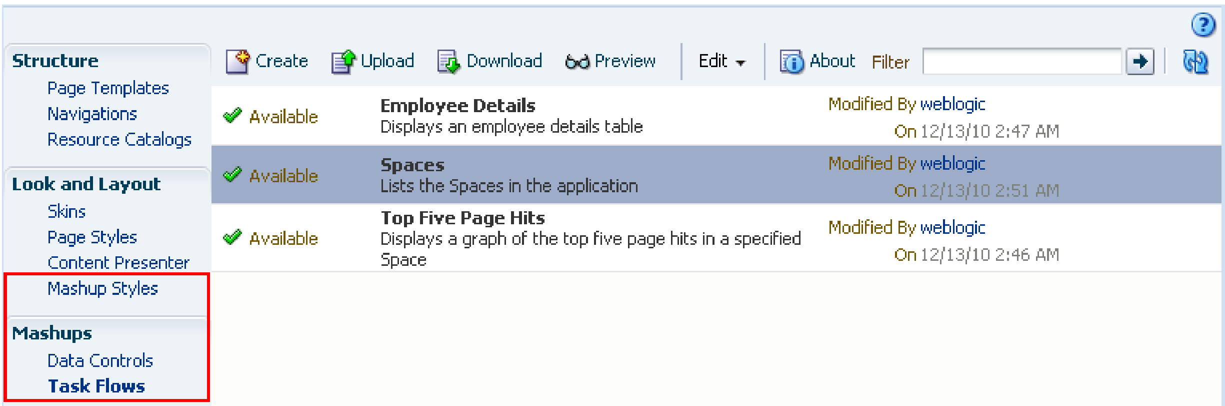
Portal designers with the application permission `Application-Resource Catalogs-Create Edit Delete` can manage application-level Resource Catalogs. Space moderators with the permission `Space-Resources-Create Edit Delete` (simple permission model) or `Space-Resource Catalogs-Create Edit Delete` (detailed permission model) can manage space-level Resource Catalogs. For information about roles and permissions, see Chapter 23, "Understanding Security."

29.1 Introducing Business Mashups

Business mashups are visualizations created by gathering data from various data sources and publishing the gathered data using different layouts such as forms, tables, and graphs. The Resource Manager (**Resources** page), shown in Figure 29–1, provides the following options to create business mashups:

- **Data Controls**: Opens the Data Controls page to create and manage SQL and Web Services data controls.
- **Task Flows**: Opens the Task Flows page to create and manage task flows that can be consumed in application pages. You may want to create task flows to consume data controls and wire parameters so that users can control the data displayed in their view of the data controls.
- **Mashup Styles**: Opens the Mashup Styles page to manage the templates available for creating task flows.

Figure 29–1 Mashups Section in the Resource Manager



You can create data controls, task flows, and mashup styles at the application level and space level. While application-level resources are also available for consumption in spaces, space-level resources are available only to the space in which they were created. You cannot modify or delete application-level resources from within a space.

Note: If you consume application-level data controls inside a space and want to export that space to another Spaces instance, you must perform all the necessary checks to ensure that the data control works properly. For more information, see Section 29.2.5.1, "Steps You Must Perform After an Import."

This section includes the following subsections:

- Section 29.1.1, "Supported Data Controls"
- Section 29.1.2, "Supported Visualizations"

29.1.1 Supported Data Controls

Spaces applications support the creation of data controls that can be used to view data from a data source and filter the data using parameters, enter data into a data source (provided the data source supports it), and drive the data in one component from the data in another component.

The advantage of creating data controls at runtime is that you can get data from different data sources and create visualizations or mashups without having to redeploy and restart your application. What's more, you can modify visualizations at any point of time and control what is retrieved from the data source and rendered. You can also write to the data sources using forms within business mashups.

The type of data control to use depends on where the data is stored and how it is exposed. For example, use a Web Service data control to call a Web Service for data. The process of collecting data is different for each data source. The Resource Manager - Data Controls page in your application or space provides options to create SQL and Web Service data controls. This section describes these data control types in brief. It includes the following subsections:

- Section 29.1.1.1, "SQL Data Controls"
- Section 29.1.1.2, "Web Service Data Controls"

29.1.1.1 SQL Data Controls

Used to collect data from relational databases. To create a SQL data control, you must have a data source connection from the application server to the database. You can retrieve data by specifying a SQL query. To limit the data retrieved to specific criteria, you can specify bind parameters as part of the SQL query. You can add as many bind parameters as required.

Data controls created at runtime can be used only to query the database, you cannot update the retrieved data. However, design time data controls that were created with read-write capabilities allow the retrieved data to be updated.

Bind parameters provide the following benefits:

- They enable reuse of a data control. A data control with one or more bind variables can be used many times in different visualizations, each instance displaying different data.
- They enable end users to control the data displayed in the data control. Data controls that you create are eventually consumed in pages or task flows and viewed by end users. You can include the data control in a task flow and wire its parameters to task flow parameters so that the task flow parameter drives the data in the data control. For more information, see Section 29.4.3, "Binding Data Control Parameters to Task Flow Parameters."

  Another way to control the data displayed is by wiring a data control parameter to an input text component on the task flow. You can achieve this type of wiring easily by using a parameter form task flow. For more information, see Section C.2.4, "Adding the Data Control in a Parameter Form Task Flow."
- If a database has imposed an IO limit, and the query happens to traverse large number of records that exceed the IO limit, then adding such a data control to a page or task flow may result in an error and failure to render. You can limit the data retrieved from a database to specific criteria by specifying bind parameters in your query.

For the steps to create a SQL data control, see Section 29.2.1, "Creating a SQL Data Control."

29.1.1.2 Web Service Data Controls

Used to collect data from a business service that can be accessed over the Internet using standard protocols, such as SOAP and HTTP. To collect data from a Web Service, you must know the path to the Web Service Description Language (WSDL) file. The WSDL file describes the Web Service and specifies the methods that can be called, including the expected parameters. It also describes the returned data.

Based on the permissions you have on a Web Service data source, you can only specify values for parameters exposed by its methods; you cannot add or delete parameters. You can specify values for the following types of parameters:

- Scalar parameters: These are simple parameters for which you can directly specify string or EL values to display data.
- Complex parameters: These are derived parameters that take objects as parameters. They may also get their value from scalar parameters exposed by the method. Complex parameters are available in XML format.

  See Section C.5, "Creating a Mashup with Data from a Siebel Data Source" for an example of how you can use complex parameters.

  > **Note:** You cannot pass values to complex parameters that are recursive, that is, if A includes B and B in turn references A.

- Array parameters: These parameters enable you to pass multiple values at a time, thereby updating multiple records in the data source simultaneously. See Section C.5, "Creating a Mashup with Data from a Siebel Data Source" for an example of how you can use array parameters.

Apart from querying the data source, for data sources that allow updating, Web Service data controls also provide an option to update records.

For more information, see Section 29.2.2, "Creating a Web Service Data Control."

29.1.2 Supported Visualizations

The data gathered using SQL and Web Service data controls can be rendered on a page or task flow in different ways. While editing a page or task flow, when you click Add against a data control's accessor, method, or parameter in the Resource Catalog, the Add menu displays different drop handlers. The drop handlers enable you to add a data control's objects as UI elements such as tables, graphs, forms, buttons, or labels. Depending on the type of object and the flavors supported, you can different UI elements. This section describes these elements. It includes the following subsections:

- Section 29.1.2.1, "Table"
- Section 29.1.2.2, "Form"
- Section 29.1.2.3, "Graph"
- Section 29.1.2.4, "Button or Link"
- Section 29.1.2.5, "Text or Label"

29.1.2.1 Table

This option is displayed when you select a data control accessor that returns a collection of objects that can be displayed in columns of a table. Select this option to display data in a tabular layout. When you add a data control inside a task flow, you can wire data control parameters to task flow parameters so that the table displays data based on a parameter value that you specify. You can add an editable table, or a read-only table that displays data based on your specification, but cannot be edited.

For more information, see Section 29.4.1.1, "Adding a Data Control as a Table."

29.1.2.2 Form

This option is displayed when you select a data control accessor that returns a collection of objects that can be displayed in a form. Select this option to display source data in a form. When you add a data control inside a task flow, you can wire data control parameters to task flow parameters so that the form displays data based on a parameter value that you specify. You can add an editable form, or a read-only form that displays data based on your specification, but cannot be edited. However, using an editable form makes sense only if the data source supports writing back to it.

For more information, see Section 29.4.1.2, "Adding a Data Control as a Form."

29.1.2.3 Graph

This option is displayed when you select a data control accessor that returns a collection of objects that can be displayed in a graph. This is useful for the purpose of analysis, when you want to generate a report. Graphs cannot be edited. Select this option to display your data graphically, as a bar, pie, line, or an area chart. When you add a data control inside a task flow, you can wire data control parameters to task flow parameters so that the graph displays data based on a parameter value that you specify.

For more information, see Section 29.4.1.3, "Adding a Data Control as a Graph."

29.1.2.4 Button or Link

The `ADF Button`, `ADF Link`, `ADF Image Link`, and `ADF Toolbar Button` options are displayed when you select a data control's methods or operations that perform an action. Select any of the button or link options while adding methods or operations such as Create, Update, Delete, Commit, Rollback, Save, or Close. Different options are available for different data controls depending on the methods exposed by the data source. For more information, see Section 29.4.7, "Writing to a Data Source from a Visualization."

29.1.2.5 Text or Label

The `ADF Output Text`, `ADF Output Text w/ Label`, `ADF Output Formatted`, `ADF Output Formatted w/ Label`, `ADF Input Text`, `ADF Input Text w/ Label`, and `ADF Label` options are displayed when you select a data control's attributes or methods that return a single object. An attribute can be a scalar parameter of an accessor, a method return, or an object member of a complex parameter. Select a text or label option depending on whether you want to display the value to users or want users to specify a value. When you add a data control inside a task flow, you can wire data control parameters to task flow parameters so that the task flow displays data based on a parameter value that you specify. You can even add an input text component and wire it to a data control parameter. For more information about this type of wiring, see Section 29.4.4, "Wiring a Data Control to a Parameter Form Task Flow."

29.2 Creating and Managing Data Controls

This section describes how to create SQL and Web Service data controls. It includes the following sections:

- Section 29.2.1, "Creating a SQL Data Control"
- Section 29.2.2, "Creating a Web Service Data Control"
- Section 29.2.3, "Managing Data Controls"
- Section 29.2.4, "Using Design-Time Data Controls"
- Section 29.2.5, "Exporting and Importing Data Controls Across Spaces"

29.2.1 Creating a SQL Data Control

SQL data controls enable you to retrieve data from a relational database using a SQL query. Therefore, before creating the data control, you must have a database connection. The task of creating a database connection must be performed by a WebCenter Portal administrator. For reference, in addition to the steps to create a SQL data control, this section also describes how to create a database connection. It includes the following subsections:

- Section 29.2.1.1, "Prerequisites When Using a DB2 or SQL Server Database"
- Section 29.2.1.2, "Creating a Database Connection"
- Section 29.2.1.3, "Creating the Data Control"

29.2.1.1 Prerequisites When Using a DB2 or SQL Server Database

If you are using a DB2 or a SQL Server database, perform the following prerequisite tasks before you create a database connection:

If You Use a DB2 or a SQL Server Database Connection:

The default SQL style for all database connections is "Oracle". If you create a database connection to an IBM DB2 or Microsoft SQL Server database, then you must perform the following tasks:

- Manually override the SQL style with one that supports the DB2 or SQL Server database. For this, you must specify a Java system property, `jbo.SQLBuilder`, with the value `DB2` or `SQLServer`. When Oracle WebLogic Server is started with this configuration, it supports the SQL style you specified.

  Specify the system property as a Java command line option in either of the following ways (examples show property values for DB2):

  – Open the `DomainHome/bin/setDomainEnv.sh` file and add `-Djbo.SQLBuilder=DB2` to the `JAVA_OPTIONS` line.

  – Edit the managed server start script in a text editor and add `-Djbo.SQLBuilder=DB2` to the `JAVA_OPTIONS` line.

    For more information, see "Specifying Java Options for a WebLogic Server Instance" in *Oracle Fusion Middleware Managing Server Startup and Shutdown for Oracle WebLogic Server*.

- Specify `Java` as a typemap entry using the `jbo.TypeMapEntries` property as follows:

```
-Djbo.TypeMapEntries="Java"
```

29.2.1.2 Creating a Database Connection

This section describes the procedure to create a database connection from the Oracle WebLogic Server Administration Console.

Note: This section is included here for reference. The task must be performed by a WebCenter Portal administrator. For more information, see "Setting Up Database Connections" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

To create a database connection:

1. In the Domain Configuration section, under Services, select **Data Sources**.

2. On the Summary of Data Sources page, click **New** and select **Generic Data Source**.
3. On the JDBC Data Sources Properties page, enter or select the following information:
   - Name - Enter a name for this JDBC data source.
   - JNDI Name - Enter the JNDI path to where this JDBC data source will be bound. Applications look up the data source on the JNDI tree by this name when reserving a connection.
   - Database Type - Select the DBMS of the database that you want to connect to. If your DBMS is not listed, select **Other**.
4. Click **Next** to continue.
5. Select the JDBC driver you want to use to connect to the database. The list includes common JDBC drivers for the selected DBMS.

   Note: You must install JDBC drivers before you can use them to create database connections. Some JDBC drivers are installed with WebLogic Server, but many are not installed.

   For more information, see "Using JDBC Drivers with WebLogic Server" in *Oracle Fusion Middleware Configuring and Managing JDBC Data Sources for Oracle WebLogic Server*.

6. On the Transaction Options page, follow these steps. Depending on the driver you selected on the JDBC Data Source Properties page, you may not need to specify any of these options.
   - Supports Global Transactions - Select this check box (the default) to enable global transaction support in this data source. Deselect this check box to disable (ignore) global transactions in this data source. In most cases, you should leave the option selected.

     If you selected Supports Global Transactions, select an option for transaction processing: (available options vary depending on whether you select an XA driver or a non-XA driver)
     - Two-Phase Commit - Select this option to enable standard XA processing.

       This option is only available when you select an XA JDBC driver to make database connections.
     - Logging Last Resource - Select this option to enable a non-XA JDBC connection to participate in global transactions using the Logging Last Resource (LLR) transaction optimization. Recommended in place of Emulate Two-Phase Commit.

       This option is only available when you select a non-XA JDBC driver to make database connections.
     - Emulate Two-Phase Commit - Enables a non-XA JDBC connection to emulate participation in distributed transactions using JTA. Select this option only if your application can tolerate heuristic conditions.

       This option is only available when you select a non-XA JDBC driver to make database connections.
     - One-Phase Commit - Select this option to enable the non-XA connection to participate in a global transaction as the only transaction participant.

This option is only available when you select a non-XA JDBC driver to make database connections.

7. Click **Next** to continue.
8. On the Connection Properties page, enter values for the following properties:
   - Database Name - Enter the name of the database that you want to connect to. Exact database name requirements vary by JDBC driver and by DBMS.
   - Host Name - Enter the DNS name or IP address of the server that hosts the database. If you are creating an Oracle GridLink service-instance connection, this must be the same for each data source in a given multi data source.
   - Port - Enter the port on which the database server listens for connections requests.
   - Database User Name - Enter the database user account name that you want to use for each connection in the data source.
   - Password/Confirm Password - Enter the password for the database user account.
9. Click **Next** to continue.
10. On the Test Database Connection page, review the connection parameters and click **Test Configuration**.

    WebLogic attempts to create a connection from the Administration Server to the database. Results from the connection test are displayed at the top of the page. If the test is unsuccessful, you should correct any configuration errors and retry the test.

    If the JDBC driver you selected is not installed on the Administration Server, you should click Next to skip this step.
11. Click **Next** to continue.
12. On the Select Targets page, select the server on which you want to deploy the data source. Select **WC_SPACES** to deploy the data source to your Spaces instance.
13. Click **Finish** to save the JDBC data source configuration and deploy the data source to the target that you selected.

    See Also: *Oracle Fusion Middleware Configuring and Managing JDBC Data Sources for Oracle WebLogic Server* for information about JDBC data sources.

29.2.1.3 Creating the Data Control

To create a SQL data control in Spaces:

1. On the **Resources** page, under **Mashups**, select **Data Controls**, and on the resulting Data Controls page, click **Create**.
2. In the Create new Data Control dialog, select **SQL** in the left pane (Figure 29–2).
3. In the Name and Description fields at the bottom of the dialog, enter a name and description for the data control.
4. In the Database Connection section, from the dropdown list, select the database connection that you will use for this SQL data control. For more information, see Section 29.2.1.2, "Creating a Database Connection."

Figure 29–2 New SQL Data Control Wizard

5. In the password field, specify the connection password.

   This field is used to ensure that only users who know the password to connect to the data source can create a data control. You must specify the password every time you create or edit a data control.

6. In the SQL Statement text box, enter a SQL query, for example:

   ```
   SELECT * FROM Persons WHERE City LIKE 'sa%'
   ```

   Specify any bind parameters as part of the query. Bind parameters are useful in controlling the data displayed in the data control. Consider the following example:

   ```
   select ename, empno, mgr, deptno from emp where job in (:job) order by empno
   asc
   ```

   This query returns details of all employees with a particular designation, for example, sales managers. In this query `:job` defines the parameter `job`, which maps to the `job` column in the `emp` database table. The query returns data based on the `job` value (how you specify this is explained in the next step). You can add as many parameters as required. You can also use the same parameter multiple times in a statement.

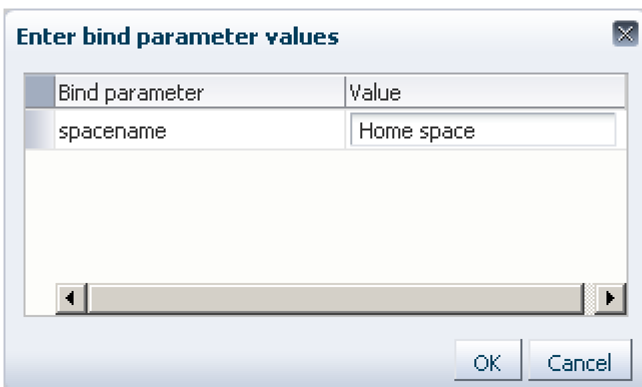
Notes:

- Avoid using SQL reserved words and keywords for bind parameter names. For more information, see the topic titled *"Oracle SQL Reserved Words and Keywords"* in the *Oracle Database SQL Language Reference* in the Oracle Database documentation library.
- If you are using a SQL Server database, you may get an error if the query contains a column with the NCHAR or NVARCHAR data type. To work around this limitation, you must modify the query using the `convert` function as shown in the following example:

```
select convert(varchar(20), col1) col1, convert(varchar(20),
col2) col2 from table1
```

7. If you added bind variables in your SQL query, for example, `job`, then click **Enter bind parameter values** to define initial values for those variables.
8. In the Enter bind parameter values dialog, shown in Figure 29–3, specify values for the parameters. The dialog lists all parameters that you defined as part of your SQL query.

Figure 29–3 The Dialog for Setting Bind Parameter Values



9. Click **OK**.
10. Click **Test** to test the query you entered.

    If you added bind parameters, but did not specify initial values for the parameters, you will see a validation exception.

    If the query is correct, you will see a table displaying the data retrieved from the data source. The table displays up to a maximum of 25 rows.
11. Click **OK** to return to the Create new Data Control dialog.
12. Click **OK**.

The new data control is listed on the Resources - Data Controls page. However, the data control is hidden by default. You can consume it in pages or task flows only if it is made available to the application. For more information, see Section 29.2.3.2, "Showing or Hiding a Data Control in the Resource Catalog."

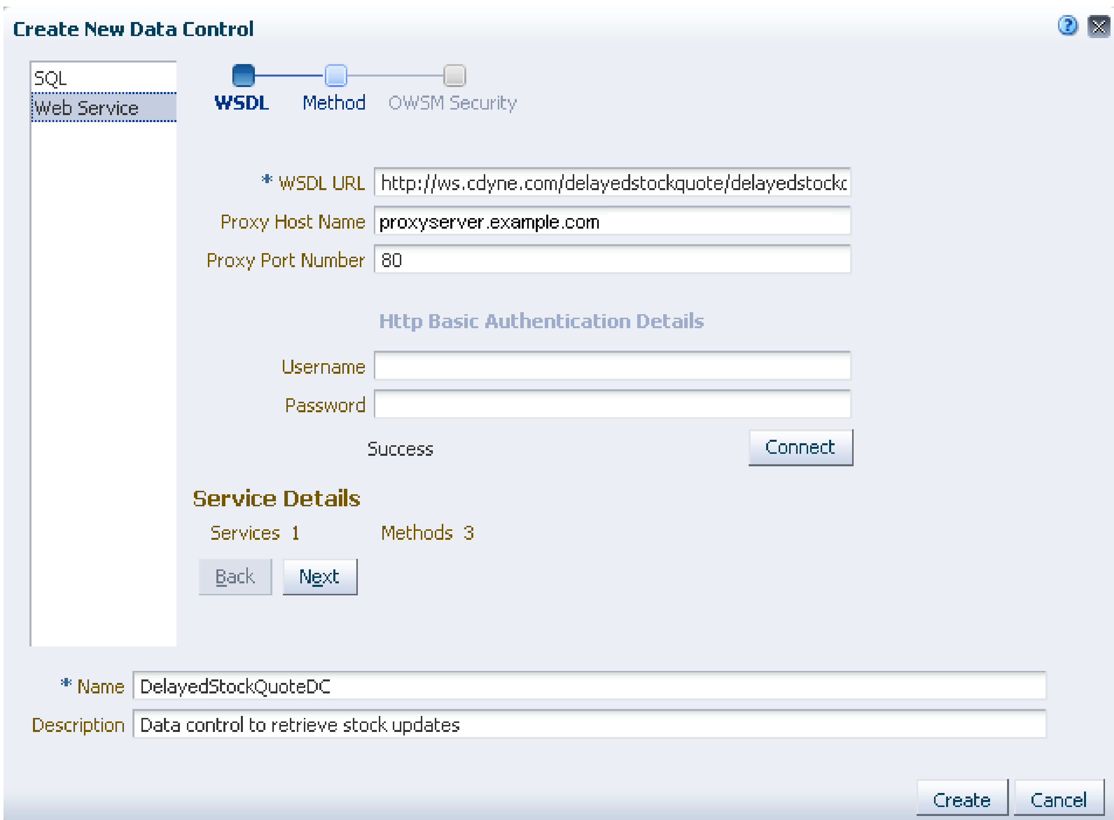
You can now add this data control to a page or task flow. For more information, see Section 29.4.1, "Consuming a Data Control in a Task Flow."

29.2.2 Creating a Web Service Data Control

To create a Web Service data control:

1. On the **Resources** page, under **Mashups**, select **Data Controls**, and on the resulting Data Controls page, click **Create**.
2. In the Create new Data Control dialog, select **Web Service** in the left pane (Figure 29–4).

Figure 29–4 New Web Service Data Control Wizard



3. At the bottom of the dialog, use the Name and Description fields to specify a name and description for the Web Service data control.
4. In the WSDL URL field, enter the WSDL for the data control. For example:

```
http://ws.cdyne.com/delayedstockquote/delayedstockquote.asmx?wsdl
```

5. Use the Proxy Host Name and Proxy Port Number fields to configure proxy authentication.

   To ensure a secure connection to the Web Service, you must first configure your application to use proxy authentication.

Notes:

- If a central WebCenter Portal proxy (or RSS proxy) is already configured, then the proxy fields are automatically populated with that proxy host name and port number. You can modify the proxy details or deselect the fields if you do not want to configure proxy.

  Changing the WebCenter Portal central proxy does not change the proxy setting against the Web Service data control. However, changing the Web Service data control proxy setting changes the WebCenter Portal central proxy setting.

  For more information about RSS proxy, see "Setting Up a Proxy Server for the RSS Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

- If Web Logic Domain proxy is already configured, and if you choose not to set proxy while creating or editing the Web Service data control, then the Web Logic Domain proxy is used as the default setting.

---

6. If you are connecting to a secured Web Service, enter user name and password to access the Web Service endpoint.

   If access to the WSDL itself is secured, then you cannot connect to the Web Service from the Create new Data Control dialog. To work around this limitation, access the WSDL in a browser by specifying the user name and password, download the WSDL page, save it locally as a `.wsdl` document, then specify the path to this document in the WSDL URL field in the Create new Data Control dialog.

7. Optionally, click **Connect** to establish the connection to the producer whose WSDL you specified.

   If the connection is successful, the Service Details section displays a count of the services and methods that exist in the Web Service.

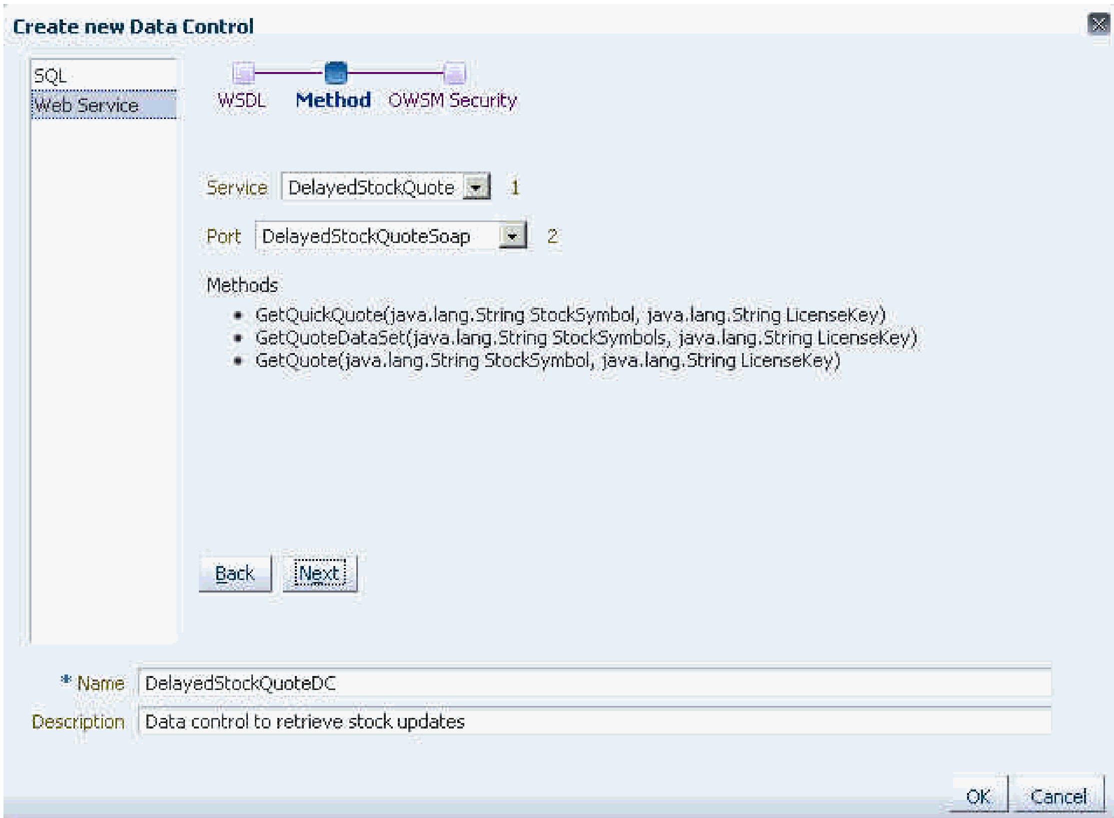
   If you do not click Connect at this stage, the connection is established later, when required.

8. Optionally, click **View XML** to view the XML content of the WSDL document.

9. Click **Next**.

   The Methods page displays the methods available for the selected service, and the parameters exposed for each method, as shown in Figure 29–5.

Figure 29–5 Web Service Data Control Methods



A Web Service may expose scalar and complex parameters that control the data displayed in the data control. For more information, see Section 29.1.1.2, "Web Service Data Controls."

You can specify values for any exposed parameters. However, you can specify values only while consuming the data control in a task flow or a page. For more information, see "Editing Parameter Values for Web Service Data Controls".

10. From the Service dropdown list, select a different service, if required.
11. From the Port dropdown list, select one of the available ports.

    All methods under that port are added to the data control. These methods are later available for selection in the Resource Catalog.
12. Click **Next**.
13. If the Web Service is secured using OWSM, use the OWSM Security panel to specify the policies to be used, as described in Table 29–1.

Table 29–1 OWSM Security Information

Name	Description
MTOM	The MTOM (message transmission optimization mechanism) policy you want to use.
Reliability	The reliability policy you want to use.
Addressing	The addressing policy you want to use.
Security	Any additional security policies you want to apply.

For example, if your Web Service is secured using a policy named `mycompany/wss_username_token_service_policy`, populate the Security field with the client policy, which is `mycompany/wss_username_token_client_policy`.

> **See Also:** *Oracle Fusion Middleware Security and Administrator's Guide for Web Services* for more information about security policies.

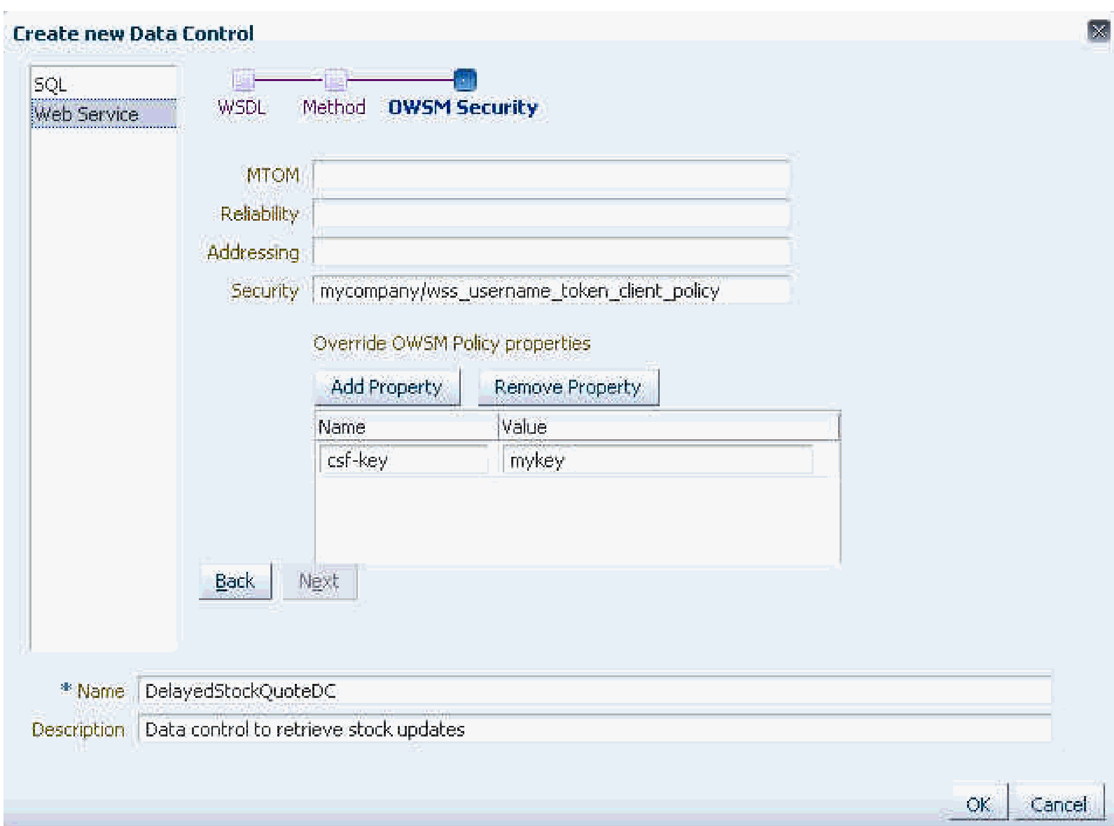
14. You can override properties on the security policy that you specified in the previous step. Use the **Add Property** and **Remove Property** buttons to add or remove entries in the Override OWSM Policy Properties section.

> **Note:** Override properties are defined by the policy. Therefore, to perform this step, you must know the policy being used and the properties that you can override.

For example, if you specified a Security policy, `mycompany/wss_username_token_client_policy`, and the policy has a `csf-key` property, then in the override section, shown in Figure 29–6, click **Add Property** to add a value for `csf-key`. Note that this key must exist in configured keystore.

> **See Also:** "Adding Keys and User Credentials to the Credential Store" in *Oracle Fusion Middleware Security and Administrator's Guide for Web Services* for information about adding `csf-key` to the credential store.

Figure 29–6 New Web Service Data Control - OWSM Security



15. Click **OK**.

    The new data control is listed on the Resources - Data Controls page. However, the data control is hidden by default. You can consume it in pages or task flows only after it is made available to the application. For more information, see Section 29.2.3.2, "Showing or Hiding a Data Control in the Resource Catalog."

You can now add this data control to a page or task flow. For more information, see Section 29.4.1, "Consuming a Data Control in a Task Flow."

29.2.3 Managing Data Controls

In addition to creating data controls, you can also edit, copy, expose, and delete data controls on the Resources - Data Controls page. This section describes these tasks. It includes the following subsections:

- Section 29.2.3.2, "Showing or Hiding a Data Control in the Resource Catalog"
- Section 29.2.3.3, "Copying Data Controls"
- Section 29.2.3.4, "Editing Data Controls"
- Section 29.2.3.5, "Editing Data Control Bind Variables"
- Section 29.2.3.6, "Setting Properties on a Data Control"
- Section 29.2.3.7, "Setting Security on a Data Control"
- Section 29.2.3.8, "Deleting Data Controls"

29.2.3.1 What You Should Know About Editing or Deleting a Data Control

The data controls that you create are consumed in pages or task flows. As a result, when you edit or delete a data control, the references to this data control in pages or task flows may be broken. Therefore, use the Edit and Delete options on a data control with caution, after considering the impact on the consuming pages and task flows.

If you added a data control inside a task flow and later deleted the data control, you can repair the task flow by removing references to the data control from the task flow's source files. Perform the following steps to repair a task flow that has broken references to a data control:

1. In the Resource Manager (see Section 11.1.4, "Accessing Resources"), select the task flow that you need to repair.
2. From the Edit menu, select **Edit Source**.
3. Click each of the three tabs, Taskflow Definition, Fragment, and Page Definition, and remove any references to the data control from the source files.

    Note: To ensure that you do not end up with an invalid task flow that does not render properly, edit the source code very carefully.

4. Click **OK**.

29.2.3.2 Showing or Hiding a Data Control in the Resource Catalog

Data controls created from the Resources - Data Controls page must be available in the Resource Catalog so that they can be consumed in your application pages or task flows. By using the Show and Hide options from the Edit menu on the Resources - Data Controls page, you can control whether a selected data control is included in the

Resource Catalog. When you mark a data control as shown, it is automatically included in the default Resource Catalog for the application or current space. Further, for a data control created at the application level, you can control whether it is available to any, all, or selected spaces in the application.

For generic information about hiding and showing resources, see Section 11.4.3, "Showing and Hiding Resources."

For generic information about resource availability in spaces, see Section 11.4.2.5, "Setting the Availability of an Application-Level Resource in Other Spaces."

29.2.3.3 Copying Data Controls

You can make a copy of a data control by selecting it and choosing **Copy** from the **Edit** menu. The procedure to copy a data control is similar to that for copying any other resource. For the generic procedure, see Section 11.4.1, "Copying a Resource."

> **Note:** Avoid copying an inherited Web Service data control as you may see an internal error when you run or edit the copy.

29.2.3.4 Editing Data Controls

You can modify a data control by selecting it and choosing **Edit** from the **Edit** menu. The Edit dialog enables you to modify the values that you provided while creating the data control. For information about the fields, see the detailed steps in Section 29.2.1, "Creating a SQL Data Control" and Section 29.2.2, "Creating a Web Service Data Control."

> **See Also:** Section 29.2.3.1, "What You Should Know About Editing or Deleting a Data Control"

29.2.3.5 Editing Data Control Bind Variables

You can add or rename bind variables in existing SQL data controls by editing the SQL query used for the data control. Modify the SQL query in the Create or Edit Data Control dialog. For the detailed steps, see Section 29.2.1.3, "Creating the Data Control."

> **Note:** You cannot create or edit parameters for Web Services data controls. A Web Services data control only allows you to specify values for the parameters exposed by its methods.

When you consume a data control, you can control the display of data in the visualization by specifying proper values for the data control's bind variables or parameters. For more information, see Section 29.4.6.1, "Editing Parameter Values for a Data Control Visualization."

29.2.3.6 Setting Properties on a Data Control

Each data control has certain properties associated with it that control how it is displayed in the application or space. You can edit these properties through the Edit Properties dialog. For the generic procedure, see Section 11.4.2, "Setting Properties on a Resource."

29.2.3.7 Setting Security on a Data Control

When you create a data control, the default application-level or space-level security settings are applied to it. You can select **Security Settings** from the **Edit** menu to modify the default settings in the following ways:

- Change the default permissions granted to users and roles.
- Revoke all permissions for a user or role.
- Grant `Edit` and `Manage` permissions to additional users and roles.

For the detailed steps, see Section 11.4.4, "Setting Security for a Resource."

29.2.3.8 Deleting Data Controls

You can delete a data control by selecting it and choosing **Delete** from the **Edit** menu. For the generic procedure, see Section 11.4.5, "Deleting a Resource."

> **See Also:** Section 29.2.3.1, "What You Should Know About Editing or Deleting a Data Control"

29.2.4 Using Design-Time Data Controls

Oracle WebCenter Portal: Framework exposes a large number of service data controls that can be added to application pages and task flows. Design-time data controls are not available out-of-the-box in the Spaces Resource Catalogs, but they are available in the Resource Registry. You can add these data controls to custom catalogs from the Resource Registry. The data controls can then be added to pages and task flows in your Spaces instance.

> **Note:** The Design-Time DataControls folder lists all the WebCenter Portal service data controls. However, adding the ConnectionsNetworkDC and KudosServiceDC data controls at runtime is not supported. Avoid adding these data controls to your page or task flow.

Design-time data controls can also be added to custom catalogs in JDeveloper. For more information, see "How to Expose Data Controls Creating at Design Time" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

29.2.5 Exporting and Importing Data Controls Across Spaces

WebCenter Portal: Spaces enables you to export and import runtime data controls as part of a space export and import. When you export a space, the data controls available in the space are also exported. This is the only way to export data controls created at runtime.

For the steps to export and import a space, see Section 55.5, "Importing and Exporting Spaces and Space Templates."

Note:

- Unlike other portal resources, you cannot edit runtime data controls in JDeveloper. The **Data Controls** page in the Resource Manager does not provide Upload and Download options.
- While importing or exporting a space that contains a Web Service data control, the Web Service must be up and accessible. If not, an import or export operation throws exceptions.

29.2.5.1 Steps You Must Perform After an Import

You must be careful while exporting and importing data controls. You may get errors if you use application-level data controls in spaces, for example, if you create an application-level data control, consume it in a space, export the space, and import it into another instance, then pages or task flows containing the application-level data control may be broken.

After a successful import, the following files on the target instance list the data controls being used in different pages, page templates, and task flows:

- `oracle/webcenter/webcenterapp/bindings/DataBindings.cpx`
- `oracle/webcenter/sitetemplate/view/DataBindings.cpx`

To ensure that an imported data control works properly, you must perform the following tasks after importing the space to the target instance:

- Open pages in the imported space and verify that the data controls display properly. If a data control is available on the page but does not display any data, then you must edit the page and add that data control to the page again. For the steps to add a data control, see Section 29.4.1, "Consuming a Data Control in a Task Flow."

  An imported data control may not display data due to the following issues:

  – The target Spaces instance and the imported space use different data bindings CPX files.

  – The CPX file used by the page does not contain a usage entry for that data control.

- For SQL data controls: In the WLS Administration Console of the target instance, create a JDBC data source connection with the same name as the connection used on the source instance. For the detailed steps, see Section 29.2.1.2, "Creating a Database Connection."

  An imported page or task flow that uses a SQL data control will not work in the new space until a JDBC Connection of the same name is created.

- For Web Services data controls:

  – In the Resource Manager (see Section 11.1.4, "Accessing Resources"), edit the data control, and provide the credentials afresh. Credentials are not exported or imported with the application. For the detailed steps, see Section 29.2.3.4, "Editing Data Controls."

  You do not have to specify security policies again as they are imported and exported along with the application.

  – Open the `DCConnections.xml` file in the imported EAR and modify the proxy host name and port number to point to the target instance. The

`DCConnections.xml` file is available in the `/META-INF/mdssys/cust/adfshare/adfshare/` directory.

To ensure a secure connection to the Web Service, you must set up a proxy server on the target instance.

29.3 Creating and Managing Task Flows

In the previous sections, you learned how to create data controls to retrieve data from different data sources. These data controls can be added to pages or task flows to provide visualizations of the gathered data. Just like pages, task flows are also containers in which you can add components such as portlets, content, and other task flows. However, task flows provide the advantage of component wiring to create mashups of your choice. When you add a data control to a page, you cannot modify or control the data displayed in the data control. If you want a more flexible setup, you can add a data control inside a task flow.

You can control the data displayed in the data control by adding it inside a task flow and wiring data control parameters to task flow parameters or input text components. For example, if you have a SQL data control, with a bind parameter `DeptNo`, that retrieves data from an employee database, you can add this data control inside a task flow and wire a task flow parameter to the `DeptNo` parameter. The data control now displays data based on the value specified for the task flow parameter. You can change the task flow parameter value in Oracle WebCenter Portal's Composer to view corresponding data in the data control.

This section describes how to create and manage task flows in the Resource Manager. It includes the following subsections:

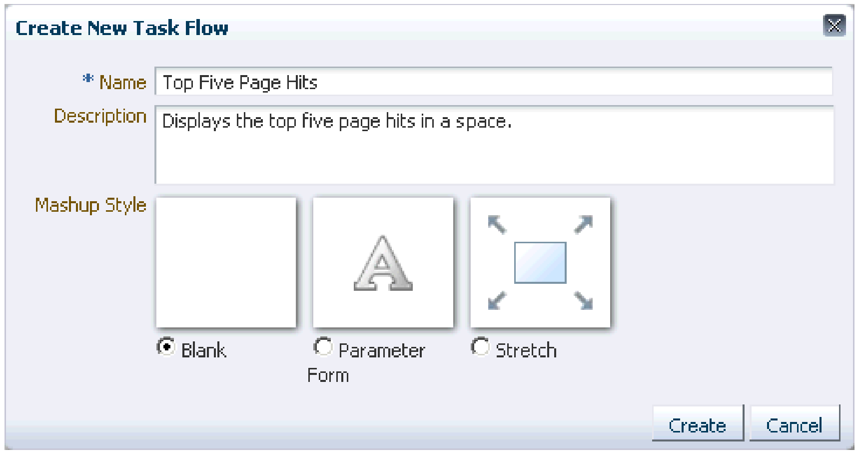
- Section 29.3.1, "Creating a Task Flow"
- Section 29.3.2, "Managing Task Flows"
- Section 29.3.3, "Using Task Flows Created at Design Time"
- Section 29.3.4, "Managing Mashup Styles"

29.3.1 Creating a Task Flow

To create a task flow:

1. On the **Resources** page, under **Mashups**, select **Task Flows**, and on the resulting Task Flows page, click **Create**.
2. In the Create new Task Flow dialog, in the **Name** field, enter a name for the task flow.
3. In the **Description** field, enter a meaningful description of the task flow (Figure 29–7).

Figure 29–7 New Task Flow



4. Select a style for the task flow. For more information, see Section 29.3.4.1, "Out-of-the-Box Mashup Styles."
5. Click **OK**.

   The new task flow is listed on the Resources - Task Flows page. However, the task flow is hidden by default. You cannot consume it unless it is made available to the application. For more information, see Section 29.3.2.1, "Showing or Hiding a Task Flow in the Resource Catalog."

You can now edit the new task flow and populate it with different resources, including data controls, that are available in the Resource Catalog. For more information, see Section 29.3.2.3, "Editing a Task Flow."

29.3.2 Managing Task Flows

This section includes the following subsections:

- Section 29.3.2.1, "Showing or Hiding a Task Flow in the Resource Catalog"
- Section 29.3.2.2, "Copying a Task Flow"
- Section 29.3.2.3, "Editing a Task Flow"
- Section 29.3.2.4, "Previewing a Task Flow"
- Section 29.3.2.5, "Setting Properties on a Task Flow"
- Section 29.3.2.6, "Setting Security on a Task Flow"
- Section 29.3.2.7, "Deleting a Task Flow"
- Section 29.3.2.8, "Using JDeveloper to Modify a Task Flow"

29.3.2.1 Showing or Hiding a Task Flow in the Resource Catalog

Task flows created from the Resources - Task Flows page must be available in the Resource Catalog so that they can be consumed in pages. By using the Show and Hide options from the Edit menu on the Resources - Task Flows page, you can control whether a selected task flow is included in the Resource Catalog. When you mark a task flow as shown, it is automatically included in the default Resource Catalog for the application or space. In the out-of-the-box catalog, the task flow is available in a Task Flows folder that is nested inside the Mash-Ups folder.

For generic information about hiding and showing resources, see Section 11.4.3, "Showing and Hiding Resources."

In addition to showing or hiding a task flow, you can control whether an application-level task flow is available to any, all, or selected spaces in the application. For generic information about resource availability in spaces, see Section 11.4.2.5, "Setting the Availability of an Application-Level Resource in Other Spaces."

29.3.2.2 Copying a Task Flow

You can create a copy of a task flow by selecting it and choosing **Copy** from the **Edit** menu on the Resources - Task Flows page. The Copy feature enables you to replicate a local task flow in the runtime environment without having to actually export and upload the task flow.

For the generic procedure, see Section 11.4.1, "Copying a Resource."

29.3.2.3 Editing a Task Flow

You may want to edit a task flow for the following reasons:

- Design the task flow's view fragment.
- Create or modify task flow parameters.

The Resource Manager provides the following two options to edit a task flow:

- Edit the task flow's view fragment in Composer.
- Edit the source code of the task flow definition file, its view fragment, and the fragment's page definition file in a text editor.

> **Note:** To perform certain advanced editing tasks, you may need to download the task flow to JDeveloper, edit it, and upload it back to your Spaces instance. For more information, see Section 29.3.2.8, "Using JDeveloper to Modify a Task Flow."

This section describes both these editing tasks. It includes the following sections:

- Section 29.3.2.3.1, "Editing a Task Flow in Composer"
- Section 29.3.2.3.2, "Editing a Task Flow's Source Files in a Text Editor"

29.3.2.3.1 Editing a Task Flow in Composer You can modify a task flow by selecting it and choosing **Edit** from the **Edit** menu on the Resources - Task Flows page. The task flow's view fragment opens in Composer. You can add a variety of resources to the view fragment from the Resource Catalog.

As this chapter focuses on how to create mashups using data from different data sources, it is useful to know how to populate task flows with data controls and bind task flow parameters to data control parameters. For more information, see Section 29.4.1, "Consuming a Data Control in a Task Flow."

For generic information about adding content to a page or task flow in Composer, see Part IX, "Organizing Your Collaborative and Social Networking Environment".

29.3.2.3.2 Editing a Task Flow's Source Files in a Text Editor The Resource Manager provides the **Edit Source** option for editing the source code of the task flow fragment, its page definition, and the task flow definition file. You may want to edit a task flow's source files for the following reasons:

- Clean up the page fragment and its page definition when you delete a referenced component, such as a data control.

  When you delete a data control after it is included in a task flow, the task flow has broken links. The source editor enables you to search and delete references to the data control from the fragment and its page definition file.

- Make adjustments to the task flow's code without having to download it, edit it in JDeveloper, and upload it back into Spaces.

To edit a task flow's source files:

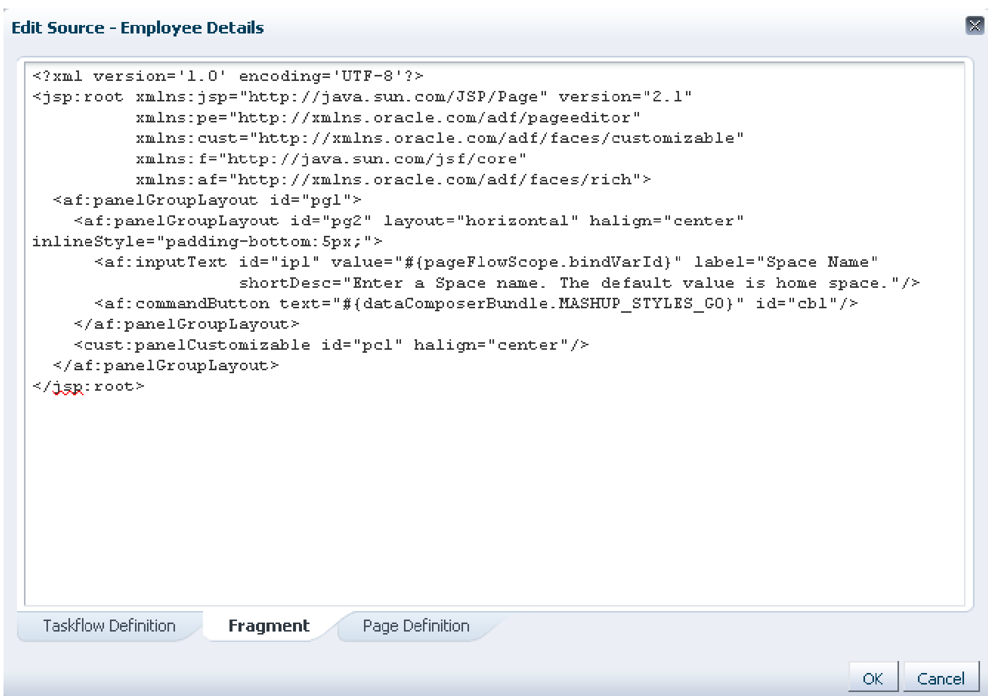
Note: Edit a task flow's source files only when absolutely necessary. To ensure that you do not end up with an invalid task flow that does not render properly, edit the source code very carefully.

---

1. In the Resource Manager (see Section 11.1.4, "Accessing Resources"), select the task flow, and from the **Edit** menu, select **Edit Source**.

   A simple Edit Source dialog (Figure 29–8) displays with three tabs, Taskflow Definition (task flow definition XML file), Fragment (page fragment JSFF file), and Page Definition (fragment's page definition XML file).

Figure 29–8 Edit Source Dialog for a Task Flow



2. Click a tab to edit the source code for that file.

   The format of the code is validated and an error message is displayed if you miss any tags or add them incorrectly.

3. Click **OK**.

29.3.2.4 Previewing a Task Flow

Use the **Preview** option to see how the task flow appears when it is consumed in a page or another task flow. In preview mode, the task flow displays Edit and Close buttons. Click **Close** to exit preview mode. Click **Edit** if you want to modify the task flow in Composer. For more information, see Section 29.3.2.3, "Editing a Task Flow."

29.3.2.5 Setting Properties on a Task Flow

Each task flow has certain properties associated with it that control how it is displayed in the application or space. You can edit these properties through the Edit Properties dialog. For the generic procedure, see Section 11.4.2, "Setting Properties on a Resource."

29.3.2.6 Setting Security on a Task Flow

When you create a task flow, the default application-level or space-level security settings are applied to it. You can select **Security Settings** from the **Edit** menu to modify the default settings in the following ways:

- Change the default permissions granted to users and roles.
- Revoke all permissions for a user or role.
- Grant `Edit` and `Manage` permissions to additional users and roles.

For the detailed steps, see Section 11.4.4, "Setting Security for a Resource."

29.3.2.7 Deleting a Task Flow

You can delete a task flow by selecting it and choosing **Delete** from the **Edit** menu on the Resources - Task Flows page. For the generic procedure, see Section 11.4.5, "Deleting a Resource."

29.3.2.8 Using JDeveloper to Modify a Task Flow

You may prefer to edit a runtime task flow in JDeveloper. To do this, you have several options:

- Use the **Edit Source** option to view the source code of the task flow's source files. You can copy the contents of the dialog to JDeveloper for editing and then copy the edited code back into the dialog. For more information, see Section 29.3.4.4, "Editing a Mashup Style."
- Download an existing Spaces task flow, import it into JDeveloper, edit it, and then upload it back to Spaces.

> **Note:** As a task flow typically involves multiple files, trying to create a task flow in JDeveloper, expose it as a portal resource, and export all files and metadata correctly can cause errors. The deployed task flow may be broken and not work properly. Therefore, it is recommended that you use JDeveloper to only modify runtime task flows. Do not export design-time task flows as portal resources.
>
> For information about using design-time task flows in Spaces, see Section 29.3.3, "Using Task Flows Created at Design Time."

The generic steps to upload and download a resource from Spaces are described in Section 11.5.2, "Downloading a Resource"and Section 11.5.3, "Uploading a Resource."

For information about how a task flow is imported, edited, and exported in JDeveloper, see the section "Working with Mashup Styles" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

> **Note:** Task flows and mashup styles are similar resources and can be edited the same way in JDeveloper.

You must note that task flows created at runtime may contain components that are bound to data controls. When you download such a task flow, the referenced data controls are not downloaded. When you open such a task flow in JDeveloper, you will not see a fully running task flow because the associated data controls are not available in JDeveloper. The task flow will work properly only when you take it back to the Spaces instance.

29.3.3 Using Task Flows Created at Design Time

If you created a custom task flow in Oracle JDeveloper and want to consume it in Spaces, you must ensure that the task flow is available in the Resource Catalog. Users can then consume the task flow in their pages and task flows. To expose a custom task flow created in JDeveloper, you must deploy the application containing the task flow as a shared library to the Spaces instance. The task flow is then included automatically in the Resource Registry. You can add the task flow to custom catalogs from the Resource Registry.

Oracle WebCenter Portal: Framework provides a workspace specifically for deploying and undeploying Spaces Shared Library Extensions. You must use that workspace to deploy task flows to Spaces. For more information, see "Deploying Your Own Custom Code and Task Flows in Shared Libraries" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

Design-time data controls can also be added to custom catalogs in JDeveloper. For more information, see "How to Manage Content in the Resource Catalog" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

29.3.4 Managing Mashup Styles

Mashup styles are templates used to create new task flows in your application. They are useful if you want to reuse a custom visualization in different task flows in your application. The Create Task Flow dialog, which is invoked from the Resources - Mashup Styles page, displays all available mashup styles. The Resource Manager (Resources page) provides options to manage mashup styles that are displayed in the Create Task Flow dialog. You can offer a wider selection of mashup styles to users or restrict mashup styles so that users build only the types of task flows that you intend.

You can manage mashup styles in the following ways:

- Copy an out-of-the-box mashup style and modify its properties.
- Upload a mashup style created in Oracle JDeveloper.
- Download a custom mashup style, edit it in Oracle JDeveloper, and upload it back to the runtime application.
- Show or hide a mashup style in the Create Task Flow dialog.
- Edit a custom mashup style or its properties.
- Change security settings on a custom mashup style.

- Delete a custom mashup style.

> **Note:** The default, out-of-the-box mashup styles cannot be edited or deleted. You can only copy these styles or hide them in the Create Task Flow dialog.

See Section C.6, "Building and Using a Custom Mashup Style with Predefined Columns" for an example of how to create a custom mashup style.

This section provides information about the out-of-the-box mashup styles included in Spaces and explains how to manage mashup styles in the Resource Manager. It includes the following sections:

- Section 29.3.4.1, "Out-of-the-Box Mashup Styles"
- Section 29.3.4.2, "Copying a Mashup Style"
- Section 29.3.4.3, "Showing or Hiding a Mashup Style in the Create Task Flow Dialog"
- Section 29.3.4.4, "Editing a Mashup Style"
- Section 29.3.4.5, "Previewing a Mashup Style"
- Section 29.3.4.6, "Setting Properties on a Mashup Style"
- Section 29.3.4.7, "Setting Security on a Mashup Style"
- Section 29.3.4.8, "Deleting a Mashup Style"
- Section 29.3.4.9, "Using JDeveloper to Build Your Mashup Style"

29.3.4.1 Out-of-the-Box Mashup Styles

Table 29–2 describes the mashup styles available out of the box.

Table 29–2 Mashup Styles

Name	Description
Blank	A one-column task flow with one layout box into which you can add content, including additional layout components. Switching this task flow style is allowed.
Stretch	Maximizes the task flow to take up all available space. For an example of a page based on the Stretch style, see the **Documents** page or the **Announcements** page in your Spaces application. Task flows based on this style cannot be switched.
Parameter Form	Provides an input text field where a user can specify a value. Out-of-the-box, the input text is wired to `pageFlowScope.bindVarId`. When you use this style, you can add other components to the task flow and use the input text's `pageFlowScope` variable as an input parameter for another component, for example, a data control. For example, you can use this mashup style to create a task flow with a search field and a search results table. If the results table displays data from a data control, you can wire the search field parameter to the data control parameter, so that the table displays data specific to the criteria you specify in the search field.

29.3.4.2 Copying a Mashup Style

You can make a copy of an existing mashup style by selecting it and choosing **Copy** from the **Edit** menu on the Resources - Mashup Styles page. Copying a mashup style enables you to replicate a local style in the runtime environment without having to actually export and upload the mashup style. As there is no option to create a mashup style from scratch, you can create a copy of a default style and replace its code with that of a custom visualization that you want to create.

For the generic procedure, see Section 11.4.1, "Copying a Resource."

You can create a custom visualization with the required UI components and use a dummy EL value, `#{dataPresenter.dummyData.collectionModel}`, as a placeholder for the real data. When you create a new task flow using this style, you can replace the dummy EL value with the real binding. For an example showing how to create a custom mashup style, see Section C.6, "Building and Using a Custom Mashup Style with Predefined Columns."

29.3.4.3 Showing or Hiding a Mashup Style in the Create Task Flow Dialog

The Create Task Flow dialog displays all the mashup styles available for building task flows. You can control whether a mashup style is displayed in the Create Task Flow dialog by marking it as shown or hidden. For generic information about hiding and showing resources, see Section 11.4.3, "Showing and Hiding Resources."

Further, for a mashup style created at the application level, you can control whether it is available to any, all, or selected spaces in the application. For generic information about availability in spaces, see Section 11.4.2.5, "Setting the Availability of an Application-Level Resource in Other Spaces."

29.3.4.4 Editing a Mashup Style

Use the **Edit Source** option in the Resource Manager to edit the source code of the mashup style's task flow definition file, view fragment, and the fragment's page definition file. You may want to edit a custom mashup style to alter its layout. You can create a create a custom visualization with the required UI components and use a dummy EL value, `#{dataPresenter.dummyData.collectionModel}`, as a placeholder for the real data. When you create a new task flow using this style, you can replace the dummy EL value with the real binding. For an example showing how to create a custom mashup style, see Section C.6, "Building and Using a Custom Mashup Style with Predefined Columns."

To edit a mashup style's source files:

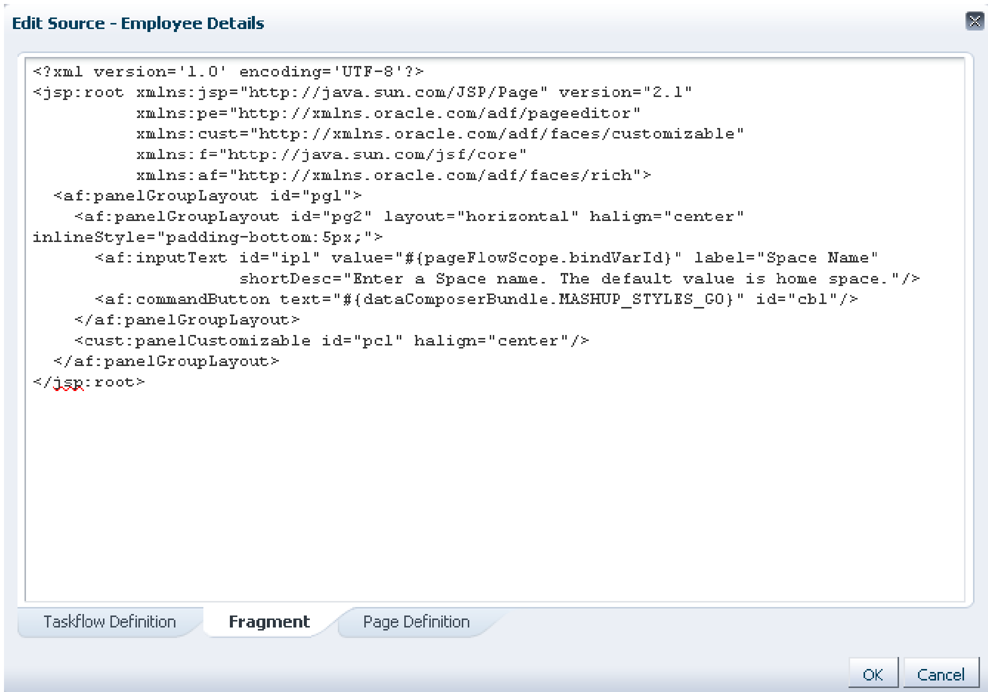
Note: Edit a mashup style's source files only when absolutely necessary. To ensure that you do not end up with an invalid style that does not render properly, edit the source code very carefully.

---

1. In the Resource Manager (see Section 11.1.4, "Accessing Resources"), select the mashup style, and from the **Edit** menu, select **Edit Source**.

   A simple Edit Source dialog displays with three tabs, Taskflow Definition, Fragment, and Page Definition, as shown in Figure 29–9.

Figure 29–9 Edit Source Dialog



2. Click a tab and edit the source code for that file.

   The format of the code is validated and an error message is displayed if you miss any tags or add them incorrectly.

3. Click **OK**.

To perform certain advanced editing tasks, you may need to download the style, edit it in JDeveloper, and upload it back to your Spaces instance. For more information, see Section 29.3.4.9, "Using JDeveloper to Build Your Mashup Style."

29.3.4.5 Previewing a Mashup Style

Use the **Preview** option to see how the style appears when it is applied to a task flow. In preview mode, the mashup style displays Edit and Close buttons. Click **Close** to exit preview mode. Click **Edit** if you want to modify the style in Composer. For more information, see Section 29.3.4.4, "Editing a Mashup Style."

29.3.4.6 Setting Properties on a Mashup Style

Default, out-of-the-box mashup styles do not have associated runtime properties. However, each custom mashup style has certain properties associated with it. You can edit these properties through the Edit Properties dialog. For the generic procedure, see Section 11.4.2, "Setting Properties on a Resource."

29.3.4.7 Setting Security on a Mashup Style

When you copy or upload a mashup style, the default application-level or space-level security settings are applied to it. You can select **Security Settings** from the **Edit** menu to modify the default settings in the following ways:

- Change the default permissions granted to users and roles.
- Revoke all permissions for a user or role.

- Grant `Edit` and `Manage` permissions to additional users and roles.

For the generic procedure, see Section 11.4.4, "Setting Security for a Resource."

29.3.4.8 Deleting a Mashup Style

You can delete a custom mashup style by selecting it and choosing **Delete** from the **Edit** menu on the Resources - Mashup Styles page. For the generic procedure, see Section 11.4.5, "Deleting a Resource."

29.3.4.9 Using JDeveloper to Build Your Mashup Style

You may want to create a mashup style that is beyond the editing capabilities of WebCenter Portal: Spaces, or you may prefer working in JDeveloper. To do this, you have several options:

- Use the **Edit Source** option to edit the source code of the mashup style's source files. You can edit the source code directly in the Edit Source dialog or you can copy the contents of the dialog to JDeveloper for editing and then copy the edited code back into the dialog. For more information, see Section 29.3.4.4, "Editing a Mashup Style."
- Download an existing Spaces mashup style, import it into JDeveloper, for editing, and then upload it back to Spaces.
- Create a completely new mashup style in JDeveloper and upload it to Spaces.

The generic steps to upload and download a resource from Spaces are described in Section 11.5.2, "Downloading a Resource"and Section 11.5.3, "Uploading a Resource."

Oracle provides a special JDeveloper workspace (`DesignWebCenterSpaces.jws`) for developing Spaces resources, including mashup styles. The workspace offers a design environment in which to create and edit your mashup style, and also enables you to upload them to Spaces for testing. For more information and to download the JDeveloper workspace, see "Developing Spaces Resources" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

For information about how a mashup style is imported, edited, and exported in JDeveloper, see the section "Working with Mashup Styles" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*. You may need to look at the special considerations for mashup styles in JDeveloper.

29.4 Creating Data Visualizations

You have seen how to create data controls and task flows. Data controls created from the Resources - Data Controls page are available automatically in the Resource Catalog and can therefore be added to task flows and pages. You can consume data controls in task flows or pages and render them in different ways, such as tables, graphs, and forms, to create useful mashups. If you consume them in task flows, you can define parameters on the data control and bind those parameters to task flow parameters so that users can specify a value for a task flow parameter and display data based on that value.

This section describes how to consume data controls and bind data control parameters to task flow parameters. It includes the following subsections:

- Section 29.4.1, "Consuming a Data Control in a Task Flow"
- Section 29.4.2, "Creating Task Flow Parameters"
- Section 29.4.3, "Binding Data Control Parameters to Task Flow Parameters"

- Section 29.4.4, "Wiring a Data Control to a Parameter Form Task Flow"
- Section 29.4.5, "Consuming Task Flows that Contain Visualizations"
- Section 29.4.6, "Editing Visualizations"
- Section 29.4.7, "Writing to a Data Source from a Visualization"

29.4.1 Consuming a Data Control in a Task Flow

When you add a data control, its accessors, or its methods to a task flow, you can select different UI options for rendering the data. Depending on the object you select and the visualizations it supports, different options are listed on the **Add** menu. For more information, see Section 29.1.2, "Supported Visualizations."

If you populate a task flow with different elements from a data control that uses bind parameters, then all the objects display data for the same parameter values. You cannot specify different parameter values for elements coming from the same data control.

This section describes the different ways in which you can add a data control inside a task flow. It includes the following subsections:

- Section 29.4.1.1, "Adding a Data Control as a Table"
- Section 29.4.1.2, "Adding a Data Control as a Form"
- Section 29.4.1.3, "Adding a Data Control as a Graph"

29.4.1.1 Adding a Data Control as a Table

The `Table` option is displayed only for data control accessors that return a collection of objects that can be displayed in columns of a table. You can add a data control as a read-only table that displays data using `Output Text` components by default, or as an editable table that displays data using `Input Text` components by default. You can also display data using `Output Formatted` components and hyperlinks.

This section describes the steps to add a sample SQL data control as a read-only table and editable table. It includes the following subsections:

- Section 29.4.1.1.1, "Adding a Data Control as a Read-Only Table"
- Section 29.4.1.1.2, "Adding a Data Control as an Editable Table"
- Section 29.4.1.1.3, "Adding a Web Services Data Control Accessor with Complex Parameters"

29.4.1.1.1 Adding a Data Control as a Read-Only Table A read-only table displays the data retrieved from a data control in `Output Text` components. The content in the table cannot be edited.

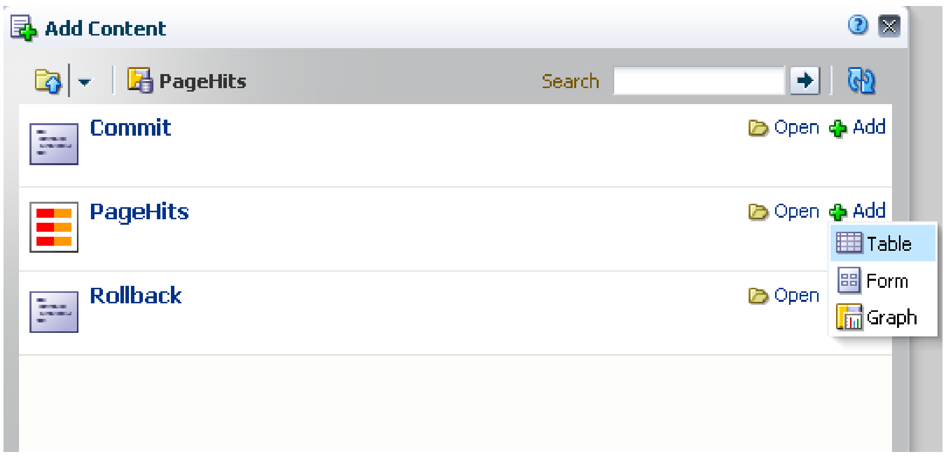
To add a SQL data control as a read-only table:

1. Select the task flow in which you want to add the data control, then from the Edit menu, select Edit to open the task flow in Composer.
2. Click **Add Content** in the container in which you want to add the data control.
3. In the Add Content dialog, navigate to the section of the Resource Catalog that contains runtime data controls.

> **Tip:** The location of data controls depends on the Resource Catalog used for editing pages. For example, in the default Resource Catalog, runtime data controls are present in the **Data Controls** subfolder, which is nested inside the **Web Development** folder or **Mash Ups** folder.

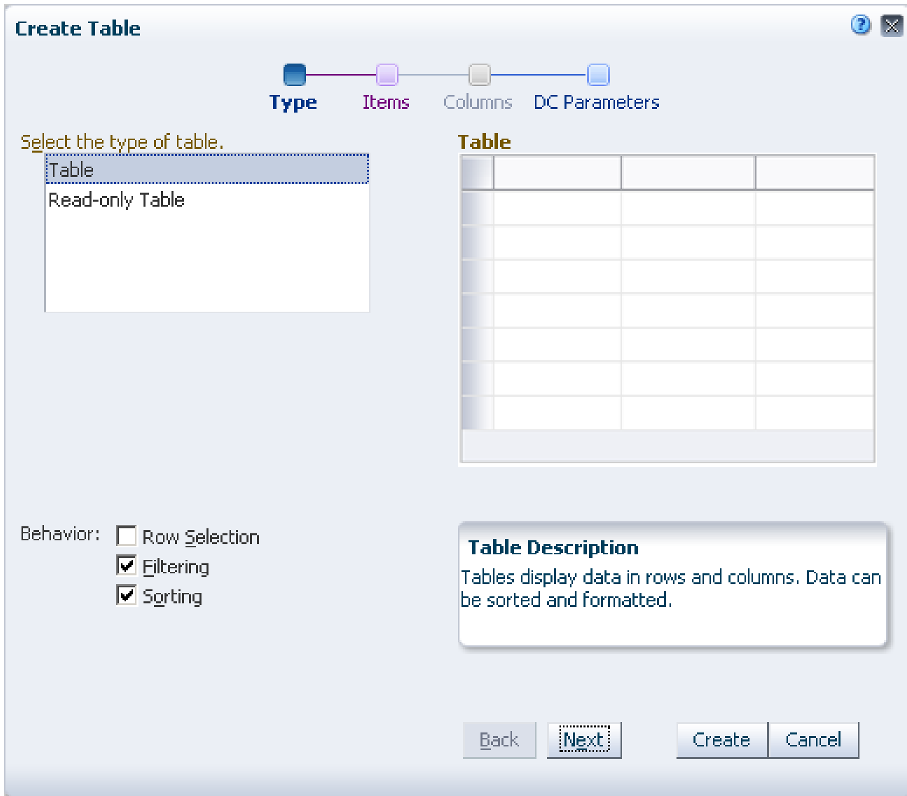
4. Click the **Open** link next to a data control, for example `PageHits`, to display its content.
5. Click the **Add** link next to the `PageHits` accessor. From the dropdown menu, select **Table**, as shown in Figure 29–10.

Figure 29–10 Add Content Dialog - Table Option



6. In the Create Table - Type page, shown in Figure 29–11, select **Read-only Table**.

Figure 29–11 Create Table - Type



7. Optionally, in the Behavior section, select the Row Selection, Filtering, and Sorting options to enable customization of the table.

   Select `Row Selection` to enable selection of a row on which you can perform any operation.

   Note:

   Using Values from Row Selection

   When you enable row selection in a table and select a row, internally, the column values of the selected row are added into a row selection bean. The column values are stored in the following EL format:

   ```
   #{dataComposerViewContext.dataSelection.COLUMN_NAME}
   ```

   You can use this format to reference the table columns from elsewhere in the task flow. Typically, this is useful in mashups where data visualizations are wired in a master-detail relationship.

   However, row selection is not supported if the data control contains bind parameters.

   Select `Filtering` to display a text field above each column in the table. You can specify a filter criteria in these text fields to display only rows that match the criteria.

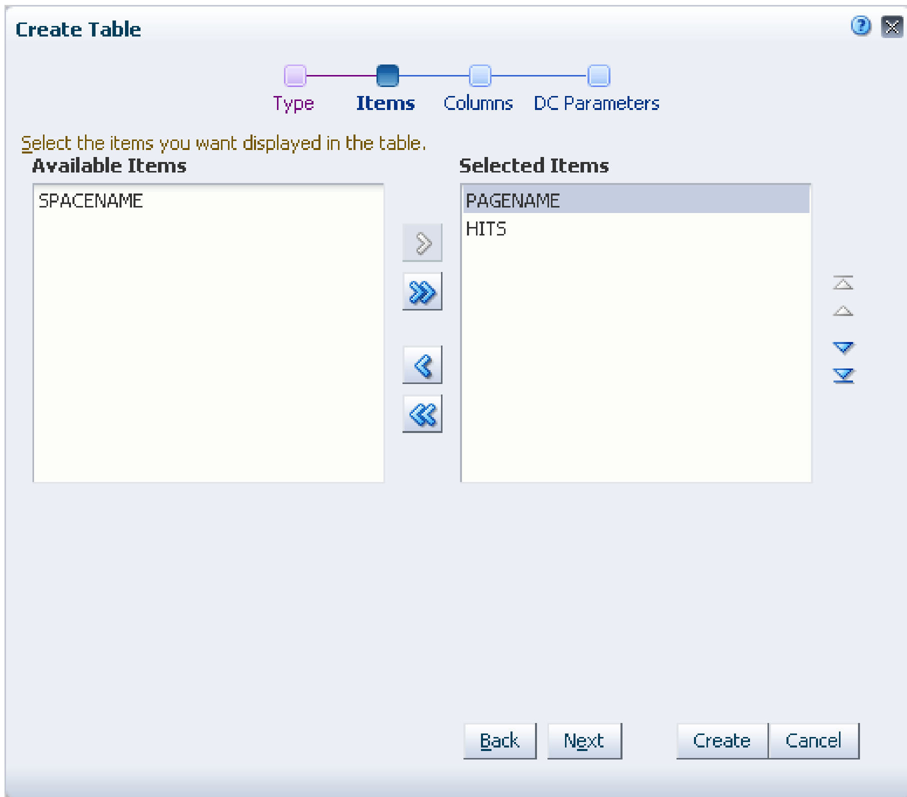
   Select `Sorting` to enable sorting of columns. When you select this option, the column headers display Up and Down arrows, which you can use to sort columns in an ascending or descending order.

8. Click **Next**.

9. In the Create Table - Items page, select the accessor attributes that you wish to display in the table and move them from the Available Items list to the Selected Items list (Figure 29–12).

   The table displays columns for attributes in the same order as they are in this dialog. You can use the Up and Down arrows to the right of the Selected Items box to resequence attributes and thereby, the table columns.

Figure 29–12 Create Table - Items



Note: If an item has a scalar value, you can add the item to the table after initial creation only if the data control was created at design time. You cannot add items with scalar values to a table from data controls created at runtime.

---

10. Click **Next**.

11. In the Create Table - Columns page (Figure 29–14), specify values for the table's display attributes, as follows:

    - **Column Header**: Specify a name to be used as a header for the selected column.
    - **Display As**: Select an output format for the column. Choose from:
      – Output Text

        Use to display data records as styled read-only text.

      – Output Formatted

Use to display data records as read-only text with limited formatting.

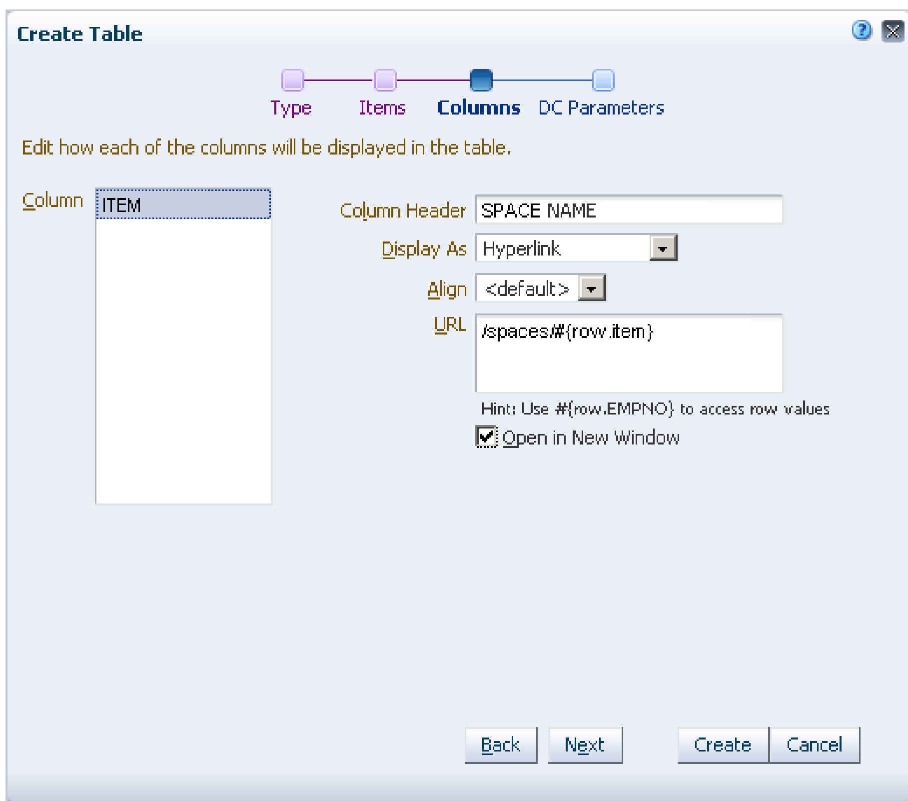
– Hyperlink

  Use to display data in the selected column as a link, for example, when connecting to an employee database, you can display employee names as hyperlinks. When a user clicks a link, it takes them to the employee's profile page. Another example would be where you add a Spaces Web Service data control as a table that list the spaces; you can use the URL option to display space names as hyperlinks so that clicking a space name opens the space.

- **Align**: Select whether the data in the table cells must be aligned to the center, end, left, right, or start.
- **URL**: Use this field to create dynamic URLs based on the values coming from the data control. Specify the URL along with the EL value that must be appended to the URL. The URL field is enabled only if you selected **Hyperlink** as the column format.

  For example, if you are adding a Spaces Web Service data control as a table that list the spaces of which the current user is a member, you can use the URL option, as shown in Figure 29–13, to display space names as hyperlinks. Clicking a space name in the table opens the space in a separate window.

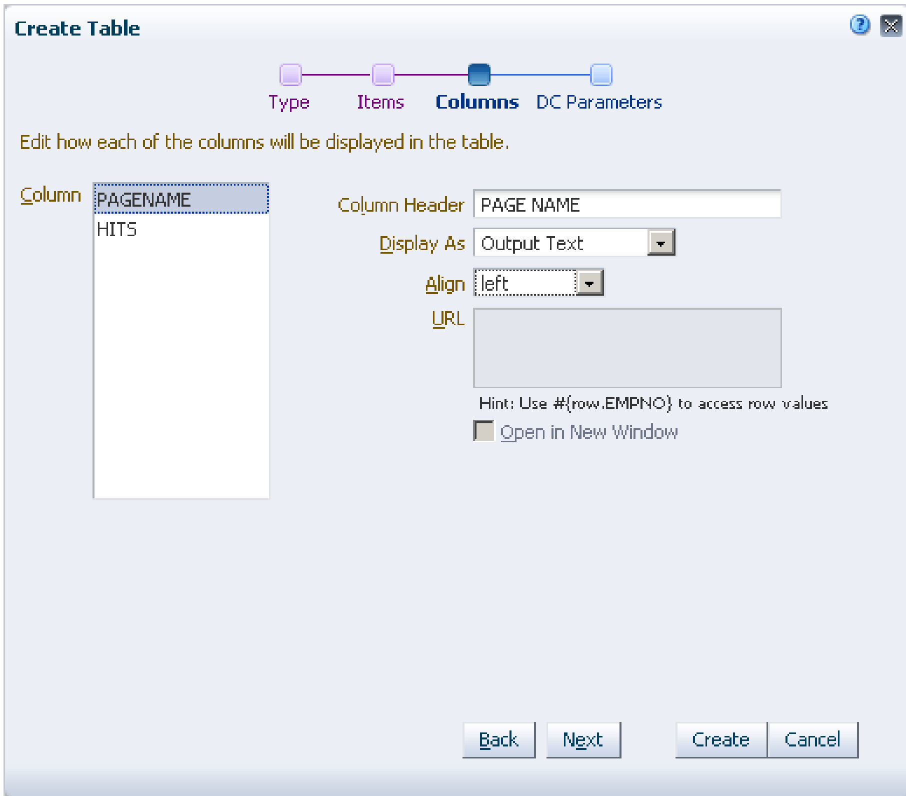
Figure 29–13 Create Table - Columns



- **Open in New Window**: Select to open the URL in a separate window. This field is enabled only when you select Hyperlink as the column format.

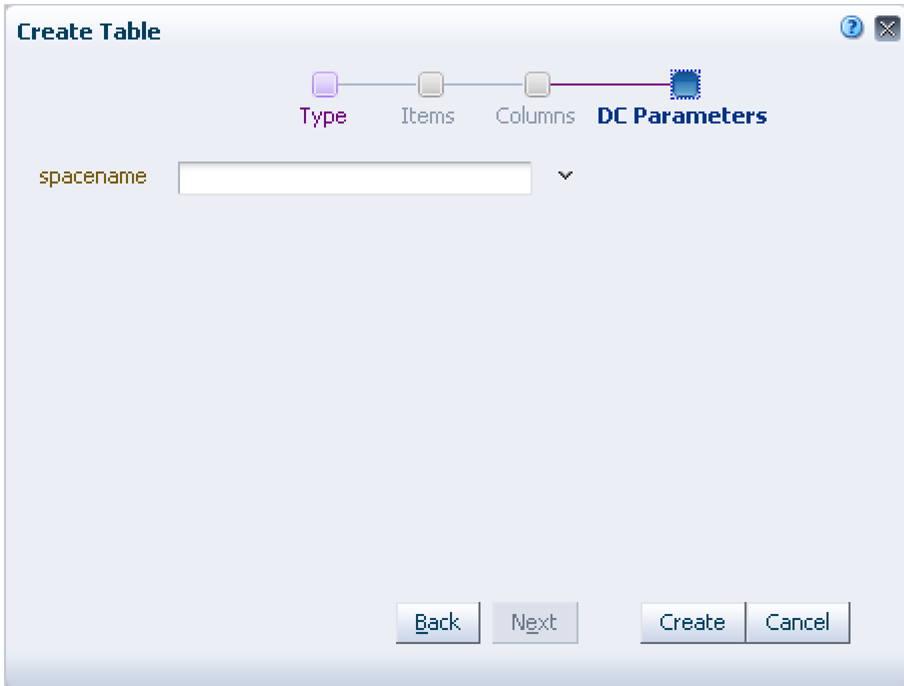
Note: The Display As field lists both `Input Text` and `Output Text` options if you selected the table type as `Table`.

Figure 29–14 Create Table - Columns



12. Click **Next**.
13. In the Create Table - DC Parameters page, shown in Figure 29–15, change the default values for the exposed data control parameters, then click **Create**.

Figure 29–15 Create Table - DC Parameters

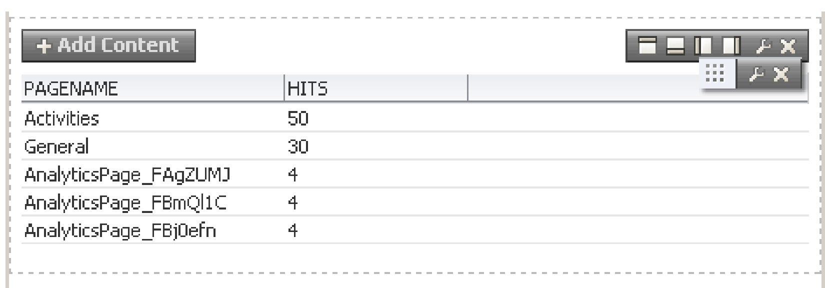


The DC Parameters page is enabled only if the accessor being added has associated parameters. You can use this page to bind data control parameters to task flow parameters. For more information, see Section 29.4.3, "Binding Data Control Parameters to Task Flow Parameters."

If you skip this step, the parameter values that you specified while creating the data control are used.

14. A table is created in the task flow based on the options you selected, as shown in Figure 29–16.

Figure 29–16 Data Control Added as a Read-Only Table



You can format the table by sorting data, reordering columns, and so on. For more information, see Section 29.4.6.2, "Customizing a Table."

Now that you have added the data control as a table inside a task flow, you can bind the task flow's parameters to the data control's parameters. By doing this, when you consume the task flow in a page, users can specify a value for the task flow parameter to view corresponding data in the table. For more information, see Section 29.4.3, "Binding Data Control Parameters to Task Flow Parameters."

29.4.1.1.2 Adding a Data Control as an Editable Table If the data source supports updating of records, you can add a data control accessor or operation return as an editable table. When you create an editable table, you can edit information in the table and commit those changes to the data source. In an editable table, most attributes are represented using ADF `Input Text` components whose values can be edited. To save your changes back to the data control, you can create command buttons using operations that can modify data records, and place those buttons in a toolbar in the table. For example, you can use the `Delete` operation to create a button that allows a user to delete a record from the current range. Or you can use the built-in `Submit` button to submit changes.

If you add an editable table and the underlying data control does not support updating, the table displays as a read-only table.

> **Note:** Data controls created at runtime do not support editing of data. Currently, only design time BC4J-based SQL data controls support editing of data through tables.

The procedure to add a data control as an editable table is similar that of adding a read-only table. This section lists the additional tasks required to add an editable table and include `Create`, `Update`, and `Delete` options on the table.

To add a data control accessor as an editable table:

1. Perform the steps in Section 29.4.1.1.1, "Adding a Data Control as a Read-Only Table," but with the following exceptions:
   a. On the Create Table - Type page, select **Table**.
   b. On the Create Table - Columns page, for each column that you want to make editable, set the Display As field to **Input Text w/Label**.

   > **Note:** If the data control does not support updating of data, the columns display read-only fields.

2. A table is created in the task flow based on the options you selected, as shown in Figure 29–17.

Figure 29–17 Data Control as an Editable Table

ENAME	EMPNO	DEPTNO	MGR
ALLEN	7499	30	7698
WARD	7522	30	7698
JONES	7566	20	7839
MARTIN	7654	30	7698
BLAKE	7698	30	7839
CLARK	7782	10	7839
TURNER	7844	30	7698

When you add a Web Service data control as an editable table, you can edit records in the table and write the changes back to the Web Service data source. However, you can update data only if the Web Service exposes a method to do so. For more information, see Section 29.4.7, "Writing to a Data Source from a Visualization."

For information about formatting a table and customizing it further, see Section 29.4.6.2, "Customizing a Table."

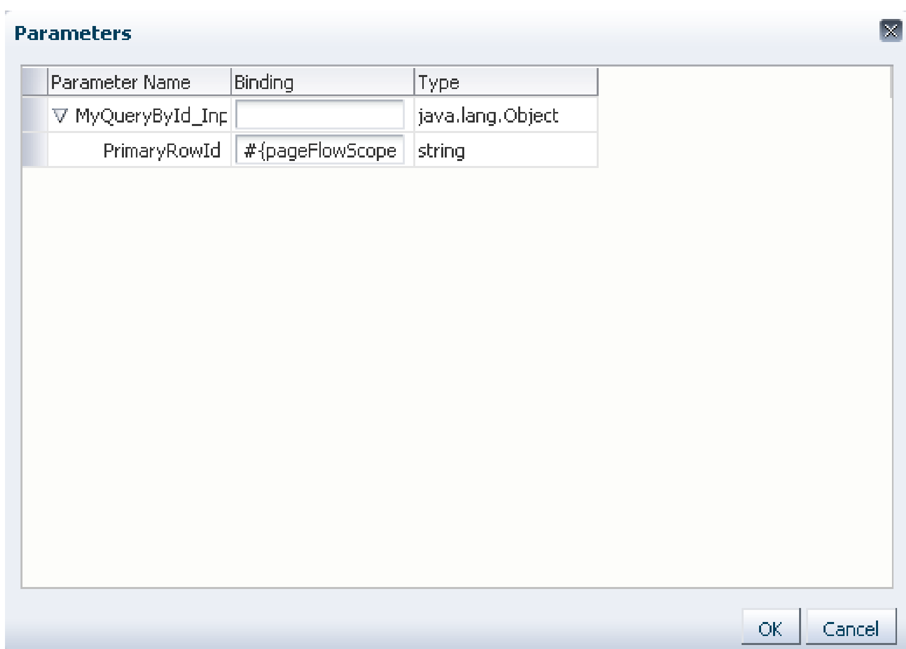
The next step is to create task flow parameters and bind the task flow's parameters to the data control's parameters. When you consume such a task flow in a page, users can specify a value for the task flow parameter to view corresponding data in the table. For more information, see Section 29.4.2, "Creating Task Flow Parameters" and Section 29.4.3, "Binding Data Control Parameters to Task Flow Parameters."

29.4.1.1.3 Adding a Web Services Data Control Accessor with Complex Parameters As explained in Section 29.1.1.2, "Web Service Data Controls," Web Services data control accessors may expose scalar or complex parameters. When you add a Web Services data control accessor as a table, you can specify values for data control parameters in the DC Parameters page of the wizard. You must specify values for scalar and complex parameters as follows:

- Simple EL or static values for scalar parameters.
- XML values for complex parameters. A complex parameter can expose a set of scalars using an EL value.

The steps to specify values for simple parameters is the same for all types of data controls and are explained in the previous section. However, if a Web Services data control accessor exposes complex parameters, the DC Parameters page of the table creation wizard displays an extra context menu option, **Parameter Structure**. The Parameter Structure option invokes a Parameters dialog, which lets you expand the complex parameter, as shown in Figure 29–18, and specify values for the complex parameter itself or its included simple parameters.

Figure 29–18 Parameters Dialog Displaying a Complex Parameter



Section C.5, "Creating a Mashup with Data from a Siebel Data Source" provides an example of using the Parameters dialog to specify values for complex parameters.

29.4.1.2 Adding a Data Control as a Form

The `Form` option is displayed only for data control accessors that return a collection of objects that can be displayed as a form element. You can add a data control accessor as a read-only form that displays data using `Output Text` components, or as an editable form that typically displays data using `Input Text` components. You can also display data using `Output Formatted` components and URLs.

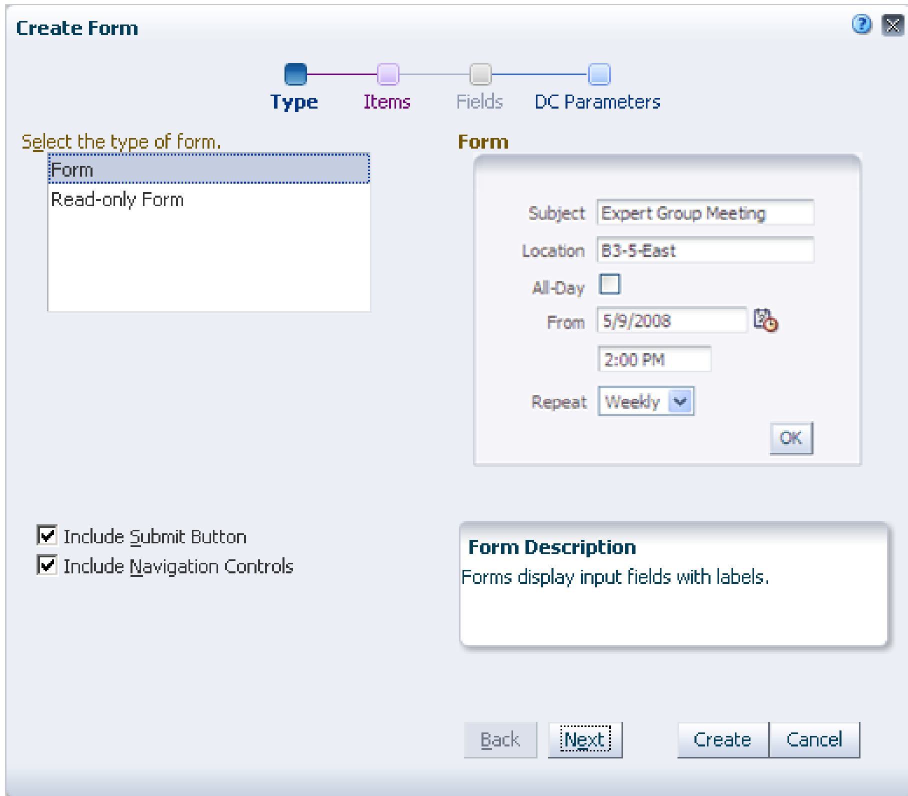
To add a Web Service data control as a form:

1. In the Resource Manager, select the task flow in which you want to add the data control, then from the Edit menu, select **Edit** to open the task flow in Composer.
2. Click **Add Content** in the container in which you want to add the task flow.
3. In the Add Content dialog, navigate to the section of the Resource Catalog that contains runtime data controls.

    Tip: The location of data controls depends on the Resource Catalog used for editing pages. For example, in the default Resource Catalog, runtime data controls are present in the **Data Controls** subfolder, which is nested inside the **Web Development** folder and **Mash Ups** folder.

4. Click the **Open** link next to a data control name, for example `DelayedStockQuoteDC`, to display its contents.
5. Click the **Add** link next to the `DelayedStockQuoteDC` accessor. From the dropdown menu, select **Form** to display the Create Form dialog.
6. Click the **Add** link next to the operation, and select **Form** to display the Create Form dialog.
7. In the Create Form - Type page, select the desired type of form, for example, **Form**, as shown in Figure 29–19.

Figure 29–19 Create Form - Type



8. Select **Include Submit Button** to display a Submit button on the form. This option is enabled only if you are creating an editable form, because you must display a submit button if users are allowed to specify values or edit form data.
9. Select **Include Navigation Controls** to display First, Previous, Next, and Last buttons on the form. Navigation controls are helpful when multiple records are retrieved from the data source.

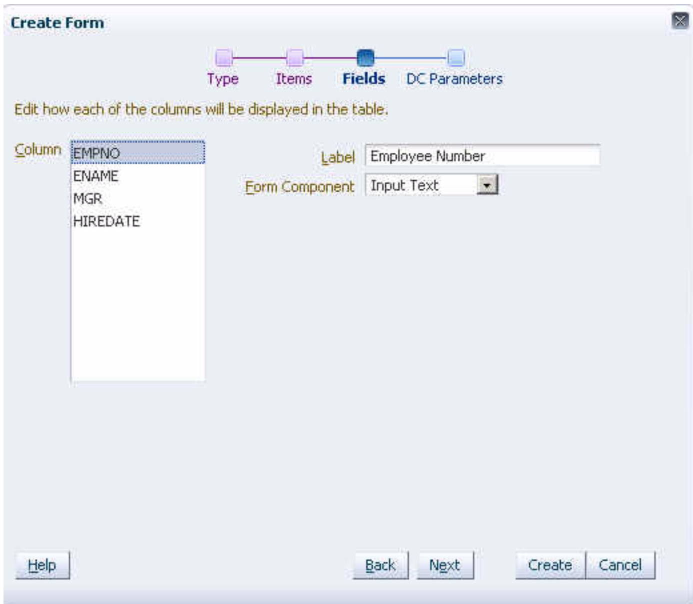
> **Note:** Navigation controls may not work properly if the data control provides bind parameters.

10. In the Create Form - Items page, from the Available Items box, select the items you wish to display in your form, then click **Next**.

> **Note:** If an item has a scalar value, you can add the item to the form after initial creation only if the data control was created at design time. You cannot add items with scalar values to a form from data controls created at runtime.

11. In the Create Form - Fields page, define a label and form component (Figure 29–20) for each column, then click **Next**.

Figure 29–20 Create Form - Fields



12. In the Create Form - DC Parameters page, specify the parameter value to display data for that value, then click **Create**.

Note: Ensure that you specify the parameter value at this stage as you cannot specify it later.

Unlike a table or a graph, after you create a form, if you edit it in Composer, the Component Properties dialog does not display the Data panel. Therefore, you cannot modify parameter values for a form once it is created.

The new form looks like the one in Figure 29–21.

Figure 29–21 New Form in the Task Flow

When you add a Web Service data control as an editable form, you can edit data in the form and write the changes back to the Web Service data source by clicking the Submit button. However, you can update data only if the Web Service supports it by providing methods for creating, updating, and deleting records. For more information, see Section 29.4.7, "Writing to a Data Source from a Visualization."

The next step is to create task flow parameters and bind the task flow's parameters to the data control's parameters. When you consume such a task flow in a page, users can specify a value for the task flow parameter to view corresponding data in the form.

For more information, see Section 29.4.2, "Creating Task Flow Parameters" and Section 29.4.3, "Binding Data Control Parameters to Task Flow Parameters."

29.4.1.3 Adding a Data Control as a Graph

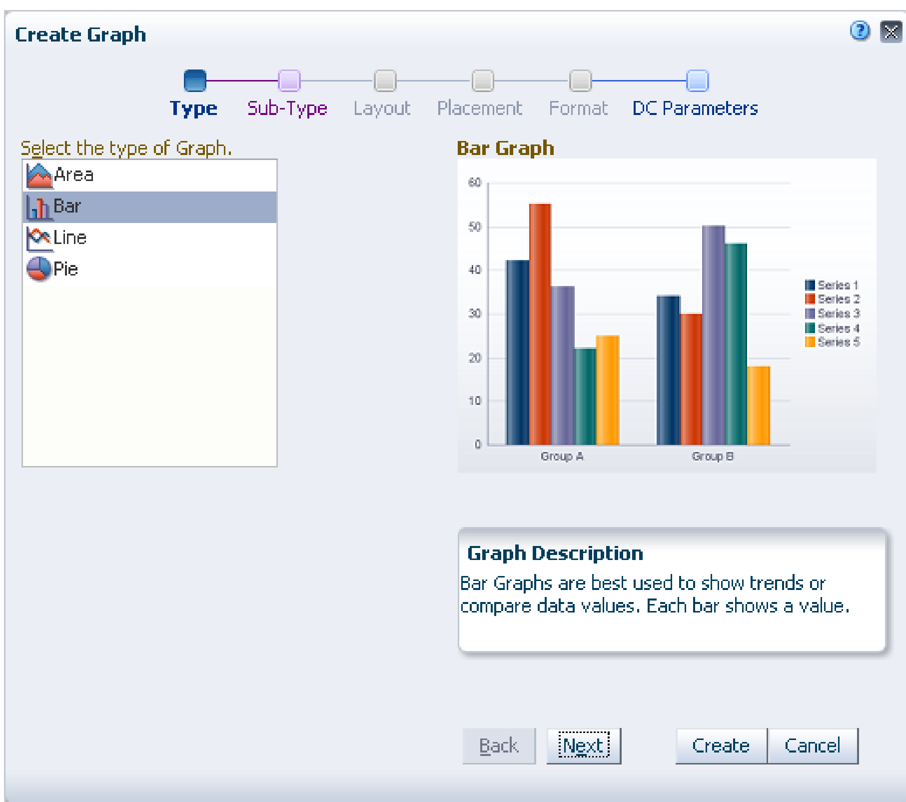
To display data as a Graph:

1. Edit the task flow in Composer.
2. Click **Add Content** to display the Add Content dialog.
3. In the Add Content dialog, navigate to the section of the Resource Catalog that contains runtime data controls.

   Tip: The location of data controls depends on the Resource Catalog used for editing pages. For example, in the default Resource Catalog, runtime data controls are present in the **Data Controls** subfolder, which is nested inside the **Web Development** folder and **Mash Ups** folder.

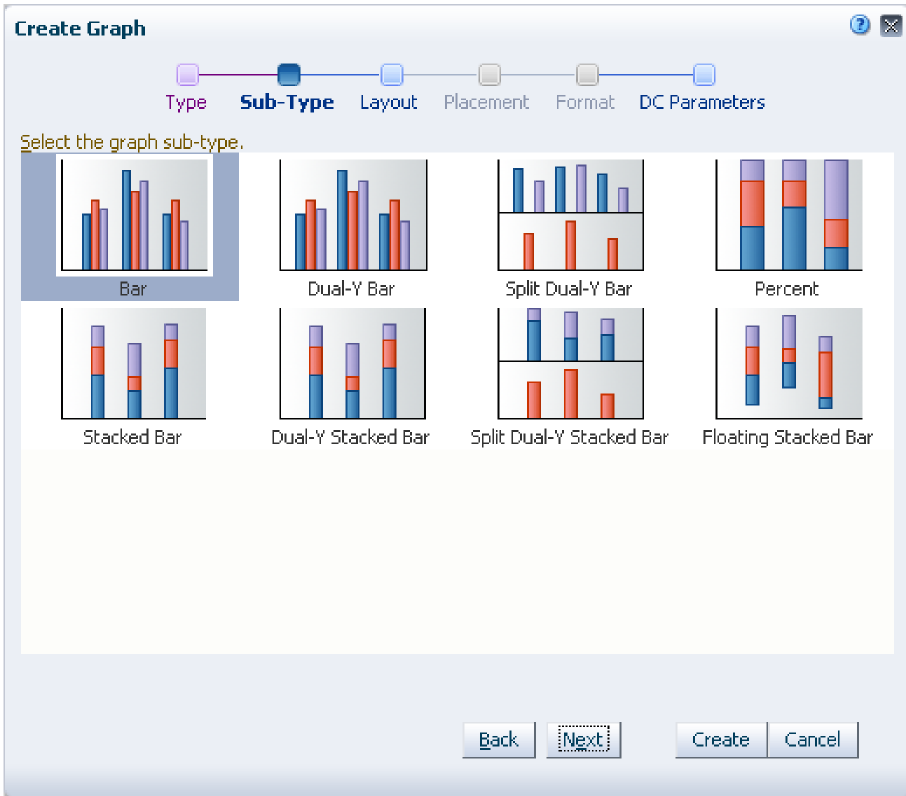
4. Click the **Open** link next to the data control to display its accessor, operations, and methods associated with it.
5. Click the **Add** link next to the data control accessor or operation return. From the dropdown menu, select **Graph** (Figure 29–10), to display the Create Graph dialog.
6. In the Create Graph - Type page, select the desired type of form, for example, **Bar**, as shown in Figure 29–22, then click **Next**.

Figure 29–22 Create Graph - Type



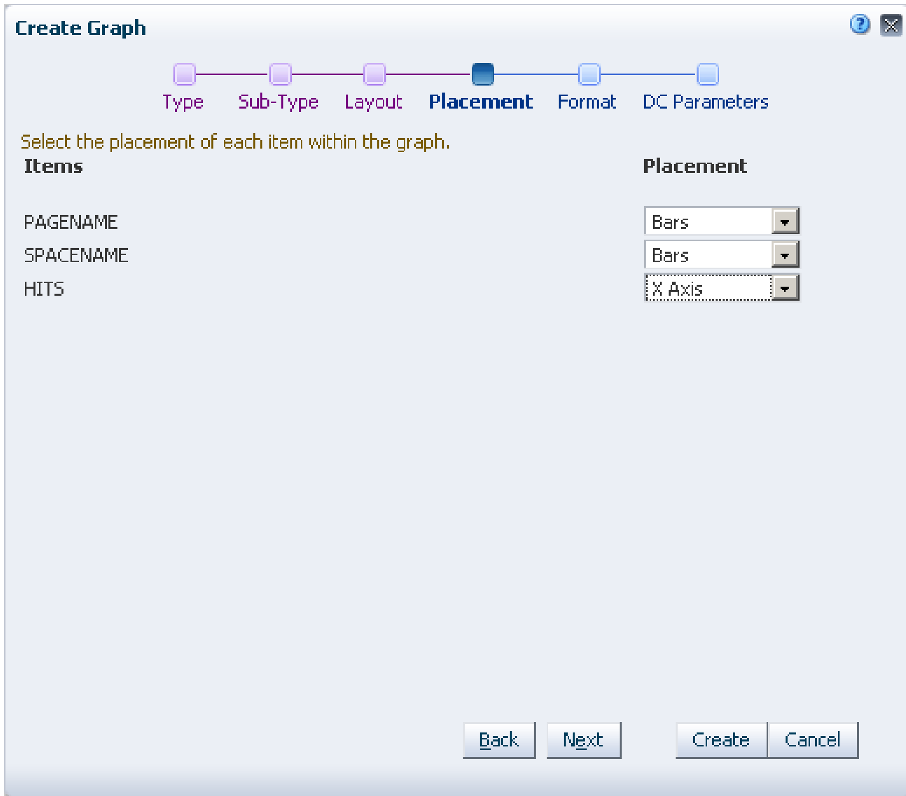
7. In the Create Graph - Sub-Type page, select a subtype, for example **Bar**, as shown in Figure 29–23, then click **Next**.

Figure 29–23 Create Graph - Sub-Type



8. In the Create Graph - Layout page, select a suitable layout, then click **Next**.
9. In the Create Graph - Items page, from the Available Items box, select the items you wish to display in your graph, then click **Next**.
10. In the Create Graph - Placement page, select the appropriate placement, as shown in Figure 29–24, then click **Next**.

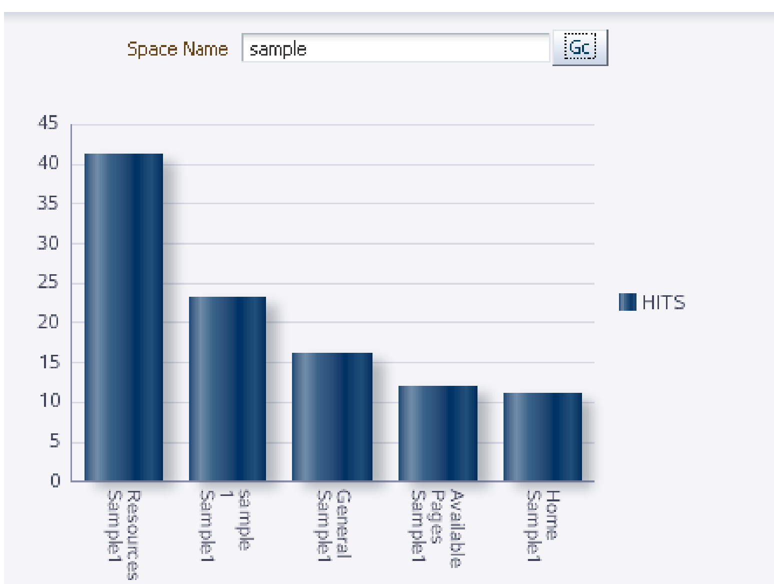
Figure 29–24 Create Graph - Placement



11. In the Create Graph - Format page, define titles and labels for each graph item, then click **Next**.

12. In the Create Graph - DC Parameters page, specify the parameter value to display data for that value, then click **Create**. The new graph looks like Figure 29–25.

Figure 29–25 New Graph in the Task Flow



For information about formatting a graph and customizing it further, see Section 29.4.6.3, "Customizing a Graph."

The next step is to create task flow parameters and bind the task flow's parameters to the data control's parameters. When you consume such a task flow in a page, users can specify a value for the task flow parameter to view corresponding data in the graph. For more information, see Section 29.4.2, "Creating Task Flow Parameters" and Section 29.4.3, "Binding Data Control Parameters to Task Flow Parameters."

29.4.2 Creating Task Flow Parameters

Task flow parameters enable you to view specific content in the task flow by providing different values for the parameter. When you add a data control inside a task flow, you can wire the task flow parameter to the data control parameter so that the data control displays data based on the task flow parameter you specify. For example, if your task flow contains a data control displaying the top five page hits in a given space, and the data control provides a `spacename` bind variable, you can create a corresponding `spacename` parameter on the task flow. When a user edits the task flow and specifies a space name, the data control displays the top five page hits in that space.

To create task flow parameters:

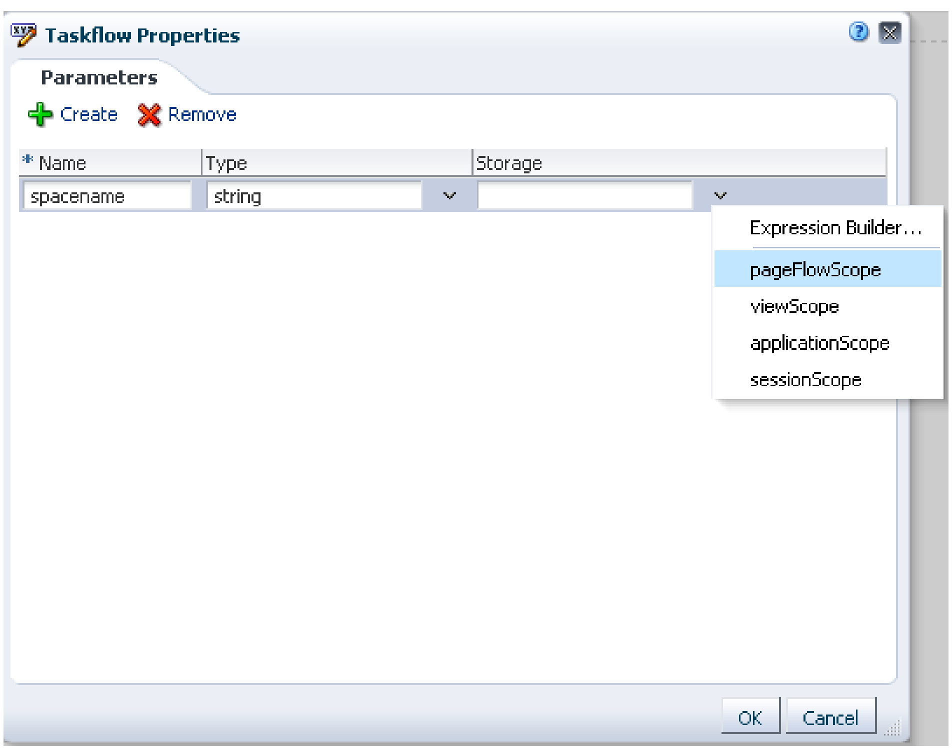
1. Select the task flow on the Resources - Task Flows page and select **Edit** from the **Edit** menu.

   The task flow opens in Composer.

2. Click the **Task Flow Properties** button.

3. In the Taskflow Properties dialog, click **Create** to display the parameter table, shown in Figure 29–26.

Figure 29–26 Taskflow Properties Dialog



4. Enter a name, type, and storage value for the new parameter.

   The storage value identifies the scope for the parameter. It specifies the location for storing the parameter value. Out-of-the-box, you are provided with four storage options, as described in Table 29–3. However, you can specify any custom storage by providing the EL value.

Table 29–3 Storage Values

Name	Description
`pageFlowScope`	The value is available to all instances of the task flow on the page.
`viewScope`	The value is available only to the selected instance, for the current user.
`applicationScope`	The value is available to all instances of the task flow within the application or across applications.
`sessionScope`	The value is available only to the current user, for the current session.

5. Click **OK**.

29.4.3 Binding Data Control Parameters to Task Flow Parameters

Data control parameters are used to restrict the data displayed in the data control based on the criteria you specify; for example, if you have a data control that displays page hits in your Spaces application, you can create a `spacename` bind variable to limit the data retrieved to a given space only. What's more, you can add the data control inside a task flow and bind the data control parameter to a task flow parameter, which can be used to control the data displayed in the data control. As page and task flow designers can edit task flow parameters, you are allowing them to control what is displayed in the data control.

Note: If you do not want to use task flow parameters or if a data control is added directly on a page, you can wire the data control's parameters to input text components on the page. This type of wiring is similar for pages and task flows. For more information, see Section 29.4.4, "Wiring a Data Control to a Parameter Form Task Flow."

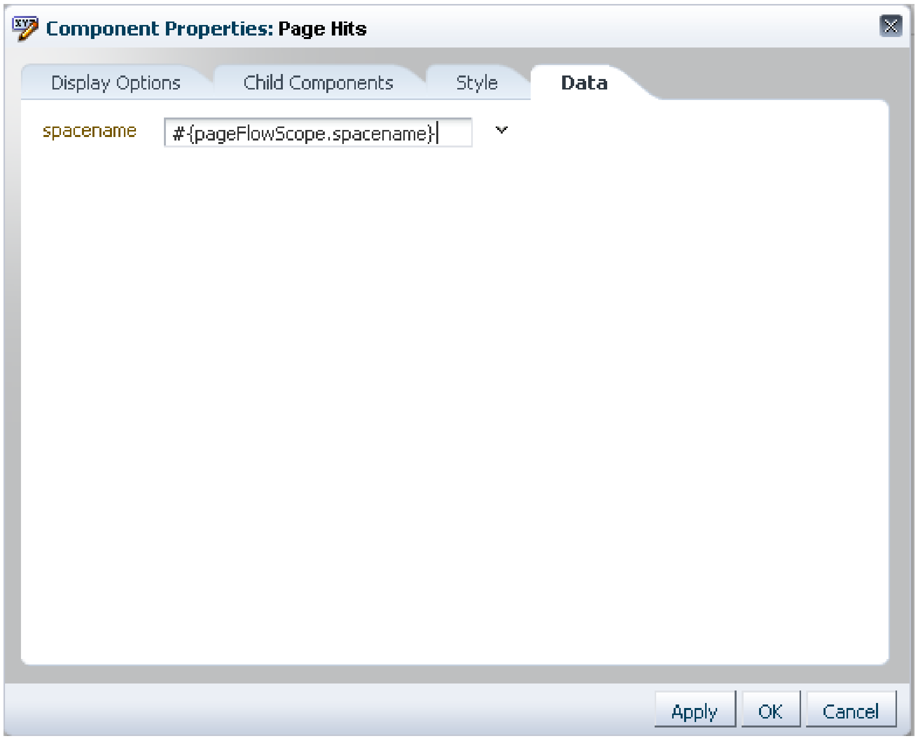
This section describes, with an example, how to bind a task flow parameter to a data control parameter. Before performing the steps in this section, ensure that you have added the data control inside a task flow and created the required task flow parameters. For more information, see Section 29.4.1, "Consuming a Data Control in a Task Flow" and Section 29.4.2, "Creating Task Flow Parameters."

To bind a task flow parameter to a data control parameter, `spacename`:

1. Click the **Task Flow Properties** button on the Composer toolbar to open the Task Flow Properties dialog.
2. Select the parameter that you want to bind to a data control parameter, copy its storage value, then close the dialog.
3. Click the **Edit** icon on the table or graph to open the Component Properties dialog.

4. On the Data tab, shown in Figure 29–27, select a data control parameter and paste the storage value in the field next to the parameter name, for example, **`#{pageFlowScope.spacename}`**.

Figure 29–27 Data Panel in the Component Properties Dialog for a Table



The data control now displays data specific to the task flow parameter value.

For a SQL data control, if there is no initial value defined for the task flow parameter, the data control retrieves data specific to the initial value of the bind parameter.

However, if you are using a Web Service data control for which you have not defined a parameter value, you must set an initial value for the task flow parameter. If not, the task flow displays an empty visualization (table, form, or graph). Therefore, in the Data tab for a Web Service data control, you must pass an initial value for the task flow parameter as shown in the following example:

```
#{empty pageFlowScope.stock_Quote ? 'ORCL' : pageFlowScope.stock_Quote}
```

See Also: Section 29.2.2, "Creating a Web Service Data Control"

5. Click **OK**.

6. Click **Close** to exit Composer.

When you consume this task flow on a page, the data control displays data specific to the task flow parameter value. For more information, see Section 29.4.5, "Consuming Task Flows that Contain Visualizations."

To get a better idea about building mashups, see the different examples in Appendix C, "Business Mashup Examples."

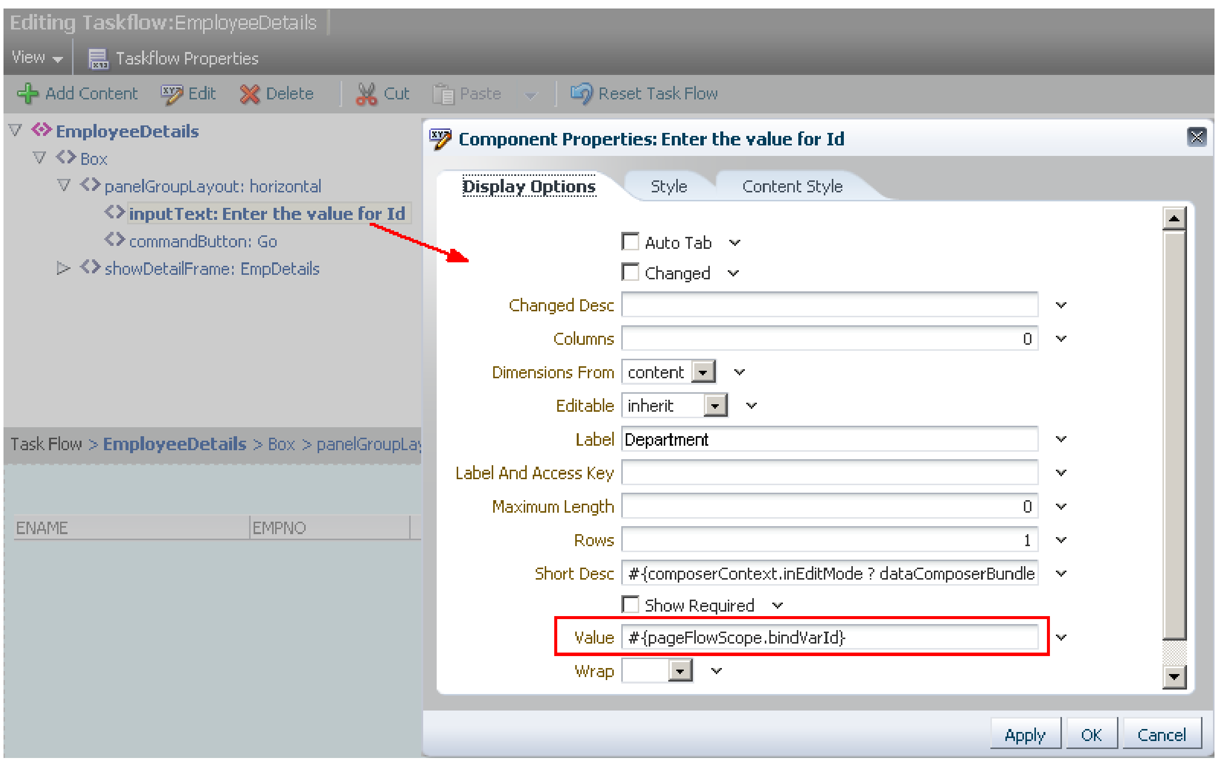
29.4.4 Wiring a Data Control to a Parameter Form Task Flow

If you added a data control as a table inside a task flow, and if the task flow is based on the Parameter Form mashup style, then you can wire the input text field in the parameter form task flow to a data control parameter so that the table displays records based on the value provided in the input text field.

To wire the input text field to a data control parameter:

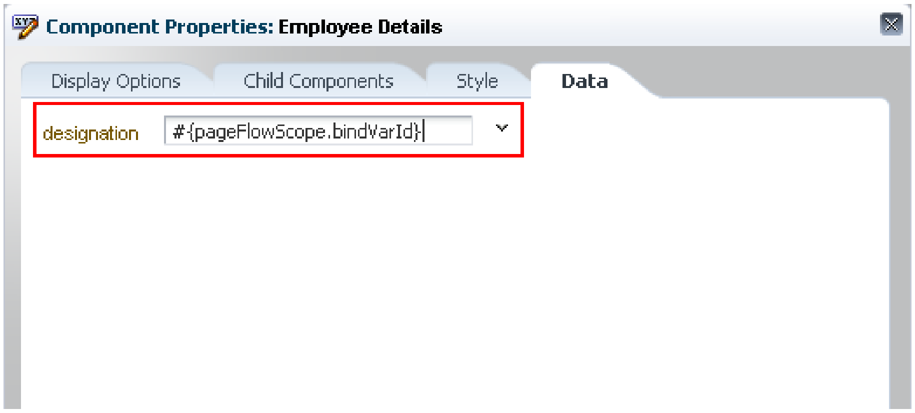
1. Edit the Parameter Form task flow in Composer.
2. Switch to Source view of the task flow.
3. Select **Input Text** in the component structure and click **Edit** on the toolbar.
4. Optionally, specify a suitable label for the field, for example, use `Department` if your task flow contains an employee details table and the data control has a bind parameter for the department ID.
5. From the Value field, copy the value, `#{pageFlowScope.bindVarId}` (Figure 29–28), and switch back to Design view.

Figure 29–28 Parameter Form Input Text Field Value



6. Click the **Edit** icon on the table.
7. In the Component Properties dialog for the table, click the **Data** tab.
8. Select the parameter that you want to bind to the Parameter Form's `Input Text` component and paste the `#{pageFlowScope.bindVarId}` value for that parameter, as shown in Figure 29–29.

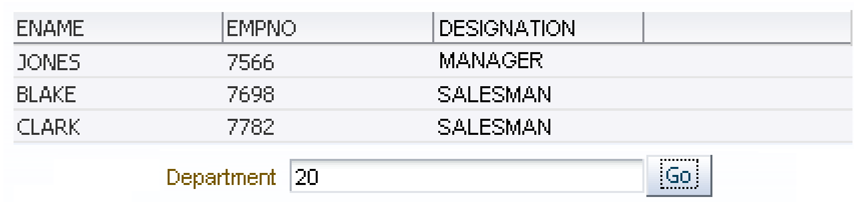
Figure 29–29 Data Control Bind Variable



9. Click **OK**.

The wiring is effective immediately. You can specify a value in the input text field to view the corresponding records in the table, as shown in Figure 29–30.

Figure 29–30 Data Control in a Parameter Form Task Flow



ENAME	EMPNO	DESIGNATION
JONES	7566	MANAGER
BLAKE	7698	SALESMAN
CLARK	7782	SALESMAN

You can find another example for this in Section C.2, "Creating a Mashup that Displays Employee Data from SQL Data Control."

29.4.5 Consuming Task Flows that Contain Visualizations

To add the task flow to a page where the visualization is displayed to users:

1. Edit the business role page in which you want to add the task flow.
2. In Composer, click **Add Content** in the container in which you want to add the mashup.
3. In the Add Content dialog, navigate to the section of the Resource Catalog that contains task flows created at runtime.

    Tip: The location of task flows depends on the Resource Catalog used for editing pages. For example, in the default Resource Catalog, task flows are present in the Mashups folder.

4. Select a task flow and click **Add**.
5. Click **Close**.

    The page displays the mashup with the visualization. If the data control parameters are bound to the task flow parameters, the task flow parameters drive the data that is displayed.

See Also: Section 29.4.3, "Binding Data Control Parameters to Task Flow Parameters"

6. To view data for different parameter values:
   a. Select the mashup on the page and click **Edit** to view its properties.
   b. On the Parameters tab in the task flow properties dialog, change the values for any exposed parameters, then click **OK**.

29.4.6 Editing Visualizations

The Resource Manager provides different options to modify data control parameter values. In addition, you can modify the visualizations that are created by adding data controls to task flows as tables, graphs, forms, or command buttons and links. This section describes the different editing tasks that you can perform on data visualizations. It includes the following subsections:

- Section 29.4.6.1, "Editing Parameter Values for a Data Control Visualization"
- Section 29.4.6.2, "Customizing a Table"
- Section 29.4.6.3, "Customizing a Graph"

29.4.6.1 Editing Parameter Values for a Data Control Visualization

If a data control provides bind variables or parameters, and you consume the data control in a page or task flow, you can use the parameter values to control the display of data in the visualization.

You can change values for a data control's parameters after the data control is consumed in a page or task flow. However, for a SQL data control, you can also change the values in the Edit Data Control wizard. This section describes how to edit parameter values for SQL and Web Services data controls.

Editing Parameter Values for SQL Data Controls

You can edit SQL data control parameters in either of the following ways:

- Edit the data control directly by selecting it on the Resource Manager - Data Controls page.
- Edit the data control in the consuming task flow, from the Resource Manager - Task Flows page.

To edit parameters directly on the data control:

1. In the Resource Manager (see Section 11.1.4, "Accessing Resources"), select the data control whose parameters you want to modify.
2. From the Edit menu, select **Edit**.
3. In the Edit dialog, click **Enter bind parameter values**.
4. In the resulting Enter bind parameter values dialog, modify values for any of the listed parameters.
5. Click **OK**.
6. Click **OK** to exit the Edit dialog.

   The table, form, or graph now displays data specific to the parameter values you provided.

To edit data control parameters through the consuming task flow:

1. In the Resource Manager (see Section 11.1.4, "Accessing Resources"), select the task flow containing the data control you want to edit.
2. From the Edit menu, select **Edit**.
3. In Composer, click the **Edit** icon on the header of the visualization (table or graph).
4. In the Component Properties dialog displayed for the task flow, click the **Data** tab.
5. Modify values for any of the listed data control parameters.
6. Click **OK**.
7. Click **Save**, then **Close** to exit Composer.

   The table or graph now displays data specific to the parameter values you provided.

Editing Parameter Values for Web Service Data Controls

Unlike SQL data controls that allow you to expose any number of bind parameters, for Web Service data controls, you can only specify values for the parameters already exposed by the Web Service method. The Edit dialog for a Web Service data control does not provide options to specify or modify parameter values. You can specify parameter values only after adding the data control inside a page or task flow.

To specify parameter values for a Web Service data control:

1. In the Resource Manager (see Section 11.1.4, "Accessing Resources"), select the task flow containing the data control you want to edit.
2. From the Edit menu, select **Edit**.
3. In Composer, click the **Edit** icon on the header of the visualization (table or graph).
4. In the Component Properties dialog, click the **Data** tab.

   The Data tab lists all parameters exposed by the Web Service method.
5. Modify values for any of the listed data control parameters.
6. Click **OK**.
7. Click **Save**, then **Close** to exit Composer.

   The table or graph now displays data specific to the parameter values you provided.

29.4.6.2 Customizing a Table

You can customize a table in the following ways:

- Sort columns: If you enabled column sorting while creating the table, the column headers display Up and Down arrows, which you can use to sort the contents either in ascending or descending order.
- Reorder columns: Edit the task flow in Composer. Click the Edit icon on the table to open the Component Properties dialog. On the Child Components tab, use the Up and Down arrows on the right to reorder table columns.
- Hide or show columns: Edit the task flow in Composer. Click the Edit icon on the table to open the Component Properties dialog. On the Child Components tab, Deselect the check box to the left of a column name to hide it. By default all columns are displayed in the table.

Adding a Column to a Table

When you add a data control as a table, the table displays only those data columns that you selected in the Create Table dialog. However, the data control retrieves all the columns that you specified in your SQL query. These columns are just not rendered in the table. To display an additional column in the table, all you need to do is edit the source of the task flow, find the hidden column, and set its `rendered` attribute to `true`.

Notes:

- You can edit the source only if the task flow or underlying mashup style was created at runtime.
- You cannot display additional columns if the table was added to a page directly as you cannot edit the source of a page.
- If the data in the column has a scalar value, you can add the column to the table only if the data control was created at design time. You cannot add columns with scalar values to a table from data controls created at runtime. Adding such a scalar value will result in no action.

To display an additional column in a table:

1. On the Resource Manger - Task Flows page, select the task flow with the table.
2. From the Edit menu, select **Edit Source**.

Note: To ensure that you do not end up with an invalid task flow that does not render properly, edit the source code very carefully.

---

3. Click the **Fragment** tab.
4. Select the column that you want to display in the table and set the `rendered` attribute to `true`.

   The following example shows the source code for a table column:

```
<column sortProperty="MGR" filterable="true" sortable="true"
        headerText="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9dbe7c35.hints.MGR.label}"
        id="column4" rendered="true">
  <af:inputText value="#{row.bindings.MGR.inputValue}"
                label="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9dbe7c35.hints.MGR.label}"
                required="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9dbe7c35.hints.MGR.mandatory}"
                columns="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9dbe7c35.hints.MGR.displayWidth}"
                maximumLength="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9dbe7c35.hints.MGR.precision}"
                shortDesc="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9dbe7c35.hints.MGR.tooltip}"
                id="inputText4">
    <f:validator binding="#{row.bindings.MGR.validator}"/>
    <af:convertNumber groupingUsed="false" pattern="#{bindings.accessor_
gsrf2d136f7_d907_481d_ad3a_eb2b9dbe7c35.hints.MGR.format}"
                   id="convertNumber3"/>
```

```
  </af:inputText>
</column>
```

5. Click **OK** to save the changes.

If you want to customize the table further, you can edit the table's properties and modify attributes such as row selection, grid lines, column groups, editable cells, column stretching, and column reordering. For more information about formatting tables, see the section titled "Displaying Data in Tables" in *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*.

29.4.6.3 Customizing a Graph

You can edit a graph and modify its display attributes in the Component Properties dialog. For more information about formatting graphs, see the section titled "Using ADF Graph Components" in *Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework*

29.4.7 Writing to a Data Source from a Visualization

When you add a data control as an editable table or form, you can update the records in the table or form and write those values back to the data source. However, you can update records only if the following is true:

- The data control is created for a Web Services data source that supports updating, and the insert or update operation is exposed through the published Web Service end-point.
- For editable tables only - the data control is a BC4J-based SQL data control created at design time. SQL data controls created at runtime do not support editing of data in a table.

  You can add the data control's accessor as a table inside a task flow and add the update method so that changes made to the table can be saved to the data source.

If a Web Service supports updating, then the Web Service data control may provide methods to query and update records. Further, to enable multiple records to be updated simultaneously, Web Service data controls created at runtime provide array parameters. You can wire an array parameter to multiple input fields in the task flow so that the values specified in the fields are passed to the data source in one go. This section describes the high-level steps to use the query and update methods from a Web Service data control. It contains the following sections:

- Section 29.4.7.1, "Querying the Data Source"
- Section 29.4.7.2, "Updating Records in the Data Source"

For an end-to-end example showing how to query and update a data source, see Section C.5, "Creating a Mashup with Data from a Siebel Data Source."

To perform the steps in this section, you must have created a Web Service data control, which provides methods to query and update data, and consumed the data control's accessor as a table inside a task flow. For the detailed steps, see Section 29.2.2, "Creating a Web Service Data Control" and Section 29.4.1, "Consuming a Data Control in a Task Flow."

29.4.7.1 Querying the Data Source

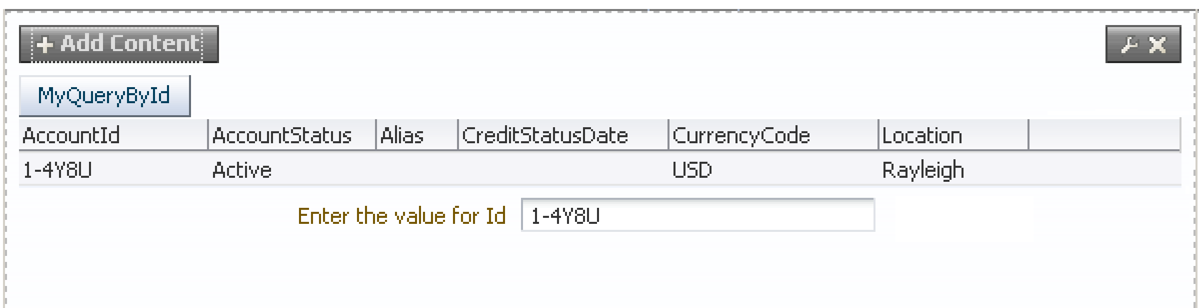
To add a query option to a task flow displaying records from a database:

1. On the Resource Manger - Task Flows page, select the task flow containing the Web Service data control.
2. From the Edit menu, select **Edit**.
3. Click **Add Content** in the container that has the table.
4. In the Add Content dialog, navigate to the Web Service data control and click **Open**.
5. Locate the method available for querying the data source, and click **Add**. You can add the method as a button or link of your choice.

   The query method in this example takes only one parameter, which is already defined when you add the data control's accessor to the task flow. As a result, the query option added to the task flow is automatically wired to the task flow parameter. However,

   The task flow displays the query option, as shown in Figure 29–31.

Figure 29–31 Query Button and Table Inside a Parameter Form Task Flow



You can specify a task flow parameter value and click the query button or link to the relevant records.

29.4.7.2 Updating Records in the Data Source

To add an update option to a task flow displaying records from a database:

1. Open the task flow containing the data visualization.
2. In the Resource Catalog, locate the method available for updating the data source, and add it to the task flow. You can add the method as a button or link of your choice.

   > **Note:** Methods to insert or update records are available only if the Web Service supports updating and the data control was added as an editable table or form.

   Typically, an insert or update the method expects values for exposed parameters, based on which it performs the operation. Therefore, the next step is to provide UI elements to specify values for parameters.

3. Add input text components to specify the method parameter values.

   > **Tip:** As the Resource Catalog does not provide ADF Faces components such as `Input Text` out-of-the-box, edit the task flow's source files and add the code for such components.

4. Wire the update method's parameters to the input text components `value` attributes. This involves:

   - Setting an input text component's `value` attribute using the format: `#{pageFlowScope.`*`COLUMN_NAME`*`}`.
   - Referencing the same location, `#{pageFlowScope.`COLUMN_NAME}, from the method's parameter. You can set this by selecting the button or link in Composer's Source view, editing its properties, and specifying the value on the Data tab.

   When you specify values in the input fields and click the update method's button or link, the values are passed back as Web Service parameter values.

   For an end-to-end example showing how to query and update a data source, see Section C.5, "Creating a Mashup with Data from a Siebel Data Source."

29.5 Business Mashup Examples

To help you understand better the tasks involved in creating business mashups, Appendix C, "Business Mashup Examples" describes many use cases that illustrate how to create different types of mashups.

In addition, sample applications developed to showcase the different mashup building capabilities are published on Oracle Technology Network (OTN). The following page on OTN provides links to business mashup-specific samples and other sample applications that illustrate the different WebCenter Portal: Spaces capabilities:

`http://www.oracle.com/technetwork/middleware/webcenter/ps3-samples-176806.html`

A readme file available with each sample on this page describes what the application illustrates and provides guidance for extending or customizing the application for real life use cases.

30 Working with OmniPortlet

This chapter provides an overview of OmniPortlet and explains the user interface elements associated with OmniPortlet. This chapter contains the following sections:

- Section 30.1, "What You Should Know About OmniPortlet"
- Section 30.2, "Working with the OmniPortlet Wizard"
- Section 30.3, "Working with OmniPortlet Parameters"
- Section 30.4, "Setting OmniPortlet Properties"
- Section 30.5, "Troubleshooting OmniPortlet"

For information regarding troubleshooting OmniPortlet, see Section 30.5, "Troubleshooting OmniPortlet."

Audience

This chapter is intended for users who want to understand OmniPortlet and learn how to use its features. It introduces how to customize OmniPortlet at runtime and in Oracle WebCenter Portal: Spaces, in addition to troubleshooting issues with OmniPortlet.

30.1 What You Should Know About OmniPortlet

OmniPortlet is a subcomponent of Oracle WebCenter Portal: Framework that enables developers to easily publish data from various data sources using a variety of layouts without writing any code. You can base an OmniPortlet on almost any kind of data source, including web services, SQL databases, spreadsheets (that is, files with character-separated values), XML, and even application data from existing web pages.

> **Note:** If your data source is a spreadsheet, the spreadsheet must be unsecured or must require only HTTP authentication; SSO authentication is not supported.

Additionally, OmniPortlet enables developers to:

- Sort the data to display
- Format data using a variety of layouts, including a customized layout
- Use portlet parameters
- Expose personalizable settings to page viewers

To display personalized data, you can refine the results returned from a data source and parameterize the credential information used to access secure data. Out of the box, OmniPortlet provides the most common layout for portlets: tabular, chart, news, bulleted list, form, HTML, and parameter form.

Notes: For more information about developing different types of portlets and information about producers and other portlet technologies, see *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

For more information about adding an instance of OmniPortlet to a page, see Section 30.2.1, "Adding an OmniPortlet Instance to a Page."

30.2 Working with the OmniPortlet Wizard

This section includes the following subsections:

- Section 30.2.1, "Adding an OmniPortlet Instance to a Page"
- Section 30.2.2, "Accessing the OmniPortlet Wizard"
- Section 30.2.3, "Selecting the Data Source Type"
- Section 30.2.4, "Identifying the Data Source"
- Section 30.2.5, "Setting Filtering Options"
- Section 30.2.6, "Setting View Options"
- Section 30.2.7, "Setting Layout Options"
- Section 30.2.8, "Customizing Your OmniPortlet"

30.2.1 Adding an OmniPortlet Instance to a Page

The steps for adding an instance of OmniPortlet to a page vary between an application built using Oracle WebCenter Portal: Framework and the Spaces application. For one thing, in a Framework application adding a portlet to a page is a design-time activity, carried out by the application developer. For information about adding OmniPortlet to a page in a Framework application, see the "Creating Portlets with OmniPortlet" chapter in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

In Spaces, portlets are added to pages at runtime—when you run the application. Portlets are available for dragging and dropping from the Composer Catalog by any user with sufficient privileges. For information about adding a portlet to a page in Spaces, see Section 18.5, "Adding a Component to a Page."

Note: In Spaces, avoid adding a portlet to a Movable Box component (For information, see Section 19.10, "Working with the Movable Box Component"). The Movable Box component duplicates the `showDetailFrame` that the portlet provides by default. Adding a portlet to a Movable Box creates an unnecessary and potentially error-prone redundancy.

When you add an instance of OmniPortlet to a page, access the portlet's Component Properties dialog and ensure that the `RenderPortletInIFrame` property is set to true. This displays the OmniPortlet in its own inline frame (`iframe`) in View mode.

For information about the Component Properties dialog, see Section 30.4, "Setting OmniPortlet Properties."

30.2.2 Accessing the OmniPortlet Wizard

Once you add an instance of OmniPortlet to your page, click the **Customize** link to start the OmniPortlet wizard.

The OmniPortlet wizard initially contains five steps:

1. Select a data source type.
2. Identify the data source.

> **Note:** If your data source is a spreadsheet, the spreadsheet must be unsecured or must require only HTTP authentication; SSO authentication is not supported.

3. Set filtering options.
4. Set view options.
5. Set layout options.

Once you complete these steps, you are done. If you want to change your initial values, you can reenter the wizard by selecting the **Customize** option from the portlet's **Actions** menu. Tabs representing the steps you took to set up OmniPortlet display. Although the data type cannot be changed, you can revise values on the **Source**, **Filter**, **View**, and **Layout** tabs.

Table 30–1 provides a high-level overview of the steps/tabs provided for configuring an OmniPortlet instance.

Table 30–1 OmniPortlet Wizard and Customize Mode

Step/Tab	Description
Type	Provides your data source options. Displays only in the initial definition of the portlet, and is not available when customizing the portlet defaults. For more information, see Section 30.2.3, "Selecting the Data Source Type."
Source	Provides options for configuring the data source connection, such as the URL of the web service you want to use. You can change these options later when editing the portlet defaults. For more information, see Section 30.2.4, "Identifying the Data Source."
Filter	Provides sorting options at the Framework application level to enable you to refine your results. You can change these options later when editing the portlet defaults. For more information, see Section 30.2.5, "Setting Filtering Options."
View	Provides options for displaying portlet header and footer text, the layout style, and caching. You can change these options later when editing the portlet defaults. For more information, see Section 30.2.6, "Setting View Options."
Layout	Provides detailed options for customizing the layout of content retrieved from the data source. You can change these options later when editing the portlet defaults. For more information, see Section 30.2.7, "Setting Layout Options."

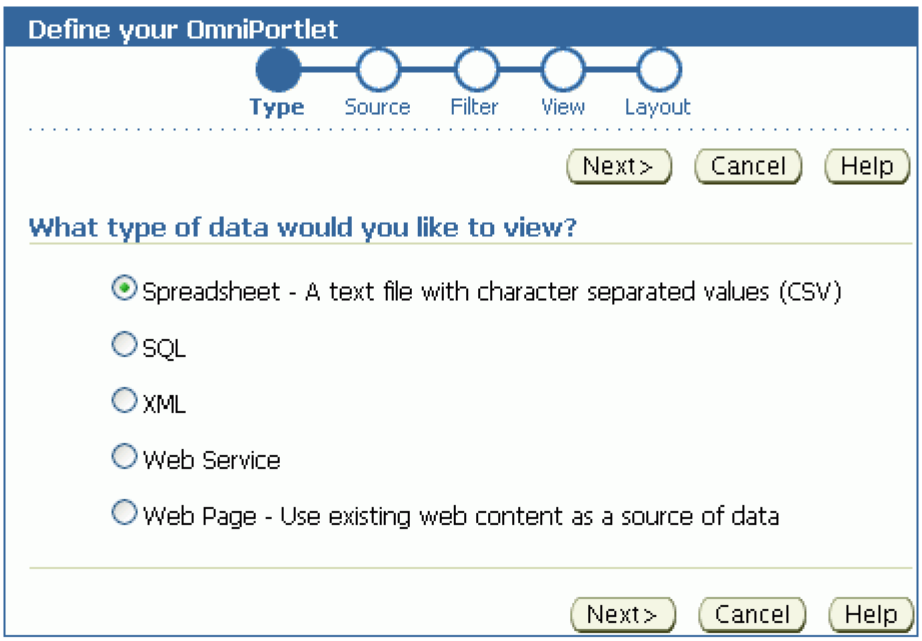
Note: On the IBM Linux on Power platform, if the action buttons (Next, Previous, Finish, and Cancel) are minimized to dots when defining the OmniPortlet, increase the stack size shell limit to unlimited and restart the oc4j_portlet instance. Run the following command to set the stack size shell limit to unlimited: `prompt> ulimit -s unlimited`.

The following sections provide more detail about the different steps/tabs in the OmniPortlet wizard.

30.2.3 Selecting the Data Source Type

When you first start OmniPortlet, the Type step displays (Figure 30–1).

Figure 30–1 Type Tab of the OmniPortlet Wizard



Use the Type step to identify the type of data to display in your OmniPortlet instance. Table 30–2 lists and describes the data types that OmniPortlet supports out of the box.

Table 30–2 OmniPortlet Supported Data Source Types

Data Source Type	Description
Spreadsheet	Displays data from a text file containing character-separated values (CSV). **Note:** If your data source is a spreadsheet, the spreadsheet must be unsecured or must require only HTTP authentication; SSO authentication is not supported.
SQL	Displays data from a database using SQL.
XML	Displays data from an XML file.
Web Service	Displays data from a discrete business service that can be accessed over the Internet using standard protocols.
Web Page	Displays data based on existing web content.

After you complete the OmniPortlet wizard, you cannot change the data source type.

30.2.4 Identifying the Data Source

Once you choose a data type, you are ready to identify a data source. The **Source** tab renders according to the data type you selected in step 1. That is, the options that display on the **Source** tab vary according to the selected data type.

Additionally, if the OmniPortlet producer has been configured to use a proxy server requiring authentication, the **Source** tab contains a **Proxy Authentication** section and a **Connection** section where you can provide the necessary information for connecting to the data source.

This section contains information about the settings common to all **Source** tabs, including settings specific to the selected data type. It contains the following subsections:

- Section 30.2.4.1, "Proxy Authentication"
- Section 30.2.4.2, "Connection and Portlet Parameters"
- Section 30.2.4.3, "Spreadsheet"
- Section 30.2.4.4, "SQL"
- Section 30.2.4.5, "XML"
- Section 30.2.4.6, "Web Service"
- Section 30.2.4.7, "Web Page"

30.2.4.1 Proxy Authentication

If the OmniPortlet producer was set up at design time to use proxy authentication that requires login credentials, then a **Proxy Authentication** section displays on the **Source** tab where you can enter this information.

OmniPortlet's support for proxy authentication includes support for global proxy authentication and authentication for each user, which means you can specify a login scenario for your OmniPortlet instance:

- All users automatically log in using a user name and password you provide.
- Each user logs in using an individual user name and password.
- All users log in using the same specified user name and password.

The **Proxy Authentication** section displays only for the following data types, and only when the specific data source requires a proxy server for access:

- CSV (character-separated values)
- XML
- Web Page

Notes: Configuring an OmniPortlet producer is a design-time activity applicable to Framework applications. For more information about configuring the OmniPortlet producer to use proxy authentication, see the WebCenter Portal: Framework online Help topic that displays when you click **Help** on the **Edit Producers: OmniPortlet Producer** page.

If the OmniPortlet producer is configured to require login for all users, then each user must set his or her own proxy login information at runtime as follows:

- For page designers, set this on the **Customize: Source** tab.
- For page viewers, set this on the **Personalize** page.

To access the **Customize: Source** tab, click the **Customize** link on the portlet's **Actions** menu. To access the **Personalize** page, click the **Personalize** link on the portlet's **Actions** menu.

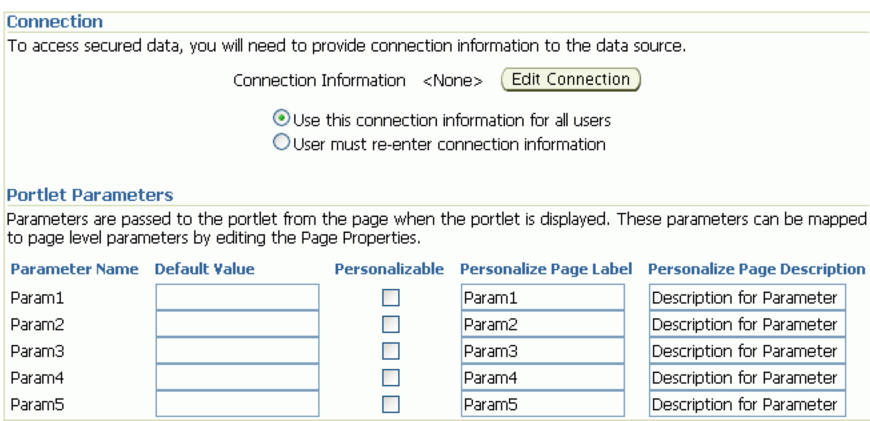
If you are using the **Web Page** data source, then the Proxy Authentication section displays in the Web Clipping Studio when you click the **Select Web Page** button on the **Source** tab.

For more information about Web Clipping Studio, see Chapter 31, "Working with the Web Clipping Portlet."

30.2.4.2 Connection and Portlet Parameters

For each data source—except the Web Page data source—the **Source** step contains a **Connection** section, where you can define connection information for accessing secured data. The **Source** step for all data sources includes a **Portlet Parameters** section, where you can define portlet parameters (Figure 30–2).

Figure 30–2 Source Tab: Connection and Portlet Parameters Sections

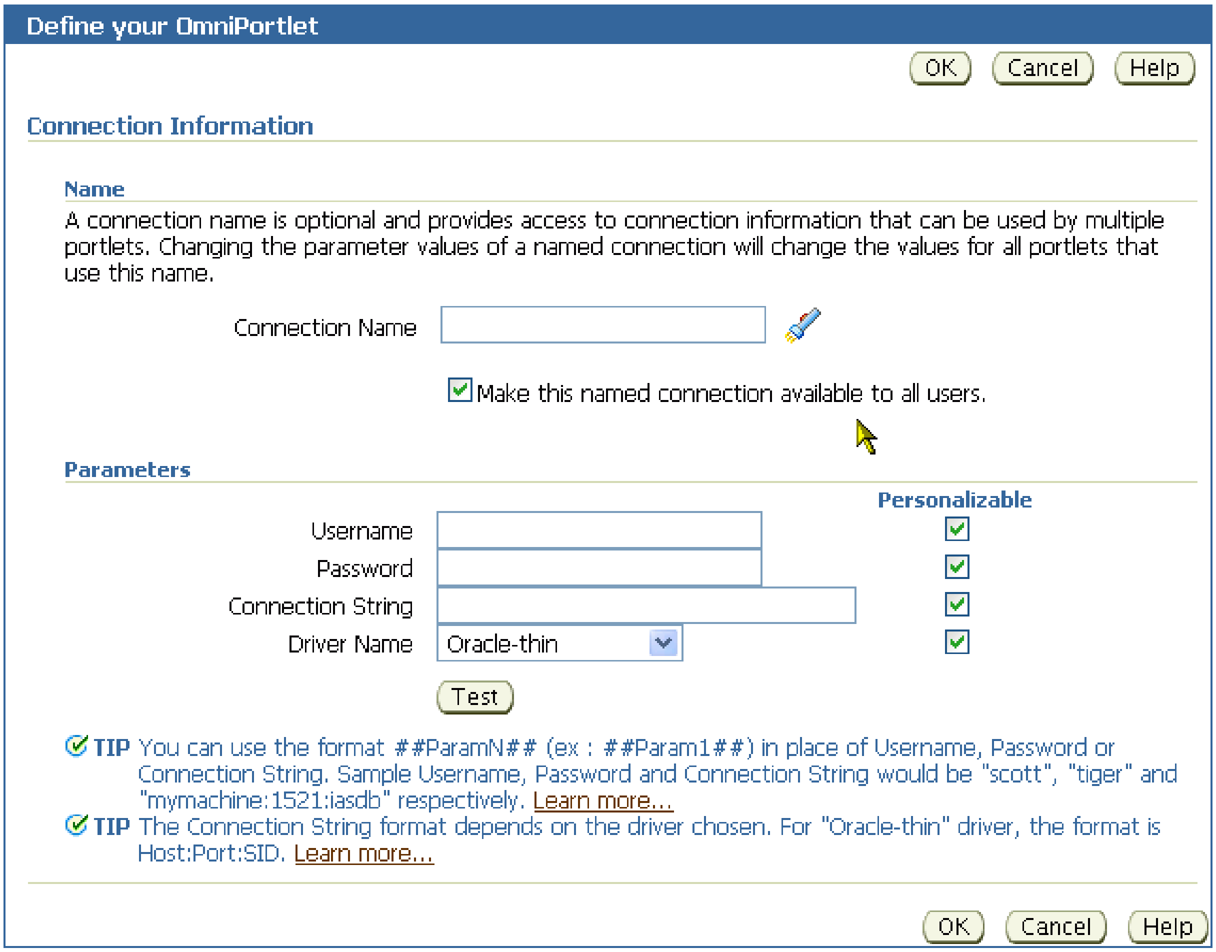


Note: You can use the format `##ParamN##` (for example, `##Param1##`) for **Username**, **Password**, or **Connection String**. The **Test** button returns an error, however, even though the connection information is correct when parameter values are substituted.

Once you define the portlet parameters, you can map them to page parameters. For more information, see Section 30.3, "Working with OmniPortlet Parameters" and Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

To edit the connection information, click the **Edit Connection** button to open the **Connection Information** page (Figure 30–3).

Figure 30–3 OmniPortlet Connection Information Page for a SQL Data Source



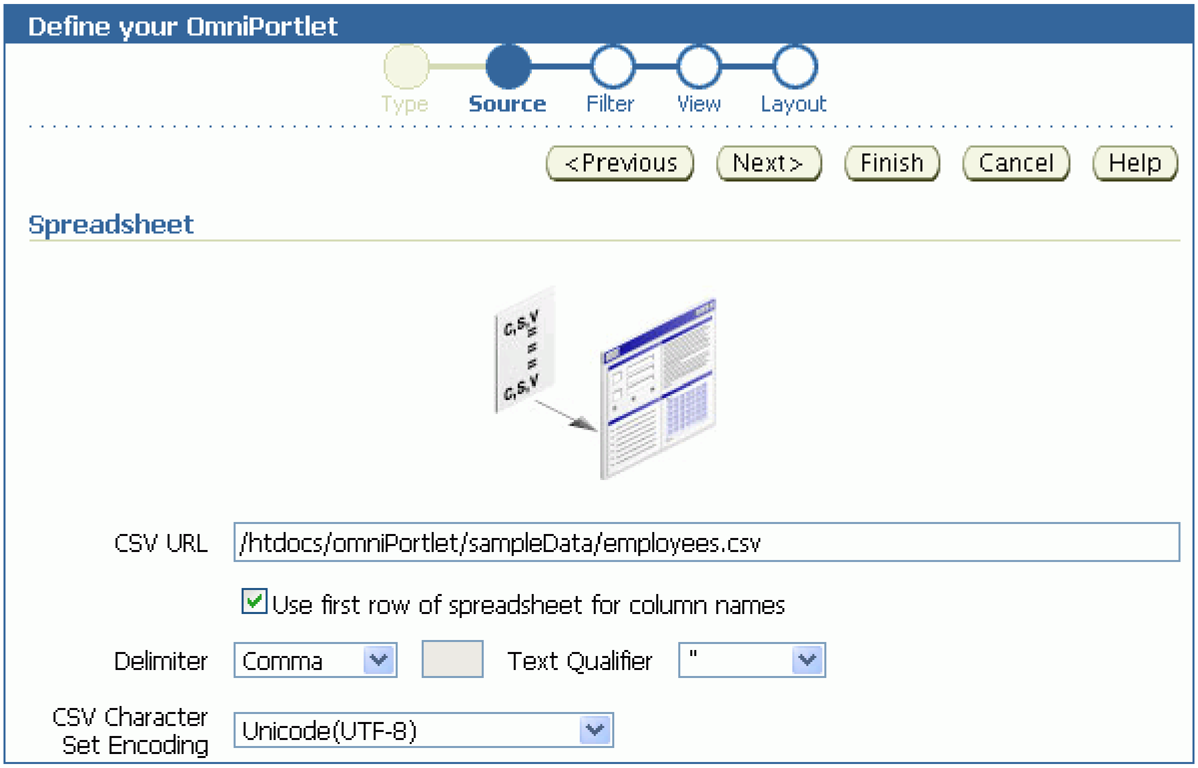
On the **Connection Information** page, you can enter a name for the connection information, and also the user name and password. For a SQL data source, you can also enter information to specify the driver you want to use to connect to the data source. For more information, see Section 30.2.4.4, "SQL."

Note: For more information about the **Connection Information** page, click **Help** on the **Source** tab of the OmniPortlet wizard.

30.2.4.3 Spreadsheet

Spreadsheets are a common method of storing small data sets. OmniPortlet enables you to share spreadsheets by supporting character-separated values (CSV) as a data source. Use the **Source** tab to specify the location of the CSV file (Figure 30–4).

Figure 30–4 Source Tab: Spreadsheet (CSV)



If the file is located on a secure server, then you can specify the connection information in the **Connection Information** section illustrated in Figure 30–3. You can select the character set to use when WebCenter Portal reads the file, and also the delimiter and text qualifier.

Note:

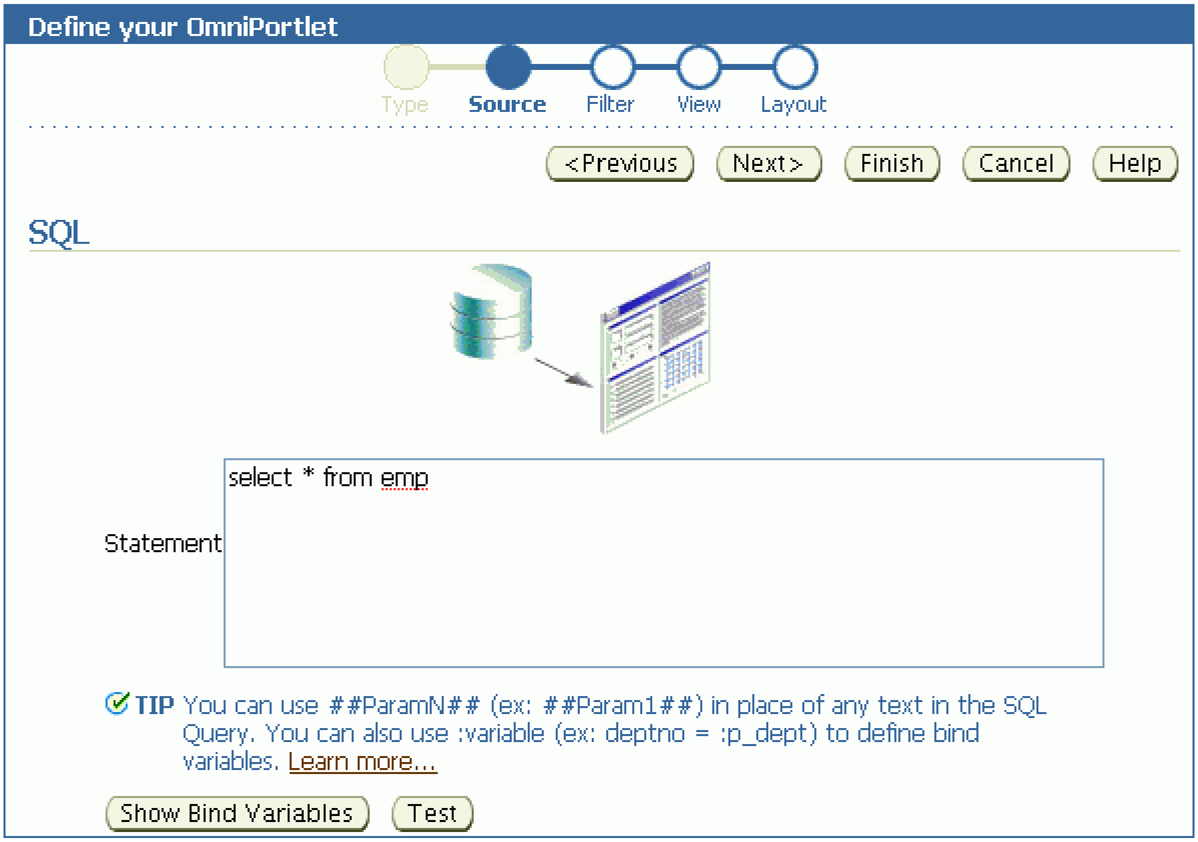
- As the OmniPortlet producer exists and executes in a tier different from the Framework application and does not have access to the session information, you must expose CSV files as PUBLIC for OmniPortlet to be able to access them.
- The CSV file must be unsecured or must require only HTTP authentication; SSO authentication is not supported.

30.2.4.4 SQL

A relational database is the most common place to store data. OmniPortlet enables you to use standard JDBC drivers and provides out-of-the-box access to Oracle and any other JDBC database. You can specify the driver type when you configure the connection information.

Figure 30–5 shows the **Source** tab for a SQL data source.

Figure 30–5 Source Tab: SQL



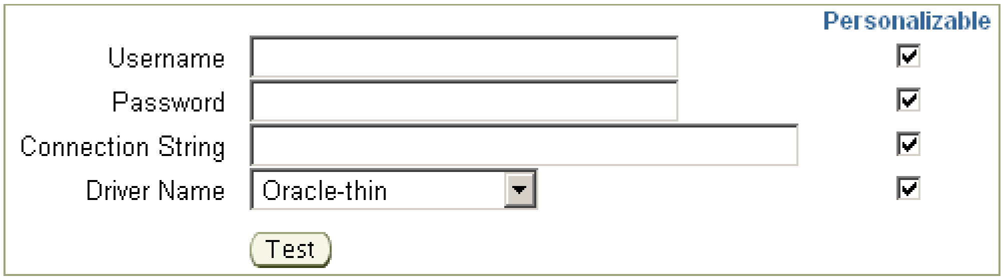
You can use DataDirect JDBC drivers to access other relational databases. To do so, you must configure OmniPortlet to recognize the driver. This is a design-time activity, typically carried out by an application developer.

Notes: For information about configuring OmniPortlet to use DataDirect drivers, see Appendix E, "Additional Portlet Configuration" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

For more information about DataDirect drivers, see the *Certification Matrix for Oracle Application Server and DataDirect JDBC* on the Oracle Technology Network (OTN) at `http://www.oracle.com/technetwork`.

Once the driver is installed, it displays in the **Driver Name** dropdown list on the **Connection Information** page (Figure 30–6).

Figure 30–6 Driver Name Dropdown List on the Connection information Page

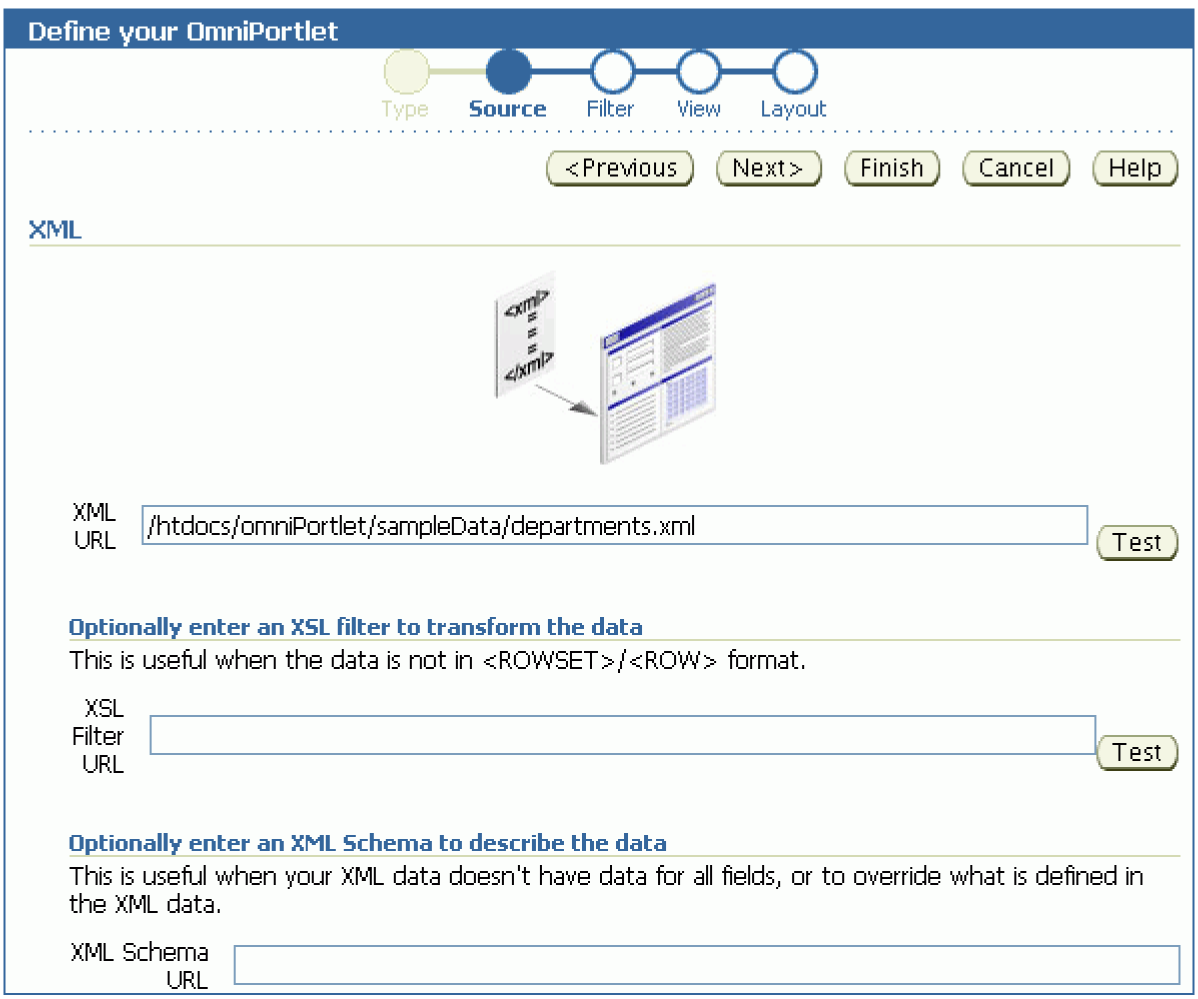


When you enter a connection string for a DataDirect driver, keep in mind that you must enter a value in the **Connection String** field using the syntax: `host_name:port`. The *host_name* is the name of the server where the database is running. The *port* is the database's listening port.

30.2.4.5 XML

You can access XML data sources across an intranet or the Internet. On the **Source** tab, you can specify the URL of the XML file that contains your data (Figure 30–7).

Figure 30–7 Source Tab: XML



Use the **Test** buttons next to the **XML URL** and the **XSL Filter URL** fields to validate your XML data source and the XSL filter.

The specified XML file can be in a tabular (ROWSET/ROW) structure, or you can provide an XML Style Sheet (XSL) that transforms data into the ROWSET/ROW structure. Example 30–1 provides an illustration of the ROWSET/ROW structure of an XML data source.

Example 30–1 ROWSET/ROW Structure of an XML Data Source

```
<TEAM>
  <EMPLOYEE>
    <DEPTNO>10</DEPTNO>
    <ENAME>KING</ENAME>
    <JOB>PRESIDENT</JOB>
    <SAL>5000</SAL>
  </EMPLOYEE>
    <DEPTNO>20</DEPTNO>
    <ENAME>SCOTT</ENAME>
    <JOB>ANALYST</JOB>
    <SAL>3000</SAL>
  <EMPLOYEE>
</TEAM>
```

In Example 30–1, the `<TEAM>` tags delineate the rowset, and the `<EMPLOYEE>` tags delineate the rows.

Regardless of the format of the XML file, OmniPortlet automatically inspects the XML to determine the column names, which are then used to define the layout. If you want to specify this information yourself, you can supply a URL to an XML schema that describes the data.

If the XML file is located on a secured server protected by HTTP Basic Authentication, you can specify connection information on the **Connection Information** page.

> **Note:** Because the OmniPortlet producer exists and executes in a tier different from the Framework application and does not have access to the session information, you must expose XML files as PUBLIC in order for OmniPortlet to access them.

30.2.4.6 Web Service

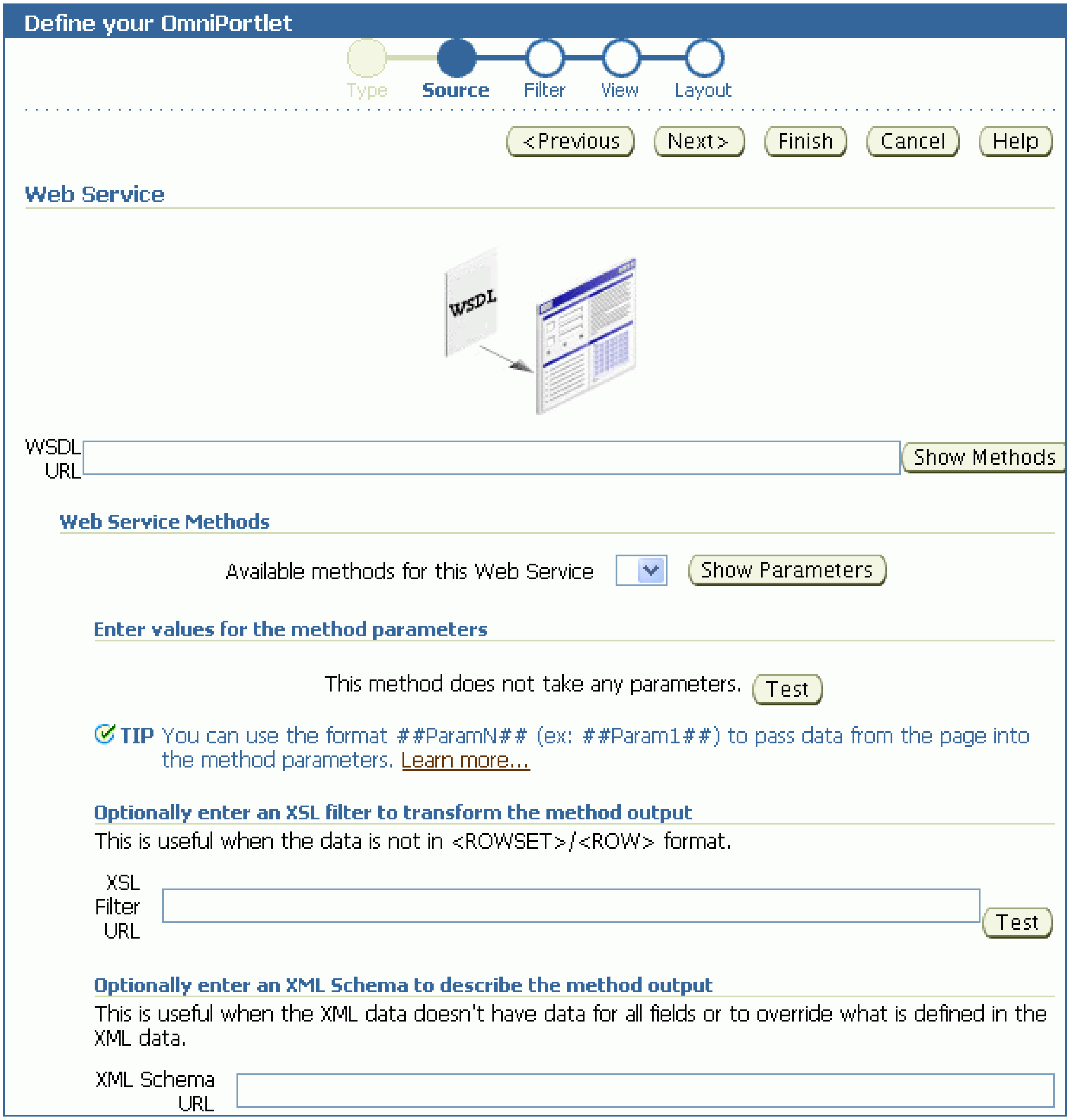
A web service is a discrete business service that can be programmatically accessed over the Internet using standard protocols, such as SOAP and HTTP. Web services are specific to neither platform nor language and are typically registered with a web service broker. When you find a web service you want to use, you must obtain the URL to the Web Service Description Language (WSDL) file. The WSDL file describes the web service and specifies the methods that can be called, including the expected parameters. It also describes the returned data.

OmniPortlet supports both types of web Services: Document and Remote Procedure Calls (RPC). After a WSDL document/file is supplied, it is parsed, and the available methods that can be called display on the **Source** tab.

Similar to the XML data source, OmniPortlet expects the web service data in ROWSET/ROW format, though you can also use an XSL file to transform the data. OmniPortlet inspects the WSDL document/file to determine the column names, though you may also specify an XML schema to describe the returned data set.

Figure 30–8 shows the **Source** tab for a sample web service.

Figure 30–8 Source Tab: Web Service



30.2.4.7 Web Page

Note: The Web Clipping portlet is deprecated in Release 11*g* (11.1.1.7.0). Consider using a clipper pagelet using Oracle WebCenter Portal's Pagelet Producer's Pagelet Producer. For more information, see the "Managing Oracle WebCenter Portal's Pagelet Producer" chapter in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

OmniPortlet enables you to use existing web content as a data source. It integrates the Web Clipping portlet's Web Clipping Studio to provide a means of clipping and rendering web content within the context of an OmniPortlet instance.

OmniPortlet's Web Page data source extends the scope offered by the Web Clipping portlet to include scraping functionality. Additional features include:

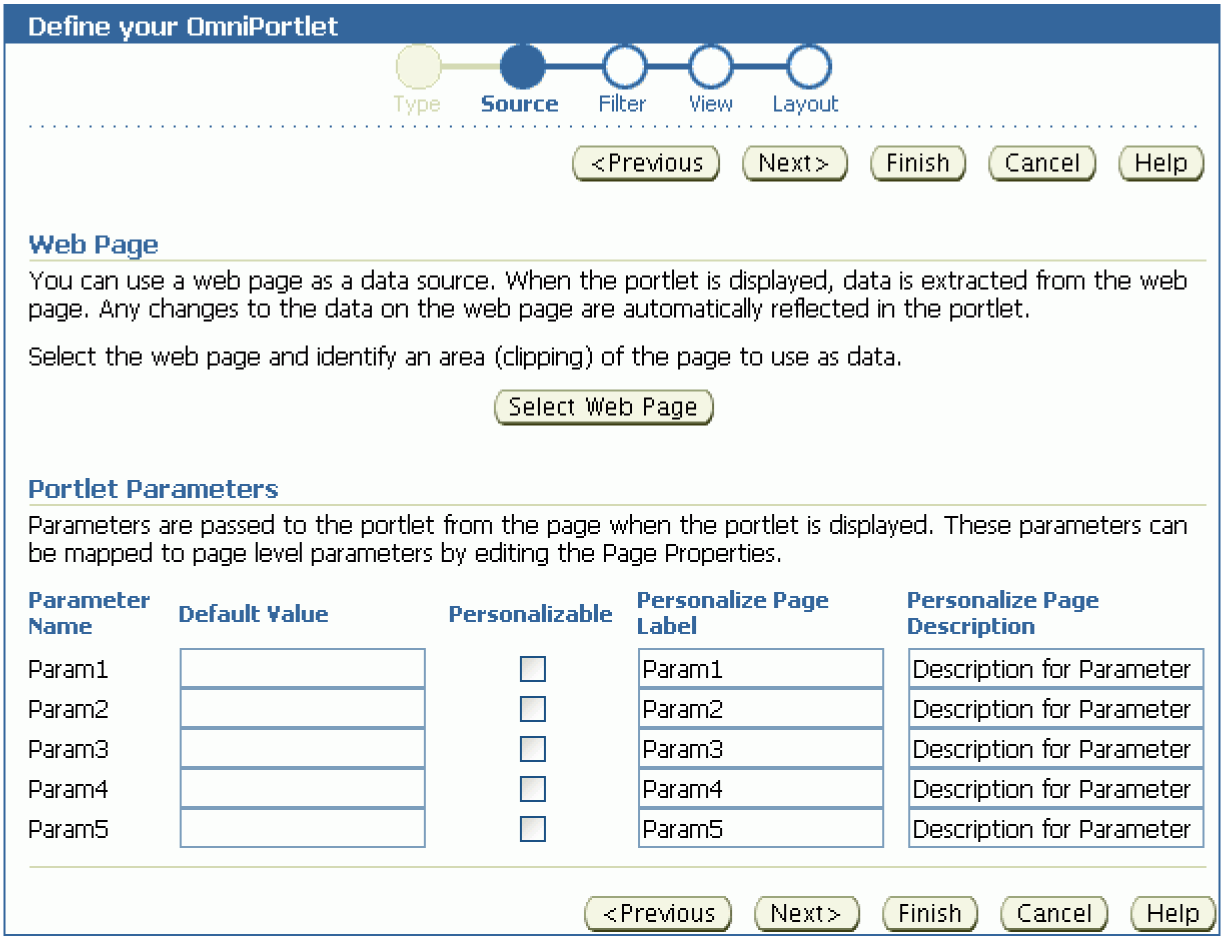
- **Navigation through various login mechanisms**, including form- and JavaScript-based submission, and HTTP Basic and Digest Authentication with cookie-based session management.
- **Fuzzy matching of clippings.** If a web clipping gets reordered within the source page or if its character font, size, or style changes, then it is still identified correctly by the web page data source and delivered as the portlet content.
- **Reuse of a wide range of web content**, including basic support of pages written with HTML 4.0.1 and JavaScript, retrieved through HTTP GET and POST (form submission).

By default, all web clipping definitions are stored persistently in Oracle Metadata Services (MDS). However, you can also use an Oracle database. Using MDS does not require any changes in the configuration files. If you use an Oracle database as the Web Clipping repository, then at design time you must update the `provider.xml` file.

Any secure information, such as passwords, is stored in encrypted form, according to the Data Encryption Standard (DES), using Oracle Database encryption technology.

When `Web Page` is selected as the data type, the OmniPortlet wizard's **Source** tab (Figure 30–9) includes a **Select Web Page** button that launches Web Clipping Studio.

Figure 30–9 Source Tab: Web Page



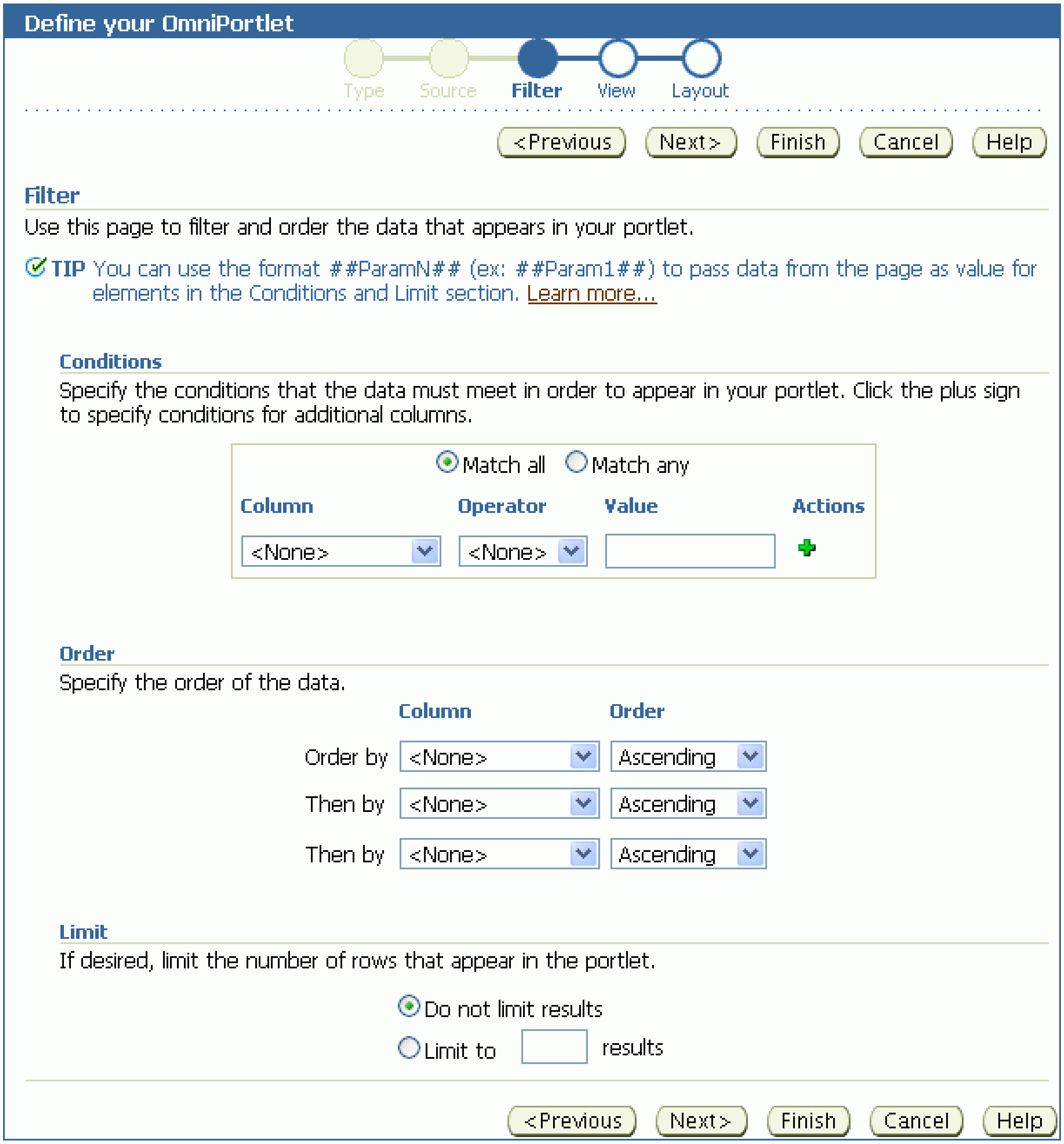
Within Web Clipping Studio, the Oracle Application Server Web Clipping online Help becomes available through the **Help** icon at the top of the page. You can use the Help to navigate your way through the process of sectioning and saving web content.

Note: For more information about using the Web Clipping Studio or clipping content for a Web Clipping Portlet, see Chapter 31, "Working with the Web Clipping Portlet."

30.2.5 Setting Filtering Options

Once you have selected the data source and specified the data source options, you can further refine your data using OmniPortlet's filtering options. To use filtering efficiently, it is better to refine the data as much as possible at the data source level on the **Source** tab, then use the options on the **Filter** tab to streamline the data. For example, if you are using a SQL data source, then you could use a `WHERE` clause to return only specific data from the specified columns. In this case, you could skip the **Filter** tab and continue to the wizard's **View** tab. However, if there are no filtering options at the data source level, then you can use the options on the **Filter** tab to sort your data (Figure 30–10).

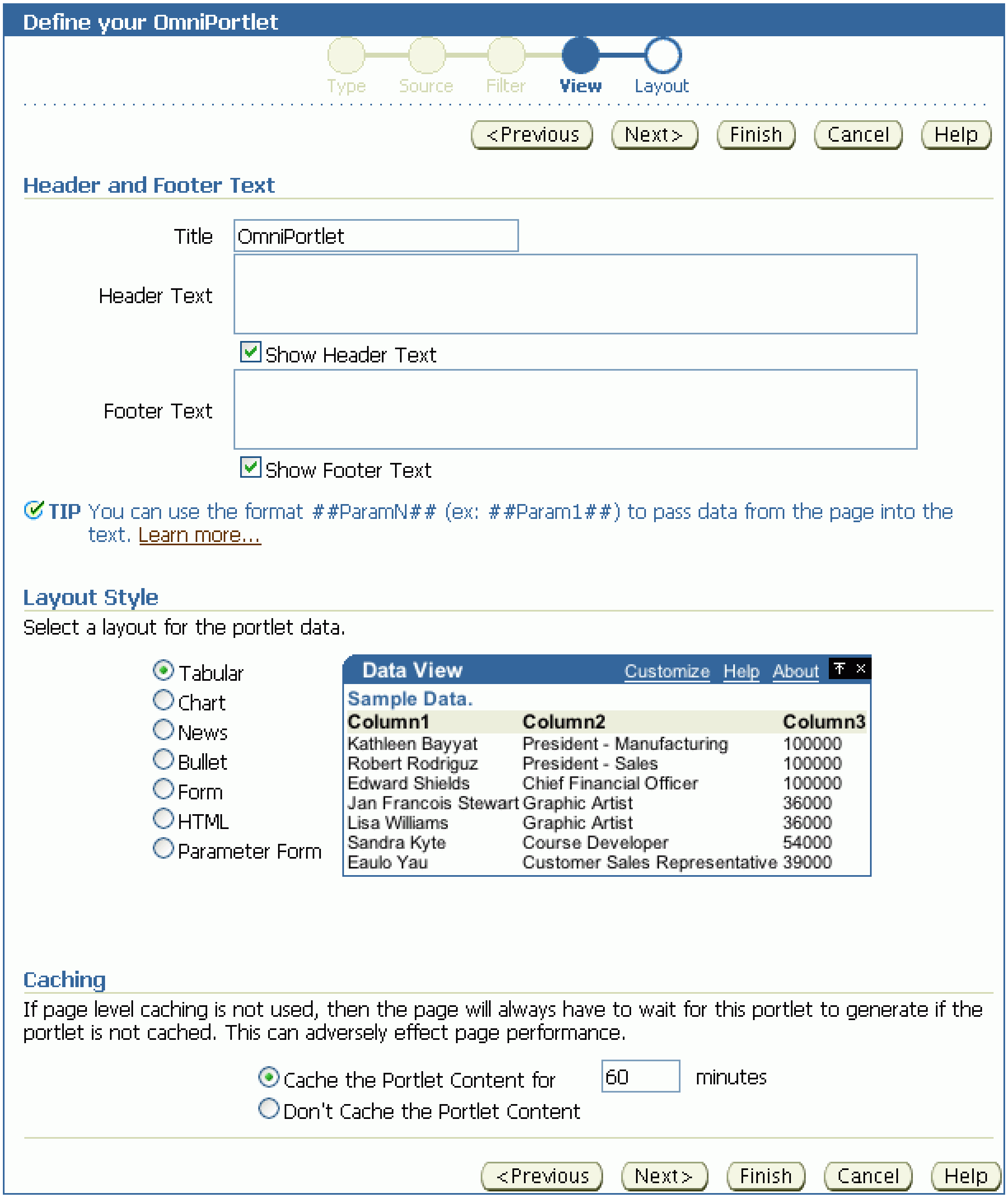
Figure 30–10 Filter Tab



30.2.6 Setting View Options

Once you have specified and filtered the data, you are ready to choose view and layout options for your OmniPortlet. The **View** tab (Figure 30–11) provides options for adding header and footer text, enabling caching, and choosing a layout style that you can later refine on the **Layout** tab.

Figure 30–11 View Tab



****

On the **View** tab, you can select from the following layouts:

- Tabular
- Chart

- News
- Bullet
- Form
- HTML
- Parameter Form

> **Note:** For more information about the different layout styles you can use with OmniPortlet, see the next section or click **Help** in the OmniPortlet wizard.

30.2.7 Setting Layout Options

The **Layout** tab enables you to further customize the appearance of your OmniPortlet. The options on the **Layout** tab change according to your selection on the **View** tab. For example, when you select **Chart Layout**, options are provided for setting up chart hyperlinks. With chart hyperlinks, clicking a specific part of the chart triggers an event (for example, navigation to another URL).

For the other layout styles, you can define each column to display in a specific format, such as plain text, HTML, an image, a button, or a field. For example, suppose you selected a data source that includes a URL to an image. To see this image, you can select **Image** for the display of this column. Each column can also be mapped to an action, similar to the behavior of chart hyperlinks.

This section includes the following subsections that provide more detail about the layout options available on the OmniPortlet **Layout** tab:

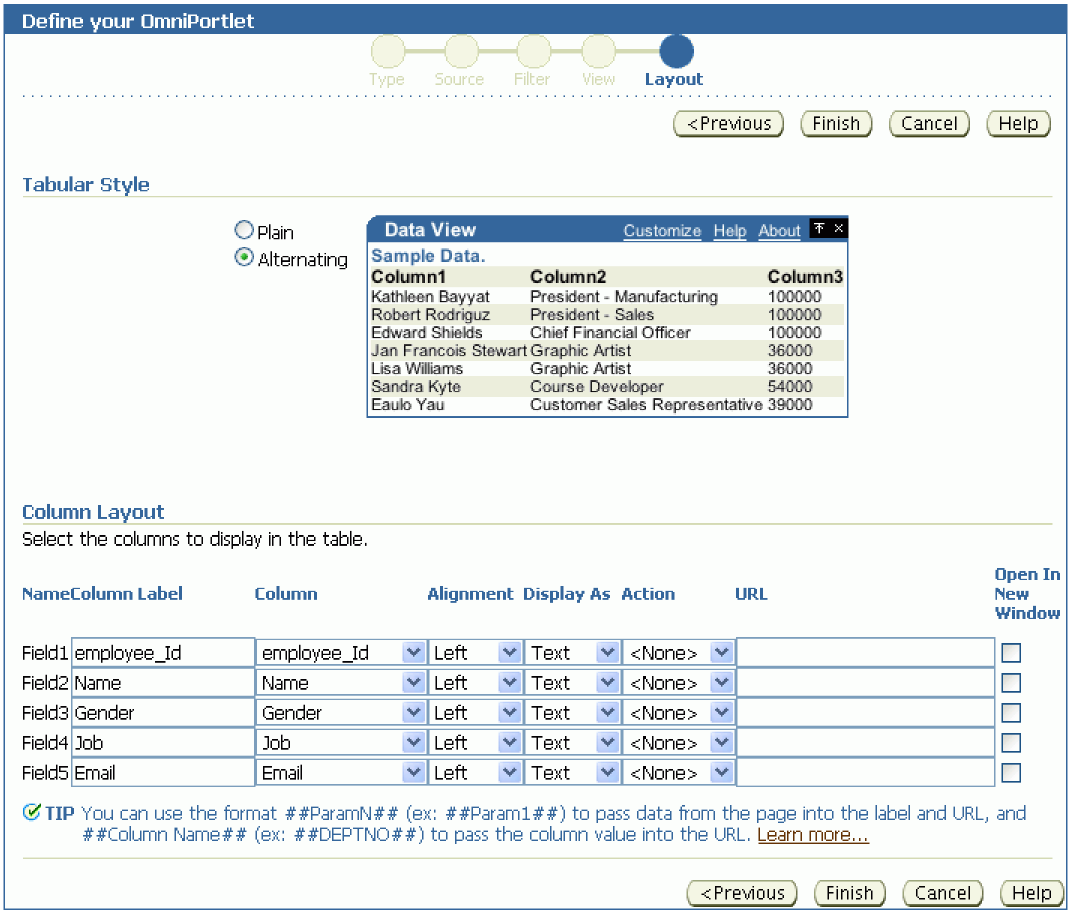
- Section 30.2.7.1, "Tabular Layout"
- Section 30.2.7.2, "Chart Layout"
- Section 30.2.7.3, "News Layout"
- Section 30.2.7.4, "Bullet Layout"
- Section 30.2.7.5, "Form Layout"
- Section 30.2.7.6, "HTML Layout"
- Section 30.2.7.7, "Parameter Form Layout"

> **Note:** Because events are not currently supported, selecting an action when designing your layout may produce unexpected results.

30.2.7.1 Tabular Layout

Typically, you use tabular layout when you have one or more columns of data to display in a table. You can select **Plain** to display all rows in the table without any background color, or **Alternating** to display a background color for every other row in the table (Figure 30–12).

Figure 30–12 Layout Tab: Tabular



Note: You can control the background color of a portlet using its style properties. Portlet style properties are exposed through the Properties panel in Composer. For more information, refer to Setting OmniPortlet Properties.

The **Column Layout** section provides options for selecting the data columns to display in the portlet and a display format. Additionally, you can associate a URL with a column to display column data as a hyperlink. You can also specify whether the secondary web page displays in a new window. Figure 30–13 shows an example of an OmniPortlet using a tabular format.

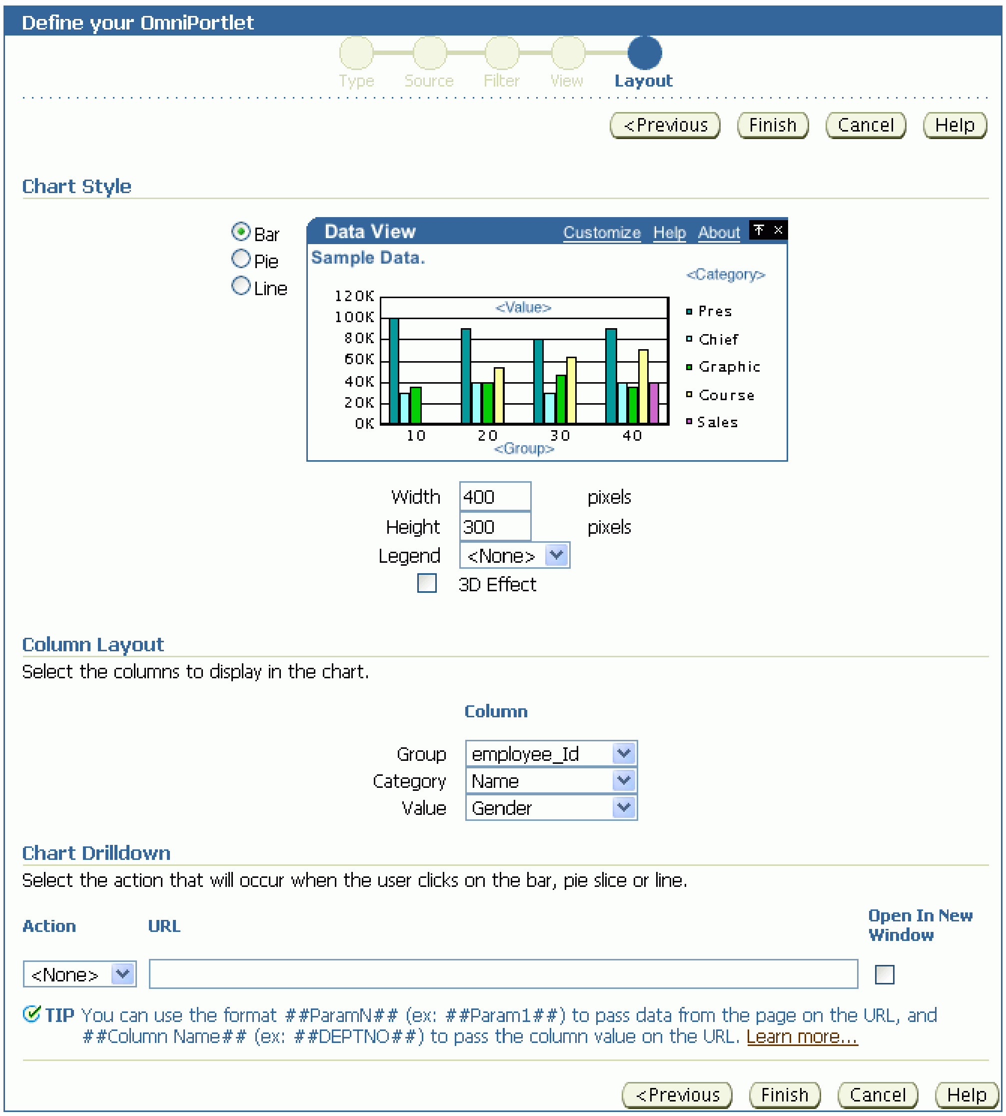
Figure 30–13 Example of an OmniPortlet Using a Tabular Layout

Note: For more information about using the OmniPortlet wizard, click the **Help** link on the **Layout** tab.

30.2.7.2 Chart Layout

Use the chart layout to display your data graphically, as a bar, pie, or line chart. The **Layout** tab (Figure 30–14) provides options for specifying the chart style to use (**Chart Style**) and the data source columns to display (**Column Layout**).

Figure 30–14 Layout Tab: Chart



Under the **Column Layout** section, you can select the data source columns to use in the chart (**Group**); the values to use in creating the chart legend (**Category**); and the relative size of the chart's bars, lines, or pie slices (**Value**).

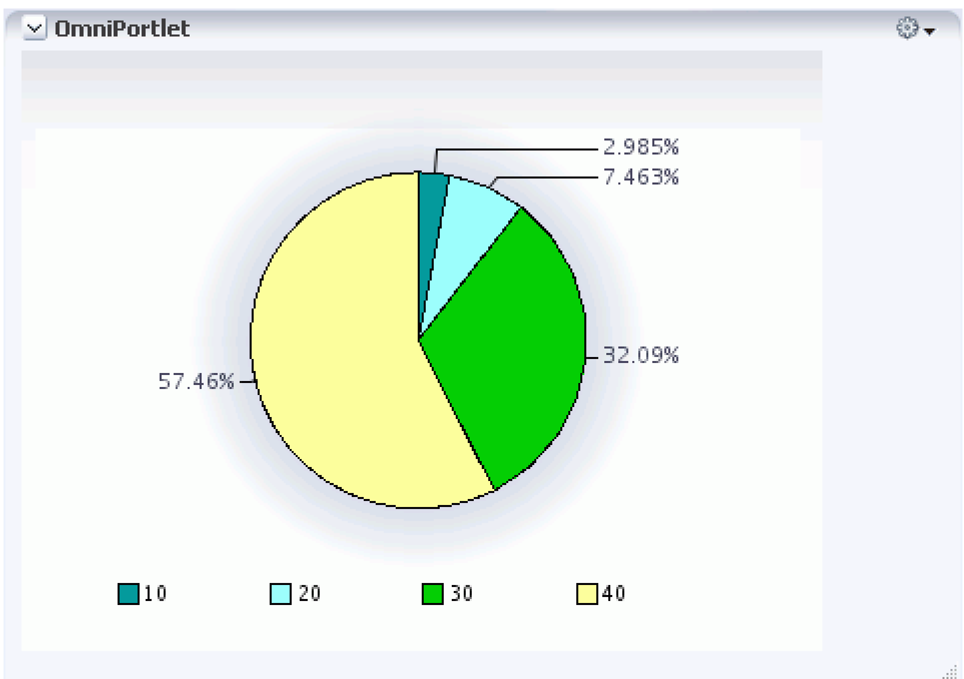
Note: To group the information in the chart, you must group the information at the data level (for example, in your SQL query statement). Also, if numeric values in a data source contain formatted strings, commas, or currency (for example, $32,789.00), then they are considered to be text and ignored when the chart is generated. You should remove these formatting characters if you want them to be correctly read as numeric values.

You can also select whether the sections of the chart should point to a hyperlink and whether the link target should display in a new window.

You can define chart hyperlinks so that each bar, pie section, or line links to another web page. For example, you can place a pie chart and a report portlet on your page, then set up hyperlinks on the pie wedges. Users click a wedge to display a row in the report with detailed information about the wedge data.

Figure 30–15 displays an example of a pie chart. In this example, the **Category** value `DEPARTMENT` is used as the chart legend.

Figure 30–15 Example of an OmniPortlet Using a Pie Chart Layout

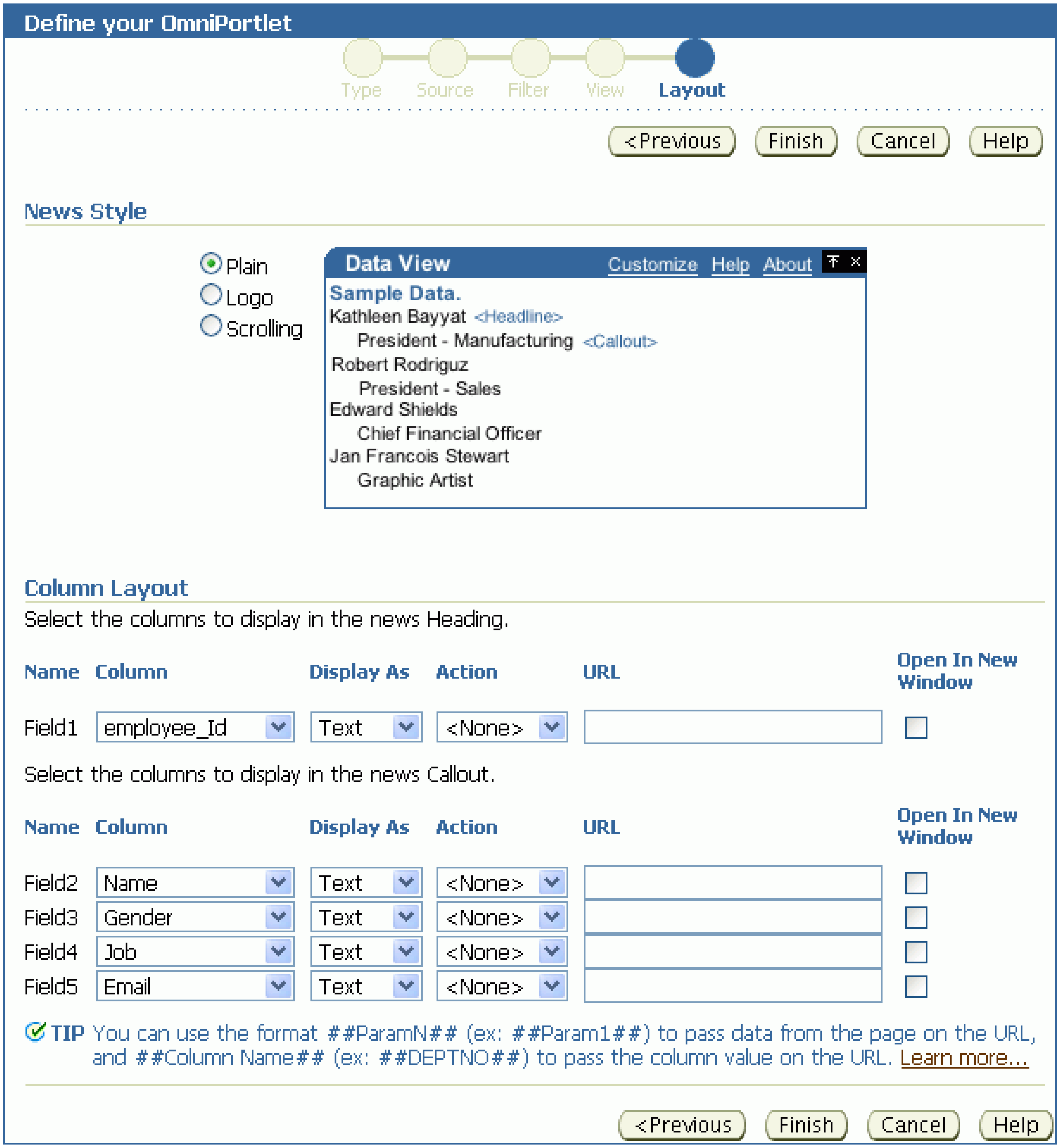


30.2.7.3 News Layout

Use the News layout to display links to articles and brief article descriptions. You can use the News layout to publish information in standard XML formats, such as Resource Description Framework (RDF) or RSS (Really Simple Syndication).

Use the **Column Layout** section (Figure 30–16) to add a heading that displays at the top of the portlet, a logo, or a scrolling layout that enables users to view all the information in the portlet as it moves vertically.

Figure 30–16 Layout Tab: News



Note: The OmniPortlet News Layout Scroll type is supported on Microsoft Internet Explorer and Netscape 7.0.

The **Layout** tab also provides options for associating a URL with column data. Users click column data in the portlet to navigate to your specified target location.

Figure 30–17 shows an example OmniPortlet using a News layout.

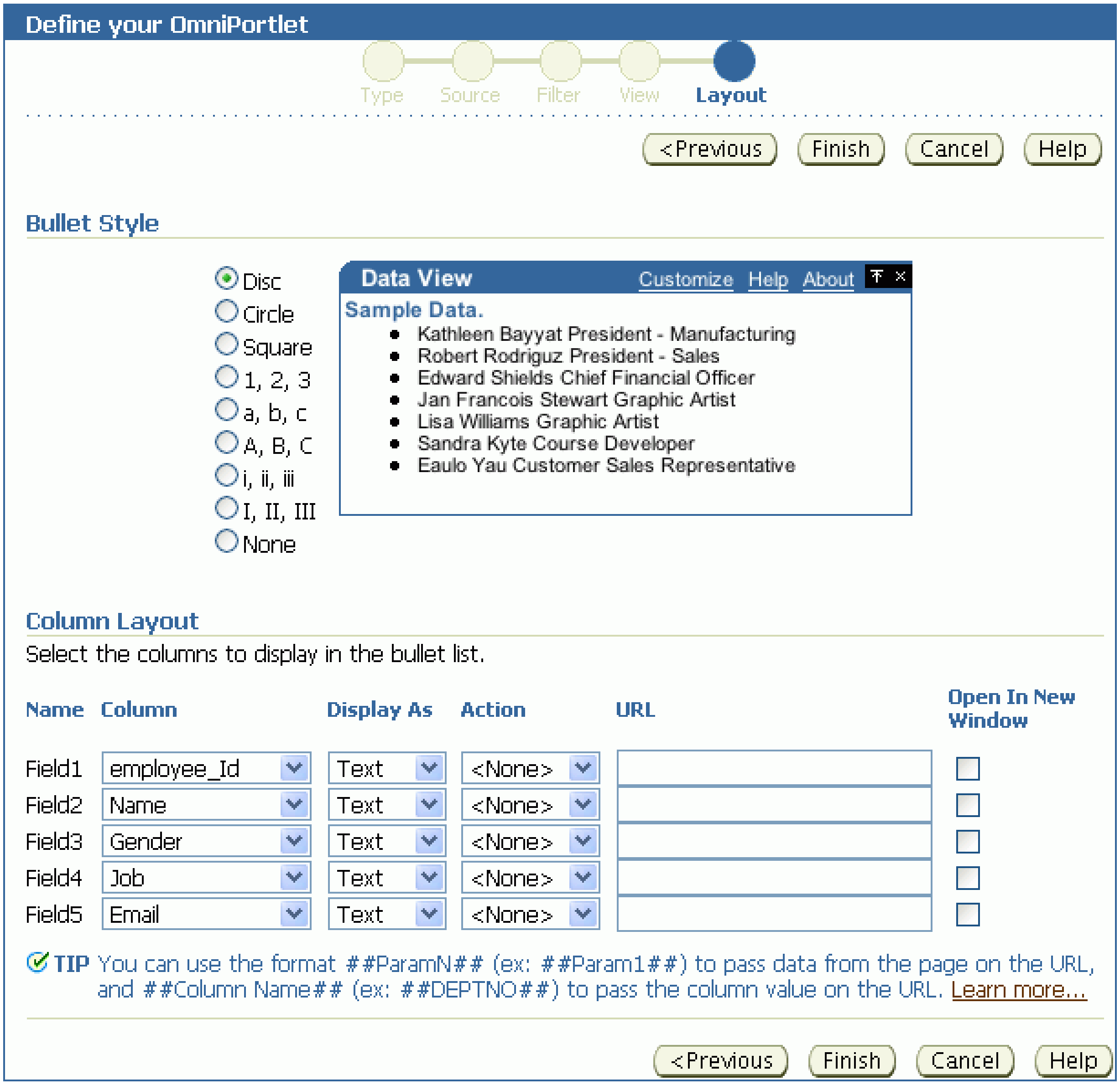
Figure 30–17 Example of an OmniPortlet Using a News Layout

Note: For more information about using the OmniPortlet wizard, click the **Help** link on the **Layout** tab.

30.2.7.4 Bullet Layout

Use the Bullet layout to display your data in a bulleted or numbered list. The **Layout** tab (Figure 30–18) provides a variety of different bullet and numbering styles.

Figure 30–18 Layout Tab: Bullet



In the **Column Layout** section, you can select how the columns display in the portlet and associate a URL with column data.

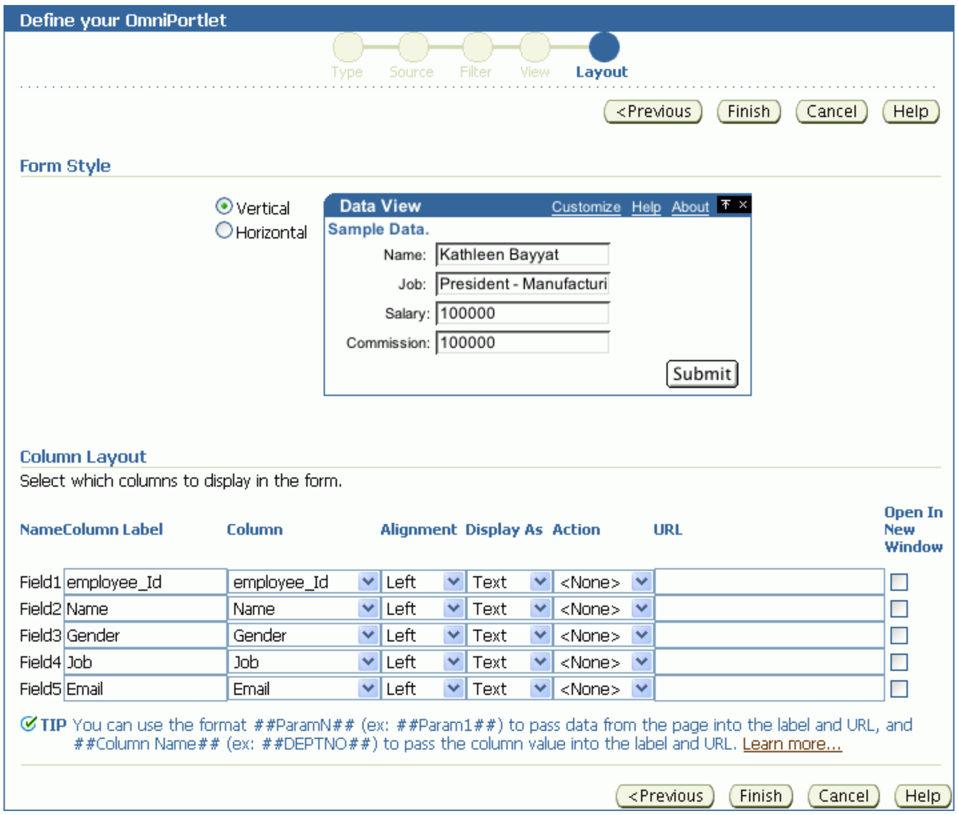
Figure 30–19 shows an example of an OmniPortlet using a Bullet layout.

Figure 30–19 Example of an OmniPortlet Using a Bullet Layout

Note: For more information about using the OmniPortlet wizard, click the **Help** link in the **Layout** tab.

30.2.7.5 Form Layout

Figure 30–20 Layout Tab: Form



Use the Form layout when you want to display source data in a form with labeled fields, such as `Name: <name>`. You can then use portlet parameters to determine the data that displays.

Use the **Column Label** column to enter row labels and the **Column** column to specify which column to use from your data source. Additionally, you can specify data alignment, select a display mode (text, HTML, image, button, field, or hidden), associate a URL or an event with the column data, and specify whether to open the URL target in a new window.

Figure 30–21 shows an example of an OmniPortlet using a Form layout.

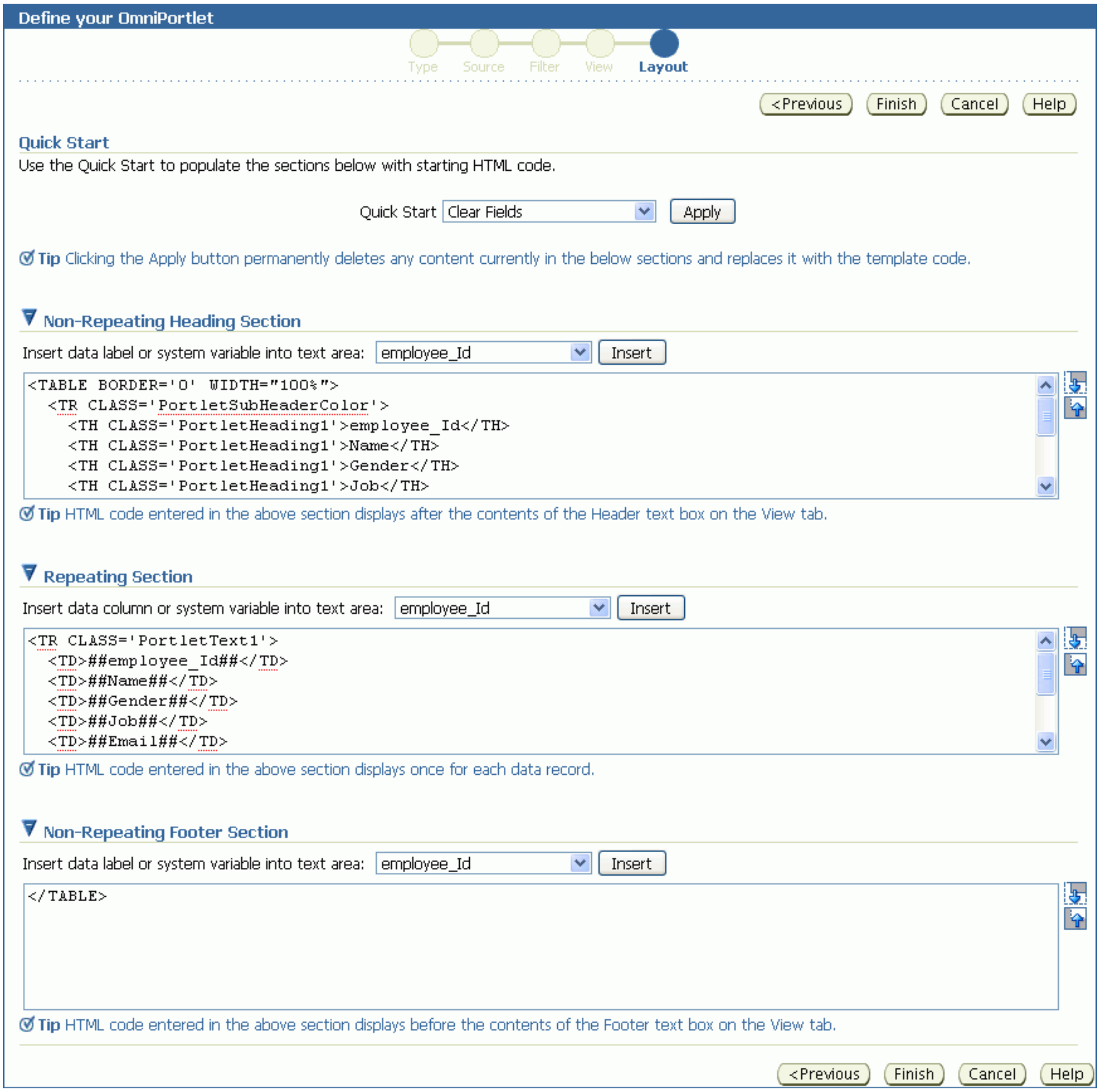
Figure 30–21 Example of an OmniPortlet Using a Form Layout

Note: For more information about using the OmniPortlet wizard, click the **Help** link in the upper right corner of the **Layout** tab.

30.2.7.6 HTML Layout

Use the HTML layout to create a customized look and feel for your OmniPortlet content. The **Layout** tab (Figure 30–22) provides a means of selecting a built-in HTML layout and modifying the code, or creating a new layout.

Figure 30–22 Layout Tab: HTML



You can hand-code your own HTML or JavaScript based on data columns that OmniPortlet has retrieved from the selected data source. By coding your own HTML and JavaScript, you have full control over the portlet's appearance, enabling you to develop a rich portlet interface.

For more information about using the fields on the **Layout** tab, click the **Help** button in the wizard. For an example of using JavaScript in the HTML layout, select the **Sortable Table** layout from the **Quick Start** dropdown list on this tab.

Note: The maximum number of characters you can enter in each of the sections (Heading, Repeating, and Footer) is 30,000 (30k).

Figure 30–23 shows an example of an OmniPortlet using the HTML layout.

Figure 30–23 Example of an OmniPortlet Using the HTML Layout

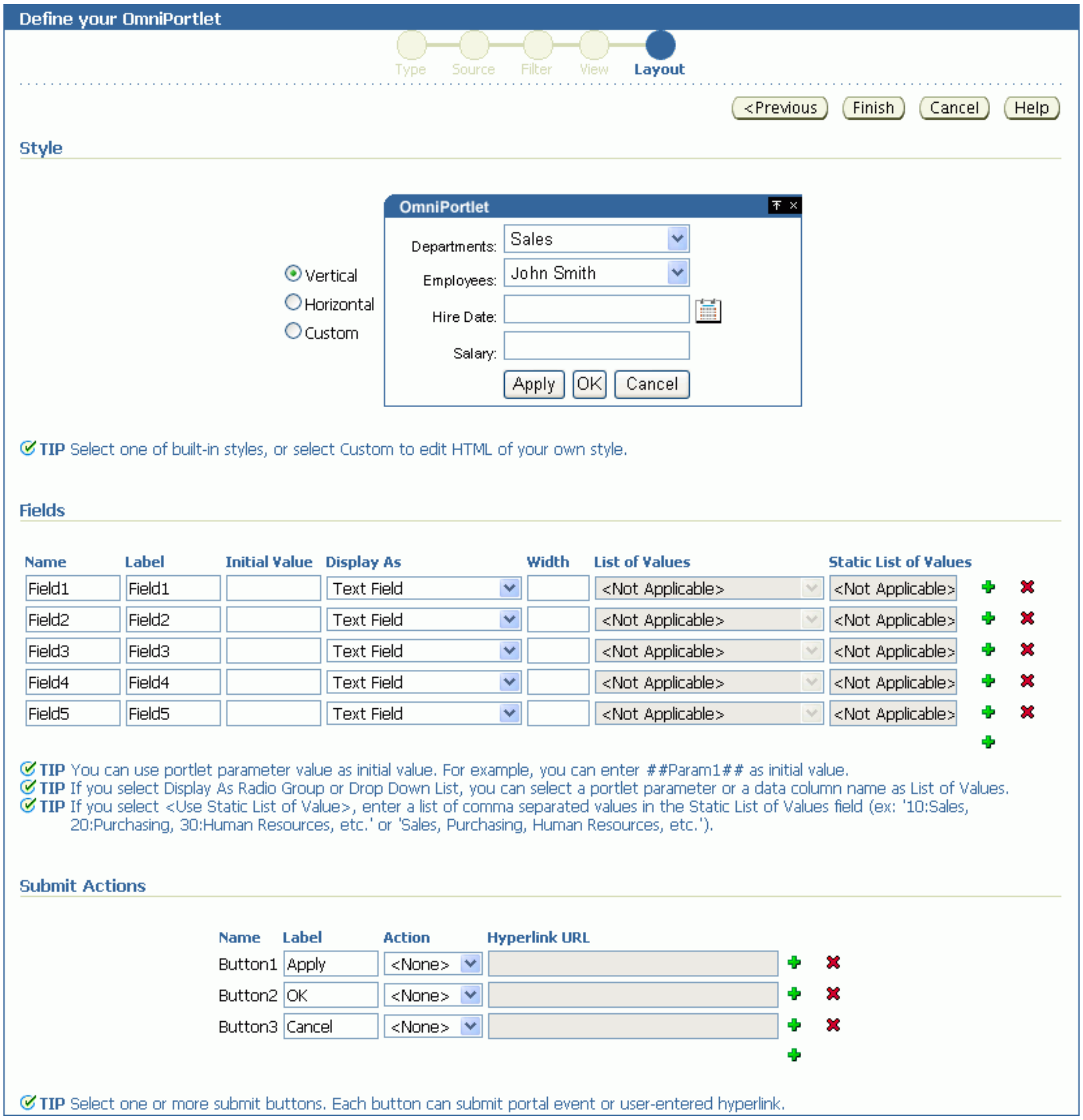

OmniPortlet

Emp ID	Name	Job	Email
20	Kathleen Bayyat	President - Manufacturing	kbayyat@mycompany.com
30	Robert Rodriguz	President - Sales	rrodrigu@mycompany.com
40	Edward Shields	Chief Financial Officer	eshields@mycompany.com
110	Jan Francois Stewart	Graphic Artist	jfrancoi@mycompany.com
100	Lisa Williams	Graphic Artist	lwilliam@mycompany.com
430	Sandra Kyte	Course Developer	skyte@mycompany.com
770	Eaulo Yau	Customer Sales Representative	eyau@mycompany.com

30.2.7.7 Parameter Form Layout

Use the Parameter Form layout to create a customized parameter form for your OmniPortlet content. The **Layout** tab (Figure 30–22) provides a means of selecting a built-in parameter form layout and modifying the code, or creating a new layout.

Figure 30–24 Layout Tab: Parameter Form



You can hand-code your own parameter form based on data columns that OmniPortlet has retrieved from the selected data source. By coding your own parameter form, you have full control over the portlet's appearance, enabling you to develop a rich portlet interface. To do so, select the Custom style option, then use the Custom HTML field to edit the parameter form (Figure 30–25).

Figure 30–25 Layout Tab: Parameter Form Custom HTML Field

For more information about using the fields on the **Layout** tab, click the **Help** button in the wizard.

30.2.8 Customizing Your OmniPortlet

After you have created your OmniPortlet and returned to your application, you can select the **Customize** option from the portlet's **Actions** menu to revise your original selections. When you revise a defined OmniPortlet, tabs correspond to the different steps originally presented in the OmniPortlet wizard. An exception to this is the **Type** step—you cannot change the originally selected data type, and so there is no corresponding **Type** tab.

When you revise an OmniPortlet using customize mode, keep in mind the following notes:

- Any modifications you make to your portlet using customize mode apply to all users, regardless of the current session language and the locale of the user's browser.
- You can personalize the portlet at runtime by clicking the **Personalize** link on the portlet or by selecting the **Personalize** option on the portlet's **Action** menu. Personalizing the portlet creates a copy of the personalization object. As all properties are duplicated, subsequently modifying the portlet through Customize mode does not affect the personalized version of the portlet. To ensure the latest customizations are made to the portlet, after you make modifications in Customize mode, you must click **Personalize** again, and then select the **Reset to Defaults** option.
- The personalization of OmniPortlet is stored in a file-preference store. For more information about configuring OmniPortlet and modifying the preference store, see Appendix E, "Additional Portlet Configuration" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

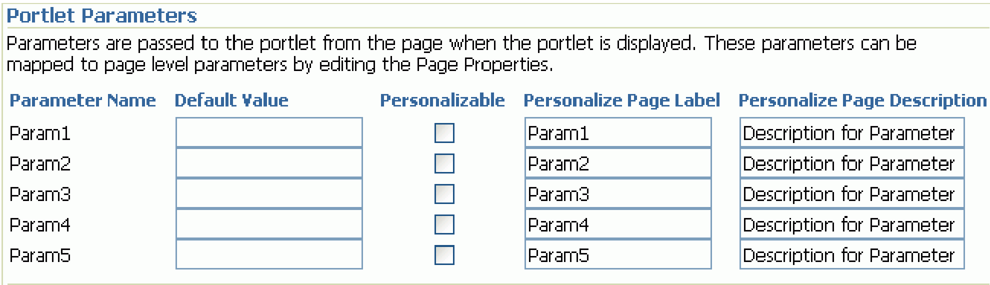
30.3 Working with OmniPortlet Parameters

You can define up to five portlet parameters for an OmniPortlet. You can define parameters in the following screens:

- On the **Source** screen of the wizard when you define the OmniPortlet
- On the **Source** tab when you select **Customize** for a defined OmniPortlet

Figure 30–26 shows the **Portlet Parameters** section on the **Source** tab.

Figure 30–26   Source Tab: Portlet Parameters Section



If you select any of these portlet parameters to be personalizable (by selecting the **Personalizable** check box), you can set their values on the Personalize screen.

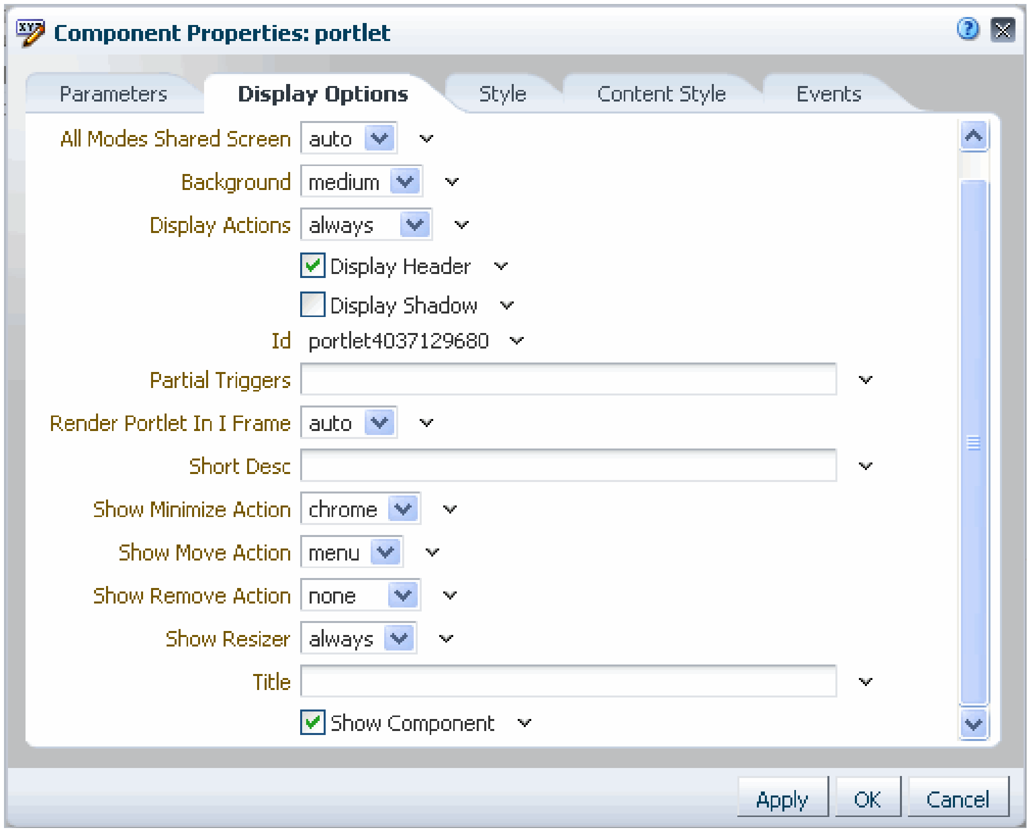
Note: You can learn more about portlet parameters in the online Help, which you can access by clicking the **Help** link on the **Source** tab in the OmniPortlet wizard. The online Help describes portlet parameters in detail, and how to set them up for your OmniPortlet.

Once you have set up portlet parameters in your OmniPortlet, you can contextually map the portlet to other portlets or components on a page. For more information about doing so, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

30.4 Setting OmniPortlet Properties

OmniPortlet has associated properties that users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 30–27).

Figure 30–27 OmniPortlet Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Events service task flows and describe the properties on the Parameters tab:

- Section 30.4.1, "What You Should Know About OmniPortlet Properties"
- Section 30.4.2, "OmniPortlet Properties"

30.4.1 What You Should Know About OmniPortlet Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 30.4.2, "OmniPortlet Properties." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For information about wiring pages and components, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

> **Note:** Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.
>
> EL validation is not performed on non-generic display options.

30.4.2 OmniPortlet Properties

Table 30–3 describes the properties that are unique to OmniPortlet.

Table 30–3 OmniPortlet Component Properties

Property	Description	Location
`Param#`	Use to map page parameters to the parameters specified when the OmniPortlet was defined. These parameters enable you to contextually wire portlets and pages. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."	**Parameters** tab
`All Modes Shared Screen`	For OmniPortlet, set this property to `false` to ensure that all portlet modes, except Show, are rendered each on their own page. Setting this property to `true` may prevent you from editing certain sections of your OmniPortlet in the OmniPortlet wizard.	**Display Options** tab
`Id`	A unique identifier for the portlet instance.	**Display Options** tab
`Partial Triggers`	Use to initialize a partial page refresh, which is a way of refreshing an area of a page without having to redraw the entire page.	**Display Options** tab
`Render Portlet In I Frame`	Use to render the portlet in an inline frame (`iframe`), omit an inline frame, or let the portlet decide. Valid values are: ▪ `auto` (default): The portlet tag checks the portlet response and decides if an inline frame is required ▪ `true`: Render the portlet instance in an inline frame ▪ `false`: Render the portlet instance inline Placing a portlet inline on a page provides a better user experience as compared to placing it in an inline frame. However, at times, it may be required to include a portlet in an inline frame. For example: ▪ The portlet is a JSF portlet ▪ The portlet contains a file upload element ▪ The parser throws an exception because it is not able to parse the markup	**Display Options** tab
`Title`	Enter a title for the OmniPortlet, to display in the portlet header.	**Display Options** tab

30.5 Troubleshooting OmniPortlet

This section provides information to help you troubleshoot problems you may encounter while using OmniPortlet.

Cannot Define OmniPortlet Using the Customize Link

You are not able to define the OmniPortlet at runtime by using the **Customize** link.

Problem

OmniPortlet only supports a `RenderPortletInIFrame` value of `true`, which means that OmniPortlet must be rendered within an inline frame and therefore, the OmniPortlet property, `RenderPortletInIFrame`, must be set to `true`. At design time, the `RenderPortletInIFrame` property is available in the Property Inspector under Display Options. At runtime, the `RenderPortletInIFrame` property is available on the **Properties** panel in Composer.

Solution

Currently, the `RenderPortletInIFrame` property has a value of `false` and, consequently, when you click the **Define** link at runtime, the **Type** tab may not display and you cannot proceed with defining the OmniPortlet.

You can select **Customize** from the **Action** menu to define OmniPortlet, or, for Framework applications at design time, select the OmniPortlet in the **Structure** window in Oracle JDeveloper, and in the Property Inspector, set `RenderPortletInIFrame` to `true`.

31

Working with the Web Clipping Portlet

This chapter provides a brief description of the Web Clipping portlet and producer and explains how you can register a Web Clipping producer and use this producer to add a Web Clipping portlet to a JSP document created through Oracle JDeveloper.

This chapter includes the following sections:

- Section 31.1, "What You Should Know About Web Clipping"
- Section 31.2, "Working with the Web Clipping Portlet"
- Section 31.3, "Setting Web Clipping Portlet Properties"
- Section 31.4, "Current Limitations of Web Clipping"
- Section 31.5, "Troubleshooting Web Clipping"

Note: The Web Clipping portlet is deprecated in Release 11*g* (11.1.1.7.0). Consider using a clipper pagelet using Oracle WebCenter Portal's Pagelet Producer. For more information, see the "Managing Oracle WebCenter Portal's Pagelet Producer" chapter in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

31.1 What You Should Know About Web Clipping

Web Clipping is a publishing portlet that enables you to integrate any web application with applications built using Oracle WebCenter Portal: Framework and with Oracle WebCenter Portal: Spaces. It is designed to give you quick integration by leveraging the existing user interface of the web application. With Web Clipping, you can consolidate content from web sites scattered throughout a large organization.

With Web Clipping, you can clip an entire web page, or a portion of it, and reuse it as a portlet. You can clip basic and HTML-form-based sites. Use Web Clipping when you want to copy content from an existing web page and expose it in your Framework application as a portlet.

Web Clipping supports the following features:

- **Navigation through various styles of login mechanisms**

  Web Clipping supports various login mechanisms including form- and JavaScript-based submission and HTTP Basic and Digest Authentication with cookie-based session management.

- **Fuzzy matching of clippings**

Fuzzy matching enables the Web Clipping engine to correctly identify a web clipping and deliver it as portlet content even if the web clipping is reordered within the source page or if its character font, size, or style changes.

- **Personalization**

  Personalization enables you to expose input parameters that end users can modify when they personalize the portlet. Parameters can be exposed as public parameters that you can map as page parameters. This feature enables end users to obtain personalized clippings.

- **Integrated authenticated web content through single sign-on**

  You can use external applications and leverage Oracle Single Sign-On to clip content from authenticated external web sites.

- **Inline rendering**

  Inline rendering enables you to set up Web Clipping portlets to display links within the context of the portlet. When a user clicks a link in the Web Clipping portlet, the results display within the same portlet. You can use this feature with internal and external web sites.

- **Proxy authentication**

  Web Clipping supports proxy authentication, including global proxy authentication and authentication for each user. You can use this feature if proxy servers require authentication. You can specify proxy server authentication details, including type (Basic or Digest) and realm in the `provider.xml` file. In addition, you can specify a scheme for entering user credentials as follows:

  – All users automatically log in using a user name and password that you provide.

  – All users are required to log in using a user name and password that they provide.

  – All public users (not authenticated into the WebCenter Portal application) automatically log in using a user name and password that you provide, while valid users (authenticated into the WebCenter Portal application) log in using a user name and password that they provide.

  For more information, see the "HTTP or HTTPS Proxy Configuration" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

- **Support for HTTPS**

  Web Clipping enables you to clip content from HTTPS-based external web sites if appropriate server certificates are acquired.

- **Open Transport API**

  By default, the Web Clipping provider supports only HTTP challenge-based authentication methods, such as Basic and Digest and form submission logins. To support custom authentication methods, such as Kerberos proxy authentication, you can use the Web Clipping Transport API. For more information, see the "Using Web Clipping Open Transport API" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

- **Reuse of a wide range of web content**

  Web Clipping provides basic support of pages written with JavaScript, applets, and plug-in enabled content, retrieved through HTTP GET and POST methods of form submission.

Web Clipping also supports clipping of content from pages written with HTML 4.01, including:

- Clipping of `<applet>, <body>, <div>, <embed>, <img>, <object>, <ol>, <span>, <table>`, and `<ul>` tagged content
- Preservation of `<head>` styles and fonts, and CSS
- Support for UTF-8 compliant character sets
- Navigation through hyperlinks (HTTP GET), form submissions (HTTP POST), frames, and URL redirection

- **Globalization support**

  Web Clipping provides globalization support in URLs and URL parameters. For information about how Web Clipping determines the character set of clipped content, see Section 31.4, "Current Limitations of Web Clipping."

- **Persistent storage of Web Clipping definitions**

  Web Clipping definitions are stored persistently in a repository. For information about Web Clipping repository, see the "Web Clipping Portlet Configuration Tips" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

- **Encryption of secure information**

  Any secure information, such as passwords, is stored in an encrypted form, according to the Data Encryption Standard (DES), using Oracle encryption technology.

31.2 Working with the Web Clipping Portlet

This section describes how to clip content for a Web Clipping portlet and make the portlet personalizable. It includes the following subsections:

- Section 31.2.1, "Adding a Web Clipping Portlet to a Page"
- Section 31.2.2, "Clipping Content for Display in the Web Clipping Portlet"
- Section 31.2.3, "Adding a Web Clipping That Users Can Personalize"

31.2.1 Adding a Web Clipping Portlet to a Page

The steps for adding a Web Clipping portlet to a page vary between a Framework application and the Spaces application. For one thing, in a Framework application adding a portlet to a page is a design-time activity, carried out by the application developer. For information about adding a portlet to a page in a Framework application, see the "Creating Content-Based Portlets with Web Clipping" chapter in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

In Spaces, portlets are added to pages at runtime—when you run the application. Portlets are available for dragging and dropping from the Composer Catalog by any user with sufficient privileges. For information about adding a portlet to a page in Spaces, see Section 18.5, "Adding a Component to a Page."

Note: In Spaces, avoid adding a portlet to a Movable Box component (For information, see Section 19.10, "Working with the Movable Box Component"). The Movable Box component duplicates the `showDetailFrame` that the portlet provides by default. Adding a portlet to a Movable Box creates an unnecessary and potentially error-prone redundancy.

31.2.2 Clipping Content for Display in the Web Clipping Portlet

Though the point at which you add a Web Clipping portlet to a page varies between Framework applications and Spaces—at design time or at runtime—Web Clipping content is defined at runtime for both scenarios.

There are two ways to clip and save web content:

- *Customize* the portlet to set up a Web Clipping portlet to display content to all users
- *Personalize* the portlet to set up your own, personal view of a Web Clipping portlet

Both options take you into Web Clipping Studio, where you can:

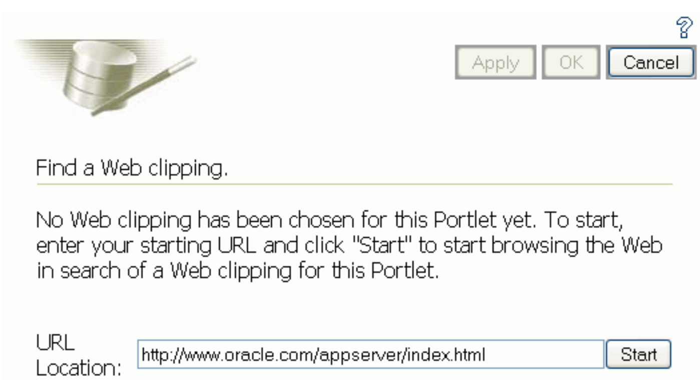
- Browse for web content
- Choose the exact portion of the web content to clip
- Preview the clipped content as a portlet
- Save the clipped content as a portlet
- Set portlet properties and save the updated portlet information

To clip web content for display in the Web Clipping portlet:

1. Open the **Find a Web clipping** page:
   - To set up a Web Clipping portlet to display content to all users, open the page in edit mode (Composer) and click the **Customize** icon in the portlet header.
   - To set up your own, personal view of a Web Clipping portlet, click the **Personalize** icon in the portlet header.

   The **Find a Web clipping** page opens (Figure 31–1).

Figure 31–1 The Find a Web Clipping Page



Note: When running a portlet that has an Edit mode, the **Personalize** option in the portlet header appears only to authenticated users. Unauthenticated or public users do not see the **Personalize** option. What this means is that, for personalization to work, some form of security must be implemented for your application.

If you are a developer creating portlets and pages, then you may want a quick way to test the Edit mode of your portlet without creating a complete security model for your application. For information about how you can quickly add the necessary security for testing portlet personalization, see the "Configuring Basic Authentication for Testing Portlet Personalization" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

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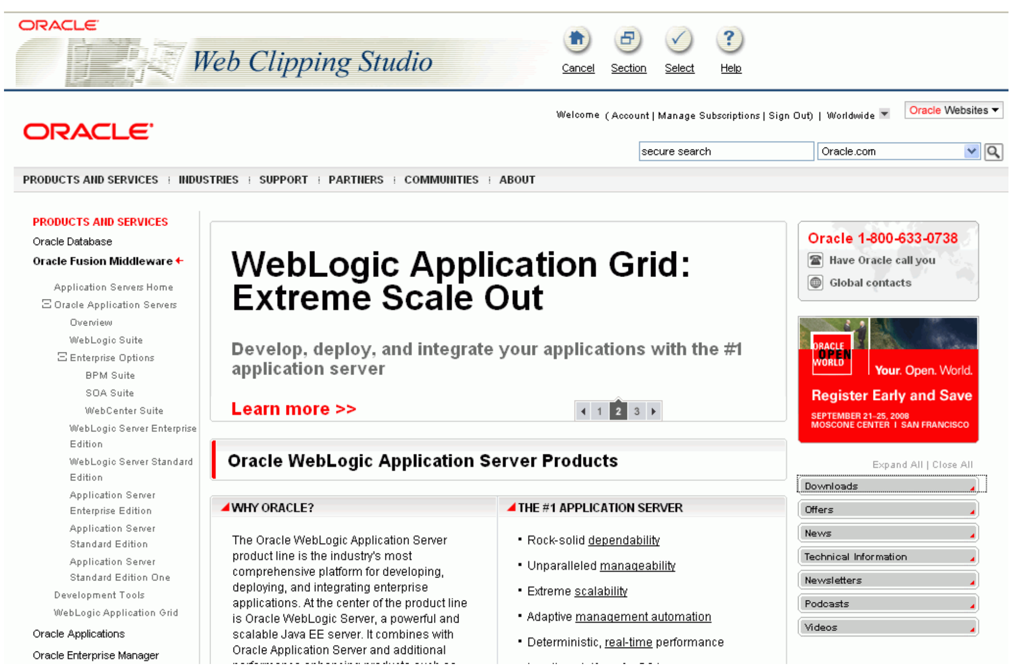
2. In the **URL Location** field, enter the URL of the web page that contains or links to the content you want to clip.
3. Click **Start**.

   Web Clipping Studio displays the page you specified (Figure 31–2).

Note: You can clip Secure Socket Layer (SSL)-enabled web sites if certificates of those sites are added to the certificate store. Certificates of SSL-enabled web sites that use Equifax, VeriSign, or Cybertrust certificates are included in the default certificate store.

For information about adding certificates, see the "Adding Certificates for Trusted Sites" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

Figure 31–2 A Web Page Displayed in Web Clipping Studio



4. If your starting web page is not the page you plan to clip, then within Web Clipping Studio browse to the content you want to clip.

   As you click hyperlinks in the web page, Web Clipping Studio records your navigation links.

   Notes: Only the significant browsing operations are recorded for later playback during the show mode. Any browsing operations that do not contribute to the eventual web clipping are discarded. Discarded links are not visited.

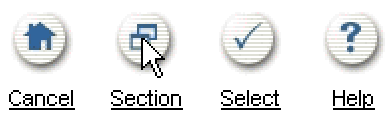
   For any web sites that require HTTP Basic or Digest Authentication, a form is displayed that requests user name and password information. This encoded authentication information is recorded as part of the browsing information.

   ---

5. On the page that contains the content you want to clip, click the **Section** icon or link on the Web Clipping Studio banner (Figure 31–3).

   If you intend to clip the full web page, it is not necessary to section the page. You can clip the full page by clicking the **Select** icon or link instead of **Section** when you are on a page you want to clip.

Figure 31–3 The Section Icon and Link in the Web Clipping Studio Banner



Sectioning divides the target web page into its clippable sections (Figure 31–4).

Figure 31–4 Sectioned Web Page in Web Clipping Studio

After you click **Section**, you cannot browse links in the displayed page. If you want to browse to other locations through page links, then click **Unsection** on the

Web Clipping Studio banner. For more information about using Web Clipping, you can click the **Help** icon or link on any of the Web Clipping pages.

Note: To adjust sectioning to encompass smaller or larger areas on the web page, use the **Section Smaller** and **Section Larger** options on the Web Clipping Studio banner. Click **Section Smaller** to divide the web page into more, smaller sections. For example, click **Section Smaller** to drill down one level of nested tables. Click **Section Larger** to divide the web page into fewer, larger sections.

---

6. At the top-left corner of the section you want to clip, click **Choose**.

   You can choose only one section at a time. Web Clipping Studio displays a preview of your chosen section.

7. If the displayed section is the clipping you want, then click **Select** on the Web Clipping Studio banner.

   If the displayed section is not the clipping you want, then click **Unselect** to return to the page containing the section. You can choose another section on the page, or click **Unsection** to remove sectioning, enabling you to navigate to another page.

Note: Some sections may contain no data, only whitespace. For example, a web page may contain an HTML `<DIV>` tag that contains no text or images. If you click **Choose** on a section that contains no data, then Web Clipping displays a preview, but the preview correctly shows only whitespace. In this case, click **Unselect** on the preview page to return to the sectioned page. Then, select a section containing data.

   Once you have made your selection, the Web Clipping Studio displays the **Find a Web clipping** page with the selected web clipping's properties.

8. Adjust the clipping's property values as necessary:

   - **URL Rewriting—**Controls the behavior of links embedded in the clipped content.

     Select from:

     – **None—**To specify that link targets display on a new browser tab.

     – **Inline—**To specify that link targets display inside the portlet. If you have integrated with an external application or are logged into the clipped site, and if you choose **Inline** for URL Rewriting, then the session is maintained to the clipped site while browsing.

Note: The **URL Rewriting** option is available only when you customize a portlet. This option is not available when you personalize a portlet.

   - **Title—**A title to display in the portlet header.
   - **Description—**A description of the clipping. The description is not displayed in the portlet.

- **Time Out (seconds)**—The number of seconds to allow for the portlet to render before it times out.
- **Expires (minutes)**—The number of minutes before cached portlet content expires. Once cached content expires, the next time the portlet is refreshed—either by a browser refresh or by clicking the **Refresh** link in the portlet itself—portlet content is retrieved from the web page from which the clipping originated.
- **Parameterize Inputs**—Options for customizing parameters associated with the clipped content.

  Click the **Click to start parameterizing** checkbox to customize parameters associated with the content, and then perform the following steps:

  a. From the **Parameters** list, choose the parameters you intend to customize.

  b. From the **Personalizable** list, select a parameter if you intend to enable users to provide their own parameter values when they personalize the portlet. Select **None** if you do not want to allow this.

  c. In the **Display Name** field, enter a name to be displayed for the parameter.

  d. In the **Default Value** field, enter a default value for the parameter.

  For an example of personalizing the parameters of a web clipping, see Section 31.2.3.2, "Parameterizing a Web Clipping Portlet."

  Note: The **Parameterize Inputs** section displays only if you entered information in a form and then selected the section including the form for your web clipping.

  ---

9. Click **OK** to save changes to property values and to display the selected clipping in the Web Clipping portlet on your page.

   Note: Web Clipping portlets support additional properties that influence the way the portlet is rendered. For information, see Section 31.3, "Setting Web Clipping Portlet Properties."

   Figure 31–5 shows the selected web clipping in your Web Clipping portlet.

Figure 31–5 Clipped Content in a Web Clipping Portlet

Note: The **Refresh** link in the Web Clipping portlet retrieves data from cache or from the originating web site, depending upon the value you provided for **Expires (minutes)**.

31.2.3 Adding a Web Clipping That Users Can Personalize

This section walks you through a demonstration of how you can enable end users to personalize their own view of the content in a Web Clipping portlet. It includes the following subsections:

- Section 31.2.3.1, "Selecting a Clipping from OTN"
- Section 31.2.3.2, "Parameterizing a Web Clipping Portlet"
- Section 31.2.3.3, "Personalizing a Web Clipping Portlet"

31.2.3.1 Selecting a Clipping from OTN

In this task, you navigate to the Oracle Technology Network (OTN) and search for specific information to clip.

To select a clipping from OTN:

1. In the portlet header, click the **Customize** icon.

   The **Find a Web clipping** page opens.

2. In the **URL Location** field, enter the following URL, and click **Start**:

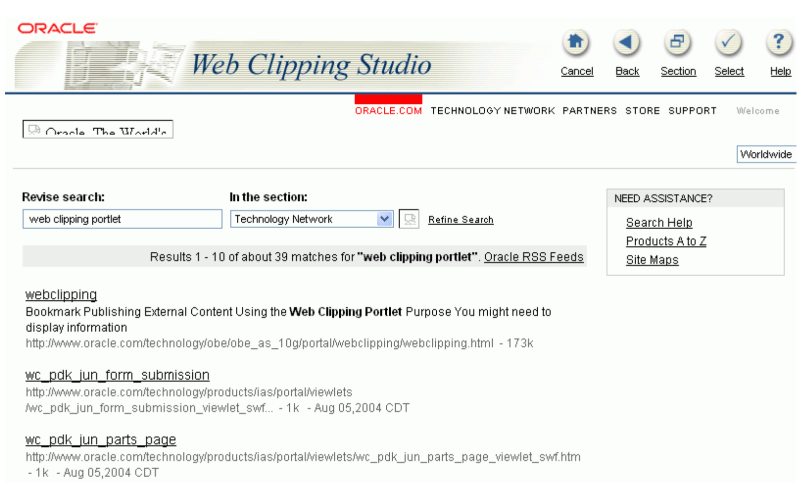
   `http://www.oracle.com/technology/products/ias/portal/index.html`

   OTN displays the Portal page.

3. Enter a search string in the Search field at the top of the page. For this example, enter `web clipping portlet`, then click the Search icon.

   Results display in Web Clipping Studio (Figure 31–6).

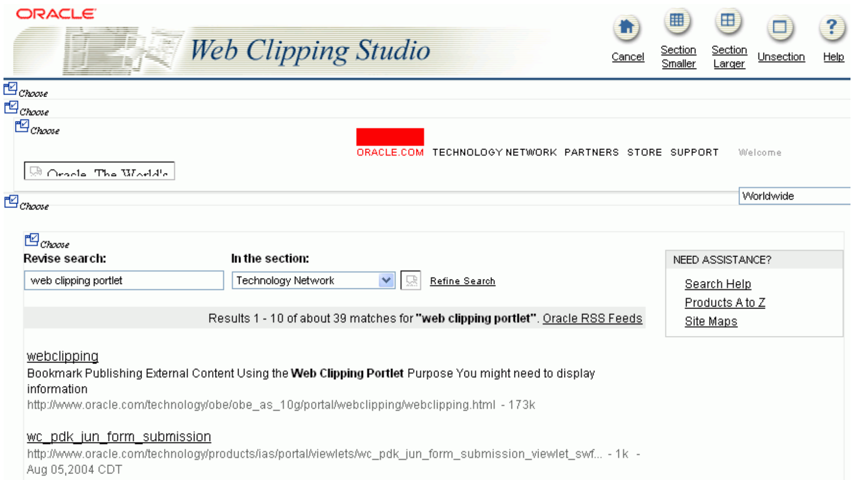
Figure 31–6 OTN Search Results in Web Clipping Studio



4. Click **Section** on the Web Clipping Studio banner.

   Web Clipping Studio divides the target web page into clippable sections (Figure 31–7).

Figure 31–7 The Choose Links on an OTN Search Results Page in Web Clipping Studio

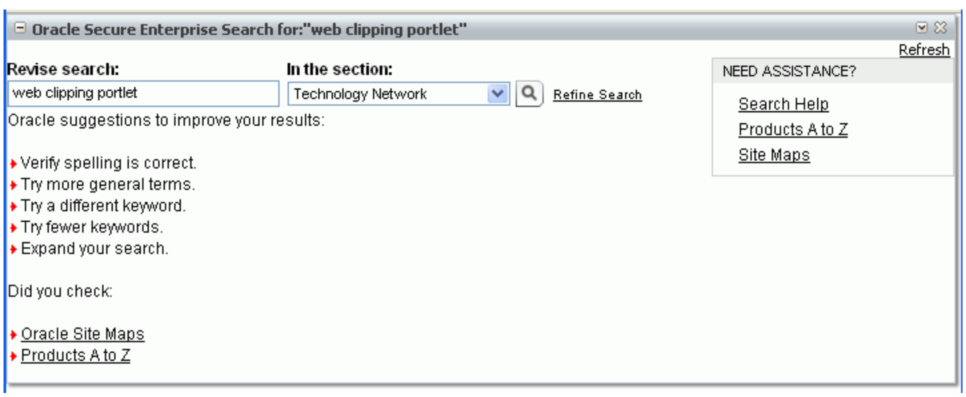


5. At the top-left corner of the area that contains the search results (just above the text Revise search), click **Choose**.

   A preview of the search result section opens.

6. Click **Select** to confirm that the search result section is the one you want to clip.
7. On the **Find a Web clipping** page, click **OK** to display the clipped content in the Web Clipping portlet (Figure 31–8).

Figure 31–8 Clipped Content Displayed in Web Clipping Portlet



31.2.3.2 Parameterizing a Web Clipping Portlet

In this task, you edit the properties of the Web Clipping portlet to enable users to display different search results in the portlet.

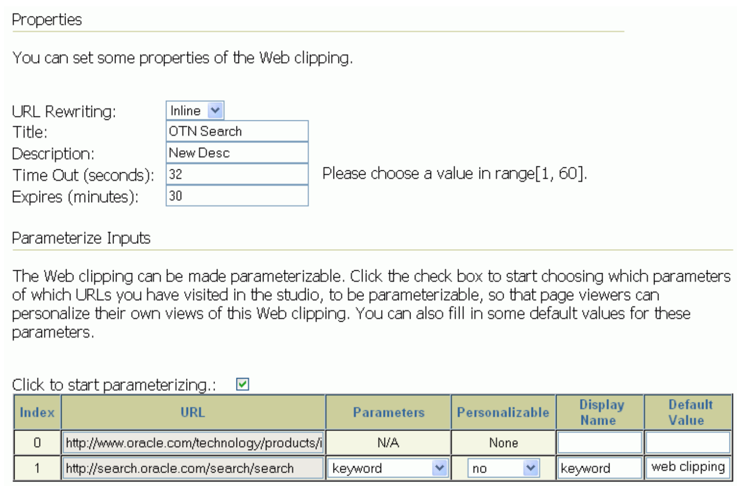
To parameterize a Web Clipping portlet:

1. Once you have clipped the OTN search results as described in Section 31.2.3.1, "Selecting a Clipping from OTN," click the **Customize** icon in the Web Clipping portlet header.
2. In the **Find a Web clipping** page, modify the following items in the **Properties** section:
   - From the **URL Rewriting** dropdown list, choose **Inline** to specify that link targets open inside the portlet, rather than in a new browser window.

- In the **Title** field, enter `OTN Search`. This title appears in the header of your Web Clipping portlet and on the pages where users can personalize parameters for the web clipping.

Figure 31–9 shows the **Properties** and **Parameterize Inputs** sections of the **Find a Web clipping** page.

Figure 31–9 Web Clipping Properties



3. Because the content displayed in the portlet was reached by entering information in the **Search** field on OTN, you can customize the parameters used by the search to enable users to specify their own search string.
4. Under the **Parameterize Inputs** section, select **Click to start parameterizing**, and make the following changes in the parameters table:
   - In the **Parameters** column, select **keyword** from the dropdown list.
   - In the **Personalizable** column, select **Param1** from the dropdown list.
   - In the **Display Name** column, enter `OTN Search`.
   - Make sure that **Default Value** displays **web clipping portlet** to be sure you have selected the right parameter.
5. Click **OK** to display the default search results in the Web Clipping portlet.

31.2.3.3 Personalizing a Web Clipping Portlet

In this task, you personalize a Web Clipping portlet to display different search results in the portlet.

To personalize a Web Clipping portlet to display different search results:

1. In the Web Clipping portlet header, click the **Personalize** icon.

Note: When running a portlet that has an Edit mode, the **Personalize** option in the portlet header appears only to authenticated users. Unauthenticated or public users do not see the Personalize option. What this means is that, for personalization to work, some form of security must be implemented for your application.

If you are a developer creating portlets and pages, then you may want a quick way to test the Edit mode of your portlet without creating a complete security model for your application. For information about how you can quickly add the necessary security for testing portlet personalization, see the "Configuring Basic Authentication for Testing Portlet Personalization" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

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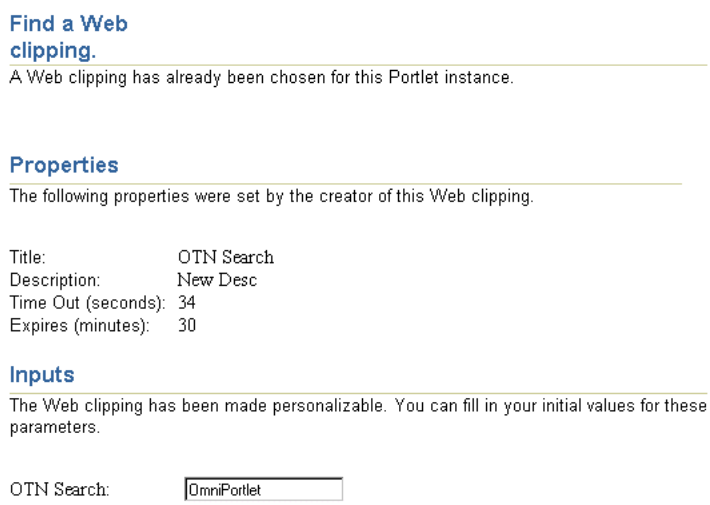
2. In the resulting **Find a Web clipping** page, scroll down to the **Inputs** section.

   Notice that the parameter field for the search string is labeled **OTN Search,** as you specified for the **Display Name** while parameterizing the Web Clipping portlet. (Figure 31–10).

Figure 31–10 A Web Clipping in the Personalize Mode



3. In the **OTN Search** field, enter a different search string.

   For example, enter `WebCenter`.

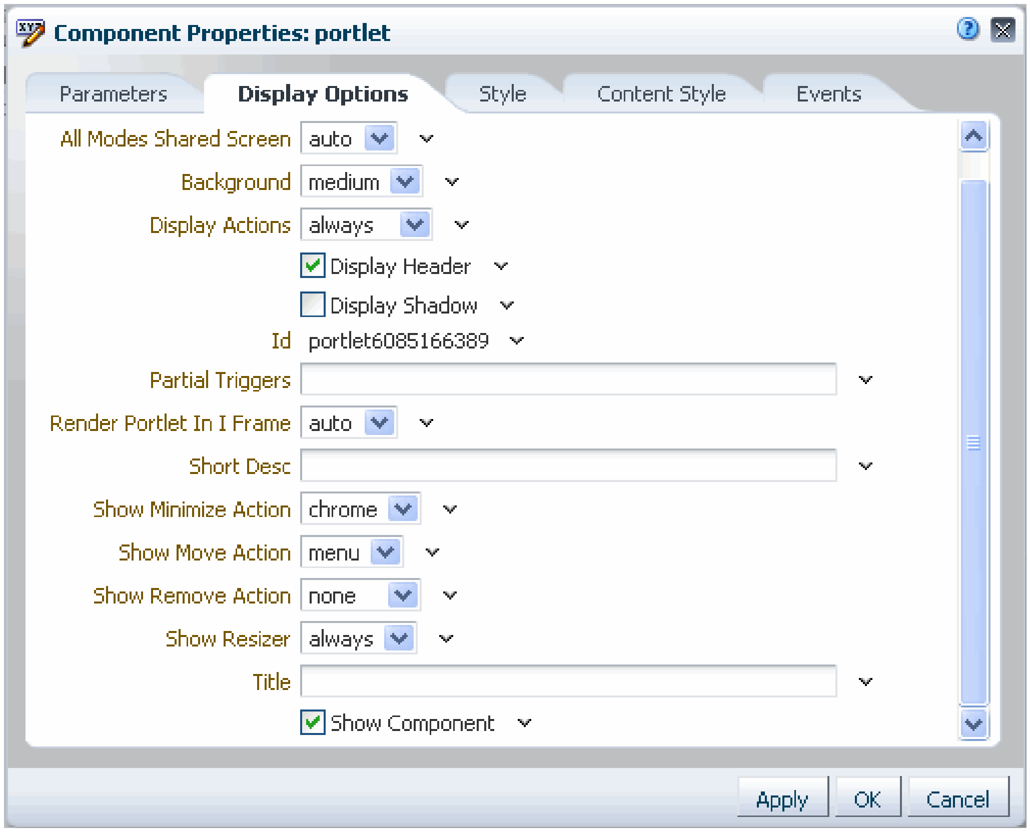
4. Click **OK**.

   The Web Clipping portlet now displays the search results for `WebCenter` from OTN.

31.3 Setting Web Clipping Portlet Properties

The Web Clipping portlet has associated properties that control the look and feel of the portlet on the page. Users with sufficient privileges can access these properties through the Component Properties dialog (Figure 31–11).

Figure 31–11 Web Clipping Portlet Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Events service task flows and describe the properties on the Parameters tab:

- Section 31.3.1, "What You Should Know About Web Clipping Portlet Properties"
- Section 31.3.2, "Web Clipping Portlet Properties"

31.3.1 What You Should Know About Web Clipping Portlet Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 31.3.2, "Web Clipping Portlet Properties." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For information about wiring pages and components, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

31.3.2 Web Clipping Portlet Properties

Table 31–1 describes the properties that are unique to the Web Clipping portlet.

Table 31–1 Web Clipping Portlet Component Properties

Property	Description	Location
`Param#`	Use to map page parameters to the parameters specified when the Web Clipping portlet was defined. These parameters enable you to contextually wire portlets and pages. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."	**Parameters** tab
`All Modes Shared Screen`	For Web Clipping, set this property to `false` to ensure that all portlet modes, except Show, are rendered each on their own page. Setting this property to `true` may prevent you from editing certain sections of your web clipping in the Web Clipping wizard.	**Display Options** tab
`Id`	A unique identifier for the portlet instance.	**Display Options** tab
`Partial Triggers`	Use to initialize a partial page refresh, which is a way of refreshing an area of a page without having to redraw the entire page.	**Display Options** tab
`Render Portlet in I Frame`	Use to render the portlet in an inline frame (iframe), omit an iframe, or let the portlet decide. Valid values are: ▪ `auto` (default): The portlet tag checks the portlet response and decides if an iframe is required ▪ `true`: Render the portlet instance in an iframe ▪ `false`: Render the portlet instance inline Placing a portlet inline on a page provides a better user experience as compared to placing it in an iframe. However, at times, it may be required to include a portlet in an iframe. For example: ▪ The portlet is a JSF portlet ▪ The portlet contains a file upload element ▪ The parser throws an exception because it is not able to parse the markup	**Display Options** tab
`Title`	Enter a title for the Web Clipping portlet, to display in the portlet header.	**Display Options** tab

31.4 Current Limitations of Web Clipping

When you use Web Clipping, you should be aware of the following limitations:

- If the site that you intend to clip uses a large amount of JavaScript to manipulate cookies or uses the `document.write` JavaScript method to modify the HTML document being written, then you may not be able to clip content from the site.
- When you integrate with partner applications (by using `mod_osso`), you cannot clip directly through those partner applications in an authenticated manner. However, you can use partner applications through the external application framework.
- You cannot use the Web Clipping portlet to clip Oracle Portal pages and ADF pages. As a workaround, reregister the same producer in the destination portal and edit the portal manually.
- You cannot use the Web Clipping portlet to clip a web page that contains multiple frames, that is, a frameset.
- Note the following about Web Clipping and the use of a CSS:
  - If a web page contains multiple portlets that use a CSS, then they should not conflict if the CSS uses distinct style names (such as `OraRef`) to specify a style within an HTML tag, rather than using an HTML tag name (such as `<A>`) as the name of the style.
  - If one portlet uses a CSS, and that CSS overwrites the behavior of HTML tags by using the name of the tag (such as `<A>`) as the name of the style, and a second portlet on the same page does not use a CSS, the second portlet is affected by the style instructions of the CSS of the first portlet.
  - If two portlets on the same page use a different CSS and each CSS overwrites the behavior of HTML tags by using the name of an HTML tag (such as `<A>`) as the name of the style, then the style that is displayed depends on the browser.
- Web Clipping checks for globalization support settings in the following way:
  1. Web Clipping checks the `Content-Type` in the HTTP header for the `charset` attribute. If this is present, then it assumes that this is the character encoding of the HTML page.
  2. If the `charset` attribute is not present, then Web Clipping checks the HTML `META` tag on the page to determine the character encoding.
  3. If the HTML `META` tag is not found, then Web Clipping uses the `charset` in the previous browsed page. If this is the first page, then it defaults to the ISO-8859-1 character encoding.
  4. If the value of the `charset` for `Content-Type` or `META` tag is not supported (for example, if the `charset` was specified as `NONE`), then Web Clipping uses the default character set, ISO-8859-1, not the `charset` in the previously browsed page.
- To use the Web Clipping portlet, you must use Microsoft Internet Explorer 5.5 or later for Windows 2000, or Microsoft Internet Explorer 6.0 or later for Windows XP. If you use browser versions older than these, then you may encounter JavaScript errors.

31.5 Troubleshooting Web Clipping

This section provides information to help you troubleshoot problems you may encounter while using Web Clipping.

Encountered "x" at line n, column n. Was expecting one of : "x", "y" ...

Parser error message written to the log file.

Problem

The web content displayed in the Web Clipping portlet contains invalid HTML or JavaScript.

Solution

This is a site-specific issue, not a Web Clipping error. Contact the site's administrator for assistance.

Part IX

Organizing Your Collaborative and Social Networking Environment

Part IX of the User's Guide steps through the process of setting up and managing a Home space and creating a social network. It includes details about social networking and collaboration and personal management tasks, such as bookmarking pages and subscribing to application objects.

Part IX includes the following chapters:

32

Exploring the Home Space

This chapter provides basic information to get you started in the Spaces application Home space. It includes the following sections:

- Section 32.1, "What You Can Do In the Home Space"
- Section 32.2, "Registering Yourself with WebCenter Portal: Spaces"
- Section 32.3, "Accessing the Home Space"
- Section 32.4, "Working with Pages in the Home Space"
- Section 32.5, "Setting Page Creation Defaults for Personal Pages"
- Section 32.6, "Exposing a Space Page in Your View of the Home Space"
- Section 32.7, "Previewing and Printing an Application Page"
- Section 32.8, "Viewing Your Personal Profile Gallery"
- Section 32.9, "Accessing WebCenter Portal: Spaces Online Help"

Audience

This chapter is intended for users minimally assigned the role `Authenticated-User`; that is, any user who is logged in, who wants to understand basic information about Spaces application self-registration, Home spaces, page access, and online help. To create and manage pages in a Home space, you must be granted, minimally, `Pages: Create, Edit, and Delete Pages`.

32.1 What You Can Do In the Home Space

The *Home space* is available to all users of a Spaces application. The application administrator may also provide you with options for creating and managing your own personal pages in the Home space.

Having page create and manage privileges in the Home space makes almost all of the information in this guide useful to you, no matter your position in your company's hierarchy. For example, you can use the information in Section 32.4, "Working with Pages in the Home Space" to create and manage your personal pages and to share such pages with the users you specify.

Note: Application administrators may choose to prohibit the creation of personal pages in the Home space, allowing only the display of business role pages and system pages, over which you have less control.

You can use the information in Chapter 17, "Creating and Managing Pages," to add content to your pages and to configure that content.

You can use the information in Part X, "Working with Content", Part XIII, "Searching WebCenter and Other Sources", Part XV, "Services: Announcements through Links", and Part XVI, "Services: Lists through Worklist" to take advantage of the many services and their associated task flows provided out of the box.

> **Tip:** Some services are active only in spaces other than the Home space. These include such services as Discussions, Events, Announcements, and Lists.

This chapter provides a basic orientation to the types of actions you can take in the Home space. Note that the actions discussed here and in the chapters cited earlier apply primarily to the personal pages you create in the Home space. There are other types of pages, too, over which you have fewer default permissions.

For example, the Home space may contain *business role pages*, that are provided to you by your application administrator. Business role pages are pushed to your view of the Home space based on your assigned application role. For example, if you are part of the Sales team, there may be a business role page in your view of the Home space that you and all the members of the Sales team can access.

> **See Also:** Section 7.1, "Working with Business Role Pages."

Additionally, there are *system pages*. System pages are typically utility pages that, in the Home space, either expose your personal view onto a given service, such as the **Documents** page or the **Activity Stream** page, or provide an application-wide function, such as the **Self-Registration** page.

> **See Also:** Section 7.3, "Working with System Pages."

Keep this in mind: though you own and operate your personal pages in the Home space, your application administrator sees all, and can access anyone's personal pages, no matter the security settings you put in place.

32.2 Registering Yourself with WebCenter Portal: Spaces

Your Spaces application administrator may provide the opportunity to self-register to the Spaces application. Self-registration enables you to create your own login credentials and enter the Spaces application from there forward as an authenticated user. The privileges of authentication are many: your own view of the Home space, access to other features based on your assigned user role, a broader range of available interactive features, to name a few.

> **Note:** Whether self-registration is available depends on how your Spaces application administrator configures the application.

To register yourself as a Spaces application user:

1. Open the Spaces application.

   For example:

   `http://host:port/webcenter`

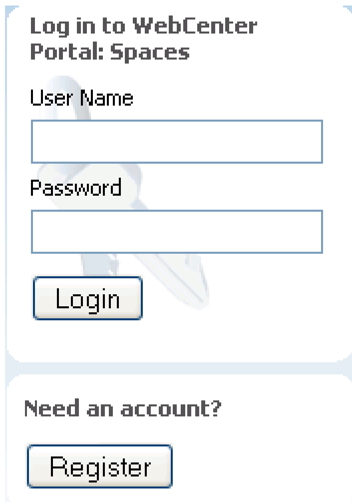
Where `<host>:<port>` refers to the host name and port number of the system where WebCenter Portal: Spaces is installed. By default, the Spaces application is installed on port 8888.

2. Click the **Register** button on the application **Welcome** page (Figure 32–1).

> **Note:** Your Spaces application administrator can customize the look and feel of the Login page, but the information depicted in Figure 32–1 is essentially the same whatever the customization.

> **See Also:** Advanced users can extend the Spaces application by customizing, for example, where the Login fields and buttons appear. For more information, see Section 7.3.2, "Customizing System Pages."

Figure 32–1 The Register Button on the Welcome Page

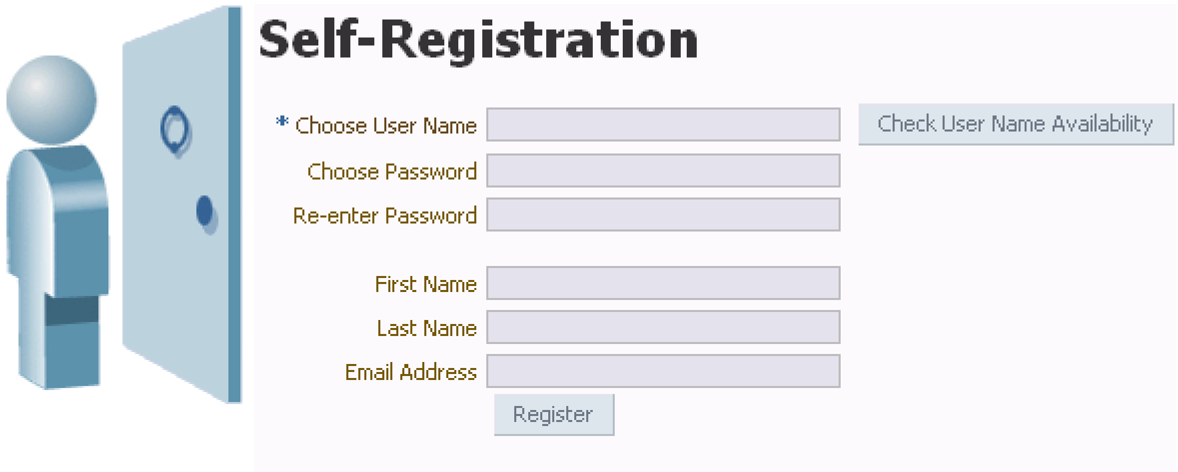


3. On the resulting **Self-Registration** page (Figure 32–2), enter your user information:

   Note that fields marked with an asterisk require a value.

   > **Tip:** Your application administrator can customize the Self-Registration page, so it may not appear as depicted in Figure 32–2.

Figure 32–2 WebCenter Portal: Spaces Self-Registration Page



Before you begin, you should know that the user name and password policy is set by the underlying identity store. Your application administrator may customize the **Self-Registration** page to include information that explains your organization's user name and password policy.

a. Enter your preferred user name in the **Choose User Name** field.

b. Click the **Check User Name Available** button to ensure the uniqueness of your chosen user name.

   If the name you entered is in use, provide another user name and test that. Continue this cycle until the check assures you that your entry is unique.

c. Provide a password in the **Choose Password** field.

d. Reenter the password in the **Re-enter Password** field.

e. Enter your first name in the **First Name** field.

f. Enter your last name (that is, your surname) in the **Last Name** field.

g. Enter your company email address in the **Email Address** field.

Note: You can create only one user account per email address.

---

4. Click the **Register** button.

   If the data you entered is accepted, a log-in dialog opens, enabling you to log in to the Spaces application.

Note: By default, if a user name with the same mail ID exists, when you click **Register**, a dialog opens informing you that the mail ID exists. The dialog includes a button for sending a message to the mail ID associated with the existing user name.

Because you are not yet authenticated, your message is sent to a public mail box, provided your application administrator has configured public mail credentials.

Note that this default behavior may be overridden by customizations provided by your portal developers.

32.3 Accessing the Home Space

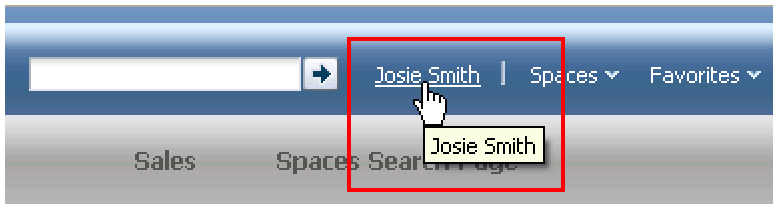
Depending on the navigation model, you may have a number of ways to access the Home space. The following are examples of some of these ways:

- Use the following URL:

  http://*host*:*port*/webcenter/spaces/home

- Click your user name where it appears as a link in the application, as shown in Figure 32–3.

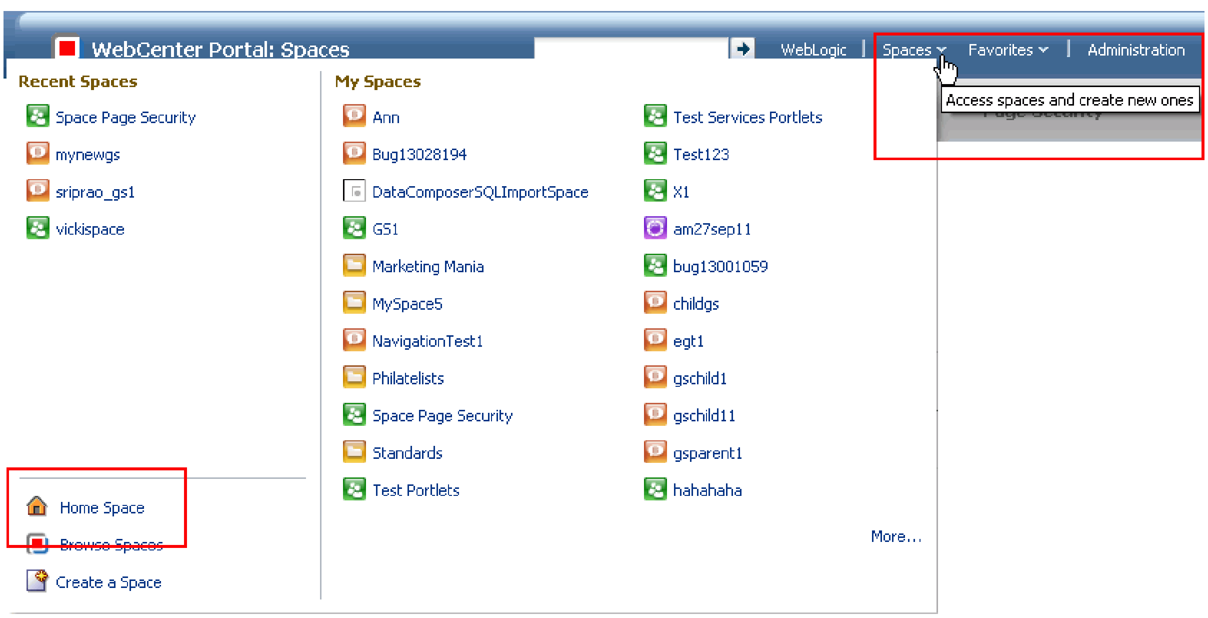
Figure 32–3 Example of a User Name as a Link



  This takes you to the **My Profile** page in the Home space.

- Click the **Spaces** menu, and select **Home Space** (Figure 32–4).

Figure 32–4 Home Space Option on the Spaces Switcher Menu



32.4 Working with Pages in the Home Space

Your application administrator can grant you permissions to create and manage pages in the Home space. Pages that you create in the Home space are your *personal pages*. You may also have access to pages created by others users, or by the application administrator, if you have been granted permissions by the page owners.

Working with personal pages in the Home space is no different than working with pages in any space. Refer to the tasks described in Section 51.11, "Working with Pages in a Space" to manage your view of pages in the Home space, and create and edit your personal pages.

32.5 Setting Page Creation Defaults for Personal Pages

If your Spaces application administrator has made the option available, you can set page creation defaults to reduce the number of steps required to create a personal page in the Home space. That is, you can specify the page style that is selected by default when you open the Create Page dialog. You can also select to bypass the Create Page dialog, which enforces the default page style.

Note: The page creation defaults an application administrator sets for business role pages also affect personal pages. For more information about application-level page creation defaults, see Section 7.1.2, "Setting Page Creation Defaults for Business Role Pages."

The settings you establish for your personal pages override any page creation settings that the application administrator sets.

To set personal page creation defaults:

1. Go to the Home space.

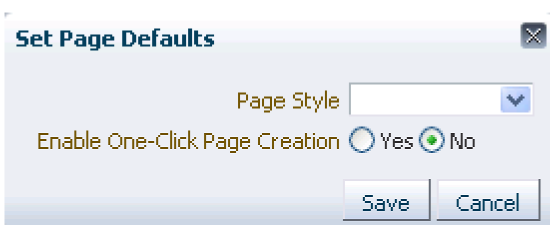
   For more information, see Section 32.3, "Accessing the Home Space."

2. In the Home space, open the **Personalize Pages** page.

   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

3. On the **Personalize Pages** page, click **Set Page Defaults** to open the Set Page Defaults dialog (Figure 32–5).

Figure 32–5 Set Page Defaults Dialog



See Also: For information about each page style, see Section 15.1, "What You Should Know About Page Styles."

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4. Select a page layout from the **Page Style** dropdown list.

   See Also: For information about the seeded page styles, see Section 15.1, "What You Should Know About Page Styles." Your application administrator may provide additional custom page styles or restrict page styles to a shorter list.

5. Select an option next to **Enable One-Click Page Creation**:

Yes: Bypass the Create Page dialog, and create all of your personal pages using the specified **Page Style**.

> **Tip:** When you skip the Create Page dialog, the new page has a generic name. For information about renaming pages, see Section 17.6, "Renaming a Page."

No: Display the Create Page dialog, with the specified **Page Style** selected as the default in the Create Page dialog for all of your personal pages. You can select a different style for your new personal pages

6. Click **Save** to save your changes and exit the dialog.

32.6 Exposing a Space Page in Your View of the Home Space

You can expose some space pages within your view of the Home space. For example, if you would like to keep close track of a space page named *Sales Results*, you can specify that this page should be available in your view of the Home space. See Section 17.9, "Exposing a Space Page in Your View of the Home Space."

32.7 Previewing and Printing an Application Page

Use the **Print Preview** option to preview and print pages that largely contain text. Print options are useful for pages where content is mainly text, such as the **Announcements** page, wiki and blog pages, and other custom pages comprised primarily of text.

Note that the **Print Preview** link may not be present if your application designer has not made it available.

> **See Also:** For information about the **Print Preview** link, see Section 21.2.27, "Print Preview."

To preview and print an application page:

1. Go to the space that contains the page of interest.

   > **See Also:** For more information, see Section 51.4, "Viewing and Accessing Available Spaces."

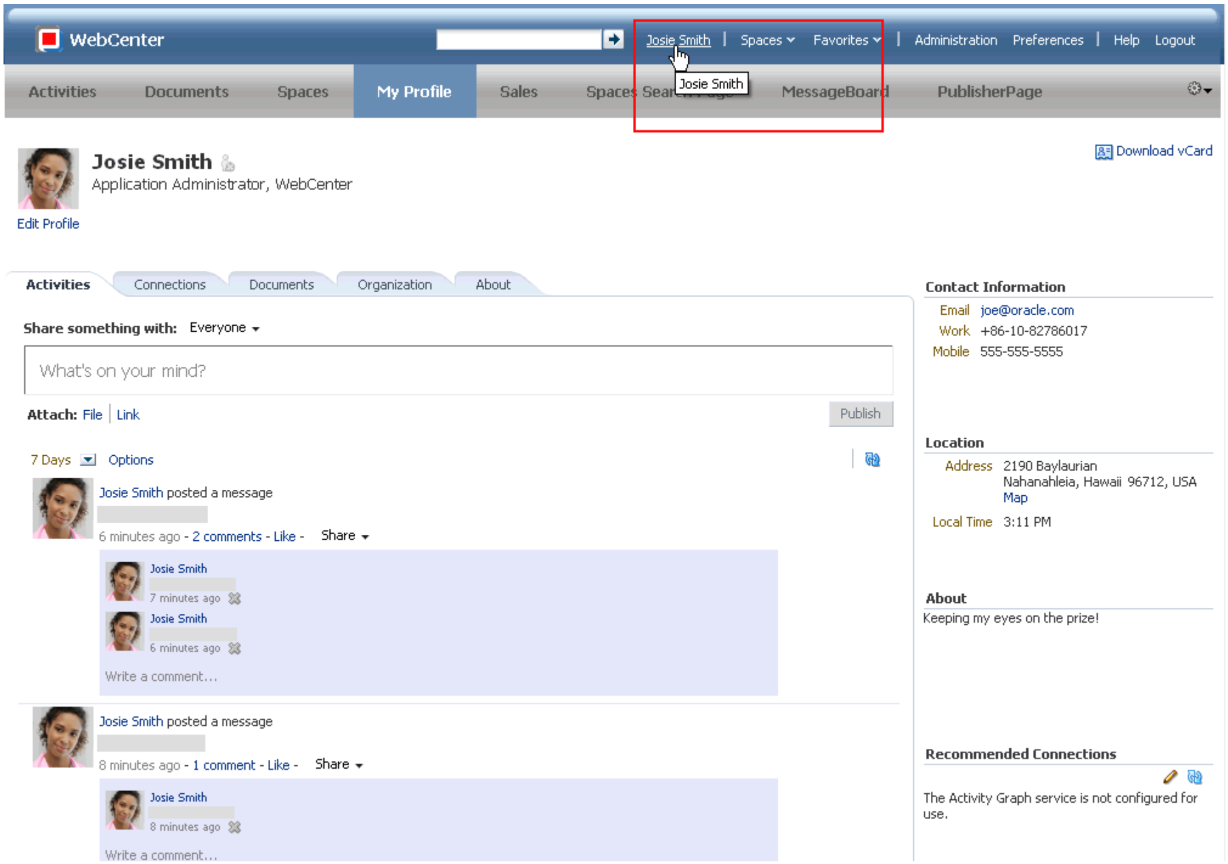
2. Click the page’s **Print Preview** link.

   A printable version of the page opens in a new browser tab or window. Print the page by pressing Ctrl-P, or simply preview the page.

32.8 Viewing Your Personal Profile Gallery

When you log in to the Spaces application, you may notice your user name at some position in the application user interface. Click this to open your personal profile gallery (Figure 32–6).

Figure 32–6 Profile Page



Your personal profile gallery presents a series of tabs, each devoted to information of interest to you:

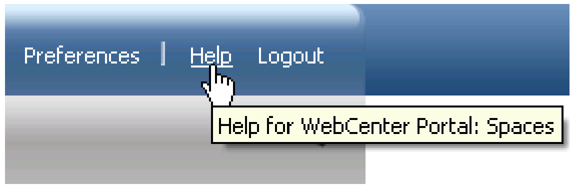
- **Activities**—Provides a Publisher, which you can use to make statements about your personal status and provide links to external or internal objects; and an Activity Stream, which streams information about the activities of you and your connections. For more information, see Chapter 35, "Tracking Your Connections' Activities," and Chapter 37, "Liking, Commenting On, and Sharing Objects."
- **Connections**—Provides a view of all of your connections and features for managing your connections. Chapter 34, "Creating Your Social Network."
- **Documents**—Provides a view of your personal document library. For more information, see Part X, "Working with Content".
- **Organization**—An organization chart that depicts you and the organization members directly associated with you. For more information, see Chapter 33, "Managing Your Profile."
- **About**—Your personal profile details. For more information, see Chapter 33, "Managing Your Profile."

32.9 Accessing WebCenter Portal: Spaces Online Help

Wherever you see a **Help** link or a **Help** button, click it to access help.

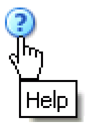
The **Help** link (Figure 32–7) opens the application's main help page. From there, you can navigate to topics of interest.

Figure 32–7 Help Link



Help icons, located throughout the application, open help topics that describe what is currently shown.

Figure 32–8 Help Icon



33

Managing Your Profile

In WebCenter Portal: Spaces, your Profile is a collection of useful data about you. It can include contact information, a photo, your location within the company hierarchy, and so on. The social networking capabilities in WebCenter Portal: Spaces enable you to view and manage your own Profile and to view the Profiles of others if they have made them available to you.

This chapter provides an overview of Profile-related features and steps you through the process of Profile viewing and managing. It includes the following sections:

- Section 33.1, "What You Should Know About Profile"
- Section 33.2, "Specifying a Management Chain for Organization View"
- Section 33.3, "Setting Profile Preferences"
- Section 33.4, "Adding a Profile Task Flow to a Page"
- Section 33.5, "Viewing and Editing Personal Profiles"
- Section 33.6, "Setting Profile Task Flow Properties"

Audience

This chapter is intended for users assigned an application role that includes, minimally, the permission `Update People Connections Data`. Users who plan to edit task flow properties must be assigned a role that also includes the permission `Pages: Edit Pages`. In a space (other than the Home space), users must be assigned a role that includes the permission `Edit Page Access and Structure`.

33.1 What You Should Know About Profile

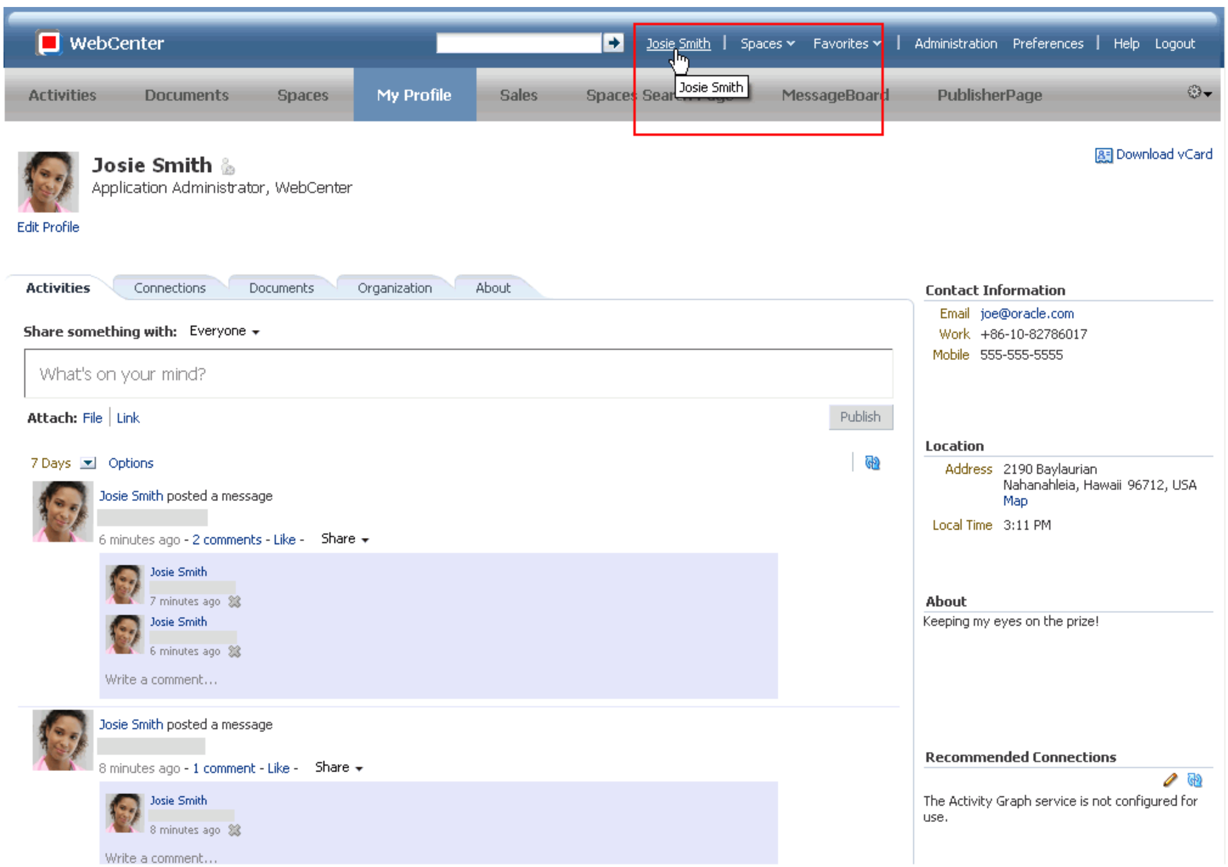
Profile provides a variety of views into your own and other users' personal profile information. Such information can include your mail address, phone number, office location, department, manager, direct reports, and so on. In a typical WebCenter Portal: Spaces installation, Profile takes the bulk of its information from the back-end identity store that provides your WebCenter application with its users (for more information, see Section 33.2, "Specifying a Management Chain for Organization View"). Additionally, Profile may offer opportunities for altering some of this information and for providing additional data not included in the identity store.

When you connect with other users, you give them access to your Profile, and gain access to theirs. You can control how much of your Profile a connection can view through Profile Preferences. For information about setting your Profile Preferences, see Section 33.3, "Setting Profile Preferences."

Before you access your Profile or Profile Preferences, your application administrator can set global application defaults that affect what all users may see and do with their own and other users' Profiles. For more information, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application."

You can access a view of a Profile, including your own, by clicking a user name wherever you see it in WebCenter Portal: Spaces. In addition to brief, popup views of user Profiles, you can see a full view of your Profile on the WebCenter Portal: Spaces **Profile** page. The **Profile** page is a business role page that is pushed to all authenticated users' views of the Home space (Figure 33–1).

Figure 33–1 Profile Page



Tip: Authenticated users are users who are logged in to WebCenter Portal: Spaces.

See Also: For information about business role pages, see Section 7.1, "Working with Business Role Pages."

By default, the **Profile** page presents a series of subpages that include your view of the Activity Stream (**Activities**), a detailed view of your connections (**Connections**), a view of the documents and folders in the Public folder of your personal document library (**Documents**), a chart view of your location within the organization (**Organization**), and a view of your full Profile (**About**).

Of all of these subpages, only **Organization** and **About** pull their content from the identity store and belong to the Profile family of task flows. The other subpages pull their content from other features and services as follows:

- **Activities** comes from the Activity Stream feature of the People Connections service (for more information, see Chapter 35, "Tracking Your Connections' Activities")
- **Connections** comes from the Connections feature of the People Connections service (for more information, see Chapter 34, "Creating Your Social Network")
- **Documents** comes from the Documents service (for more information, see Part X, "Working with Content".

Your portal designer can revise the default **Profile** business role pages to include additional components, remove existing components, and revise the page look and feel. Consequently, the page described here may finally have little to do with the final **Profile** page that you see.

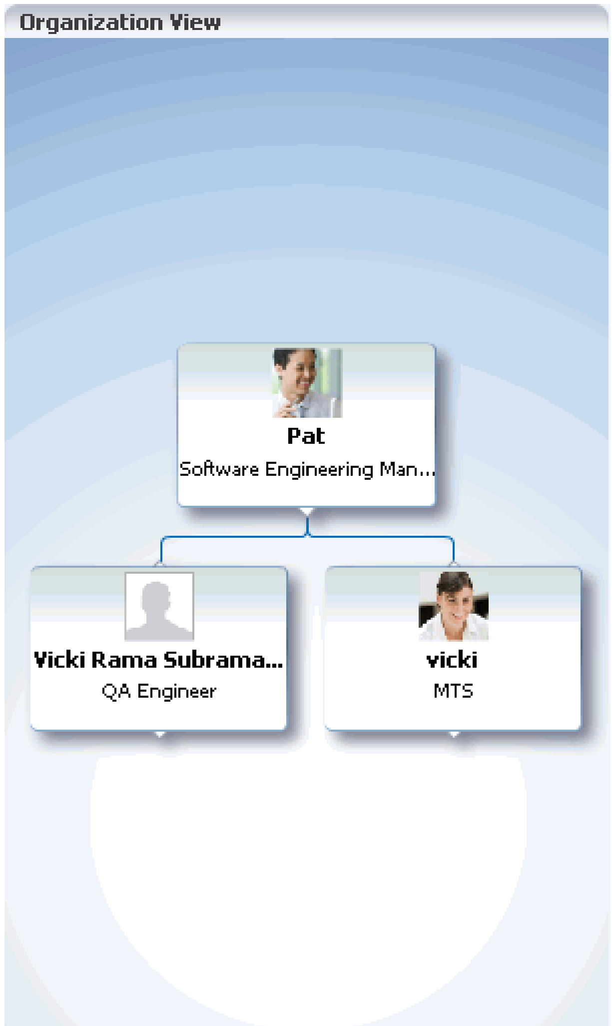
> **See Also:** For information about revising business role pages, see Section 7.1, "Working with Business Role Pages."

In addition to Profile business role pages, Profile provides several task flows that each offer a unique view of a user's Profile information. Provided you have edit permission on a page, you can place a Profile task flow wherever you find it of use.

Profile provides the following task flows:

- **Organization View** for a graphical depiction of the current user's position within the company—that is, a detail of the overall organization chart. In Organization View, you can cycle through three views of the current user's Profile information, including contact information; the user's address and the current time in the user's locale; and a summary About Me statement. It also provides a link to a full-blown profile of the current user (Figure 33–2).

Figure 33–2 Organization View Task Flow



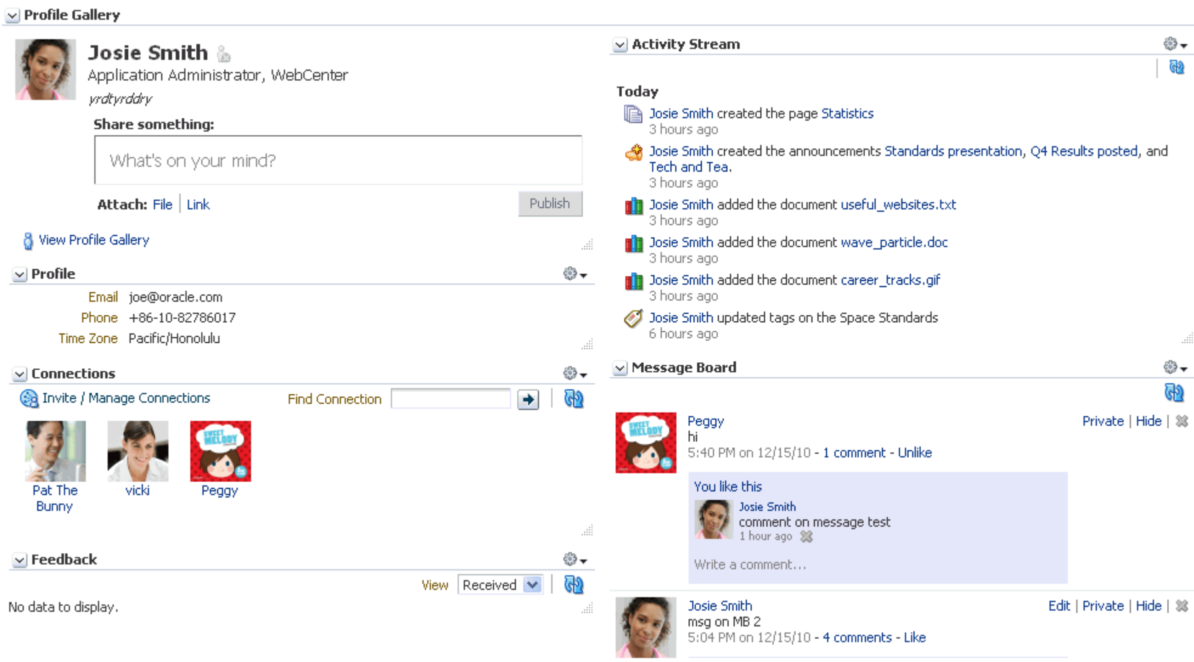
See Also: For information about enabling a hierarchical view of your organization, as depicted in Figure 33–2, see Section 33.2, "Specifying a Management Chain for Organization View."

- **Profile** for displaying a user's profile details, uploading a photo, and (if enabled) editing Profile details (Figure 33–3)

Figure 33–3 Profile Task Flow

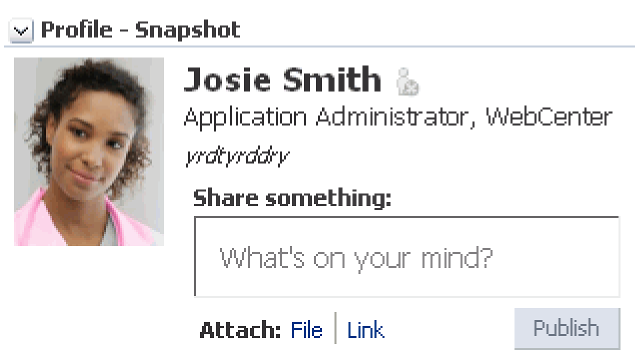
- **Profile Gallery** for accessing all of your social networking information from one view (Figure 33–4)

Figure 33–4 Profile Gallery Task Flow



- **Profile - Snapshot** for viewing a user photo and status message (Figure 33–5)

Figure 33–5 Profile - Snapshot Task Flow



> **See Also:** For information about working with Profile task flow features, see Section 33.5, "Viewing and Editing Personal Profiles."

Profile task flows have associated properties that you can use to control the appearance and behavior of a task flow instance. For example, you can use Profile properties to specify that the statements you enter into a Publisher task flow (see Section 36.1.1, "What You Should Know About Message Board") are included in those Profile views that provide a status message. You can control whether a Profile allows the display of a photo and whether the photo can be updated in page view mode.

> **See Also:** For more information about Profile properties, see Section 33.6, "Setting Profile Task Flow Properties."

For information about using Profile features, see Section 33.5, "Viewing and Editing Personal Profiles."

33.2 Specifying a Management Chain for Organization View

The Organization View task flow and the **Organization** subpage on a **Profile** page can provide a visualization of your management chain, that is, they can render a view of a manager and the manager's direct reports (Figure 33–6).

Figure 33–6 Organization View of a Manager and the Manager's Direct Reports

Organization views of a user profile are available on a user's **Profile** page—on the **Organization** subpage—and through the Organization View task flow. By default, the values that define the management chain for these organization views are blank. This means that managers are not automatically specified for users in the back-end identity store that provides user details.

> **Tip:** The value for **Manager** on the **Profile** page's **About** subpage is also defined by the methods suggested in this section.

For the management chain to be rendered in organization views, the back-end identity store that is used for WebCenter Portal: Spaces authentication must be set up in such a way that direct report users have a `manager` attribute. And the `manager` attribute must be defined as the Distinguished Name (DN) of their manager user (see "Example Embedded LDAP Configuration").

> **Tip:** In an LDAP environment, a user can be managed by only one person; in the same environment, a user can manage many people.

Example Embedded LDAP Configuration

You can specify a management chain within the Oracle WebLogic Server (WLS) embedded LDAP or within an external LDAP, such as Oracle Internet Directory (OID). Note, however, that the management chain you define through the embedded LDAP is for testing or proof of concept and not for production. For production, you must use an external LDAP, such as OID, for the identity store for WebCenter Spaces authentication.

> **See Also:** For more information, see the chapter "Configuring the Identity Store," in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*, or refer to the documentation provided with your LDAP implementation.

This example describes how to define a management chain within the embedded LDAP in WebLogic Server for testing or proof of concept.

> **Note:** The steps provided in this example are similar to those you take for an external LDAP. That is, you create an attribute (`manager`) and set a value on the attribute for each user. For this value, enter the DN of the selected user's manager.

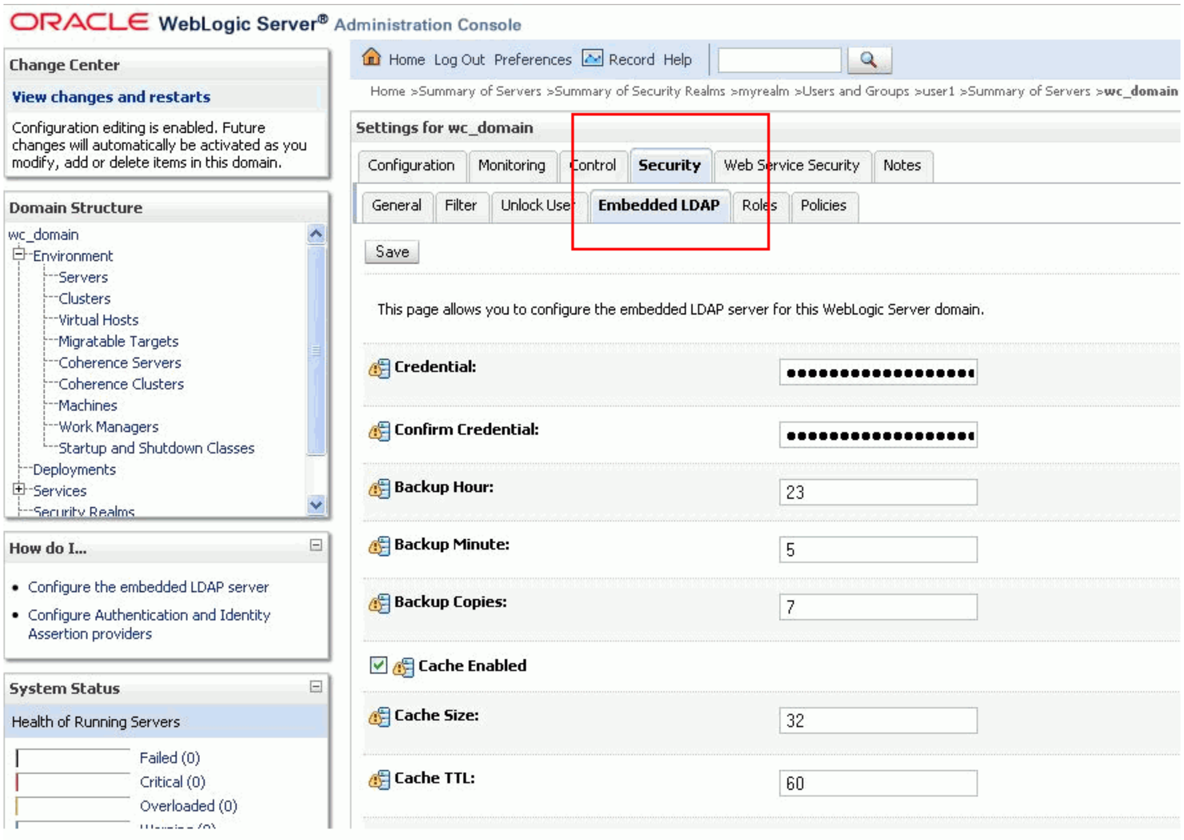
In this example, there are three users:

- `user1`
- `user2`
- `manager_user`

To define a management chain with these users:

1. Enable browsing of the embedded LDAP using an external viewer, such as Apache Directory Studio:
   a. Go to the WLS Administration Console, and log in as the administrator user.
   b. Click your domain, for example, wc_domain, then open the Security Tab and then the Embedded LDAP Sub-tab (Figure 33–7).

Figure 33–7 Oracle WebLogic Server Administration Console



c. Enter a value in the **Credential** field, and then reenter that value in the **Confirm Credential** field.

   Tip: The default credential is a randomly generated password. Set it to something memorable.

d. Restart your administration and managed servers.

2. Start up the LDAP viewer you selected in Step 1, and create a connection using the following details:

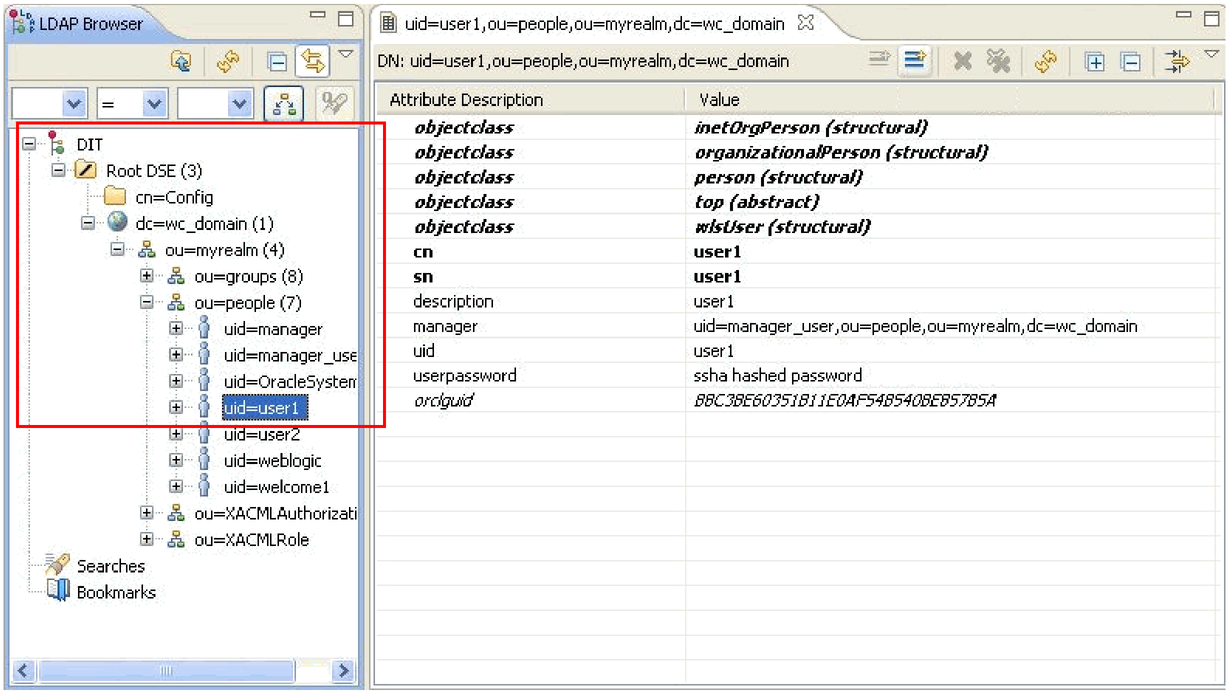
   - `hostname` (for example, `example.com`)
   - `port` (the WLS administration port, for example `7001`)
   - `Bind DN` (`cn=Admin`)
   - `Password` (that is, the credential you set in Step 1c)

3. Navigate to `user1` by finding the users within the DIT tree (Figure 33–8).

   For example, click in succession:

   - `dc=wc_domain`
   - `ou=myrealm`
   - `ou=people`
   - `uid=user1`

Figure 33–8 Selecting a User in the DIT Tree of an LDAP Browser



4. In the **Attribute Description** column, add a new attribute of type `manager`.

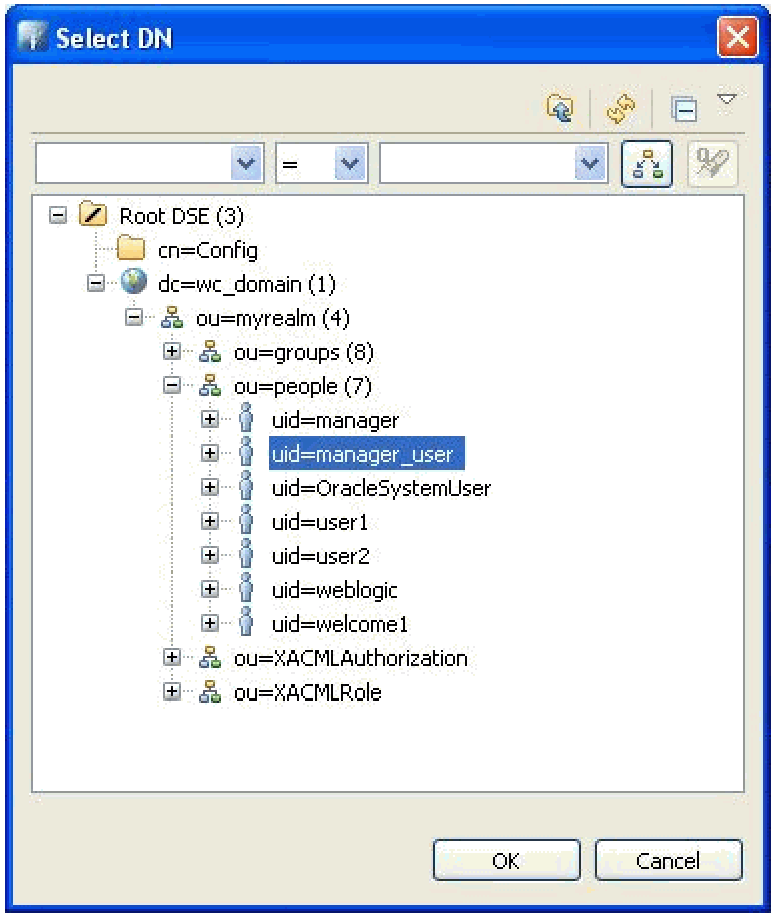
   Tip: Press Ctrl-Shift-+ to open the New Attribute dialog.

5. For the attribute value, select the DN for `manager_user` (Figure 33–9).

   For example, under the root, select in succession:

   - `dc=wc_domain`
   - `ou=myrealm`
   - `ou=people`
   - `uid=manager_user`

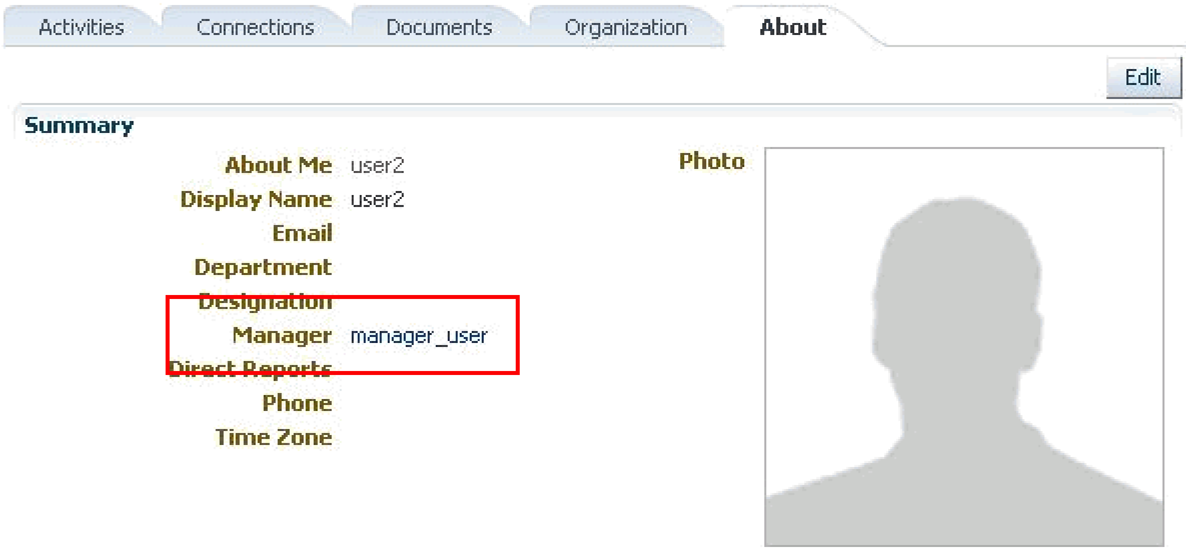
Figure 33–9 Select DN Dialog



6. Repeat Steps 3 through 5 for `user2`.

Now `user1` and `user2` are managed by `manager_user`. You can check this by logging in to WebCenter Portal: Spaces as `user1` and navigating to the About subpage of the My Profile page. The user `manager_user` is displayed as the manager (Figure 33–10).

Figure 33–10 About Subpage of the My Profile Page

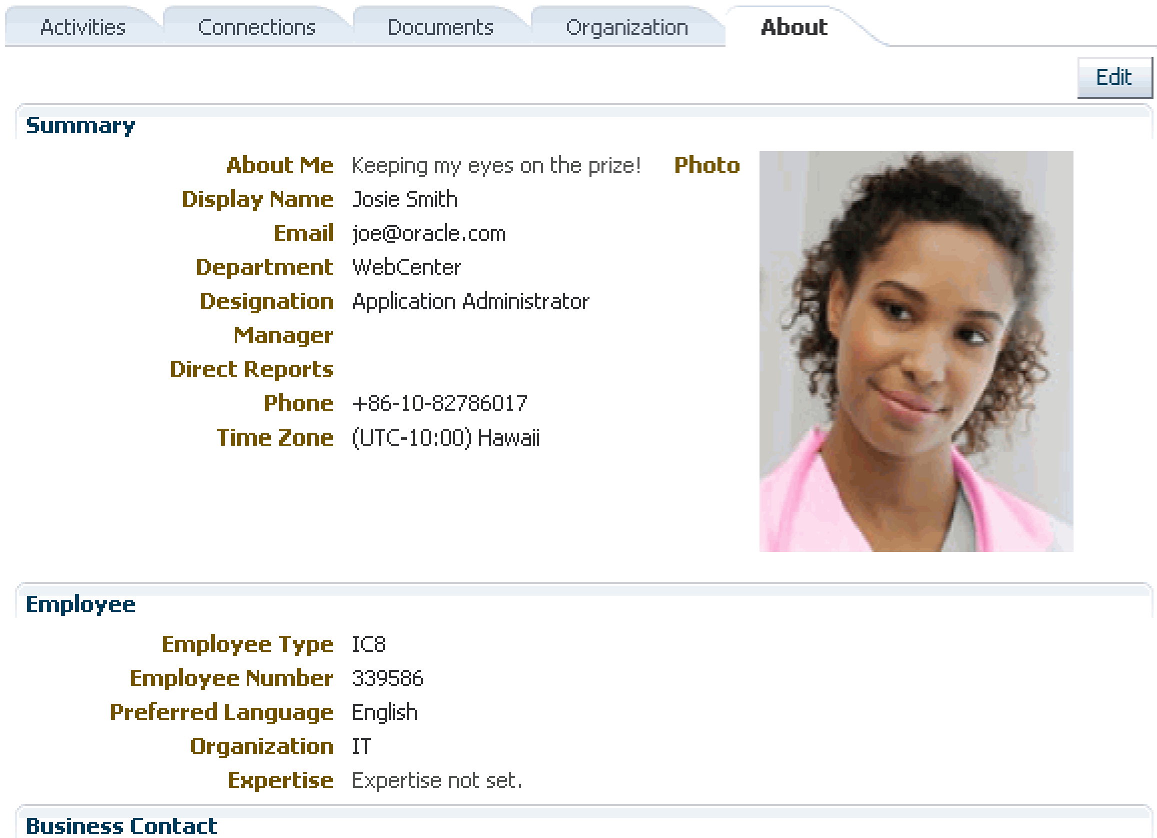


Tip: Click the value for **Manager** (in this example, `manager_user`) to view the manager's profile. Access the **Organization** subpage to see the organization view associated with the currently viewed profile (see Figure 33–6).

33.3 Setting Profile Preferences

The Profile details that are affected by your Preferences settings appear in your full Profile view, for example, in the Profile task flow and on the **About** subpage of the default **My Profile** business role page (Figure 33–11).

Figure 33–11 About Subpage on Profile Page



Full profiles are presented in four sections: **Summary**, **Employee**, **Business Contact**, **Personal Information**. Each section provides information related to the section heading. For example, **Summary** includes a collection of basic details, such as your user name, mail address, and office location.

Note: Your portal administrator can control every users' access to their own Profile information. For example, the administrator can control whether a Profile section is shown, whether a given section is editable, and who can see what Profile information. Consequently, the control you can exercise over your own Profile preferences is determined by the actions of your administrator. For more information, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application."

Only the administrator can control access to the Summary section. For more information, see Section 6.4.3.4, "Configuring Profile."

Use Profile preferences to specify who can view different types of information associated with your personal profile.

To set Profile preferences:

1. Open the Preferences dialog.
2. Click **People Connections** to display People Connections preferences.
3. Click the **Profile** tab to bring it forward (Figure 33–12).

Figure 33–12 Profile Preferences

For each section of your personal profile, specify the users who can view it:

- **Everyone**—All users, including users who are not logged in, can view the associated section of your Profile.
- **Authenticated Users**—Only users who are logged in can view the associated section of your Profile.
- **User's Connections**—Only you and your connections can view the associated section of your Profile.
- **User Only**—Only you can view the associated section of your Profile.

4. Click **OK**.

33.4 Adding a Profile Task Flow to a Page

For the steps to add a Profile task flow to a page, see Section 18.5, "Adding a Component to a Page."

33.5 Viewing and Editing Personal Profiles

Profile task flows provide quick access to contact and status information about you and your connections. This section describes how to use the features offered through Profile task flows. It includes the following subsections:

- Section 33.5.1, "Viewing Profile Details"
- Section 33.5.2, "Editing Your Personal Profile"
- Section 33.5.3, "Uploading and Updating a Personal Profile Picture"

See Also: Advanced users can extend WebCenter Portal: Spaces by customizing user Profile attributes. For more information, read the white paper, "Using WebCenter Portal: Spaces Extension Samples (11.1.1.4.0)," available on the Oracle Technology Network at `http://www.oracle.com/technetwork/index.htm`.

33.5.1 Viewing Profile Details

You can view your full profile details by clicking your user name, provided it appears in the application chrome. For example, in Figure 33–13 the user name `Josie Smith` appears at the top of the application.

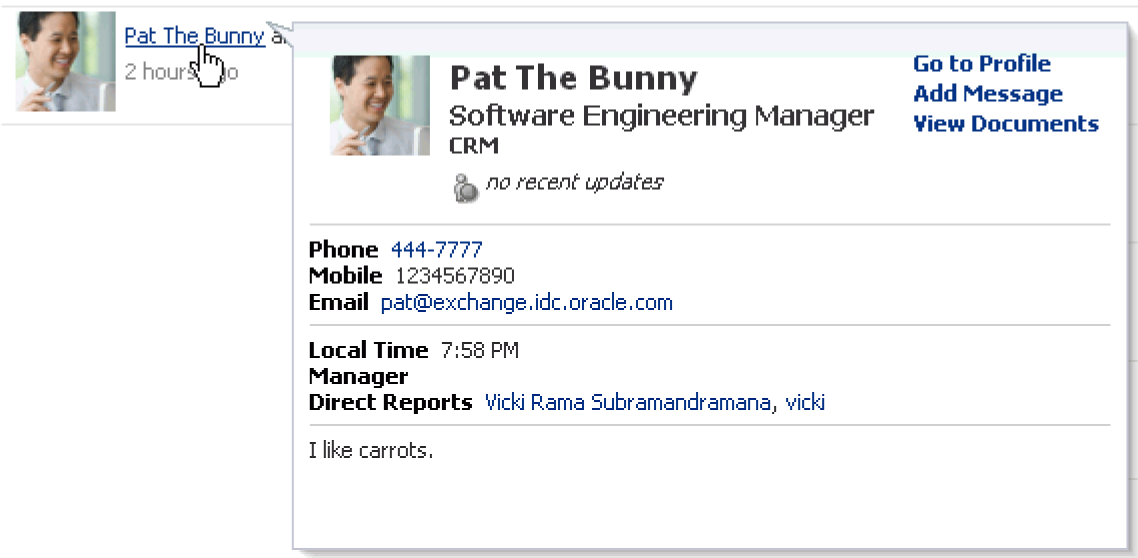
Figure 33–13 User Name at Top of Application

On the resulting page, click the **About** tab to view your full profile details (Figure 33–14).

Figure 33–14 About Subpage on Profile Page

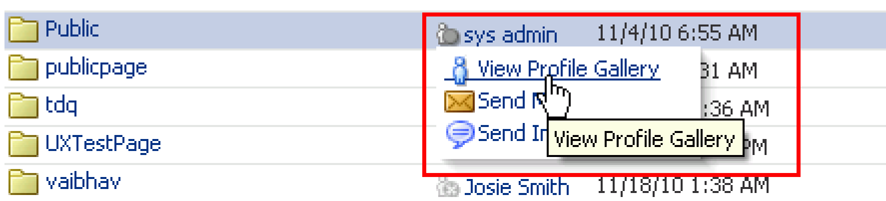
You can view summary profile details for yourself, all of your connections, and all of the members of the spaces for which you have access (through the Members task flow) simply by clicking a user name wherever it appears in the application context. Clicking a name opens a Profile popup (Figure 33–15).

Figure 33–15 Profile Popup



In some application contexts, such as in a Document Library or on an announcement, a context menu opens in lieu of a Profile popup. Click the user name and select **View Profile Gallery** from the resulting context menu (Figure 33–16) to access a view of the user's profile gallery.

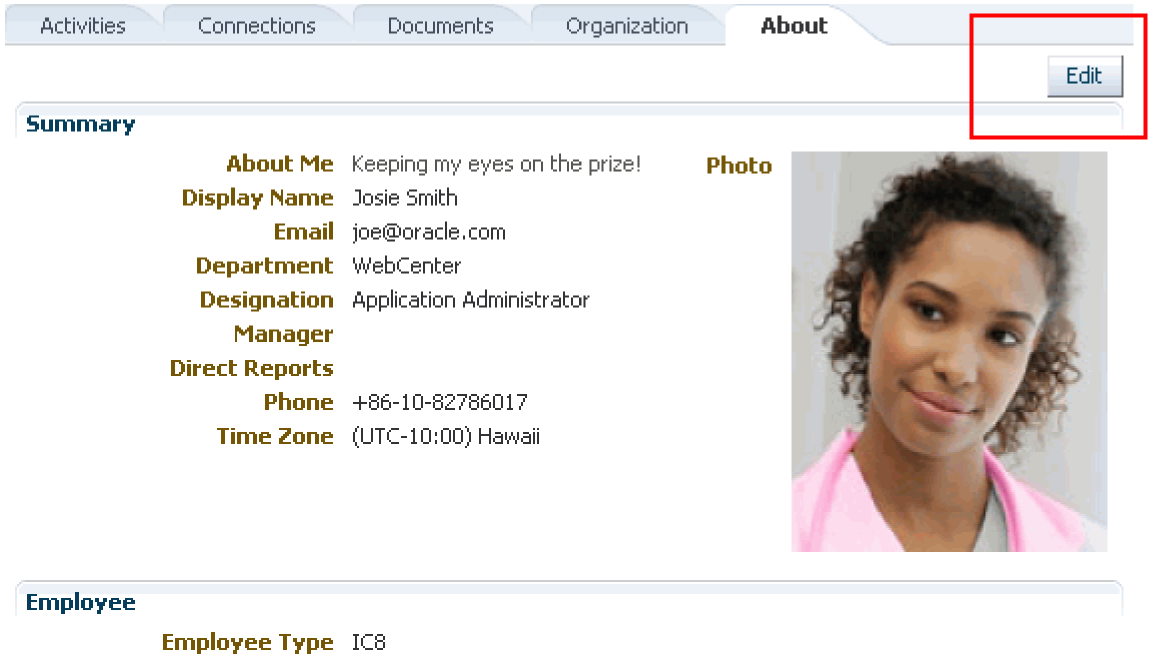
Figure 33–16 View Profile Gallery Option on the Documents Page



33.5.2 Editing Your Personal Profile

Your application administrator determines how much of your personal profile you may revise (for more information, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application."). When you have permission to revise your Profile, an **Edit** link is shown on the **Profile** page (Figure 33–17).

Figure 33–17 Edit Button on a Profile



Click the **Edit** button to open an edit view of your personal profile.

Note: Even when your application administrator has enabled the editing of a particular Profile section, all fields in that section may not be editable.

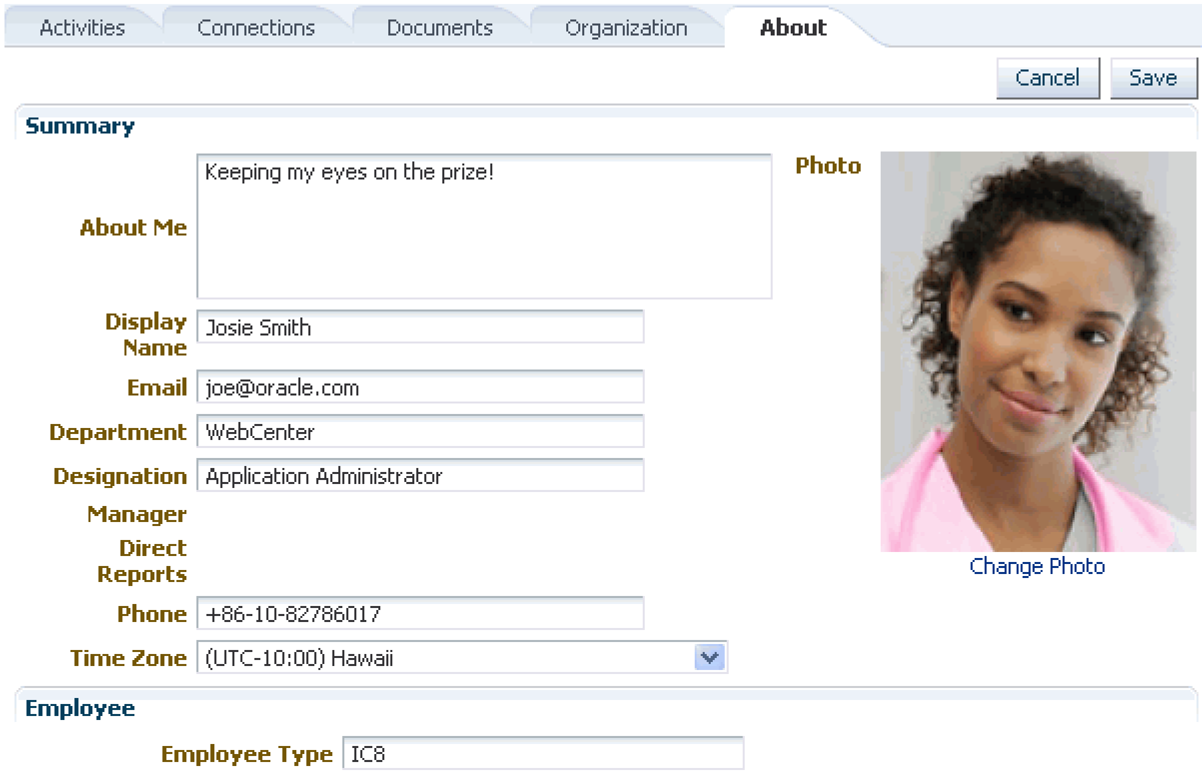
To edit your personal profile:

1. Open your **Profile** page.

   See Also: For more information, see Section 33.5.1, "Viewing Profile Details."

2. Click **Edit** to open your Profile in edit mode (Figure 33–18).

Figure 33–18 Profile in Edit Mode



3. Make your changes, and click **Save**.

33.5.3 Uploading and Updating a Personal Profile Picture

Provided the Profile task flow is configured to allow it, users with a personal Profile can upload or update their Profile image.

Note: The file must have the mime-type *image*, and cannot have the extension `*.ico`.

The task flow property `Allow photo upload` must be set to `#{true}`. For more information, see Section 33.6, "Setting Profile Task Flow Properties."

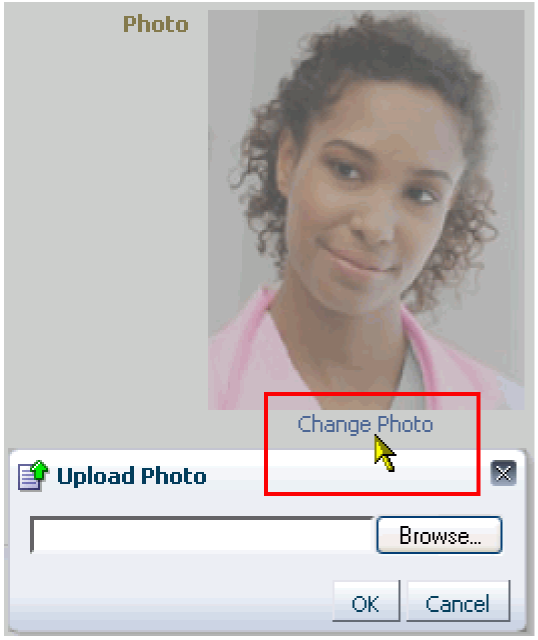
To upload or update your profile image:

1. Open your Profile page.

   See Also: For more information, see Section 33.5.1, "Viewing Profile Details."

2. Click the **Change Photo** link to open the Upload Photo dialog (Figure 33–19).

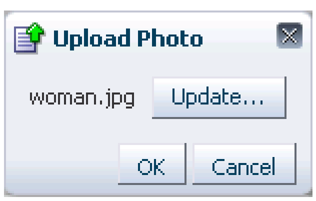
Figure 33–19 Change Photo Link and Upload Photo Dialog



3. Click **Browse** to locate and select a photo.
4. Click **OK** to complete the upload.

When you update your profile photo (as opposed to providing a new one), additional dialogs may come into play. When you click the **Change Photo** link, the Upload Photo dialog opens, displaying the name of the current file along with an **Update** button (Figure 33–20).

Figure 33–20 Upload Photo Dialog (Update Photo)

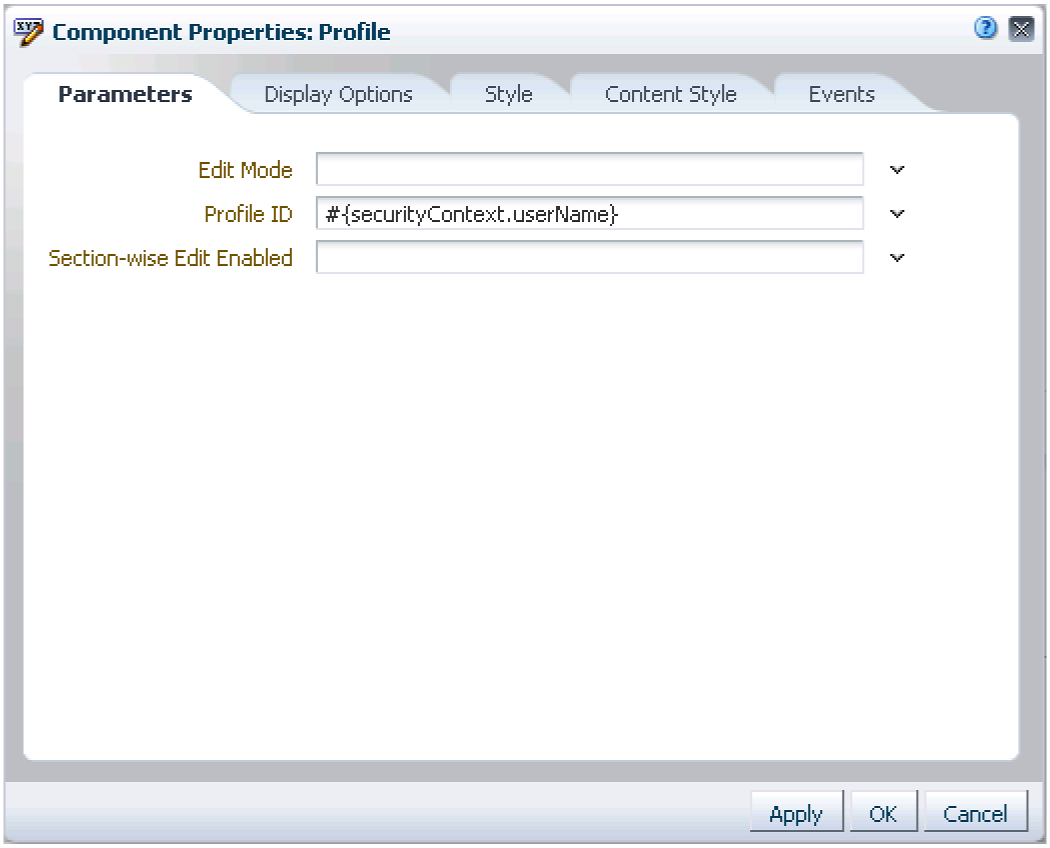


Click **Update** to open the Upload Photo dialog depicted in Figure 33–19, and complete the process as described in this section.

33.6 Setting Profile Task Flow Properties

Profile task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 33–21).

Figure 33–21 Profile Task Flow Component Properties Dialog



> **See Also:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties associated with Profile task flows and describe the properties available on the Parameters tab:

- Section 33.6.1, "What You Should Know About Profile Task Flow Properties"
- Section 33.6.2, "Profile Task Flow Parameters"
- Section 33.6.3, "Using Properties to Configure a Profile Task Flow Instance"

33.6.1 What You Should Know About Profile Task Flow Properties

When you set property values on a Profile task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the **Parameters** tab of the Component Properties dialog can affect the default task flow content. For descriptions of the parameters on this tab, see Section 33.6.2, "Profile Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

> **Note:** Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.
>
> EL validation is not performed on non-generic display options.

33.6.2 Profile Task Flow Parameters

Table 33–1 describes the parameters that are unique to Profile task flows.

Table 33–1 Profile Task Flow Parameters

Parameter	Description
`Allow photo upload`	A Boolean value representing whether the task flow exposes a means of uploading a profile photo Check for `#{true}`, deselect for `#{false}`. This parameter is associated with the Profile - Snapshot task flow.
`Allow status update`	A Boolean value representing whether the Profile - Snapshot task flow exposes a means of entering a personal status message Check for `#{true}`, deselect for `#{false}`. If status updates are enabled (`#{true}`), users can enter updates through an embedded Publisher task flow. For information about the Publisher task flow, see Section 37.3.3, "Sharing Items, Files, and URLs Through the Publisher Task Flow." This parameter is associated with the Profile – Snapshot task flow.
`Control Panel Shown`	A Boolean value representing whether a control panel for manipulating the style, alignment, and size of the content is available on the runtime task flow instance Check for `#{true}`, deselect for `#{false}`. This parameter is associated with the Organization View task flow.
`Edit Mode`	A means of determining whether to display Profile details as editable without requiring specific navigation to an editable view ■ Enter `#{true}` to always show Profile details in edit mode. ■ Enter `#{false}` to show Profile details as read-only. When the value is set to `#{false}`, users click an **Edit** button to take Profile details into edit mode. Note that this parameter is recognized only if the parameter `sectionWiseEditEnabled` is set to `#{false}`. This parameter is associated with the Profile task flow.

Table 33–1 (Cont.) Profile Task Flow Parameters

Parameter	Description
`Image Size`	The size of the Profile photo to show Values can be one of: `ORIGINAL`, `LARGE`, `MEDIUM`, `SMALL`. This parameter is associated with the Profile – Snapshot task flow.
`Org Bread Crumbs Shown`	A Boolean value representing whether a breadcrumbs component delineating the user's upward path in the organization hierarchy is shown Check for `#{true}`, deselect for `#{false}`. This parameter is associated with the Profile - Snapshot task flow.
`Profile Edit Link Shown`	A Boolean value representing whether a link to edit the user Profile is shown Check for `#{true}`, deselect for `#{false}`. This link does not perform any operation, but instead leads to a region navigation event (to the same view), which the consumer can listen to and perform navigation appropriately. Out of the box, the My Profile business role page, which contains the Profile - Snapshot task flow, is wired to the Profile task flow on the About subpage. Upon receiving a region navigation event from the Profile - Snapshot task flow, clicking the Edit link switches the Edit Mode parameter of the Profile task flow on the About subpage, effectively toggling the mode. Because of this out-of-the-box wiring, the Edit link works on the My Profile business role page. If you plan to expose the Profile Edit link, you must retain the code to listen to the region navigation event and provide the same type of wiring to the target task flow. This parameter is associated with the Profile - Snapshot task flow.
`Profile ID`	The ID of the user to display in the task flow The value for this parameter, `#{securityContext.userName}`, is set automatically. The value is an Expression Language expression that returns the name of the current user. For information about Expression Language expressions, see Appendix B, "Expression Language (EL) Expressions." This parameter is associated with the Profile task flow.
`Resource Id`	The ID of the user to display in the task flow The value for this parameter, `#{securityContext.userName}`, is set automatically. The value is an Expression Language expression that returns the name of the current user. For information about Expression Language expressions, see Appendix B, "Expression Language (EL) Expressions." This parameter is associated with the Profile Gallery task flow.

Table 33–1 (Cont.) Profile Task Flow Parameters

Parameter	Description
`Section-Wise Edit Enabled`	A means of enabling or disabling section-by-section edit capability on the task flow ■ Enter `#{true}` to enable section-by-section editing. An **Edit** button is shown on each editable Profile section. ■ Enter `#{false}` to disable section-by-section editing. One **Edit** button is shown for the whole task flow. This parameter is associated with the Profile task flow.
`User Id`	The ID of the user to display in the task flow The value for this parameter, `#{securityContext.userName}`, is set automatically. The value is an Expression Language expression that returns the name of the current user. For information about Expression Language expressions, see Appendix B, "Expression Language (EL) Expressions." This parameter is associated with the Organization View task flow.
`User Name`	The ID of the user to display in the task flow The value for this parameter, `#{securityContext.userName}`, is set automatically. The value is an Expression Language expression that returns the name of the current user. For information about Expression Language expressions, see Appendix B, "Expression Language (EL) Expressions." This parameter is associated with the Profile - Snapshot task flow.

33.6.3 Using Properties to Configure a Profile Task Flow Instance

This section provides examples of how you use property values to affect the behavior of a given task flow instance. It includes the following subsections:

- Section 33.6.3.1, "Change Profile Photo in Profile - Snapshot Task Flow"
- Section 33.6.3.2, "Post a Status Update"
- Section 33.6.3.3, "Expose Additional Controls in Organization View"
- Section 33.6.3.4, "Enable Continuous Edits of Profile Details"
- Section 33.6.3.5, "Setting Size of Profile Images in Profile - Snapshot Task Flow"
- Section 33.6.3.6, "Exposing Navigational Breadcrumbs in Profile - Snapshot"
- Section 33.6.3.7, "Enabling Section-By-Section Profile Editing"

33.6.3.1 Change Profile Photo in Profile - Snapshot Task Flow

Use the property `Allow photo upload` to enable users to upload their own Profile photos in an instance of the Profile - Snapshot task flow. Photos uploaded to Profile - Snapshot are persisted to all other Profile task flows that expose a photo.

To enable users to change their Profile photo in the Profile - Snapshot task flow:

1. Edit the properties of a Profile - Snapshot task flow instance.

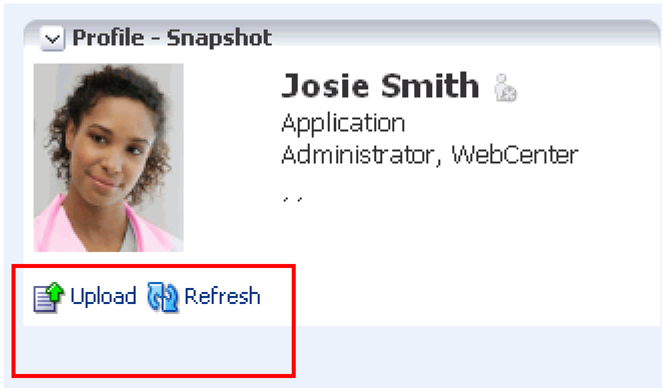
   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.

3. Provide a value for the property `Allow photo upload`:

   - Select the check box (`#{true}`) to enable users to change their Profile photo on the task flow instance. When you apply this change, **Upload** and **Refresh** controls appear close to the photo display area (Figure 33–22).

Figure 33–22 Upload and Refresh Icons on Profile - Snapshot Task Flow



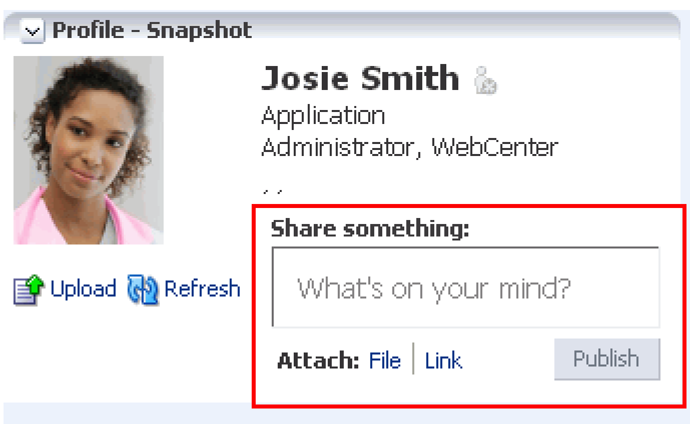
   - Deselect the check box (`#{false}`) to disable this feature.

4. Click **OK**.

33.6.3.2 Post a Status Update

Use the property `Allow Status Update` to show or hide a means of entering a personal status message in the Profile - Snapshot task flow. If status updates are enabled, users can enter their status messages through an embedded Publisher task flow (Figure 33–23).

Figure 33–23 Publisher Task Flow in Profile - Snapshot



> **See Also:** For information about the Publisher task flow, see Section 37.3.3.1, "What You Should Know About the Publisher Task Flow."

When this property is enabled, whenever the current user posts a status message using the Publisher task flow, it is also posted as a Profile status message to Profile - Snapshot, Profile Gallery, and Profile task flows.

To enable users to post a status update to their Profile:

1. Edit the properties of a Profile - Snapshot task flow instance.

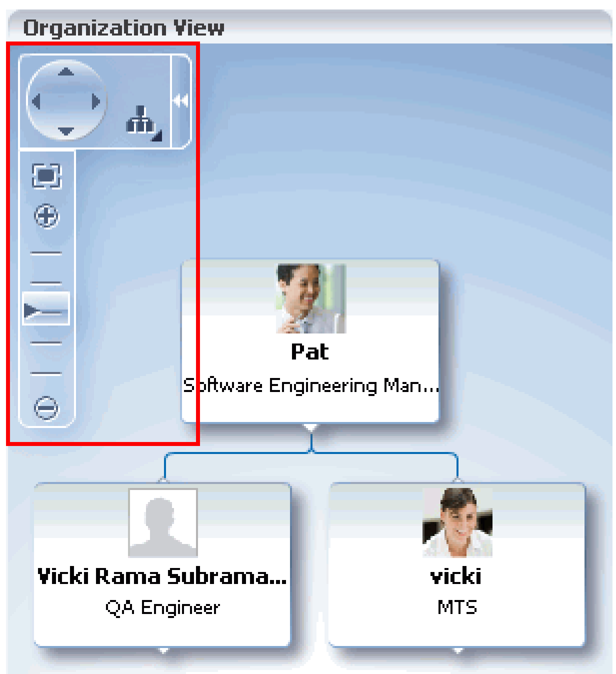
   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Provide a value for the property `Allow Status Update`:
   - Select the check box (`#{true}`) to expose controls for updating Profile status in the Profile - Snapshot task flow.
   - Deselect the check box (`#{false}`) to hide this feature.
4. Click **OK**.

33.6.3.3 Expose Additional Controls in Organization View

The Organization View task flow provides additional controls for manipulating your view of task flow content (Figure 33–24).

Figure 33–24 Control Panel Shown in Organization View



Use additional controls to zoom in and out and select a display format.

Use the property `Control Panel Shown` to expose these controls in an instance of the Organization View task flow.

To expose additional controls in an Organization View task flow:

1. Edit the properties of an Organization View task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Provide a value for the property `Control Panel Shown`:
   - Select the check box (`#{true}`) to expose the Organization View control panel.
   - Deselect the check box (`#{false}`) to disable this feature.
4. Click **OK**.

33.6.3.4 Enable Continuous Edits of Profile Details

Use the property `Edit Mode` to enable users to edit Profile details without having to specifically enter an edit mode. Users navigate to the task flow instance and make changes to editable fields without having to first click an **Edit** button or link.

> **Note:** This parameter is recognized only if the parameter `sectionWiseEditEnabled` is set to `#{false}`. For more information, see Section 33.6.3.7, "Enabling Section-By-Section Profile Editing."

To enable continuous edits of Profile details:

1. Edit the properties of a Profile task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Provide a value for the property `Edit Mode`:
   - Enter `#{true}` to always show Profile details in edit mode.
   - Enter `#{false}` to disable this feature. When the value is set to `#{false}`, users click an **Edit** button to take Profile details into edit mode.
4. Click **OK**.

33.6.3.5 Setting Size of Profile Images in Profile - Snapshot Task Flow

Use the property `Image Size` to specify the display size of images that are uploaded through a Profile - Snapshot task flow. The value you enter affects the size of the photo in only the given task flow instance. No other types of Profile task flows and no other task flow instances are affected.

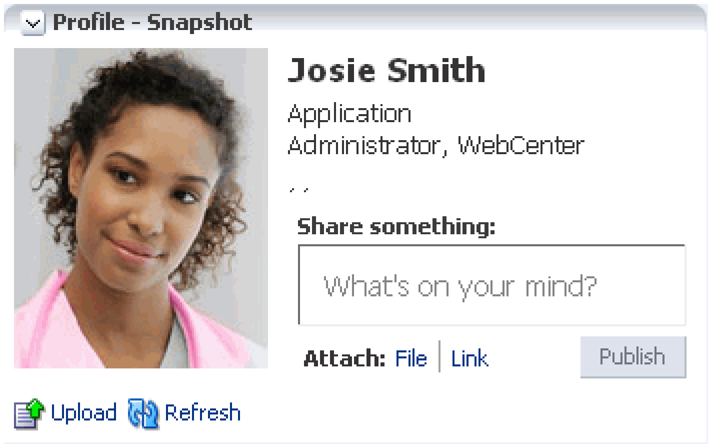
To set the size of a Profile image in the Profile - Snapshot task flow:

1. Edit the properties of a Profile - Snapshot task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

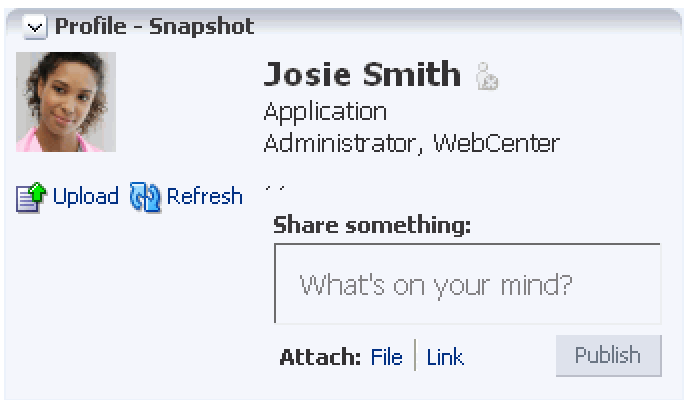
2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Enter a value for the property `Image Size`:
   - `ORIGINAL` (Figure 33–25)

Figure 33–25 Image Size Set to ORIGINAL



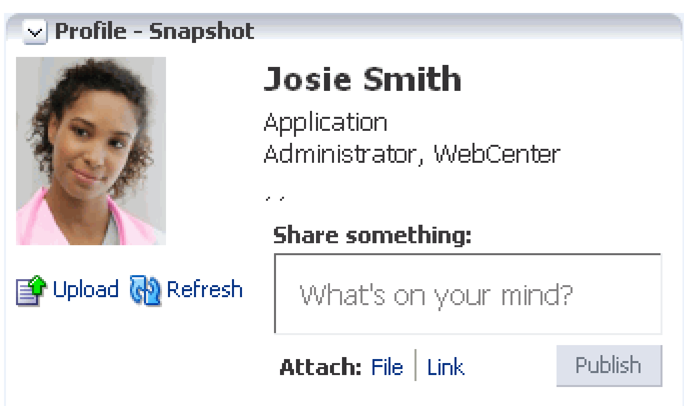
- `SMALL` (Figure 33–26)

Figure 33–26 Image Size Set to SMALL



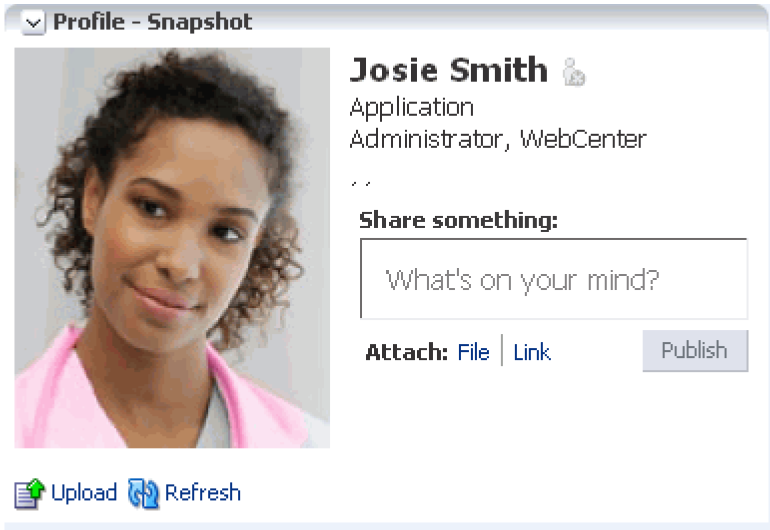
- `MEDIUM` (Figure 33–27)

Figure 33–27 Image Size Set to MEDIUM



- LARGE (Figure 33–28)

Figure 33–28 Image Size Set to LARGE

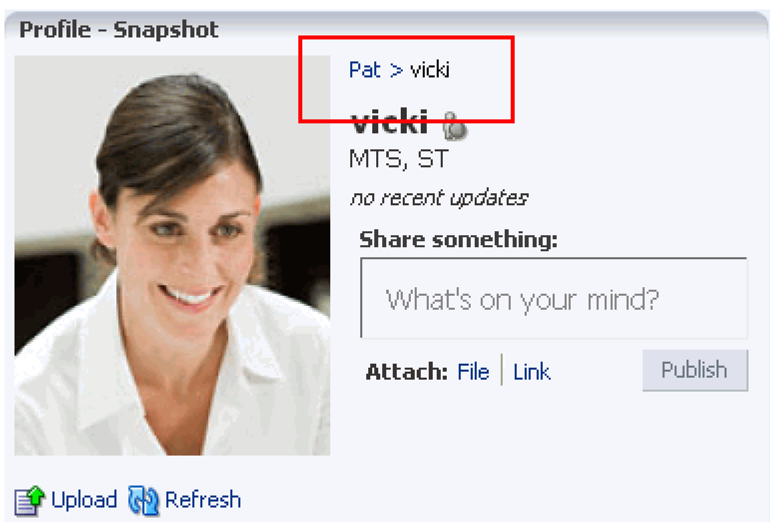


4. Click **OK**.

33.6.3.6 Exposing Navigational Breadcrumbs in Profile - Snapshot

Use the property `Org Bread Crumbs Shown` to enable the display of breadcrumbs that visualize the current users position in the organization hierarchy (Figure 33–29).

Figure 33–29 Breadcrumbs in Profile - Snapshot Task Flow



Users can click a name in the hierarchy to navigate to a view of that user's Profile.

To expose navigational breadcrumbs in a Profile - Snapshot task flow:

1. Edit the properties of a Profile - Snapshot task flow instance.

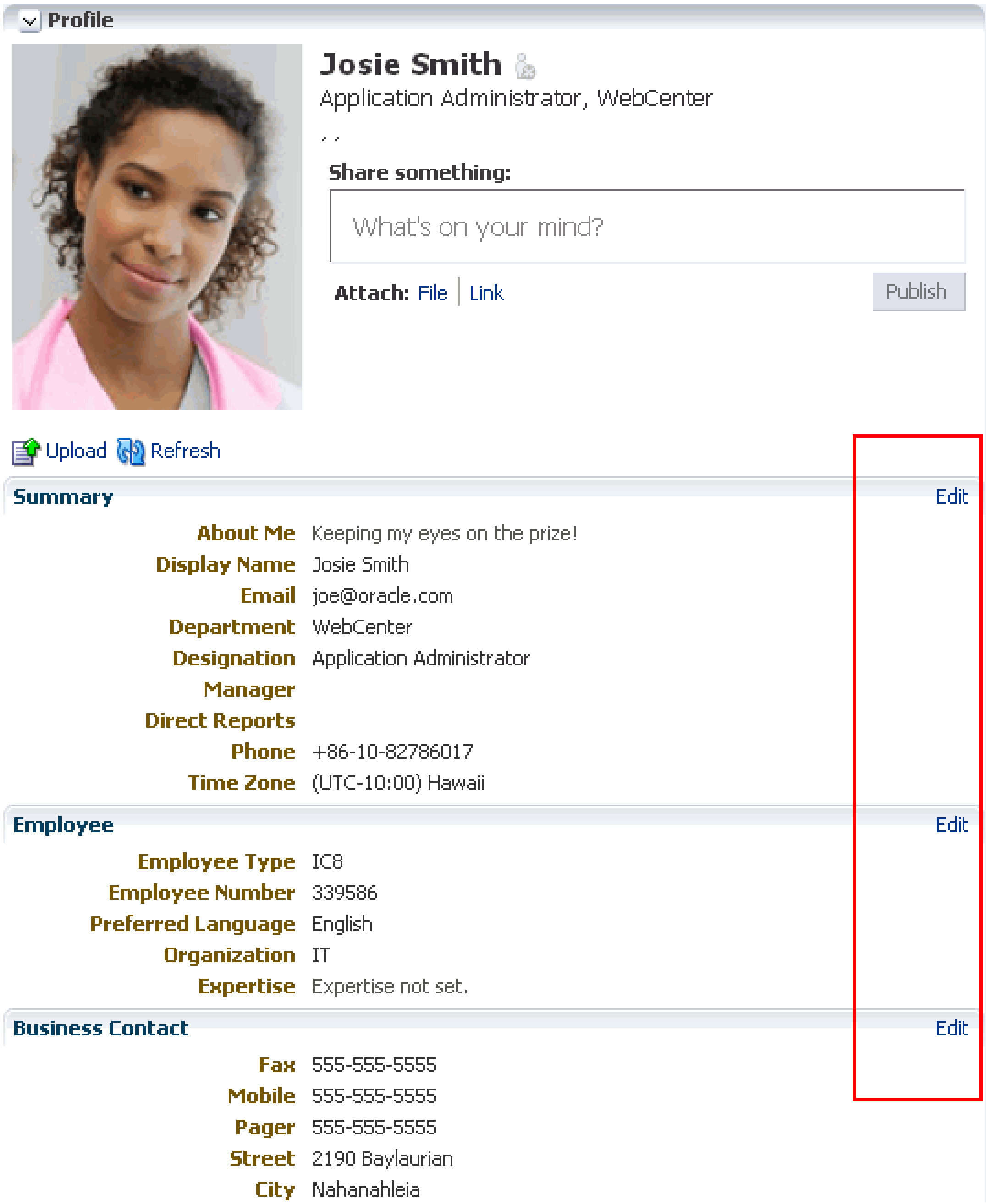
> **See Also:** For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Set a value for `Org Bread Crumbs Shown`:
   - Select the check box (`#{true}`) to expose hierarchical breadcrumbs.
   - Deselect the check box (`#{false}`) to disable this feature.
4. Click **OK**.

33.6.3.7 Enabling Section-By-Section Profile Editing

Use the `Section-Wise Edit Enabled` property to specify whether section-by-section editing is enabled, exposing **Edit** buttons on each editable section of a Profile task flow instance, or disabled, exposing only a single **Edit** button for the entire Profile (Figure 33–30).

Figure 33–30 Section-Wise Edit Enabled Parameter Enabled



Note: Whether Profile details are editable in all Profile task flow instances is determined by your application administrator. For more information, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application."

To enable section-by-section editing in a Profile task flow instance:

1. Edit the properties of a Profile task flow instance.

See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Set a value for `Section-Wise Edit Enabled`:
   - Enter (`#{true}`) to enable section-by-section editing of the Profile task flow instance. **Edit** buttons are shown on each details section.
   - Deselect the check box (`#{false}`) to disable section-by-section editing of the Profile task flow instance. One **Edit** button is shown for all Profile details.
4. Click **OK**.

34

Creating Your Social Network

In WebCenter Portal: Spaces, Connections provides a means of establishing a social network that is comprised of your work friends and associates. Once you have connected with others, you can set up your working environment to provide different levels of access to those who are and are not connected to you. For example, you can enable access to your views of Profile, Message Board, Activity Stream, and Feedback to just your connections, leaving the unconnected without access. For Message Board and Feedback, you can give everyone view access, but limit post access to just your connections or to a limited set of your connections through a connections list.

This chapter provides an overview of Connections task flows and steps you through the tasks you can accomplish using them. It includes the following subsections:

Audience

This chapter is intended for users assigned an application role that includes, minimally, the permission `People Connections: Connect with People`. To work with connections lists, users must also be granted the permission `People Connections: Update People Connections Data`.

Users who plan to edit task flow properties must be assigned a role that also includes the permission `Edit Pages`. In a space (other than the Home space), users must be assigned a role that includes the permission `Edit Page Access and Structure`.

34.1 What You Should Know About Connections

Connections provides a means of collecting your business friends and contacts into a social network. It furnishes tools for managing your own connections and viewing the connections of others. Using People Connections Preferences, you can grant differing levels of access to those who are and are not your connections. For example, you can limit view privileges on your Profile to just your connections or enable your connections to view certain sections of your Profile, while hiding those sections from users who are not your connections.

> **See Also:** For information about setting your Connections Preferences, see Section 34.2, "Setting Connections Preferences."

When you connect with other users, you give them access to your People Connections views, and gain access to theirs.

Note: The People Connections service encompasses Connections, Profile, Activity Stream, Message Board, and Feedback. For more information, see:

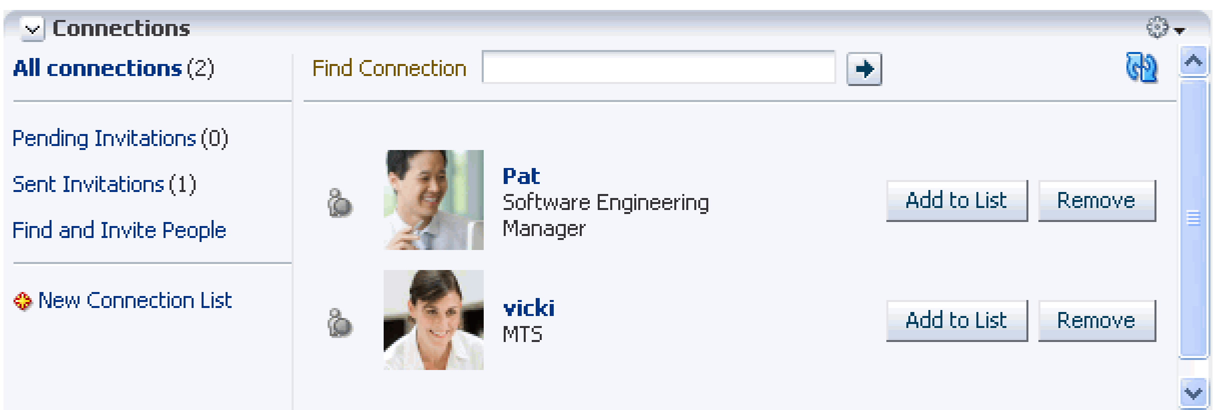
- Chapter 33, "Managing Your Profile"
- Chapter 35, "Tracking Your Connections' Activities"
- Chapter 36, "Posting and Managing Messages and Feedback"

Before you begin to build your social network, your application administrator can set global application defaults that affect what all users may see and do with their own and other users' connections. For more information, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application."

WebCenter Portal: Spaces provides the following Connections task flows:

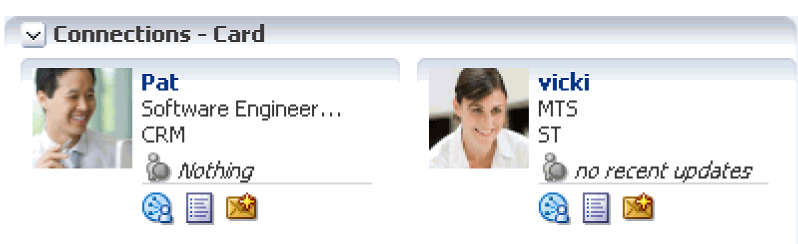
- **Connections** for viewing and managing your connections, creating connections lists, and sending and responding to invitations to connect (Figure 34–1)

Figure 34–1 Connections Task Flow



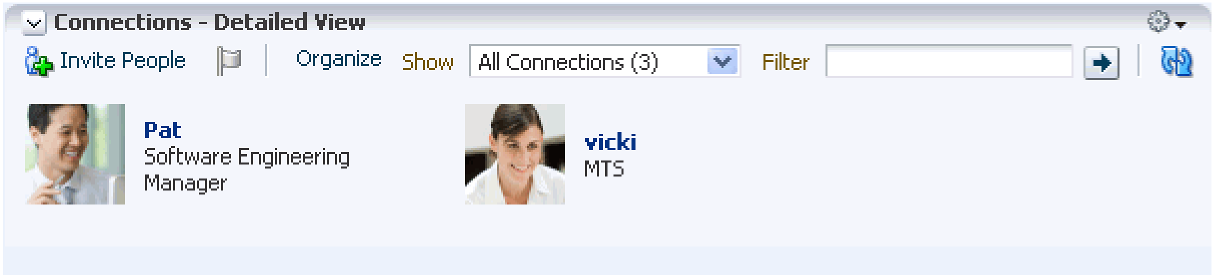
- **Connections - Card** for photos, status messages, and instant contact options to your connections (Figure 34–2)

Figure 34–2 Connections - Card Task Flow



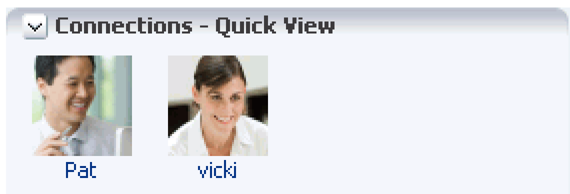
- **Connections - Detailed View** for photos and quick access to your connections and to features for inviting new connections, managing existing connections, and organizing your connections into lists (Figure 34–3)

Figure 34–3 Connections - Detailed View Task Flow



- **Connections - Quick View** for photos and quick access to your connections (Figure 34–4)

Figure 34–4 Connections - Quick View Task Flow



Connections task flows have associated properties that you can use to control the appearance and behavior of a task flow instance. For example, you can use Connections properties to specify the number of connections to show or the number of rows to show in Connections - Card and Connections - Quick View task flows.

> **See Also:** For more information about Connections properties, see Section 34.5, "Setting Connections Task Flow Properties."

For information about using Connections features, see Section 34.4, "Setting Up Your Social Network."

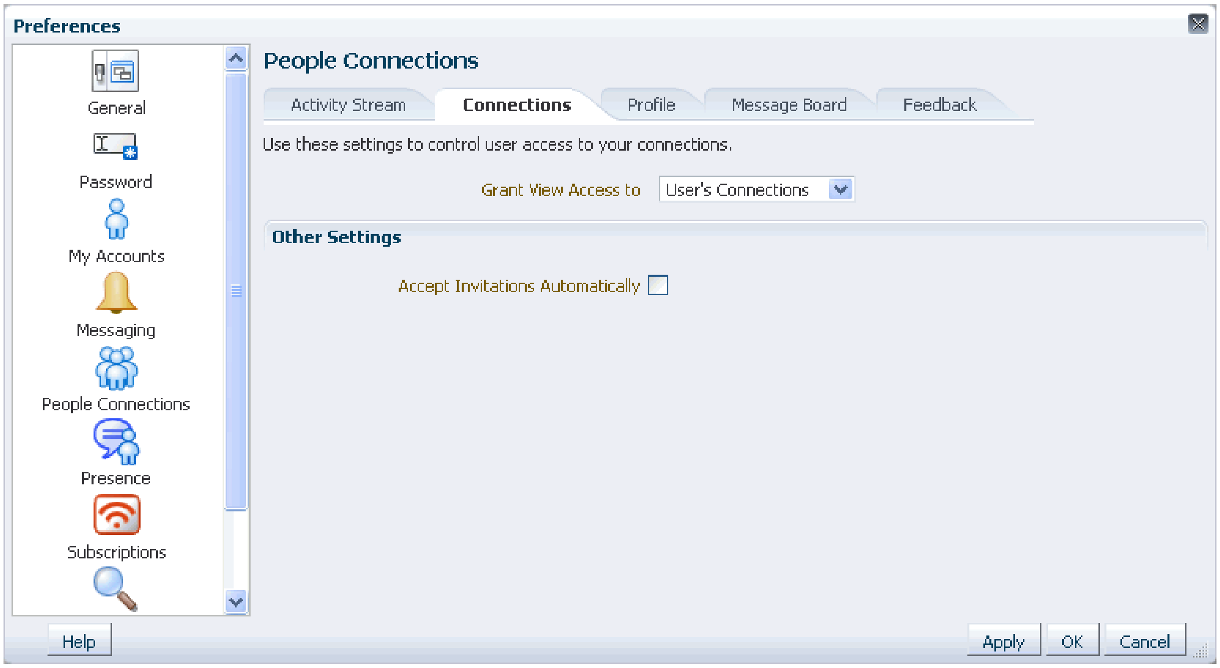
34.2 Setting Connections Preferences

You use Connections Preferences to specify who can view information about the people you have connected with and whether to accept invitations to be others' connections automatically.

To set Connections preferences:

1. Click the **Preferences** link next to the **Administration** link. This opens the Preferences dialog.
2. Click **People Connections** to display People Connections preferences.
3. Click the **Connections** tab to bring it forward (Figure 34–5).

Figure 34–5 Connections Preferences



4. From the **Grant View Access to** dropdown list, select the users who can view your list of connections:

   - **Everyone**—All users, including users who are not logged in, can see information about your connections.
   - **Authenticated Users**—Only users who are logged in can view your connections.
   - **User's Connections**—Only you and your Connections can view your connections.
   - **User Only**—Only you can view your connections.

   Note: The **Grant View Access to** dropdown is disabled in your view if the administrator disables user override for these settings in Connections configuration settings. For more information, see Section 6.4.3.3, "Configuring Connections."

   ---

5. Select **Accept Invitations Automatically** to automatically accept invitations to connect with another user.

   Deselect this check box to leave yourself the option of accepting, refusing, or ignoring an invitation to connect with another user.

6. Click **OK**.

34.3 Adding a Connections Task Flow to a Page

For the steps to add a People Connections service task flow to a page, see Section 18.5, "Adding a Component to a Page."

34.4 Setting Up Your Social Network

Connections provides the core features for building and visualizing your social network. Use Connections task flows to invite other users to connect, to accept connection invitations, to create connections lists, and to remove obsolete connections.

Note: The level of access you have to a connection is determined by the People Connections defaults set by the application administrator, a given connection's People Connections Preference settings, and properties set on a Connections task flow instance.

For information about Connections Preferences, see Section 34.2, "Setting Connections Preferences." For information about People Connections defaults set by the application administrator, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application." For information about Connections task flow properties, see Section 34.5, "Setting Connections Task Flow Properties."

This section provides information about using Connections to set up and manage your personal social network. It contains the following subsections:

- Section 34.4.1, "Viewing Your Connections"
- Section 34.4.2, "Inviting Others to Connect"
- Section 34.4.4, "Responding to Invitations to Be a Connection"
- Section 34.4.5, "Creating and Managing Connections Lists"
- Section 34.4.6, "Removing a Connection"

34.4.1 Viewing Your Connections

You can view your connections in any Connections task flow. One of these is always available on the **Connections** page, which you can navigate to by clicking your user name wherever it appears in the application. In large lists of connections, you can use a search feature to locate a particular connection.

This section describes how to access the Connections page and view or search through your connections. It includes the following subsections:

- Section 34.4.1.1, "Viewing Your Connections"
- Section 34.4.1.2, "Searching Through Your Connections"

34.4.1.1 Viewing Your Connections

To view your connections:

1. Go to the Home space, and open your profile page, for example, by clicking on your user name in the UI.

   You can also use the following URL to navigate to a Profile page:

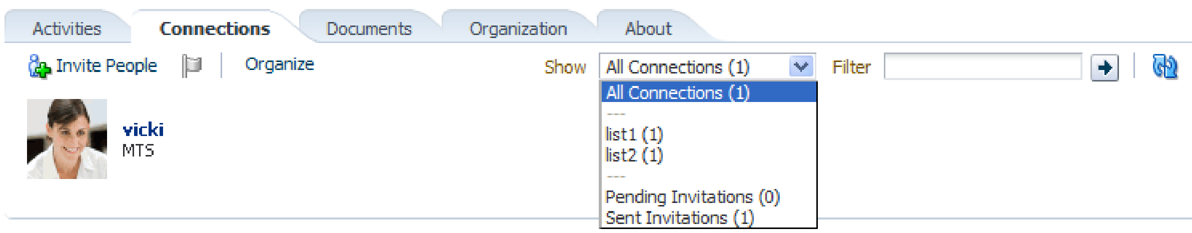
   ```
   http://host:port/webcenter/spaces/profile/userName
   ```

Tip: For *userName*:

- When *userName* matches the current user or is not specified, this URL navigates to your view of the Profile page.
- When *userName* is not the current user's, it navigates to the specified user's view of the Profile page.

2. On the resulting page, click the **Connections** tab to bring it forward (Figure 34–6).

Figure 34–6 Connections Tab on Profile Page



3. From the **Show** dropdown, select **All Connections**.

34.4.1.2 Searching Through Your Connections

The Connections search feature provides an efficient way to locate a particular connection in an otherwise long list of connections.

To search through your connections:

1. Go to the **Connections** page.

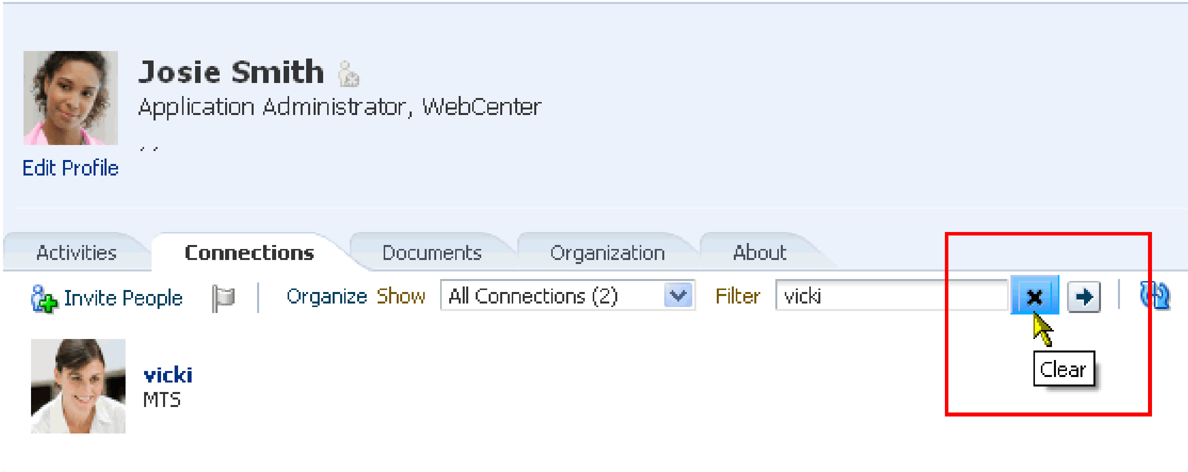
   See Also: For more information, see Section 34.4.1.1, "Viewing Your Connections."

2. From the **Show** dropdown, select **All Connections**.
3. In the **Filter** field, enter the user name of the connection, and click the **Find connection** icon next to the field.

   Tip: Click a connection name to open a Profile dialog and view profile details.

To exit the search, click the **Clear** icon that appears to the right of the **Filter** field (Figure 34–7).

Figure 34–7 Clear Icon Next to Filter Field



34.4.2 Inviting Others to Connect

Connecting to another user potentially provides view access to that user's personal Profile and Activity Stream, and view and post access to the user's Message Board. The level of access you have to a connection is determined by the People Connections defaults set by the application administrator, the individual user's People Connections Preference settings, and properties set on the task flow instance.

> **See Also:** For information about Connections Preferences, see Section 34.2, "Setting Connections Preferences." For information about People Connections defaults set by the application administrator, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application." For information about Connections task flow properties, see Section 34.5, "Setting Connections Task Flow Properties."

You can issue invitations from the Connections - Detailed View task flow and from the **Connections** page that you access in the Home space. This section describes the **Connections** page method.

To invite another user to connect:

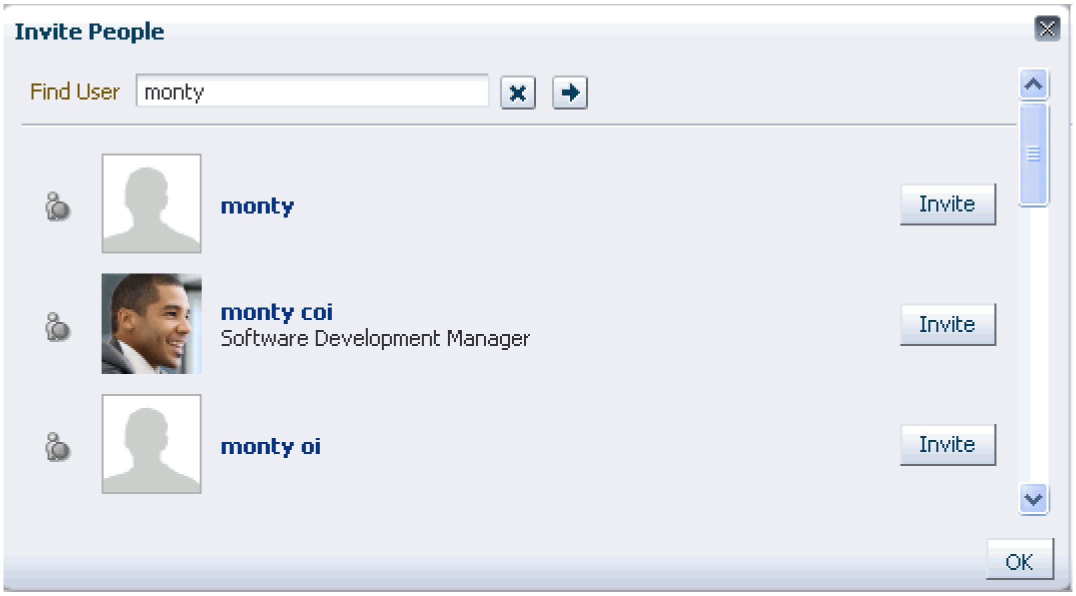
1. Go to the **Connections** page, for example, by clicking your user name in the UI and then selecting the **Connections** subpage on the resulting **Profile** page.

   > **See Also:** For more information, see Section 34.4.1.1, "Viewing Your Connections."

2. On the **Connections** page, click the **Invite People** link to open the Invite People dialog.
3. In the **Find User** field, enter the user name of the person you want to invite to be your connection, then click the **Find user** icon (Figure 34–8).

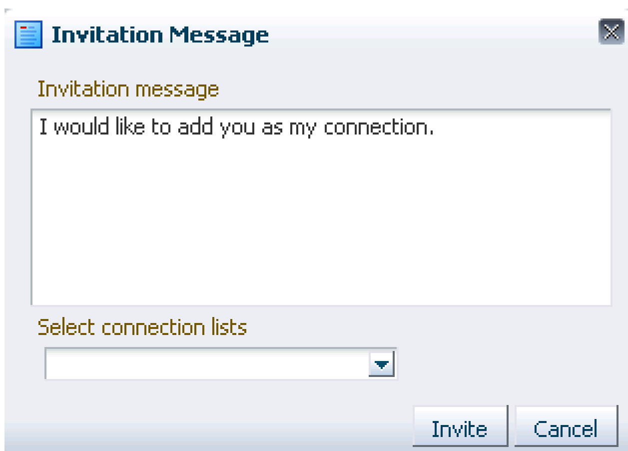
   > **See Also:** For tips on searching for a user in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."

Figure 34–8 Invite People Dialog



4. Click the **Invite** link next to the user of interest to open the Invitation Message dialog (Figure 34–9).

Figure 34–9 Invitation Message Dialog



5. Enter a connection invitation or use the default message.
6. Optionally, from the **Select connection lists** dropdown, select one or more connections lists to which to add the user once the invitation is accepted.
7. Click **Invite**.

   If the person you have invited set Preferences to automatically accept all invitations, you are connected immediately. Otherwise, the invitation becomes available in the recipient's view of the **Connections** page.

   > **Tip:** You can also view invitations from the Connections - Detailed View task flow For more information, see Section 34.4.3, "Viewing Invitations to Connect."

See Also: For information about Connections Preferences, see Section 34.2, "Setting Connections Preferences."

34.4.3 Viewing Invitations to Connect

You can view the invitations you have sent and received in the Connections - Detailed View task flow and on the **Connections** page. This section describes the **Connections** page case. It includes the following subsections:

- Section 34.4.3.1, "Viewing Invitations You Have Sent"
- Section 34.4.3.2, "Viewing Invitations You Have Received"

34.4.3.1 Viewing Invitations You Have Sent

To view invitations you have sent:

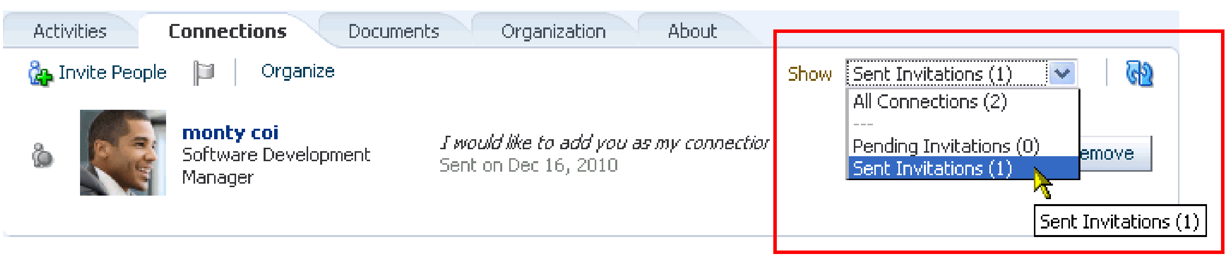
1. Go to the **Connections** page.

   See Also: For more information, see Section 34.4.1.1, "Viewing Your Connections."

2. From the **Show** menu, select **Sent Invitations**.

   The **Connections** page refreshes, now showing a list of the pending invitations to connect that you have sent (Figure 34–10).

Figure 34–10 Sent Invitations View



Note: In the **Show** menu, the number next to **Sent Invitations** represents the number of pending invitations you have sent.

34.4.3.2 Viewing Invitations You Have Received

To view invitations you have received:

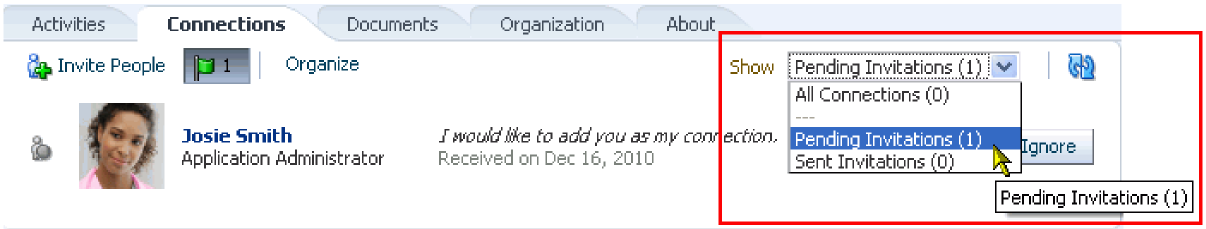
1. Go to the **Connections** page.

   See Also: For more information, see Section 34.4.1.1, "Viewing Your Connections."

2. From the **Show** menu, select **Pending Invitations**.

   The **Connections** page refreshes, now showing a list of the pending invitations to connect that you have received (Figure 34–11).

Figure 34–11 Pending Invitations View



> **Tip:** In the **Show** menu, the number next to **Pending Invitations** represents the number of pending invitations you have received.

34.4.4 Responding to Invitations to Be a Connection

Connections provides two methods for responding to an invitation to connect:

- You can set your Connections Preferences to accept such invitations automatically.

  > **See Also:** For information about setting Connections Preferences, see Section 34.2, "Setting Connections Preferences."

- You can manually accept, decline, or ignore such invitations through the Connections - Detailed View task flow or in your view of the **Connections** page.

This section describes the manual method of responding to invitations to connect from the **Connections** page.

To respond to invitations to connect:

1. Go to the **Connections** page.

   > **See Also:** For more information, see Section 34.4.1.1, "Viewing Your Connections."

2. From the **Show** menu, select **Pending Invitations** to display a list of your pending invitations (Figure 34–12).

Figure 34–12 Pending Invitations View Showing Accept, Decline, and Ignore Buttons

> **Tip:** Alternatively, click the **Invitations** icon (flag).

3. Next to a given invitation, select your desired response:

   - **Accept**—Make the connection.

- **Decline**—Refuse the connection, with notification. When you decline an invitation to connect, the issuer becomes aware of this by watching his sent invitations.
- **Ignore**—Remove the connection, without responding. When you ignore an invitation to connect, the issuer does not become aware of this by watching his sent invitations.

Once you respond to an invitation, it is removed from the list of received invitations. The users whose invitations you accept appear in your view of the **Connections** page.

4. Optionally, return to your default view of the **Connections** page by selecting **All Connections** from the **Show** menu.

34.4.5 Creating and Managing Connections Lists

Connections provides a means of grouping your connections into lists for managing the display of your connections and your connections activities. For example:

- You can select a list and view just its members on your **Connections** page.
- You can configure a Connections - Card task flow instance to display only the connections on a specified list (for more information, see Section 34.5, "Setting Connections Task Flow Properties").
- You can configure Activity Stream Preferences to show activities only from specified connections lists (for more information, see Chapter 35, "Tracking Your Connections' Activities").

This section describes how to create and manage lists of connections. It includes the following subsections:

- Section 34.4.5.1, "Creating a Connections List"
- Section 34.4.5.2, "Adding a Connection to a List"
- Section 34.4.5.3, "Removing a Connection from a List"
- Section 34.4.5.4, "Deleting a Connections List"

34.4.5.1 Creating a Connections List

You can create a connections list using the Connections and Connections - Detailed View task flows and on the **Connections** page. This section describes how to create a connections list on the **Connections** page.

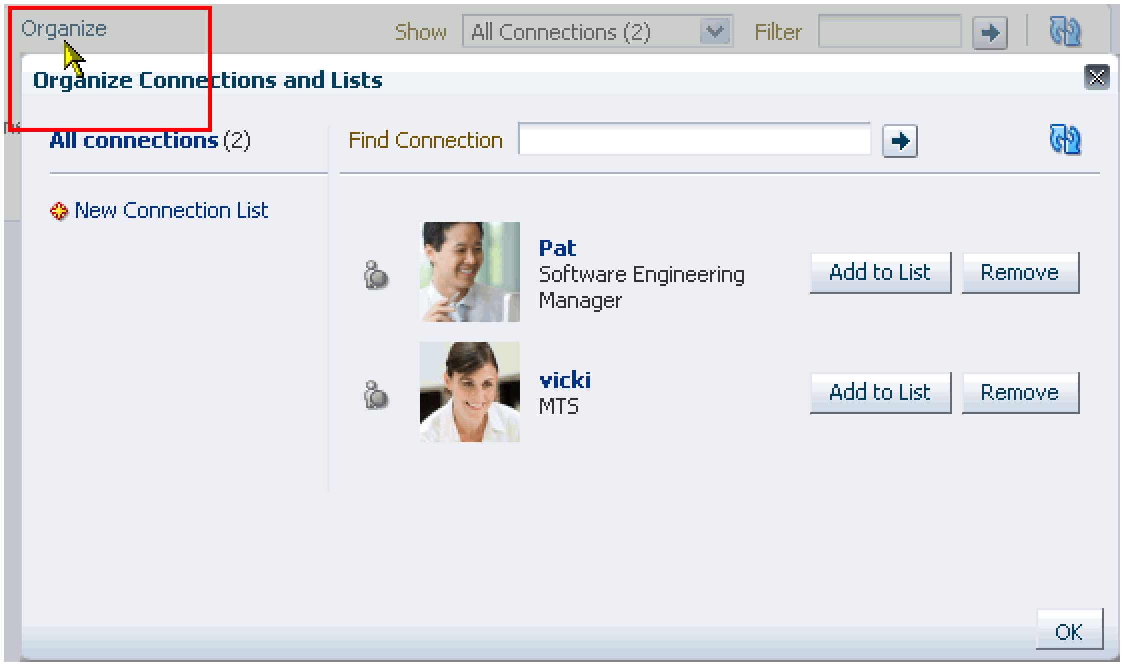
To create a list of connections:

1. Go to the **Connections** page.

   See Also: For more information, see Section 34.4.1.1, "Viewing Your Connections."

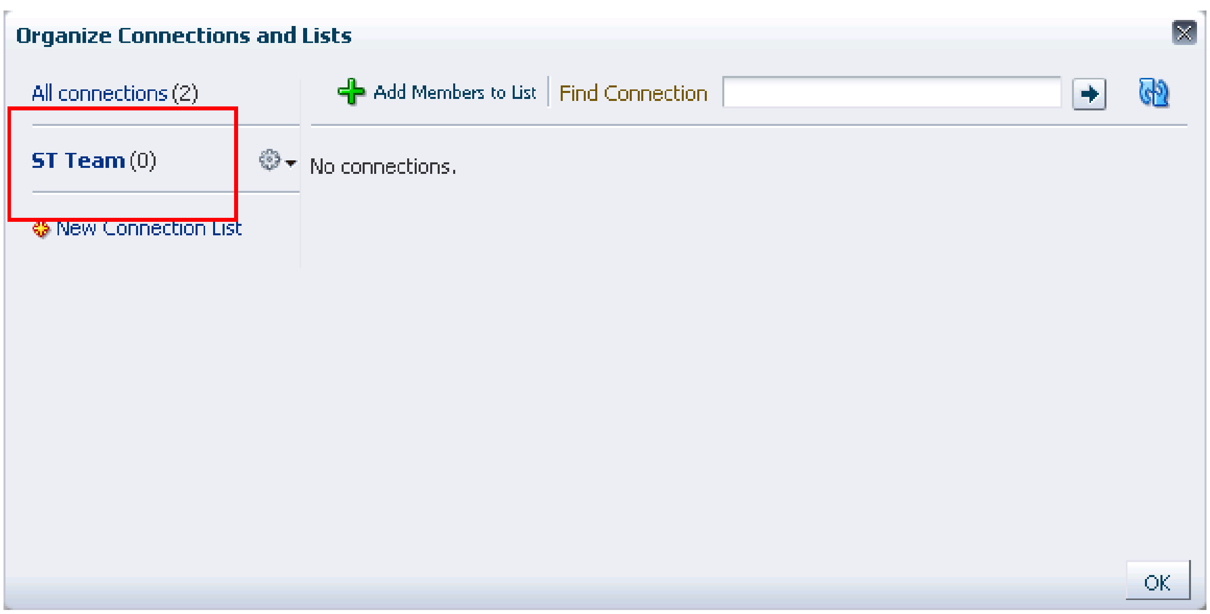
2. Click **Organize** to open the Organize Connections and Lists dialog (Figure 34–13).

Figure 34–13 Organize Button and Resulting Dialog



3. Click **New Connection List** to open the **Create List** dialog
4. Enter a name for your list of connections, and click **OK** to create the list and open it in the Organize Connections and Lists dialog (Figure 34–14).

Figure 34–14 New ST Team Connections List



Tip: To view all of your connections, click **All connections**.

> **See Also:** For information about adding connections to a list, see Section 34.4.5.2, "Adding a Connection to a List."

34.4.5.2 Adding a Connection to a List

You can add connections to a Connections list using the **Connections** page and the Connections and Connections - Detailed View task flows. This section describes the **Connections** page case.

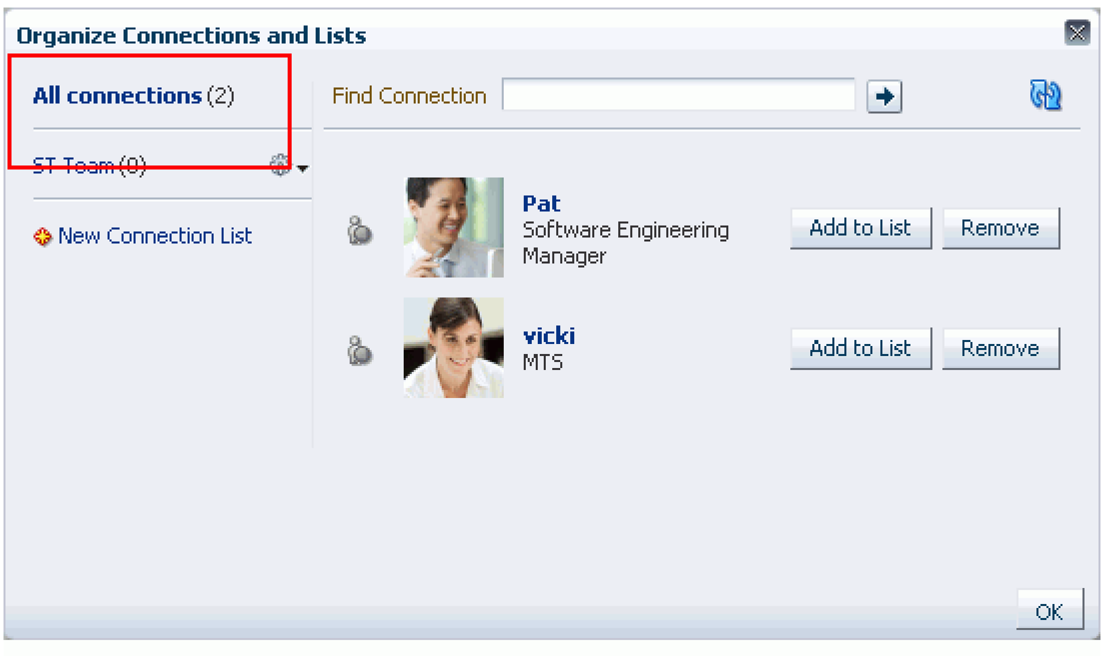
To add a connection to a Connections list:

1. Go to the **Connections** page.

   > **See Also:** For more information, see Section 34.4.1.1, "Viewing Your Connections."

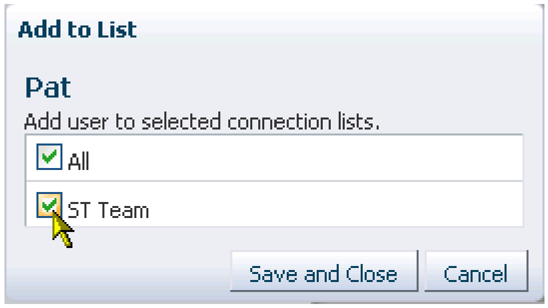
2. Click **Organize** to open the Organize Connections and Lists dialog, and select **All connections**, to show all of your connections (Figure 34–15).

Figure 34–15 Organize Connections and Lists Dialog



3. Click **Add to List** next to the user, and select one or more lists from the resulting dialog (Figure 34–16).

Figure 34–16 Add to List Dialog



4. Click **Save and Close**.

 Tip: Click **All** to add the selected user to all of your Connections lists.

5. Repeat steps 3 and 4 until you are done.
6. Click **OK** to close the Organize Connections and Lists dialog.

34.4.5.3 Removing a Connection from a List

To remove a connection from a list:

1. Go to the **Connections** page.

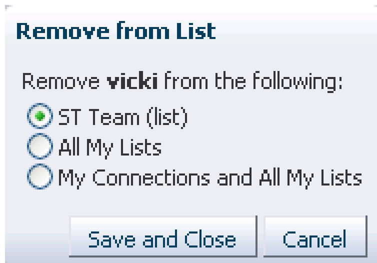
 See Also: For more information, see Section 34.4.1.1, "Viewing Your Connections."

2. Click **Organize** to open the Organize Connections and Lists dialog, and select the list from which to remove a connection to show the list (Figure 34–17).

Figure 34–17 Organize Connections and Lists Dialog with ST Team List Selected

3. Click **Remove from List** next to the user to open the Remove from List dialog (Figure 34–18).

Figure 34–18 Remove from List Dialog



4. Select one or more lists from which to remove the selected user, or select **My Connections and All My Lists** to remove the selected user from all lists and as your connection.
5. Click **Save and Close**.
6. Repeat steps 3 through 5 until you are done.
7. Click **OK** to close the Organize Connections and Lists dialog.

34.4.5.4 Deleting a Connections List

When you delete a Connections list, you are not deleting the connections you added to the list. You are deleting only the selected grouping, that is, the list itself. The connections that were on the deleted list continue to be your connections.

You can delete a Connections list from the **Connections** page and from the Connections and Connections - Detailed View task flows. This section describes the **Connections** page case.

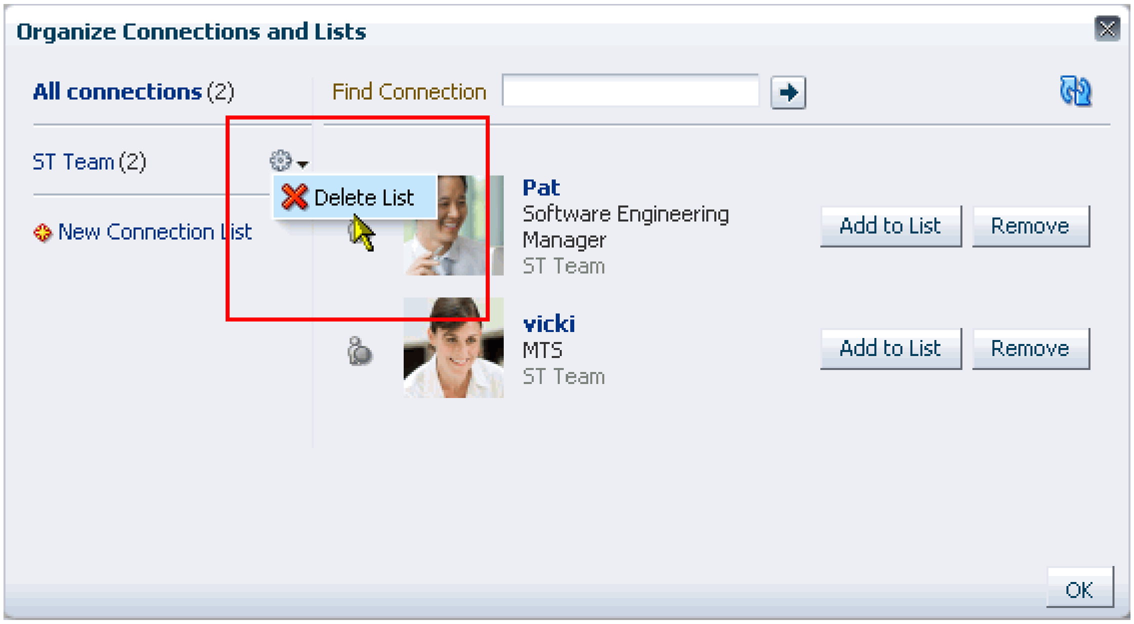
To delete a connections list:

1. Go to the **Connections** page.

   See Also: For more information, see Section 34.4.1.1, "Viewing Your Connections."

2. Click **Organize** to open the Organize Connections and Lists dialog.
3. Click the **Actions** icon next to the Connections list you want to delete, and select **Delete List** from the resulting menu (Figure 34–19).

Figure 34–19 Delete List Option on Actions Menu



4. In the resulting confirmation dialog, click **Yes** to delete the list.
5. Click **OK** to close the Organize Connections and Lists dialog.

34.4.6 Removing a Connection

Included in the process of managing your connections is the occasional necessity of weeding people out: they may leave your group or the company, or there may no longer be a compelling reason to stay connected.

Controls for removing a connection are available through the **Connections** page and the Connections and Connections - Detailed View task flow. This section describes the **Connections** Page case.

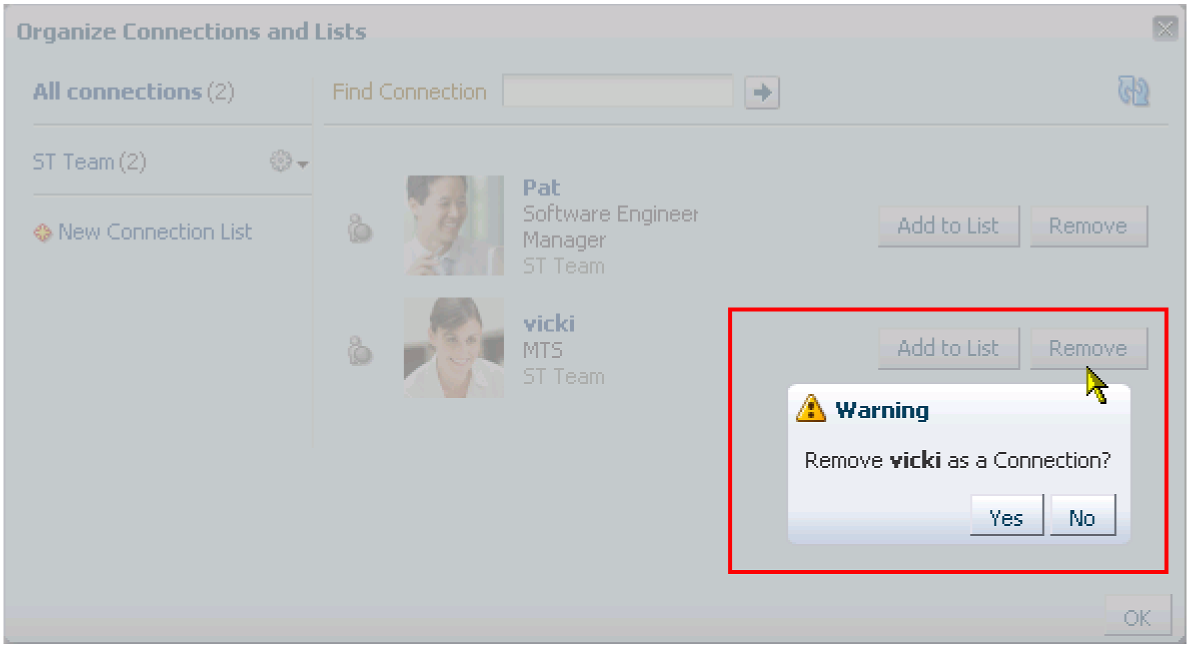
To remove one of your connections:

1. Go to the **Connections** page.

   See Also: For more information, see Section 34.4.1.1, "Viewing Your Connections."

2. Click **Organize** to open the Organize Connections and Lists dialog.
3. Click the **Remove** button next to the connection to remove.
4. In the resulting dialog, click **Yes** to remove the selected connection (Figure 34–20).

Figure 34–20 Confirmation Dialog for Remove Connection Action

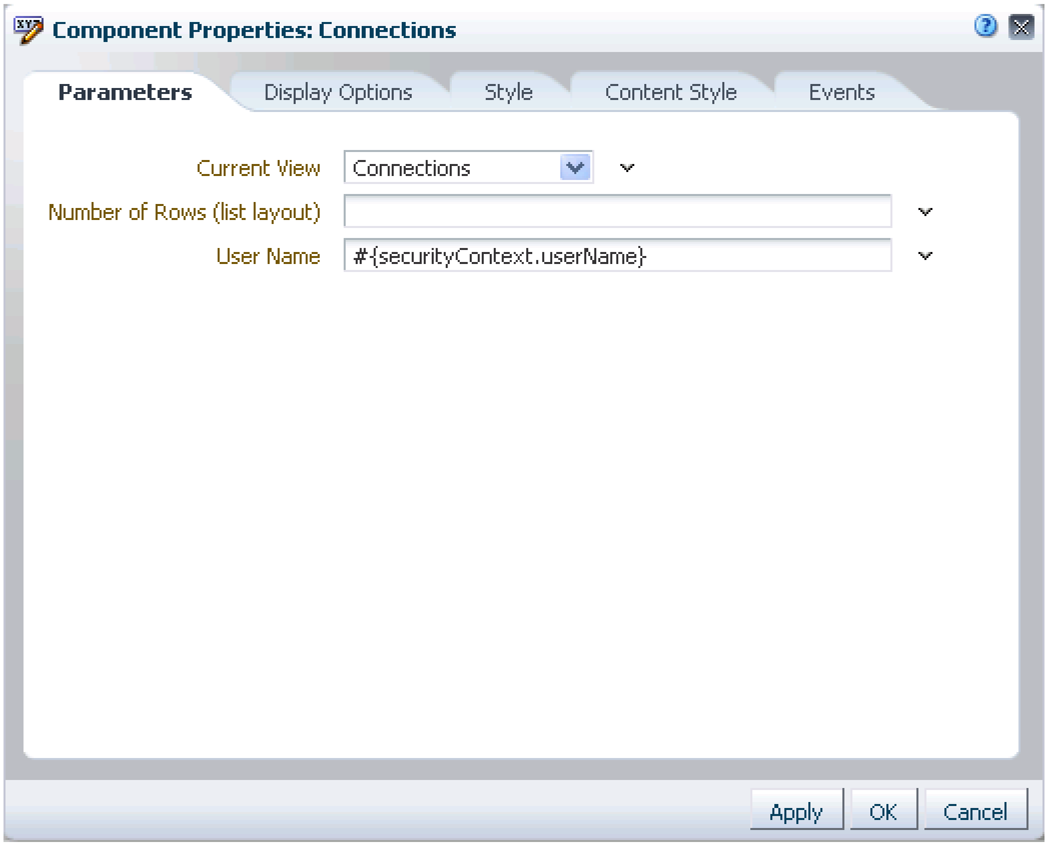


5. Click **OK** to close the Organize Connections and Lists dialog.

34.5 Setting Connections Task Flow Properties

Connections task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 34–21).

Figure 34–21 Connections Task Flow Component Properties



See Also: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties associated with Connections task flows and describe the properties available on the Parameters tab:

- Section 34.5.1, "What You Should Know About Connections Task Flow Properties"
- Section 34.5.2, "Connections Task Flow Parameters"
- Section 34.5.3, "Using Properties to Configure a Connections Task Flow Instance"

34.5.1 What You Should Know About Connections Task Flow Properties

When you set property values on a Connections task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 34.5.2, "Connections Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

34.5.2 Connections Task Flow Parameters

Table 34–1 describes the parameters that are unique to Connections task flows.

Table 34–1 Connections Task Flow Parameters

Parameter	Description
`Allow Remove`	A Boolean value representing whether a control is available on the task flow for removing a connection Enter either `true` or `false`. This value is honored only when the task flow instance is rendered in list format. For more information, see `Profile Format`. This parameter is associated with the Connections - Card task flow.
`Connection List Name`	The name of a grouped list of connections Use this parameter to limit the display of connections to those on the specified Connections list. Enter the name of a Connections list. This parameter is associated with the Connections - Card task flow.
`Current View`	The view to display by default Valid values include: ■ `connections`—(the default value) a list of connections ■ `receivedInvitations`—a list of connections invitations you received ■ `sentInvitations`—a list of connections invitations you sent ■ `people`—a search field for finding people with whom to connect When users access the task flow instance, the view specified here is the first one they see. All selections, except `people`, provide controls for navigating to the application default view (`connections`). Selecting `people` provides search and select controls for inviting other users to connect. This parameter is associated with the Connections task flow.
`Filter Pattern`	A value to act as a filter against task flow content For example, to show only those connections with a user name that includes the term *pat* (including *patrick* or *sripathy*), enter `pat` in the **Filter Pattern** field. This parameter is associated with the Connections - Card task flow.
`Hide Footer`	A Boolean value representing whether to hide the task flow footer Use this parameter to show or hide a link at the bottom of the task flow that enables users (when shown) to navigate to a detailed view of Connections when the number of available connections exceeds the number of connections that are shown. ■ Select the check box (`#{true}`) to hide the task flow footer. ■ Deselect the check box (`#{false}`) to show the task flow footer. This parameter is associated with the following task flows: ■ Connections – Card ■ Connections – Quick View

Table 34–1 (Cont.) Connections Task Flow Parameters

Parameter	Description
`Hide Header`	A Boolean value representing whether to hide the task flow header Use this parameter to show or hide a link at the bottom of the task flow that enables users (when shown) to navigate to a detailed view of Connections when the number of available connections exceeds the number of connections that are shown. ■ Select the check box (`#{true}`) to hide the task flow header. ■ Deselect the check box (`#{false}`) to show the task flow header. This parameter is associated with the Connections - Quick View task flow.
`Number of Columns`	The number of columns to show in the task flow For example, with six connections to show, a value of `2` means those connections are shown in two columns with three rows. When a user's number of connections exceeds the number of connections allowed after column and row restrictions are applied, **Previous** and **Next** links are shown, enabling the user to page through his connections. (See also `Number of Rows`.) This parameter is associated with the following task flows: ■ Connections - Card ■ Connections - Quick View
`Number of Connections` per page	The number of connections to show in the given task flow instance Enter a numeric value, such as `10`, `2`, `15`, and so on. The number you enter here limits the number of connections that are shown in the task flow instance. If a user's number of connections exceeds the specified value, a **More** link is shown, enabling the user to navigate to a full view of the **Profile** page's **Connections** subpage. This parameter is ignored if both the number of rows and the number of columns have been specified together as parameters. This parameter is associated with the following task flows: ■ Connections - Card ■ Connections - Detailed View ■ Connections - Quick View
`Number of Rows`	The number of rows to show in the task flow For example, with six connections to show and a value of `2` for `Number of Columns`, a value of `2` for `Number of Rows` means connections are shown in two columns with two rows. That is, four connections are shown. When a user's number of connections exceeds the number of connections allowed after column and row restrictions are applied, **Previous** and **Next** links are shown, enabling the user to page through his connections. (See also `Number of Columns`.) This parameter is associated with the following task flows: ■ Connections - Card ■ Connections - Quick View

Table 34–1 (Cont.) Connections Task Flow Parameters

Parameter	Description
`Number of Rows (list layout)`	The number of rows to show in a list layout of the Connections task flow This value is honored only when the view of the Connections task flow is set to `connections`. (For more information, see `Current View`.) When a user's number of connections exceeds the number of connections allowed after row restrictions are applied, **Previous** and **Next** links are shown, enabling the user to page through his connections. This parameter is associated with the Connections task flow.
`Profile Format`	The layout style for the task flow Enter one of the following: ■ `vcard`—Renders each connection in a virtual business card and includes the connection's user name and status message and quick-access buttons for interacting with your connections. ■ `iconic`—Renders the connection's personal profile photo and shows the user name below the photo. ■ `list`—Renders connections in a list, showing the personal profile photo, user name, information about recent profile updates, and quick-access buttons for interacting with your connections. ■ `tiled`—Renders the connection's personal Profile photo and shows the user name and job title beside the photo. This parameter is associated with the Connections - Card task flow.
`Profile Launched on Selection`	A Boolean value representing whether a Profile popup should open when a user clicks a connection listed in the task flow ■ Select the check box (`#{true}`) to enable a Profile popup to launch when a user clicks a connection. ■ Deselect the check box (`#{false}`) to suppress this option. This parameter is associated with the Connections - Card task flow.

Table 34–1 (Cont.) Connections Task Flow Parameters

Parameter	Description
`Sort Criteria`	The connections sort order Enter `LAST_ACTIVITY_TIME` to sort connections in descending date/time order. Leave blank to sort alphabetically by name. This parameter is associated with the following task flows: ■ Connections - Card ■ Connections - Detailed View
`User Id`	The ID of the user to show in the task flow This value is set automatically (`#{securityContext.userName}`). Do not edit this value. This parameter is associated with the following task flows: ■ Connections - Quick View ■ Connections - Detailed View
`User Name`	The ID of the user to show in the task flow This value is set automatically (`#{securityContext.userName}`). Do not edit this value. This parameter is associated with the following task flows: ■ Connections - Card ■ Connections

34.5.3 Using Properties to Configure a Connections Task Flow Instance

This section provides examples of how you use property values to affect the behavior of a given task flow instance. Because you make these changes in page edit mode (Composer), they affect all users' views of the affected task flow instance.

This section includes the following subsections:

- Section 34.5.3.1, "Adding a Remove Button to Connections - Card"
- Section 34.5.3.2, "Restricting Connections Displayed to Those on a Named List"
- Section 34.5.3.3, "Specifying an Initial View for a Connections Task Flow Instance"
- Section 34.5.3.4, "Limiting the Number of Displayed Connections"
- Section 34.5.3.5, "Specifying Numbers of Rows and Columns"
- Section 34.5.3.6, "Applying a Filter to a Connections - Card Task Flow Instance"
- Section 34.5.3.7, "Selecting a Display Format for a Connections - Card Task Flow Instance"
- Section 34.5.3.8, "Invoking a Profile Popup from a Connections - Card Task Flow Instance"

34.5.3.1 Adding a Remove Button to Connections - Card

By default, the Connections - Card task flow does not provide a control for permanently removing a connection. You can use the `Allow Remove` property on a Connections - Card flow instance to render a **Remove** button next to each listed connection. `Allow Remove` is honored when the task flow's `Profile Format` property is set to `List` or `Virtual Business Card`.

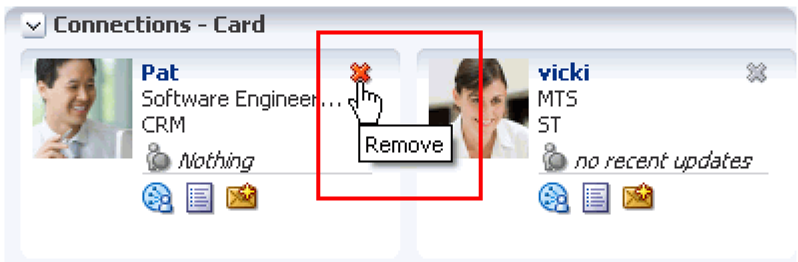
To enable the removal of a connection in a Connections - Card task flow:

1. Edit the properties of a Connections - Card task flow instance.

    See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Set `Profile Format` to `list`.
4. Provide a value for `Allow Remove`:
    - Select the check box (`#{true}`) to enable the display of a **Remove** button next to a listed connection (Figure 34–22).

Figure 34–22 Remove Icon on a Connections - Card Task Flow



    - Deselect the check box (`#{false}`) to disable this feature.
5. Click **OK**.

34.5.3.2 Restricting Connections Displayed to Those on a Named List

In an instance of the Connections - Card task flow, you can use the `Connection List Name` property to restrict the display of connections to only those users included on a named Connections list.

> **See Also:** For information about Connections lists, see Section 34.4.5, "Creating and Managing Connections Lists."

To restrict a Connections - Card task flow to a particular Connections list:

1. Edit the properties of a Connections - Card task flow instance.

    See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. In the **Connection List Name** field, enter the name of the Connections list to use to limit the display of connections.
4. Click **OK**.

34.5.3.3 Specifying an Initial View for a Connections Task Flow Instance

Use the `Current View` property to specify the initial view of a Connections task flow instance. For most views, users can change the default you specify here. The exception is the `people` view, in which there are no controls for switching to a different view.

To specify an initial view for a Connections task flow instance:

1. Edit the properties of a Connections task flow instance.

    See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. For `Current View`, select one of the following:
    - `connections`—(the default value) a list of connections
    - `receivedInvitations`—a list of connections invitations you received
    - `sentInvitations`—a list of connections invitations you sent
    - `people`—a search field for finding people with whom to connect
4. Click **OK**.

34.5.3.4 Limiting the Number of Displayed Connections

The Connections - Card, Connections - Detailed View, and Connections - Quick View task flows provide the property `Number of Connections per page` for limiting the number of connections to show at a time. If a user's number of connections exceeds the specified value, a link is shown at the bottom of the task flow to enable the user to navigate to a full view of the **Profile** page's **Connections** subpage.

To limit the number of displayed connections in a Connections - Card, Connections - Detailed View, or Connections - Quick View task flow instance:

1. Edit the properties of a Connections - Card, Connections - Detailed View, or Connections - Quick View task flow instance.

    See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Provide a value for **Number of Connections per page**.
4. Click **OK**.

34.5.3.5 Specifying Numbers of Rows and Columns

The Connections, Connections - Card, and Connections - Quick View task flows provide properties for controlling the number of columns and rows to show at a time. When column and row values are both specified, and a user's number of connections exceeds the specified values, **Previous** and **Next** links are shown, enabling the user to page through his connections.

To specify the number of rows and columns of connections to show:

1. Edit the properties of a Connections, Connections - Card, or Connections - Quick View task flow instance.

    See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Enter a numeric value to control the number of rows to show:
    - For Connections, enter a number for **Number of Rows (list layout)**.

- For Connections - Card and Connections - Quick View, enter a number for **Number of Rows**.

4. For Connections - Card and Connections - Quick View, enter a numeric value in the **Number of Columns** field to control the number of columns to show.
5. Click **OK**.

34.5.3.6 Applying a Filter to a Connections - Card Task Flow Instance

The `Filter Pattern` property enables you to apply a filtering term that limits the display of connections in a Connections - Card task flow instance to only those who meet the filtering criteria. For example, to show only those connections with a user name that includes the term *pat* (including *patrick* or *sripathy*), enter `pat` for the `Filter Pattern` property.

The filter is applied to all of the information in a given card, so you can filter against things like the user's job title or name. For example, entering the term *manager*, ensures that only those connections whose job title includes *manager* are displayed in the task flow instance.

To apply a filter to a Connections - Card task flow instance:

1. Edit the properties of a Connections - Card task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Enter a filtering term for **Filter Pattern**.

   Tip: For example, enter a job title, a user name, or partial values, such as `man`.

4. Click **OK**.

34.5.3.7 Selecting a Display Format for a Connections - Card Task Flow Instance

The `Profile Format` property provides options for controlling the arrangement of connections within a Connections - Card task flow instance. Both the placement of information and the amount of information shown are affected by your selection.

To select a display format for a Connections - Card task flow instance:

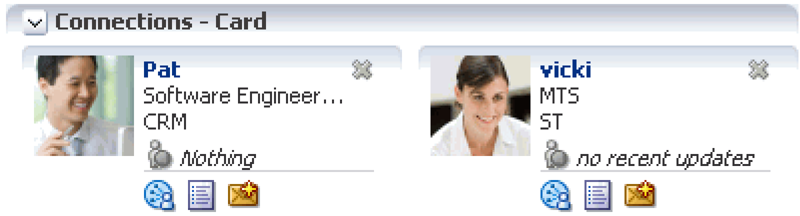
1. Edit the properties of a Connections - Card task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Select a format from the **Profile Format** dropdown list:

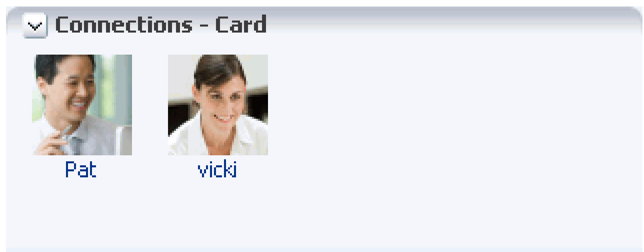
   - `Virtual Business Card`—Renders each connection in a virtual business card and includes the connection's user name and status message and quick-access buttons for interacting with your connections (Figure 34–23).

Figure 34–23 Connections - Card in Virtual Business Card Format



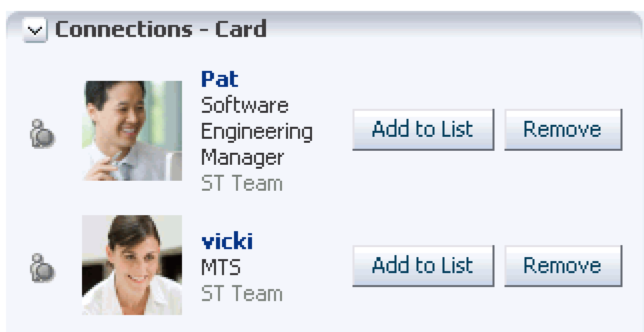
- `Iconic`—Renders the connection's personal profile photo and shows the user name below the photo (Figure 34–24).

Figure 34–24 Connections - Card in Iconic Format



- `List`—Renders connections in a list, showing the personal profile photo, user name, information about recent profile updates, and quick-access buttons for interacting with your connections (Figure 34–25).

Figure 34–25 Connections - Card in List Format



- `Tiled`—Renders the connection's personal Profile photo and shows the user name and job title beside the photo (Figure 34–26).

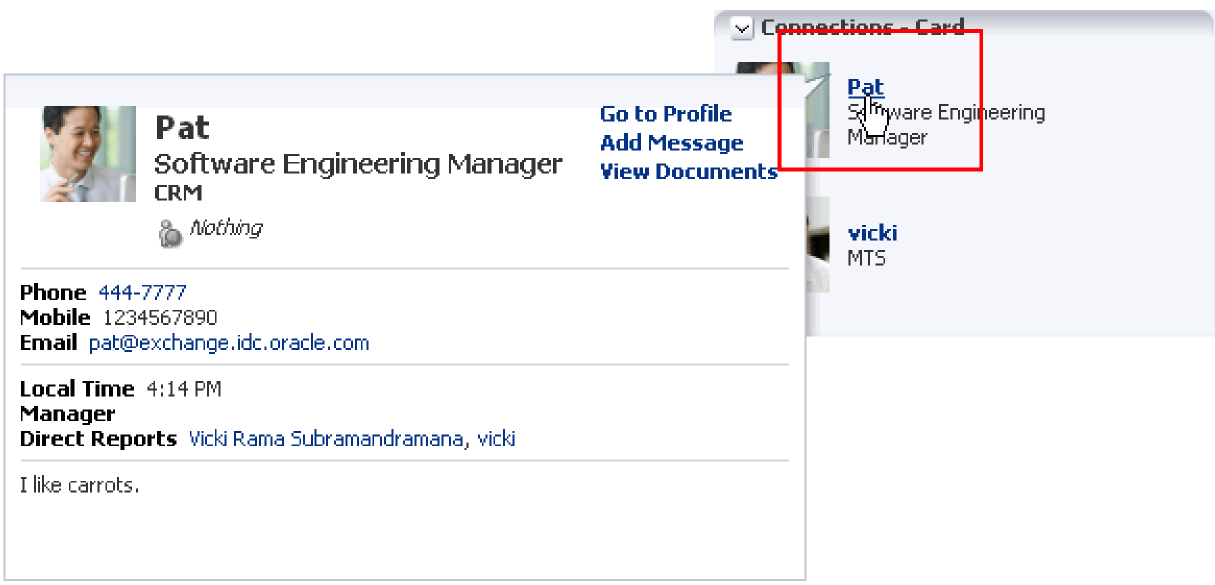
Figure 34–26 Connections - Card in Tiled Format

4. Click **OK**.

34.5.3.8 Invoking a Profile Popup from a Connections - Card Task Flow Instance

The `Profile Launched on Selection` property provides a means of launching a Profile popup when users click a connection name in a Connections - Card task flow instance (Figure 34–27).

Figure 34–27 Invoking a Profile Popup from the Connections - Card Task Flow



When this option is not selected, clicking a connection name in the task flow simply selects the connection.

To enable the launch of a Profile popup from a Connections - Card task flow instance:

1. Edit the properties of a Connections - Card task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Select an option for Profile Launched on Selection:

- Select the check box (`#{true}`) to enable a Profile popup to launch when a user clicks a connection.
- Deselect the check box (`#{false}`) to suppress this option.

4. Click **OK**.

35

Tracking Your Connections' Activities

The social networking capabilities in WebCenter Portal: Spaces enable you to view and manage your own Activity Stream and to view the Activity Streams of others if they have made them available to you. Additionally, all members of a given space can view the streamed activities of all other members without formally connecting to them when the Activity Stream is scoped to that space.

This chapter provides an overview of Activity Stream and its associated features and functions, and catalogs the properties associated with Activity Stream task flows. It includes the following sections:

- Section 35.1, "What You Should Know About Activity Stream"
- Section 35.2, "Setting Activity Stream Preferences"
- Section 35.3, "Adding an Activity Stream Task Flow to a Page"
- Section 35.4, "Working with Activity Stream Task Flows"
- Section 35.5, "Setting Activity Stream Task Flow Properties"

Audience

This chapter is intended for users assigned an application role that includes, minimally, the permission `People Connections: Update People Connections Data`. Users who plan to edit task flow properties must be assigned a role that also includes the permission `Edit Pages`. In a space (other than the Home space), users must be assigned a role that includes the permission `Edit Page Access and Structure`.

35.1 What You Should Know About Activity Stream

In WebCenter Portal: Spaces, Activity Stream provides a streaming view of the activities of your connections, actions taken in spaces, and business activities. For example, Activity Stream can note when you or a connection posts feedback, uploads a document, and creates a discussion forum. Additionally, it streams messages and attachments entered through the Publisher task flow.

> **See Also:** For information about the Publisher task flow, see Chapter 37, "Liking, Commenting On, and Sharing Objects."

Through Activity Stream Preferences, you can select to show connection and space activities. (Note, however, that your application administrator may disable all users from overriding application-level settings.) Through application programming interfaces (APIs), you can control the display of business activities.

> **See Also:** *Oracle Fusion Middleware Java API Reference for Oracle WebCenter* for information about tracking business activities using APIs

In addition to streaming messages, your Activity Stream can provide access to file attachments and web links added through the Publisher task flow. Supported mime types can be fully previewed in the Activity Stream. Unsupported mime types are rendered as links, which you can use to access the file.

Activity Stream previews files through either a native web format or through Oracle WebCenter Content slide rendition. The previewer used depends on the mime type of the file to be previewed.

The mime types that use the native web format include the following:

- `image`
- `htm`
- `text`

The mime types that use Oracle WebCenter Content slide rendition include the following:

- `pdf`
- `powerpoint`
- `powerpnt`
- `pptx`

> **Note:** PDF file previews are available in Activity Stream when the mime type is `pdf`, `webContextRoot` is specified in the Oracle WebCenter Content connection, and the application is accessed through an Oracle HTTP Server.

Note that the mime types shown in these bullet lists are the only mime types that are previewed. Other mime types appear as links. The mime types `docx` and `xlsx` are *not* previewed in Activity Stream. Note also that a parameter associated with an Activity Stream task flow instance can be set to omit file previews (for more information, see Section 35.5.2, "Activity Stream Task Flow Parameters").

Users can share a streamed activity and its attachments using a **Share** feature, available on each streamed item.

> **See Also:** For information about sharing, see Section 35.4.7, "Sharing Files and other Objects Through an Activity Stream Item."

Table 35–1 lists and describes the types of activities that are reported through Activity Stream.

> **Note:** Delete activities do not appear *per se* in the Activity Stream. But references to objects, such as *Joe Smith created the document file.xml*, are removed from the stream when such objects are deleted.

Table 35–1 Activities Tracked by Activity Stream

Service	Tracked Activities	Scope	Activities Shared or Private
Announcements	▪ Create announcement ▪ Edit announcement	▪ space	▪ Shared with other space members
Blogs	▪ Create blog ▪ Update blog	▪ space ▪ Home space	▪ Activities on space blogs are shared with other space members. ▪ Activities on Home space blogs are shared with the blogger's connections.
Connections	▪ Invitations to connect ▪ People are connected	▪ Home space	▪ Shared with invitor and invitee's connections
Discussions	▪ Create forum ▪ Create topic ▪ Reply to topic	▪ space	▪ Shared with other space members
Documents	▪ Create document ▪ Edit document ▪ Add tag ▪ Remove tag	▪ space ▪ Home space	▪ Activities on space documents are shared with other space members. ▪ Activities on Home space documents are private to user.
Feedback	▪ Feedback left ▪ Feedback received	▪ Home space	▪ Shared with whomever is permitted to view such activities (for more information, see this section and Section 36.2, "Setting Message Board and Feedback Preferences."
Lists	▪ Create a list	▪ space	▪ Shared with other space members
Message Board	▪ Message left ▪ Message received	▪ Home space	▪ Shared with whomever is permitted to view such activities (for more information, see this section and Section 36.2, "Setting Message Board and Feedback Preferences."
Pages	▪ Create page ▪ Edit page ▪ Add tag ▪ Remove tag	▪ space ▪ Home space	▪ Activities on space pages are shared with other space members. ▪ Activities on Home space pages are private to user.
Profiles	▪ Photo updated ▪ Profile updated ▪ Personal status note updated	▪ Home space	▪ Shared with whomever is permitted to view such activities (for more information, see this section and Section 33.3, "Setting Profile Preferences."

Table 35–1 (Cont.) Activities Tracked by Activity Stream

Service	Tracked Activities	Scope	Activities Shared or Private
Space Events	▪ Create an event ▪ Edit an Event	▪ space	▪ Shared with other space members
Spaces Management	▪ Create space ▪ Join space	▪ space	▪ Shared with other space members
Tagging	▪ Add tag ▪ Remove tag	▪ space ▪ Home space	▪ Activities in a space are shared with all space members. ▪ Activities in a Home space are shared with whomever is permitted to view such activities (for more information, see Section 6.4.3.2, "Configuring Activity Stream," and Section 35.2, "Setting Activity Stream Preferences").

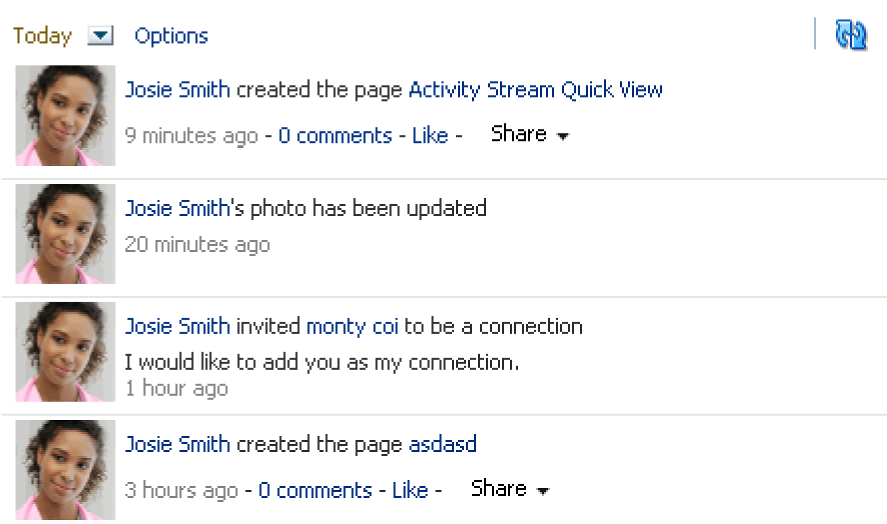
In page view mode, use Activity Stream Preferences to specify who can view your Activity Stream and the types of activities to show. For more information about Preferences relating to Activity Stream task flows, see Section 35.2, "Setting Activity Stream Preferences."

In page edit mode, use Activity Stream task flow properties to hide or show various controls on everyone's view of a task flow instance and to limit the types of services and objects and the specific spaces that are tracked. For more information about Activity Stream task flow properties, see Section 35.5, "Setting Activity Stream Task Flow Properties."

WebCenter Portal: Spaces provides the following Activity Stream task flows:

- **Activity Stream** for viewing application activities and the activities of your connections and for providing access to the attachments added through the **Share** link (Figure 35–1)

Figure 35–1 Activity Stream Task Flow



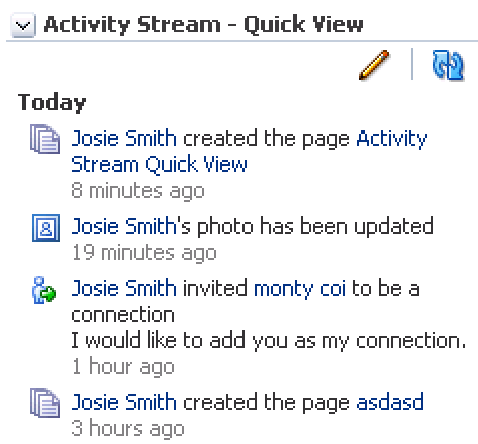
This full view of Activity Stream functionality includes options for liking and commenting on listed activities and for sharing different types of objects, such as images, URLs, documents, and the like. Activity Stream also provides a means of hiding the activities and posts of a given user. You can use Activity Stream Options to show those users you have hidden.

The **Activities** page in the Home space combines an instance of the Publisher task flow with the Activity Stream task flow.

> **See Also:** For information about the Publisher task flow, see Section 37.3.3.1, "What You Should Know About the Publisher Task Flow."

- **Activity Stream - Quick View** provides a summary view of application activities and the activities of your connections (Figure 35–2).

Figure 35–2 Activity Stream - Quick View Task Flow



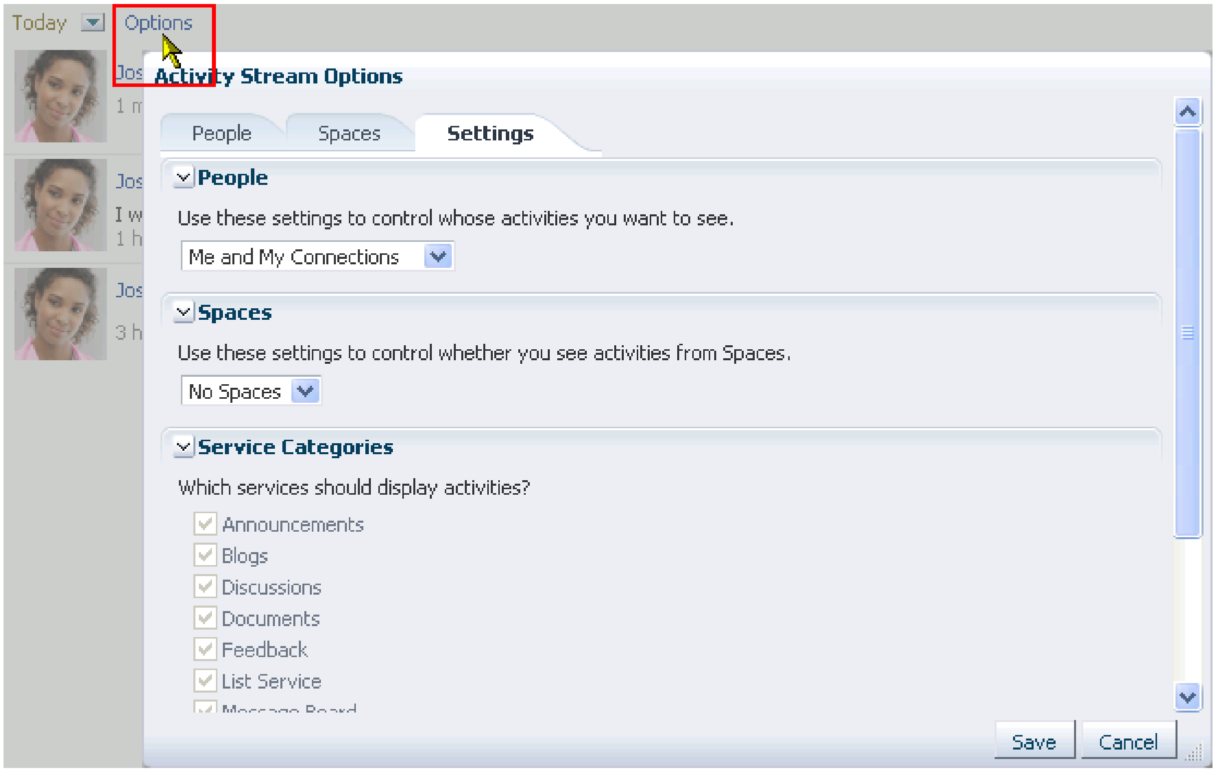
Unlike the full view of Activity Stream, Activity Stream - Quick View does not display **Like**, **comments**, and **Share** links.

A hierarchy of configuration settings control what you can do with your view of the Activity Stream. The application administrator sets application-wide values on the **Administration** page. You can set your own personal values through People Connections Preferences. You can also set values on a given task flow instance in both page edit mode, which affects all users' views of the task flow instance (application customization), and page view mode, which affects only your view of the task flow (user customization).

> **Tip:** If you adjust a setting through Preferences that does not seem to affect the behavior of a task flow as you expected, it may be because settings on the task flow itself override Preferences settings.

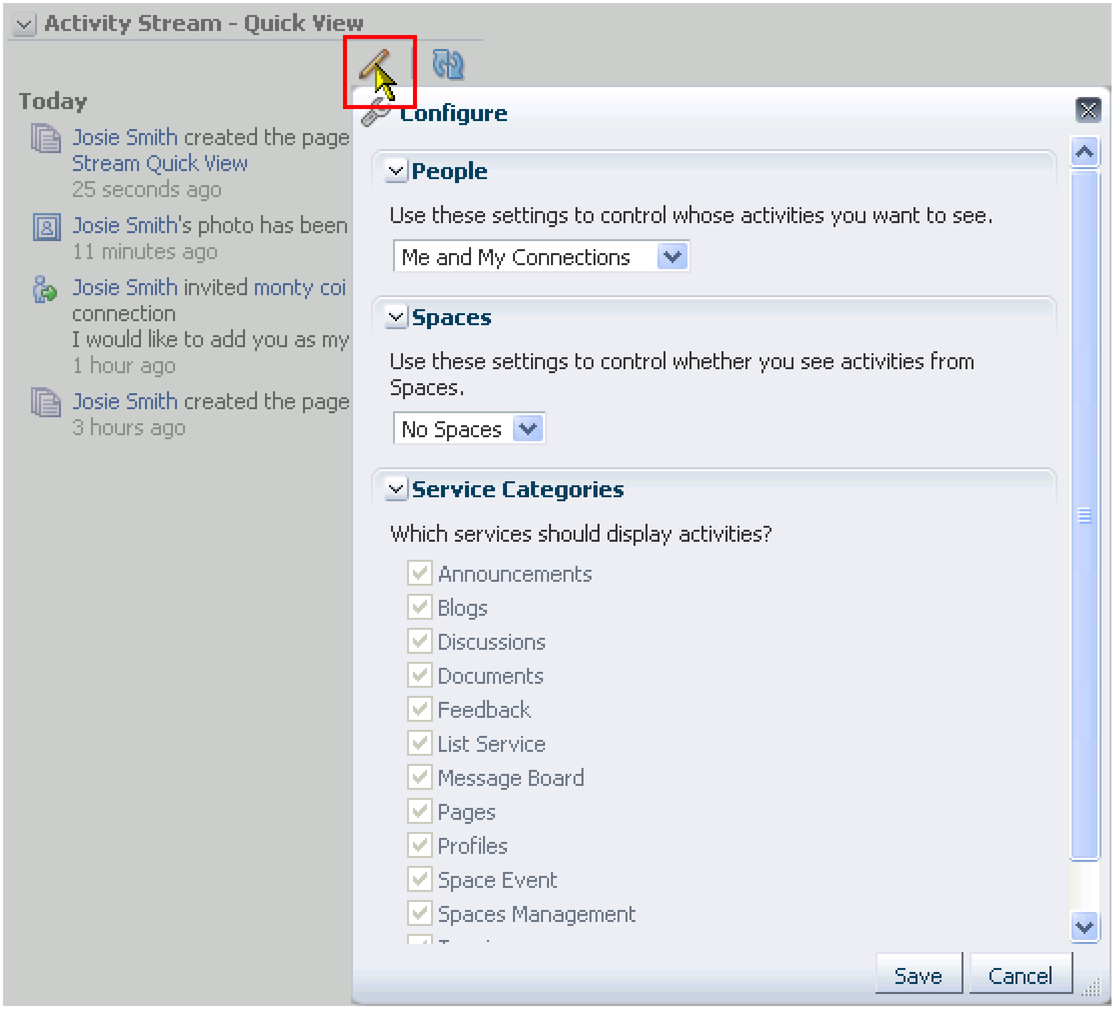
The Activity Stream task flow provides an **Options** link for accessing configuration settings for a given task flow instance (Figure 35–3).

Figure 35–3 Options Link for Activity Stream Options



The Activity Stream - Quick View provides access to its own configuration settings through a pencil icon (**Change the source, filter, and display options**) (Figure 35–4).

Figure 35–4 Pencil Icon and Resulting Configure Dialog



Use these controls to adjust an individual task flow instance with the same kinds of settings that are provided for all of your views of Activity Stream task flows through Activity Stream Preferences (for more information, see Section 35.2, "Setting Activity Stream Preferences," and Section 35.4, "Working with Activity Stream Task Flows").

Clicking an object in an Activity Stream opens the object. For example, clicking the name of a newly created document in an Activity Stream opens the document (see Section 43.10, "Opening a File" for more information about file preview in the Document Viewer). Clicking a user name in an Activity Stream opens a user profile pop-up. Clicking an attachment, such as a file or a URL, navigates you to that attachment.

> **See Also:** You can attach object to messages streamed from the Publisher task flow to the Activity Stream. For more information, see Chapter 37, "Liking, Commenting On, and Sharing Objects."

Activity Stream compares somewhat to the Recent Activities service, which also tracks and reports on application activities (for more information, see Chapter 71, "Working with the Recent Activities Service"). Both track the application activities of integrated services, though Activity Stream tracks a broader range. For example, Recent Activities tracks the Document, Announcements, and Discussions services, as well as page-related activities. Activity Stream tracks all of these as well as People Connections, Wikis, and Blogs. Recent Activities tracks activities no matter who performs the action. Activity Stream tracks activities performed by a user's connections. Activity Stream can be scoped to the space (including the Home space) in which it is placed. It also provides the name of the person performing the action. Recent Activities cannot be scoped to the Home space, and it does not provide the name of the person who performed the action.

To summarize the basic difference between these two services: Recent Activities provides an overview of what is happening in an application. Activity Stream provides an overview of what is happening with a user's connections.

For more information, see Section 35.4, "Working with Activity Stream Task Flows."

Advanced users, such as application administrators, can archive streamed activities to relieve the burden on your storage and to maintain a record of past activities. For more information, see the section, "Activity Stream," in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

35.2 Setting Activity Stream Preferences

Use Activity Stream Preferences to specify who can view your Activity Stream; the users, services, and spaces for which to track activities; and the activities to show in an Activity Stream task flow.

> **See Also:** For information about the services that Activity Stream tracks, see Table 35–1, " Activities Tracked by Activity Stream".

To set Activity Stream preferences:

1. Open the Preference dialog.
2. Click **People Connections** to display People Connections preferences.
3. Click the **Activity Stream** tab to bring it forward (Figure 35–5).

Figure 35–5 Activity Stream Preferences

4. Under **People**, specify whose activities to show in your view the Activity Stream:

   Tip: This setting relates only to the activities that stream from the People Connections service. Such activities include making connections, posting Feedback and Messages, adjusting your Profile, and so on.

   From the dropdown list, select one option from:

   - **Only Me**—Show only your own activities in your view of the Activity Stream.
   - **Me and My Connections**—Show only your activities and the activities of your connections in your view of the Activity Stream.
   - **No Personal**—Do not show any user activities in your view of the Activity Stream, including your own.
   - **Selected Connection Lists**—Show the activities of only those users on the selected connections lists in your view of the Activity Stream.

     When you select this option, all available connections lists appear below it. Select one or more connections lists to limit the display of activities to the users on those lists.

   Note: Use this option only after you have created one or more connections lists (for more information, see Section 34.4.5, "Creating and Managing Connections Lists").

   ---

5. Under **Spaces**, select to show activities from:

- **All Spaces—**Stream activities from all available spaces.
- **My Spaces—**Stream activities from the spaces of which you are a member.
- **No Spaces—**Do not stream any activities from spaces other the Home space.

6. Under **Service Categories**, select the services for which to track activities.

   Select a check box to track the activity of a particular service; deselect a check box to ignore the activity of a particular service.

   > **Tip:** Selecting **No Spaces** in the previous step affects the outcome of your service selection: despite their selection here, services publish no activities to your view of the Activity Stream.

7. Under **Privacy**, identify the types of users who can see your view of the Activity Stream:

   - **Everyone—**All users, whether they are logged in, can see your view of the Activity Stream.
   - **Authenticated Users—**All users who are logged in can see your view of the Activity Stream.
   - **My Connections—**The people to whom you are connected can see your view of the Activity Stream.
   - **Myself—**Only you can see your view of the Activity Stream.

8. Click **OK**.

35.3 Adding an Activity Stream Task Flow to a Page

For the steps to add a People Connections service task flow to a page, see Section 18.5, "Adding a Component to a Page."

35.4 Working with Activity Stream Task Flows

In page view mode, you can perform user customizations on a task flow instance that affect only your view of that task flow. Activity Stream task flows provide user customization controls for determining whose activities and what activities are streamed.

In page edit mode, you can perform application customizations on a task flow instance that affect everyone's view of that task flow. For example, Activity Stream provides controls for enabling or disabling the display of links for liking, sharing, and commenting on individual Activity Stream items. In view of this, some of the actions described in this section may not be available, depending on such customizations.

> **See Also:** For information about performing application-level customizations on Activity Stream task flows, see Section 35.5, "Setting Activity Stream Task Flow Properties."

This section provides information about controlling whose activities what activities are shown in a given task flow instance, as well as how to like and comment on a streamed item, and how to share a file or URL with other users through the Activity Stream.

This section includes the following subsections:

- Section 35.4.2, "Selecting the Spaces to Stream in an Activity Stream Instance"
- Section 35.4.3, "Selecting the Services to Stream in an Activity Stream Instance"
- Section 35.4.4, "Hiding and Showing the Activities of a Selected User"
- Section 35.4.5, "Hiding and Showing the Activities of a Selected Space"
- Section 35.4.6, "Liking and Commenting On Activity Stream Items"
- Section 35.4.7, "Sharing Files and other Objects Through an Activity Stream Item"

35.4.1 Selecting the People to Stream in an Activity Stream Instance

Use the **Options** link on an Activity Stream task flow instance to specify the people from whom to stream activities in your view of an Activity Stream instance. Use the pencil icon on an Activity Stream - Quick View task flow to perform the same operation.

To select the people from whom to stream activities in your view of an Activity Stream task flow instance:

1. Go to an instance of an Activity Stream or Activity Stream - Quick View task flow.
2. On an Activity Stream task flow, click **Options**.

   On an Activity Stream - Quick View task flow, click the **Change the source, filter, and display options** icon (pencil).
3. For Activity Stream only: in the resulting dialog, click the **Settings** tab to bring it forward.
4. Under **People**, select the people from whom to stream activities:
   - **Only Me—**Show only your own activities in your view of the Activity Stream.
   - **Me and My Connections—**Show only your activities and the activities of your connections in your view of the Activity Stream.
   - **No Personal—**Do not show any user activities in your view of the Activity Stream, including your own.
   - **Selected Connection Lists—**Show the activities of only those users on the selected connections lists in your view of the Activity Stream.

     When you select this option, all available connections lists appear below it. Select one or more connections lists to limit the display of activities to the users on those lists.

     Note: Use this option only after you have created one or more connections lists (for more information, see Section 34.4.5, "Creating and Managing Connections Lists").

     ---
5. Click **Save** to save your changes and exit the dialog.

35.4.2 Selecting the Spaces to Stream in an Activity Stream Instance

Use the **Options** link on an Activity Stream task flow instance to select the spaces from which to stream activities. Use the pencil icon on an Activity Stream - Quick View task flow to perform the same operation.

To select the spaces from whom to stream activities in an Activity Stream task flow instance:

1. Go to an instance of an Activity Stream or Activity Stream - Quick View task flow.
2. On an Activity Stream task flow, click **Options**.

   On an Activity Stream - Quick View task flow, click the **Change the source, filter, and display options** icon (pencil).
3. For Activity Stream only: in the resulting dialog, click the **Settings** tab to bring it forward.
4. Under **Spaces**, select to show activities from all available spaces in your view of the Activity Stream (**All Spaces**), or omit the display of any space activities (**No Spaces**).

   > **Tip:** Selecting **No Spaces** affects the outcome of your service selection (see Section 35.4.3): despite their selection, services publish no activities to your view of the Activity Stream.
5. Click **Save** to save your changes and exit the dialog.

35.4.3 Selecting the Services to Stream in an Activity Stream Instance

Use the **Options** link on an Activity Stream task flow instance to select the services from which to stream activities. Use the pencil icon on an Activity Stream - Quick View task flow to perform the same operation.

To select the services from whom to stream activities in an Activity Stream task flow instance:

1. Go to an instance of an Activity Stream or Activity Stream - Quick View task flow.
2. On an Activity Stream task flow, click **Options**.

   On an Activity Stream - Quick View task flow, click the **Change the source, filter, and display options** icon (pencil).
3. For Activity Stream only: in the resulting dialog, click the **Settings** tab to bring it forward.
4. Under **Service Categories**, select the services for which to track activities.

   Select a check box to track the activity of a particular service; deselect a check box to ignore the activity of a particular service.

   > **Tip:** Selecting **No Spaces** in Section 35.4.2 affects the outcome of your service selection: despite their selection here, services publish no activities to your view of the Activity Stream.
5. Click **Save** to save your changes and exit the dialog.

35.4.4 Hiding and Showing the Activities of a Selected User

Some of your connections may post activities with a frequency that is more of a distraction than a help. In this case, or for any other reason, you can select to hide the activities streamed from selected users in your view of the Activity Stream task flow (or from the **Activities** page in the Home space).

You can easily reverse this action by showing one or more hidden users through the **Options** link on the affected Activity Stream task flow.

This section describes how to hide or show the activities of individual users in an Activity Stream task flow instance. It includes the following subsections:

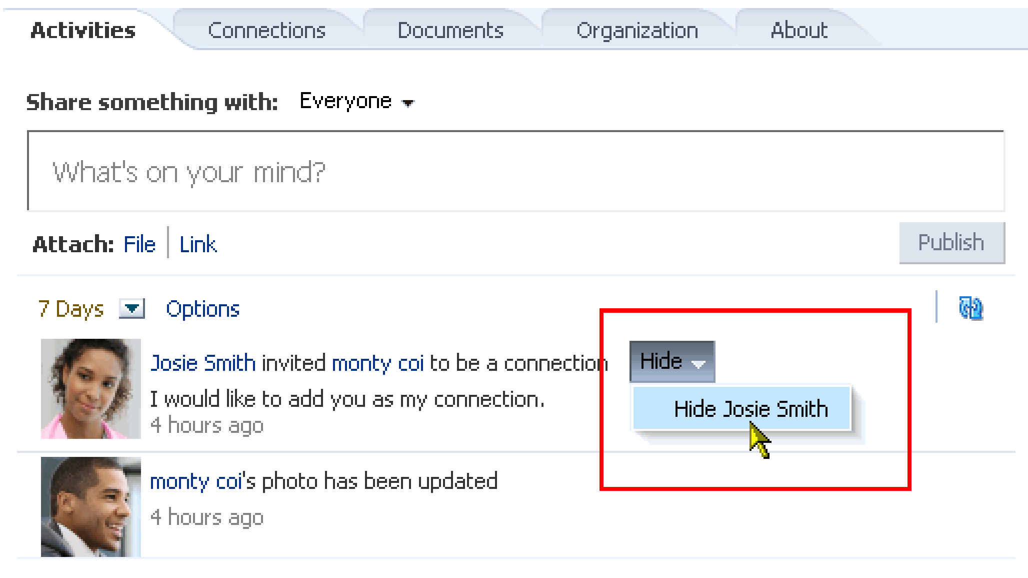
- Section 35.4.4.1, "Hiding the Activities of a Selected User"
- Section 35.4.4.2, "Showing the Activities of a Hidden User"

35.4.4.1 Hiding the Activities of a Selected User

To hide the activities streaming from a selected user in an Activity Stream task flow instance:

1. Go to an instance of an Activity Stream task flow.
2. Open the **Hide** menu next to the user you want to hide, and select the relevant user name (Figure 35–6).

Figure 35–6 The Hide Option in the Activity Stream



3. Click **OK** in the confirmation dialog.

   The page refreshes, and the task flow no longer shows activities from the selected user.

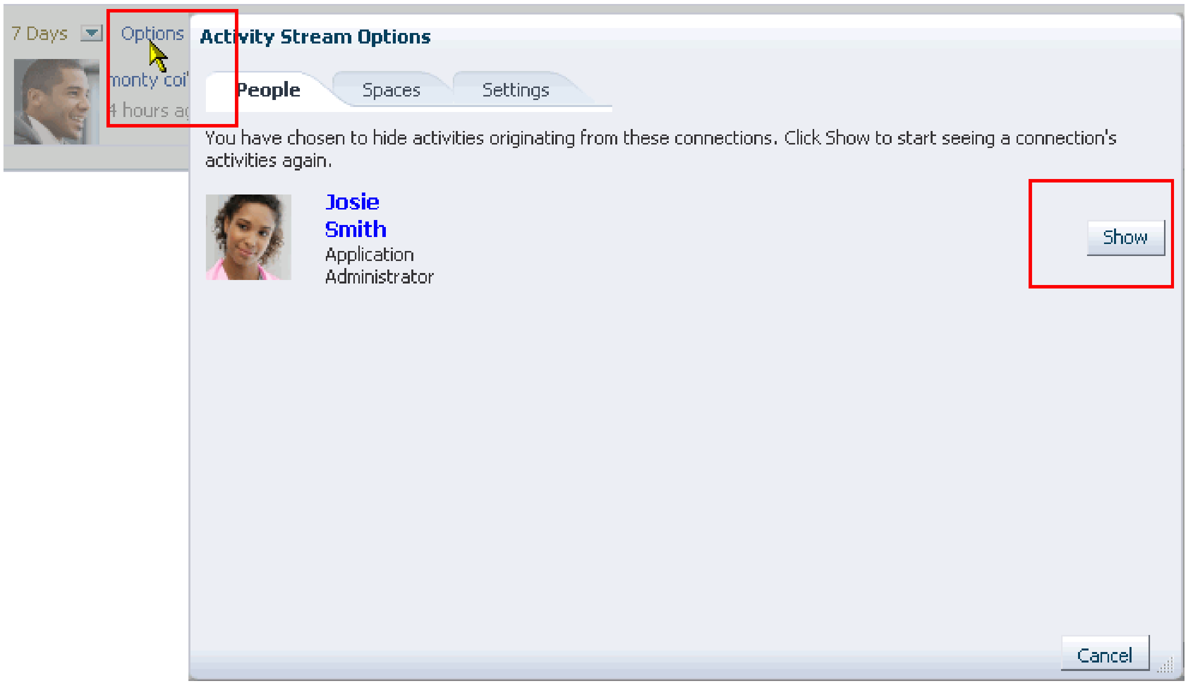
   > **See Also:** For information about showing a hidden user, see Section 35.4.4.2, "Showing the Activities of a Hidden User."

35.4.4.2 Showing the Activities of a Hidden User

To reinstate the streaming of activities from a hidden user:

1. Go to an instance of an Activity Stream task flow where a user's activities are hidden.
2. Click **Options**.
3. In the resulting dialog, click the **People** tab to bring it forward.
4. Next to the person whose activities you want to show, click **Show** (Figure 35–7).

Figure 35–7 The Options Link and the Show Button



35.4.5 Hiding and Showing the Activities of a Selected Space

If there is a space that streams activities that are not currently of interest to you, you can hide that space's activities from a selected instance of the Activity Stream task flow (or from the **Activities** page in the Home space).

You can easily reverse this action by showing one or more hidden spaces through the **Options** link on the affected Activity Stream task flow.

In order to be able to hide the activities streaming from a particular space, the affected Activity Stream task flow instance must be configured to show **All Spaces** (for more information, see Section 35.2, "Setting Activity Stream Preferences," and Section 35.4.2, "Selecting the Spaces to Stream in an Activity Stream Instance").

> **Tip:** Whether or not the activities streaming from space are shown can be determined at the application level, in personal Preferences, and on an individual task flow instance in both page view mode and page edit mode. If you find you cannot hide or show activities streaming from spaces, it is likely that at one of these levels, the facility to see such activities has been blocked.

This section describes how to hide the activities streaming from a particular space, and how to show those hidden activities. It includes the following subsections:

- Section 35.4.5.1, "Hiding the Activities of a Selected Space"
- Section 35.4.5.2, "Showing the Activities of a Hidden Space"

35.4.5.1 Hiding the Activities of a Selected Space

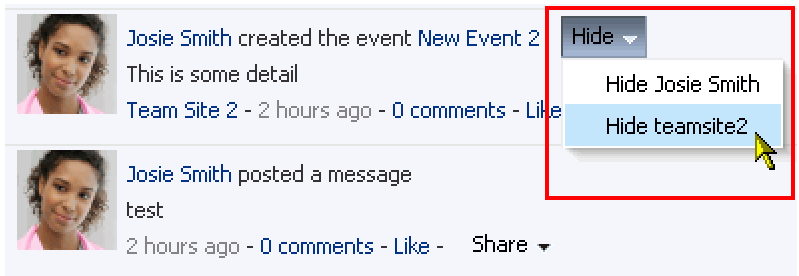
To hide the activities streaming from a selected space in an Activity Stream task flow instance:

Note: Your Preference settings may prevent any space activities from streaming. For information about Activity Stream Preferences, see Section 35.2, "Setting Activity Stream Preferences."

---

1. Go to an instance of an Activity Stream task flow.
2. Open the **Hide** menu next to an activity that has streamed from the space you want to hide, and select the relevant space name (Figure 35–8).

Figure 35–8 Selecting to Hide the Space teamsite2



3. Click **OK** in the confirmation dialog.

   The page refreshes, and the task flow no longer shows activities from the selected space.

   See Also: For information about showing a hidden space, see Section 35.4.5.2, "Showing the Activities of a Hidden Space."

35.4.5.2 Showing the Activities of a Hidden Space

To reinstate the streaming of activities from a hidden space:

1. Go to an instance of an Activity Stream task flow where a space's activities are hidden.
2. Click **Options**.
3. In the resulting dialog, click the **Spaces** tab to bring it forward.
4. Next to the space whose activities you want to show, click **Show** (Figure 35–9).

Figure 35–9 The Options Link and the Show Button in Activity Stream Options Dialog

35.4.6 Liking and Commenting On Activity Stream Items

Provided the Activity Stream task flow has been configured to do so, you and the users to whom you have provided access to your Activity Stream can express a liking for or comment on a particular streamed item.

To express a liking for a streamed item, go to an Activity Stream task flow and click the **Like** link. You can remove your liking by clicking the resulting **Unlike** link.

To comment on a streamed item, click the **comments** link, enter a comment in the input area, then click **Comment** to display your comment below the item. The comment display is limited to 500 characters. For each comment you add, a delete icon is provided to enable you to remove your comment.

> **See Also:** For more information, see Chapter 37, "Liking, Commenting On, and Sharing Objects."

35.4.7 Sharing Files and other Objects Through an Activity Stream Item

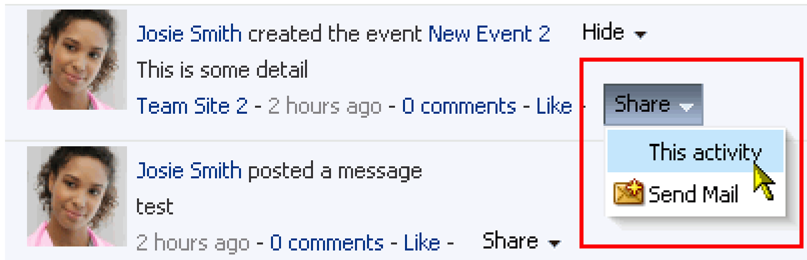
Provided the Activity Stream task flow is configured to support it, you can share a streamed item with all of the users who are allowed to view your streamed activities. This could be all of your connections or all of the users on a selected connections list. Who an item is shared with is determined by how you or your application administrator has configured your Activity Stream.

If you prefer, you can send a streamed item through mail, and consequently select all recipients yourself.

To share a streamed item:

1. Go to the streamed item of interest.
2. Select an option from the **Share** menu (Figure 35–10).

Figure 35–10 Share Menu on a Streamed Activity



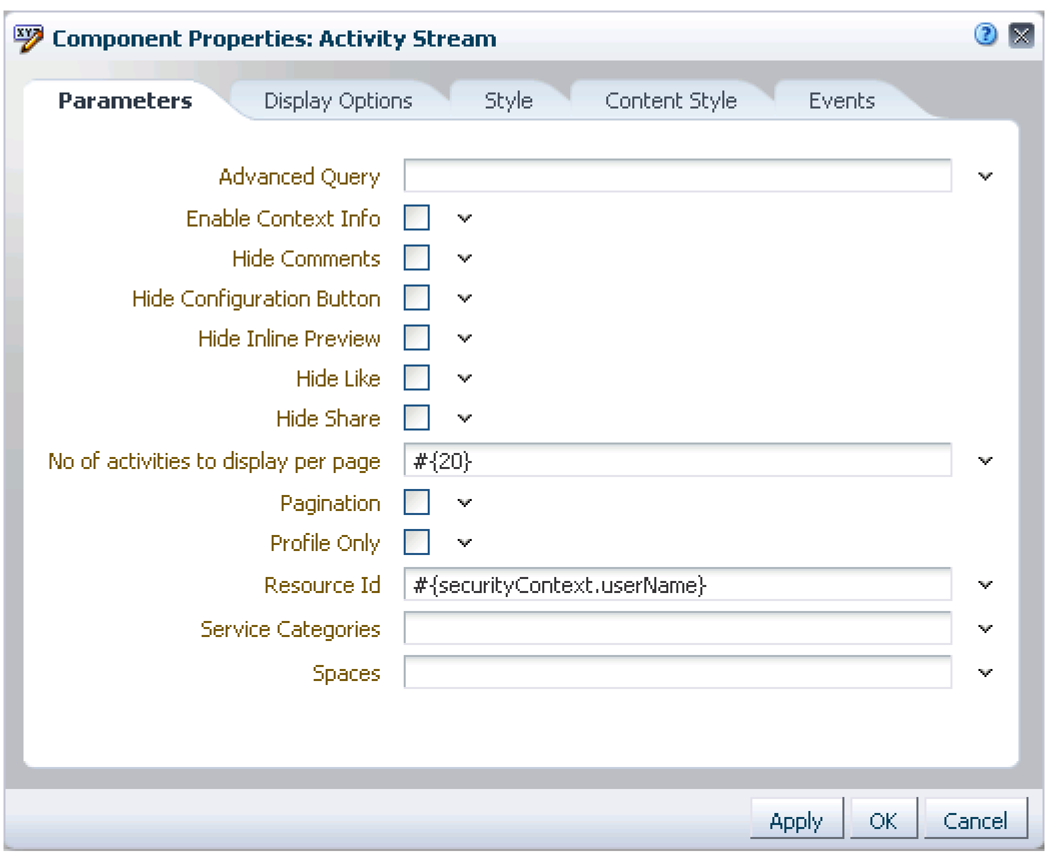
- Select **This activity** to stream a URL to the item (such as a new space, a new announcement or discussion topic, and the like) to all enabled users.
- Select **Send Mail** to send a mail with a link to the item to all specified recipients.

See Also: For more information, see Chapter 37, "Liking, Commenting On, and Sharing Objects."

35.5 Setting Activity Stream Task Flow Properties

Activity Stream task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 35–11).

Figure 35–11 Activity Stream Task Flow Component Properties



See Also: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties associated with Activity Stream task flows and describe the properties available on the Parameters tab:

- Section 35.5.1, "What You Should Know About Activity Stream Task Flow Properties"
- Section 35.5.2, "Activity Stream Task Flow Parameters"
- Section 35.5.3, "Using an Advanced Query to Filter Activity Stream Items"
- Section 35.5.4, "Using Properties to Configure an Activity Stream Task Flow Instance"

35.5.1 What You Should Know About Activity Stream Task Flow Properties

When you set property values on an Activity Stream task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 35.5.2, "Activity Stream Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

35.5.2 Activity Stream Task Flow Parameters

Table 35–2 describes the parameters that are unique to Activity Stream task flows.

Table 35–2 Activity Stream Task Flow Parameters

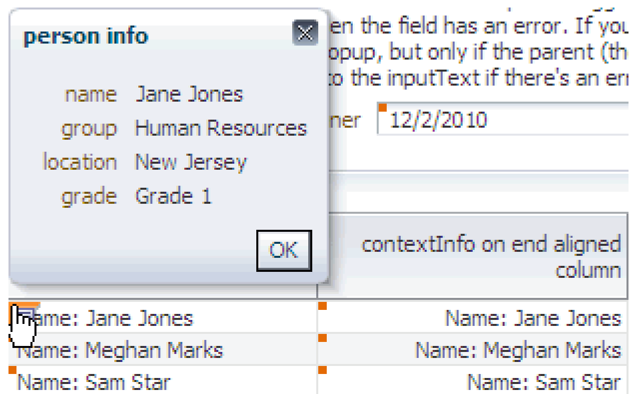
Parameter	Description
`Advanced Query`	A field for specifying a custom query to filter streamed items For more information, see Section 35.5.3, "Using an Advanced Query to Filter Activity Stream Items." This parameter is associated with the Activity Stream task flow.
`Enable Context Info`	A check box for specifying whether contextual information is shown when users click a **Context Info** icon  For example, if the item `John created the purchase order General Supplies` appears in the Activity Stream with a Context Info icon (the reddish dot), users who see the streamed item can click the icon to view the PO in a popup or navigate to the PO, depending on how the event is configured. This parameter is primarily for use with WebCenter Portal: Framework applications. In WebCenter Portal: Spaces, unless otherwise handled (such as the Profile popup on a user name), resources are rendered within the Resource Viewer system page (see Table 7–2, " Seeded System Pages"). ■ Select the check box to enable context information (`#{true}`). ■ Deselect the check box to prevent the display of context information (`#{false}`). This parameter is associated with the Activity Stream task flow.
`Hide Comments`	A check box for specifying whether a **comments** link is shown on a task flow instance ■ Select the check box to show the **comments** link (`#{true}`). ■ Deselect the check box to hide the **comments** link (`#{false}`). This parameter is associated with the Activity Stream task flow.
`Hide Configuration Button`	A check box for specifying whether the **Options** link appears on the Activity Stream task flow or the pencil icon appears on Activity Stream - Quick View ■ Select the check box to show the configuration control (`#{true}`). ■ Deselect the check box to hide the configuration control (`#{false}`). This parameter is associated with the following task flows: ■ Activity Stream - Quick View ■ Activity Stream

Table 35–2 (Cont.) Activity Stream Task Flow Parameters

Parameter	Description
`Hide Footer`	A check box for specifying whether a **More** link is shown at the base of the task flow Users click the **More** link to navigate to the **Activities** business role page in the Home space. ■ Select the check box to hide the **More** link (`#{true}`). ■ Deselect the check box to show the **More** link (`#{false}`). This parameter is associated with the Activity Stream - Quick View task flow.
`Hide Header`	A check box for specifying whether to hide the controls that appear in the task flow header ■ Select the check box to hide the task flow header (`#{true}`). The **Refresh** and pencil icons are hidden. ■ Deselect the check box to show the task flow header (`#{false}`). This parameter is associated with the Activity Stream - Quick View task flow.
`Hide Inline Preview`	A check box for specifying whether to hide previews of streamed files ■ Select the check box to hide previews of streamed files (`#{true}`). Links to streamed files are provided but previews are omitted. ■ Deselect the check box to show previews of streamed files (`#{false}`). Both links to and previews of streamed files are shown. For information about the mime types that are supported for file previewing in Activity Stream, see Section 35.1, "What You Should Know About Activity Stream." This parameter is associated with the Activity Stream task flow.
`Hide Like`	A check box for specifying whether to hide the **Like** link on streamed items ■ Select the check box to hide the **Like** link (`#{true}`). ■ Deselect the check box to show the **Like** link (`#{false}`). This parameter is associated with the Activity Stream task flow.
`Hide Share`	A check box for specifying whether to hide the **Share** menu on streamed items ■ Select the check box to hide the **Share** menu (`#{true}`). ■ Deselect the check box to show the **Share** menu (`#{false}`). This parameter is associated with the Activity Stream task flow.
`No of activities to display per page`	A field for entering the number of streamed items to show per page This parameter is associated with the following task flows: ■ Activity Stream ■ Activity Stream - Quick View
`Pagination`	A check box for specifying whether to provide **Previous** and **Next** links to enable users to page through streamed activities ■ Select the check box to show **Previous** and **Next** links (`#{true}`). ■ Deselect the check box to hide them (`#{false}`). This parameter is associated with the Activity Stream task flow.

Table 35–2 (Cont.) Activity Stream Task Flow Parameters

Parameter	Description
`Profile Only`	A check box for specifying whether to stream activities only from user profiles ■ Select the check box to stream only those activities associated with the current user (`#{true}`). ■ Deselect the check box to stream the activities of other users along with those associated with the current user (`#{false}`). This parameter is associated with the Activity Stream task flow.
`Profile User Id`	A field for entering the ID of the current user This value is provided by default, `#{securityContext.userName}`. This parameter is associated with the Activity Stream - Quick View task flow.
`Resource Id`	A field for entering the ID of the current user This value is provided by default, `#{securityContext.userName}`. Users should not change this value when the task flow instance appears in the context of a space. You can use it in the Home space to view the activities of a named user. This parameter is associated with the Activity Stream task flow.
`Service Categories`	A field for entering the IDs of services from which to stream activities Use this parameter to limit the display of streamed activities to only those associated with the specified service or services. Enter the service category ID or the service ID. For a list of valid service IDs, see Table B–19, " Service IDs". This parameter is associated with the Activity Stream task flow.
`Spaces`	A field for entering the names of spaces from which to stream activities Use this parameter to limit the display of streamed activities to only those associated with the specified space or spaces. Enter the GUID of the space or the space's *internal name*. The space internal name is the name specified by the **Space URL** on the **General** page of a space's administration settings. Note that the activities that are streamed in an Activity Stream task flow that is scoped to a particular space are visible to all members of that space, regardless of whether they are formally connected to each other. This parameter is associated with the Activity Stream task flow.

35.5.3 Using an Advanced Query to Filter Activity Stream Items

The Activity Stream task flow provides an `Advanced Query` parameter, which you can use to create custom filters against streamed activities using a SQL `WHERE` clause. For example, using SQL you can set up an Activity Stream instance to show only those activities relating to the Page service or streaming from the current user or a named user.

This section provides an overview of the Activity Stream Advanced Query option and steps you through the process of entering an advanced query. It includes the following subsections:

- Section 35.5.3.1, "What You Should Know About the Activity Stream Advanced Query Option"
- Section 35.5.3.2, "Entering an Advanced Query Against an Activity Stream Task Flow Instance"

35.5.3.1 What You Should Know About the Activity Stream Advanced Query Option

Use `Advanced Query` to create filters against user names, service IDs, and object details, such as a document's display name. You can use SQL syntax for parameter values. Additionally you can place EL expressions within the SQL.

You can construct queries against specific database objects, which are represented by aliases that are prefixed to the inquiry. Table 35–3 lists and describes the types of database objects against which you can construct a query and provides their alias prefixes.

> **See Also:** In many cases, you can use EL expressions to obtain the value you require for the supported fields and columns listed in Table 35–3. For more information, see Appendix B, "Expression Language (EL) Expressions."

Table 35–3 Supported Database Objects for Constructing a SQL WHERE Clause

Database Object	Alias Prefix	Supported Fields/Columns
ACTIVITY	AE	■ `SCOPE_ID`—The GUID of the scope (e.g., `#{serviceCtx.scope.GUID}`). ■ `SERVICE_ID`—The service ID of the service to track. See Table B–19, " Service IDs" for a list of service IDs. ■ `ACTIVITY_TIME`—The time the activity occurs. Use the datetime format that is supported in the SQL or target database. You can also use Oracle database SQL constructs, such as `to_date()`. ■ `ACTIVITY_TYPE`—The type of activity to track For a list of valid activity type names, see Table 35–4.
ACTIVITY (ACTOR)	AD	`ACTOR_NAME`—The user name of the person performing the activity.
ACTIVITY (OBJECT)	OD	■ `SERVICE_ID`—The service ID of the service from which the tracked object issues. See Table B–19, " Service IDs" for a list of service IDs. ■ `OBJECT_ID`—The GUID of the object. ■ `DISPLAY_NAME`—The object display name. ■ `OBJECT_TYPE`—The object type. Object type names for use with Advanced Query include: ■ `event` ■ `announcement` ■ `forum` ■ `topic` ■ `bookmark` ■ `list` ■ `page` ■ `blog` ■ `document` ■ `wiki`

Table 35–4 Activity Type Names for Advanced Query

Service	Activity Type Name
Events	■ `createEvent` ■ `updateEvent`
Announcements	■ `createAnnouncement` ■ `updateAnnouncement`
Discussions	■ `createForum` ■ `createTopic` ■ `replyTopic`
Tags	■ `updateBookmark`
Lists	■ `createList`
Page	■ `createPage` ■ `editPage`
Documents	■ `create-blog` ■ `update-blog` ■ `create-document` ■ `create-wiki` ■ `update-document` ■ `update-wiki`
People Connections (Profile)	■ `updateStatus` ■ `updateProfile` ■ `updatePhoto`
People Connections (Message Board)	■ `postScope` ■ `postself` ■ `post` ■ `sharescope` ■ `shareself` ■ `share` ■ `shareobjectscope` ■ `shareobjectself` ■ `shareobject` ■ `updatescope` ■ `updateself` ■ `update`
People Connections (Connections)	■ `connect` ■ `inviteForConnection`
People Connections (Feedback)	■ `post`

The SQL string that is passed as the advanced query parameter complies with SQL standards. That is, it supports SQL constructs, such as `AND`, `OR`, `IN`, and the like. Note, however, that it does not support `INSERT`, `UPDATE`, `DELETE`, `SELECT`, `JOIN` constructs. The syntax of the advanced query must contain only the `WHERE` clause portion of a SQL query. Because `SELECT` is not supported, the `WHERE` clause cannot have nested queries or subqueries.

The `Advanced Query` parameter also supports EL expressions, which can be embedded in the `WHERE` clause or used to generate the whole `WHERE` clause.

All the literals in the query must be escaped by prepending a backward slash (\), otherwise such characters generate syntax errors (see Table 35–5 for examples).

Note that the advanced query `WHERE` clause is always `AND`'ed to the internal query that is generated by Activity Stream based on the current user, space membership, connection list, and the like. This is to prevent a user from viewing activities to which he or she does not have access.

Table 35–5 lists examples of advanced queries.

Table 35–5 Examples of Advanced Queries for Use with Activity Stream

Use Case	Query Syntax
Stream only document creation activities.	`AE.SERVICE_ID = \'oracle.webcenter.doclib\'`
Stream activities only from an object or current space.	`OD.OBJECT_ID = \'objectA\' OR AE.SCOPE_ID = \'#{serviceCtx.scope.GUID}\'`
Stream activities only about wikis created by the current user.	`OD.OBJECT_TYPE = \'Wiki\' AND AD.ACTOR_NAME = \'#{securityContext.userName}\'`
Stream activities for documents and discussions, but only create activities or all activities for the current user.	`(AE.SERVICE_ID IN (\'oracle.webcenter.doclib\', \'oracle.webcenter.collab.forum\') AND AE.ACTIVITY_TYPE IN (\'createDocument\', \'createTopic\')) OR AD.ACTOR_NAME = \'#{securityContext.userName}\'`

35.5.3.2 Entering an Advanced Query Against an Activity Stream Task Flow Instance

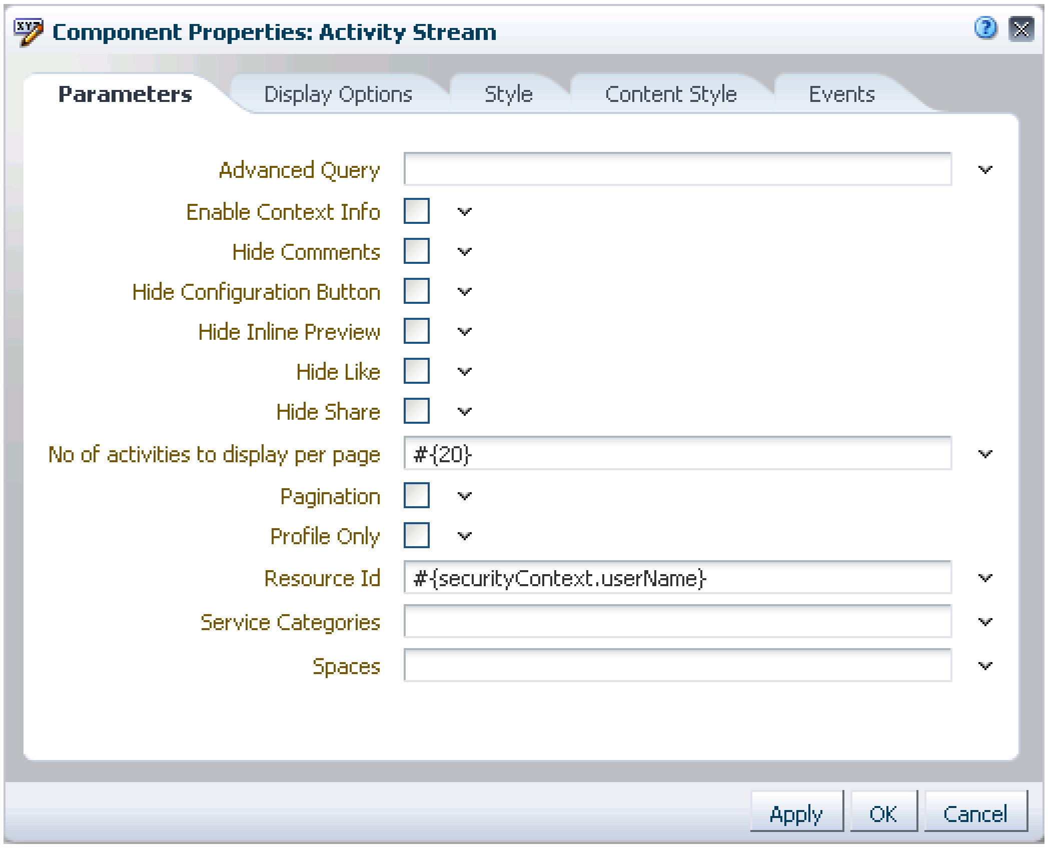
To enter an advanced query against an instance of the Activity Stream task flow:

1. Edit the properties of an Activity Stream task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward (Figure 35–12).

Figure 35–12 Activity Stream Task Flow Component Properties



3. Provide a value for the property `Advanced Query`:

    See Also: See Section 35.5.3.1, "What You Should Know About the Activity Stream Advanced Query Option," for information about the type and format of values to provide for this field.

4. Click **OK**.

Going forward, streamed activities are filtered by your query.

35.5.4 Using Properties to Configure an Activity Stream Task Flow Instance

This section provides examples of how you use property values to affect the behavior of a given task flow instance. It includes the following subsections:

- Section 35.5.4.1, "Preventing Users from Customizing an Activity Stream"
- Section 35.5.4.2, "Hiding File Previews in Streamed Items"
- Section 35.5.4.3, "Preventing Users from Commenting on Streamed Items"
- Section 35.5.4.4, "Preventing Users from Liking Streamed Items"
- Section 35.5.4.5, "Preventing Users from Sharing Streamed Items"
- Section 35.5.4.6, "Limiting the Stream to Activities from One or More Spaces"
- Section 35.5.4.7, "Limiting the Stream to One or More Services"
- Section 35.5.4.8, "Limiting the Stream to Your Own Activities"

35.5.4.1 Preventing Users from Customizing an Activity Stream

By default, Activity Stream task flows provide user customization controls that enable users to specify whose actions they want to see and from what services and spaces in a given Activity Stream task flow. On the Activity Stream task flow, this is the **Options** link. On the Activity Stream - Quick View task flow, this is the pencil icon.

The `Hide Configuration Button` property is available when you want to prevent users from overriding application-level customizations with their own user-level customizations.

To prevent users from customizing an Activity Stream task flow instance:

1. Edit the properties of an Activity Stream task flow instance.

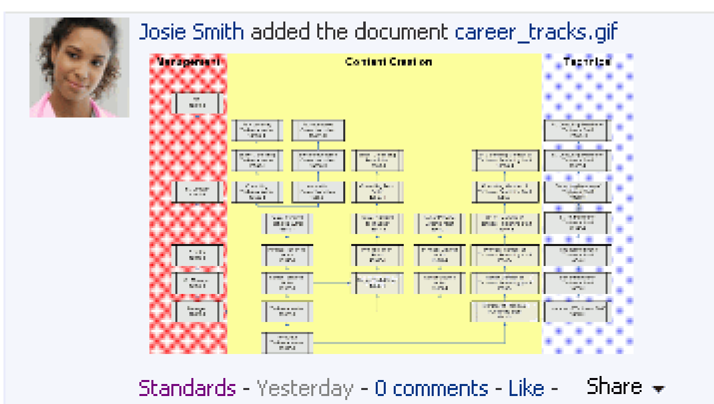
   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Provide a value for the property `Hide Configuration Button`:
   - Select the check box (`#{true}`) to omit the display of the **Options** link or pencil icon on the task flow instance.
   - Deselect the check box (`#{false}`) to show these controls on the task flow instance.
4. Click **OK**.

35.5.4.2 Hiding File Previews in Streamed Items

By default, in most cases where an Activity Stream item has an associated file, such as a document or an image, both a file link and a file preview are shown with the item (Figure 35–13).

Figure 35–13 Previewed File in Activity Stream



Activity Stream previews files through either a native web format or through Oracle WebCenter Content slide rendition. The previewer used depends on the mime type of the file to be previewed.

The mime types that use the native web format include the following:

- `image`
- `htm`

- `text`
- `pdf`

The mime types that use Oracle WebCenter Content slide rendition include the following:

- `powerpoint`
- `powerpnt`
- `pptx`

Note that the mime types shown in these bullet lists are the only mime types that are previewed. Other mime types appear as links.

You can use the `Hide Inline Preview` property to suppress the file preview, leaving the link for accessing the file should users want to do so.

The `Hide Inline Preview` property is provide with the Activity Stream task flow.

To hide a file preview in streamed items:

1. Edit the properties of an Activity Stream task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Provide a value for the property `Hide Inline Preview`:
   - Select the check box (`#{true}`) to omit the display of a file preview with items streamed from the Documents service.
   - Deselect the check box (`#{false}`) to show inline previews with items streamed from the Documents service.
4. Click **OK**.

35.5.4.3 Preventing Users from Commenting on Streamed Items

By default, a **comments** link is shown with all items in an Activity Stream task flow to enable users to comment on a given item (Figure 35–14).

Figure 35–14 Comments Link on a Streamed Item

You can use the `Hide Comments` property to suppress the display of the **comments** link and, consequently, prevent users from commenting on streamed items in a given task flow instance.

To prevent users from commenting on streamed items:

1. Edit the properties of an Activity Stream task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Provide a value for the property `Hide Comments`:
   - Select the check box (`#{true}`) to hide the **comments** link on streamed items.
   - Deselect the check box (`#{false}`) to show the **comments** link on streamed items.
4. Click **OK**.

35.5.4.4 Preventing Users from Liking Streamed Items

By default, a **Like** link is shown with all items in an Activity Stream task flow to enable users to express a favorable opinion of a given item (Figure 35–15).

Figure 35–15 Like Link on a Streamed Item

Once clicked, the **Like** link switches to an **Unlike** link to enable users to undo their favorable opinion.

You can use the `Hide Like` property to suppress the display of the **Like** link, and, consequently, prevent users from liking streamed items in a given task flow instance.

To prevent users from liking streamed items:

1. Edit the properties of an Activity Stream task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Provide a value for the property `Hide Like`:
   - Select the check box (`#{true}`) to hide the **Like** link on streamed items.
   - Deselect the check box (`#{false}`) to show the **Like** link on streamed items.
4. Click **OK**.

35.5.4.5 Preventing Users from Sharing Streamed Items

By default, a **Share** menu is shown with all items in an Activity Stream task flow to enable users to share a streamed item with their connections (Figure 35–16).

Figure 35–16 Share Menu on a Streamed Item

You can use the `Hide Share` property to suppress the display of the **Share** menu, and, consequently prevent users from sharing streamed items from a given task flow instance.

To prevent users from sharing streamed items:

1. Edit the properties of an Activity Stream task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Provide a value for the property `Hide Share`:
   - Select the check box (`#{true}`) to hide the **Share** menu on streamed items.
   - Deselect the check box (`#{false}`) to show the **Share** menu on streamed items.
4. Click **OK**.

35.5.4.6 Limiting the Stream to Activities from One or More Spaces

Configuration options in both the Activity Stream and Activity Stream - Quick View task flows provide all-or-none options for streaming activities from spaces (see Section 35.4.2, "Selecting the Spaces to Stream in an Activity Stream Instance"). The `Spaces` property associated with the Activity Stream task flow provides the additional dimension of selecting specific spaces from which to stream activities.

To limit the stream to activities from one or more spaces:

1. Edit the properties of an Activity Stream task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. In the `Spaces` field, enter a comma-separated list of the space names or space GUIDs from which to stream activities in this task flow instance.

   Tip: Enter the space *internal name*. The space internal name is the name specified by the **Space URL** on the **General** page of a space's administration settings.

   You can obtain the space GUID from the About Space dialog (see Section 51.6, "Viewing Information About a Space") or by using the EL expression.

4. Click **OK**.

35.5.4.7 Limiting the Stream to One or More Services

Configuration options for both the Activity Stream and Activity Stream - Quick View task flows provide a means of selecting the service categories from which to stream activities (see Section 35.4.3, "Selecting the Services to Stream in an Activity Stream Instance").

The `Service Categories` property associated with the Activity Stream task flow extends this capability by enabling you to enforce a particular selection. For example, you can specify the service category `documents`, and only those connections' activities that stream from the Documents service are shown in the task flow instance.

To limit streamed activities to one or more services:

1. Edit the properties of an Activity Stream task flow instance.

    See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. In the `Service Categories` field, enter a comma-separated list of the services from which to stream activities in this task flow instance.

    Tip: Enter the service category ID or the service ID. For a list of valid service IDs, see Table B–19, " Service IDs".

4. Click **OK**.

35.5.4.8 Limiting the Stream to Your Own Activities

You can use the `Profile Only` property associated with the Activity Stream task flow to limit the display of streamed activities to just your own activities.

To limit streamed activities to just your own:

1. Edit the properties of an Activity Stream task flow instance.

    See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Provide a value for the property `Profile Only`:
    - Select the check box (`#{true}`) to show only your own activities.
    - Deselect the check box (`#{false}`) to stream your own and your connections' activities.
4. Click **OK**.

36

Posting and Managing Messages and Feedback

WebCenter Portal: Spaces provides task flows for posting messages and Feedback to your connections. Use Message Board task flows to post, view, and manage messages to and from your connections. Use Feedback task flows to post, view, and manage Feedback to and from your connections.

This chapter provides an overview of Message Board and Feedback and steps you through the process of enabling, viewing, and managing messages and Feedback. It includes the following sections:

- Section 36.1, "What You Should Know About Message Board and Feedback"
- Section 36.2, "Setting Message Board and Feedback Preferences"
- Section 36.3, "Enabling Other Users to Post Messages and Feedback for You"
- Section 36.4, "Working with Message Board and Feedback Task Flows"
- Section 36.5, "Setting Message Board and Feedback Task Flow Properties"

Audience

This chapter is intended for users assigned an application role that includes, minimally, the permission `People Connections: Update People Connections Data`. Users who plan to edit task flow properties must be assigned a role that also includes the permission `Edit Pages`. In a space (other than the Home space), users must be assigned a role that includes the permission `Edit Page Access and Structure`.

36.1 What You Should Know About Message Board and Feedback

This section provides an overview of the task flows and features associated with Message Board and Feedback. It includes the following sections:

- Section 36.1.1, "What You Should Know About Message Board"
- Section 36.1.2, "What You Should Know About Feedback"

36.1.1 What You Should Know About Message Board

Message Board provides a means of viewing and posting messages and attachments to Message Boards and Activity Streams. Messages posted to and received on a Message Board (even those marked *private*) are shared with all of your connections and all of the recipient's connections in their views of the Activity Stream, depending on your portal configuration and your Activity Stream preference settings.

Note: The messages you mark *private* are shown only to you and the recipient in your views of Message Board. However, private messages are shared with all of your connections and with all of the recipient's connections in their views of Activity Stream, unless your administrator configures Activity Stream to omit showing actions from Message Board or you do so through your personal Activity Stream preferences. For more information, see Section 6.4.3.2, "Configuring Activity Stream," and Section 35.2, "Setting Activity Stream Preferences."

In your view of the Home space, Message Board enables you to view messages and attachments from your connections.

Message Boards in your connections' view of the Home spaces enable you to view the messages and attachments they have received and to post messages and attachments to their Message Boards, provided they have granted you access.

In spaces other than the Home space, Message Board provides a means of viewing and posting messages within the scope of the space. In a space, every instance of a Message Board task flow shows the same content: messages left by authorized users who are members of the space. The space Message Board leverages Page service permissions as its permission model.

Table 36–1 lists the page permissions required for performing actions in a space Message Board.

Table 36–1 Page Permissions for a space Message Board

Page Permission	Post	View	Update	Delete
View Page	No	Yes	No	No
Personalize Page	Yes	Yes	Yes for messages posted by this user	Yes for messages posted by this user
Perform All Page Actions	Yes	Yes	Yes for all messages	Yes for all messages

See Also: For information about space permissions, see Chapter 54, "Managing Space Members and Roles."

When you connect with other users, you potentially give them access to your Message Board and gain access to theirs. Access to other users' Message Boards must be specifically granted through Message Board Preferences.

See Also: You can grant access to your Message Board through People Connections Preferences. For more information, see Section 36.2.1, "Setting Message Board Preferences."

Before you access your Message Board or Message Board Preferences, your application administrator can set global application defaults that affect what all users may see and do with their own and other users' Message Boards. For more information, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application."

WebCenter Portal: Spaces provides the following Message Board task flows:

- **Message Board** for adding, viewing, updating, hiding, deleting, and managing your view of messages, and for marking messages as private and sharing private messages (Figure 36–1)

Figure 36–1 Message Board Task Flow

- **Message Board - Quick View** for adding, viewing, updating, hiding, and deleting messages, and for marking messages as private and sharing private messages (Figure 36–2)

Figure 36–2 Message Board - Quick View Task Flow

> **See Also:** The Publisher task flow has many qualities in common with Message Board, but is a separate feature. For more information about the Publisher task flow, see Chapter 37, "Liking, Commenting On, and Sharing Objects."

For more information about Message Board features, see Section 36.4, "Working with Message Board and Feedback Task Flows."

36.1.2 What You Should Know About Feedback

Feedback provides a means of viewing, posting, and managing feedback remarks. By default, you can view Feedback in your own Feedback view. You can view and post Feedback in your connections' Feedback views—provided they have granted you access.

Note: The feedback you mark *private* are shown only to you and the recipient in your views of Feedback task flows. However, private Feedback is shared with all of your connections and with all of the recipient's connections in their views of Activity Stream, unless your administrator configures Activity Stream to omit showing actions from Feedback or you do so through your personal Activity Stream preferences. For more information, see Section 6.4.3.2, "Configuring Activity Stream," and Section 35.2, "Setting Activity Stream Preferences."

When you connect with other users, you potentially give them access to your Feedback view and gain access to theirs. Access to other users' Feedback views must be specifically granted through Feedback preferences.

See Also: You can grant access to your view of Feedback through People Connections preferences. For more information, see Section 36.2.2, "Setting Feedback Preferences."

Feedback posts are also streamed to the Activity Stream, unless the application administrator has configured the Activity Stream not to show Feedback activity. Additionally, you can elect not to show Feedback activity in your own view of the Activity Stream through your personal Preference settings.

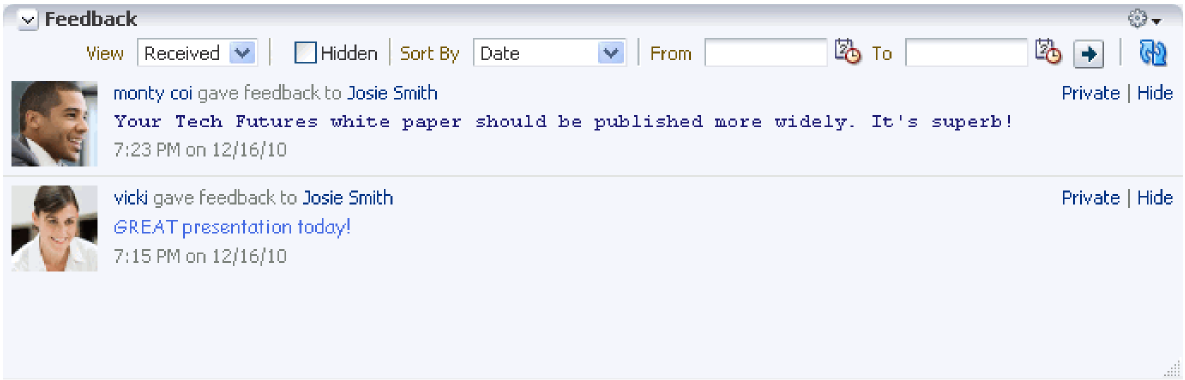
See Also: For information about administrator-level Activity Stream settings, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application." For information about your personal Activity Stream Preferences, see Section 35.2, "Setting Activity Stream Preferences."

Before you access your view of Feedback or your Feedback Preferences, your application administrator can set global application defaults that affect what all users may see and do with their own and other users' views of Feedback. For more information, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application."

WebCenter Portal: Spaces provides the following Feedback task flows:

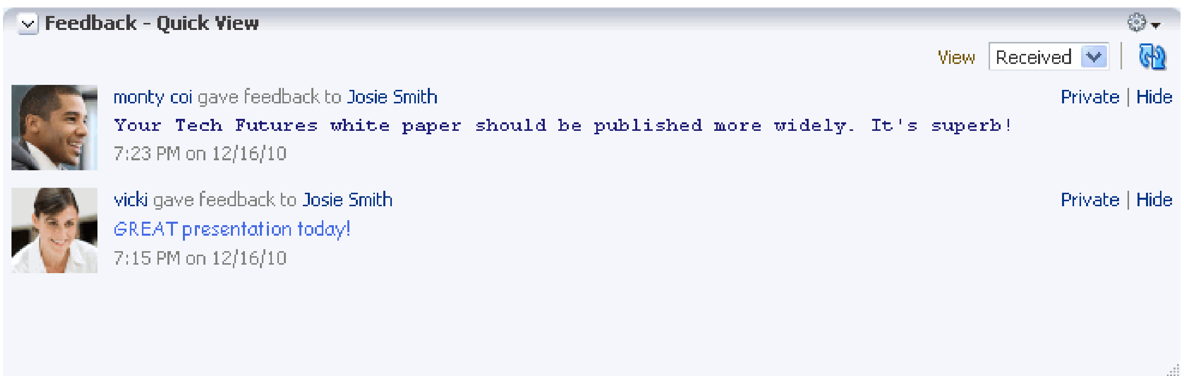
- **Feedback** for viewing, posting, and managing Feedback (Figure 36–3)

Figure 36–3 Feedback Task Flow



- **Feedback - Quick View** for viewing and posting Feedback (Figure 36–4)

Figure 36–4 Feedback - Quick View Task Flow



See Also: For information about business role pages, see Section 7.1, "Working with Business Role Pages."

For more information about Feedback features, see Section 36.4.2, "Working with Feedback Task Flows."

36.2 Setting Message Board and Feedback Preferences

This section describes how to use Message Board and Feedback Preferences to specify who can view and who can post messages to your view of these task flows. It includes the following subsections:

- Section 36.2.1, "Setting Message Board Preferences"
- Section 36.2.2, "Setting Feedback Preferences"

36.2.1 Setting Message Board Preferences

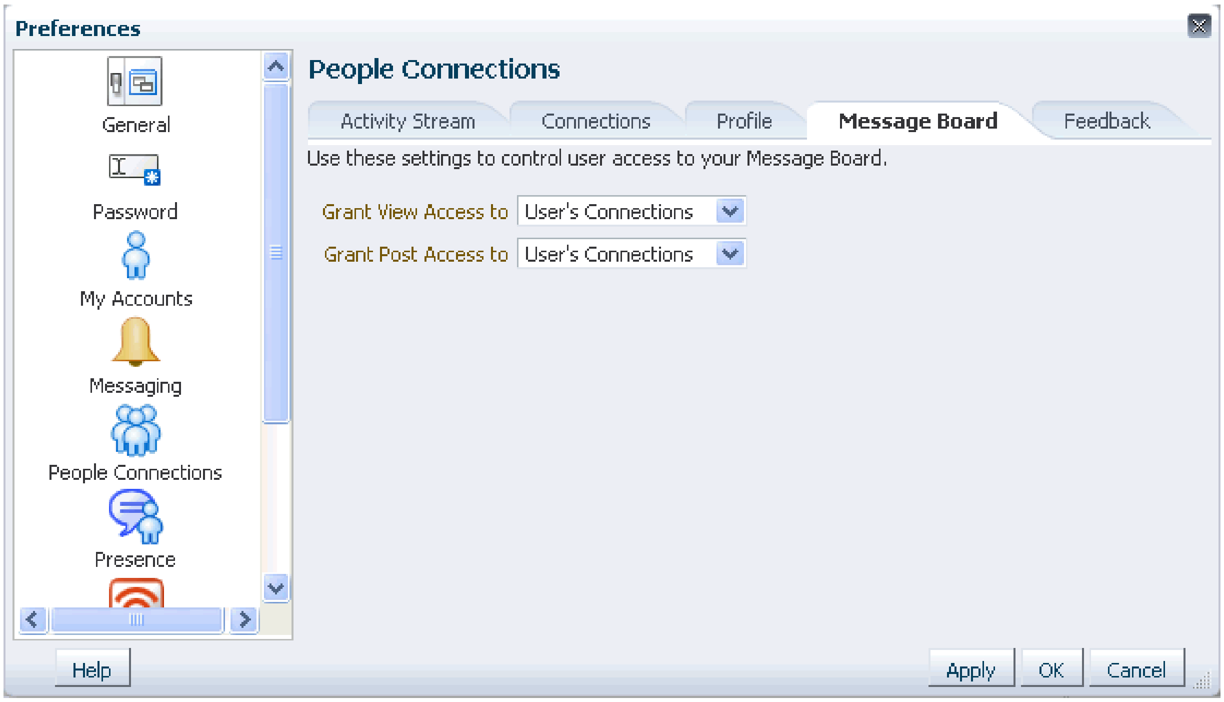
Use Message Board preferences to specify who can view and post to your Message Board.

To set Message Board Preferences:

1. Open the Preferences dialog.

2. Click **People Connections** to display People Connections Preferences.
3. Click the **Message Board** tab to bring it forward (Figure 36–5).

Figure 36–5 Message Board Preferences



4. Set your Preferences for the Message Board.

   Table 36–2 lists and describes each option.

Table 36–2 Message Board Preference Options

Option	Description
Grant View Access to	Select who can view your Message Board: ▪ **Everyone**—All users, including users who are not logged in, can view your Message Board messages. ▪ **Authenticated Users**—Only users who are logged in can view your Message Board messages. ▪ **User's Connections**—Only you and the users you your Connections can view your Message Board messages. ▪ **User Only**—Only you can view your Message Board messages.
Grant Post Access to	Select who can post messages to your Message Board: ▪ **Everyone**—All users, including users who are not logged in, can post messages to your Message Board. ▪ **Authenticated Users**—Only users who are logged in can post messages to your Message Board. ▪ **User's Connections**—Only you and your Connections can post messages to your Message Board. ▪ **User Only**—Only you can post messages to your Message Board.

5. Click **OK**.

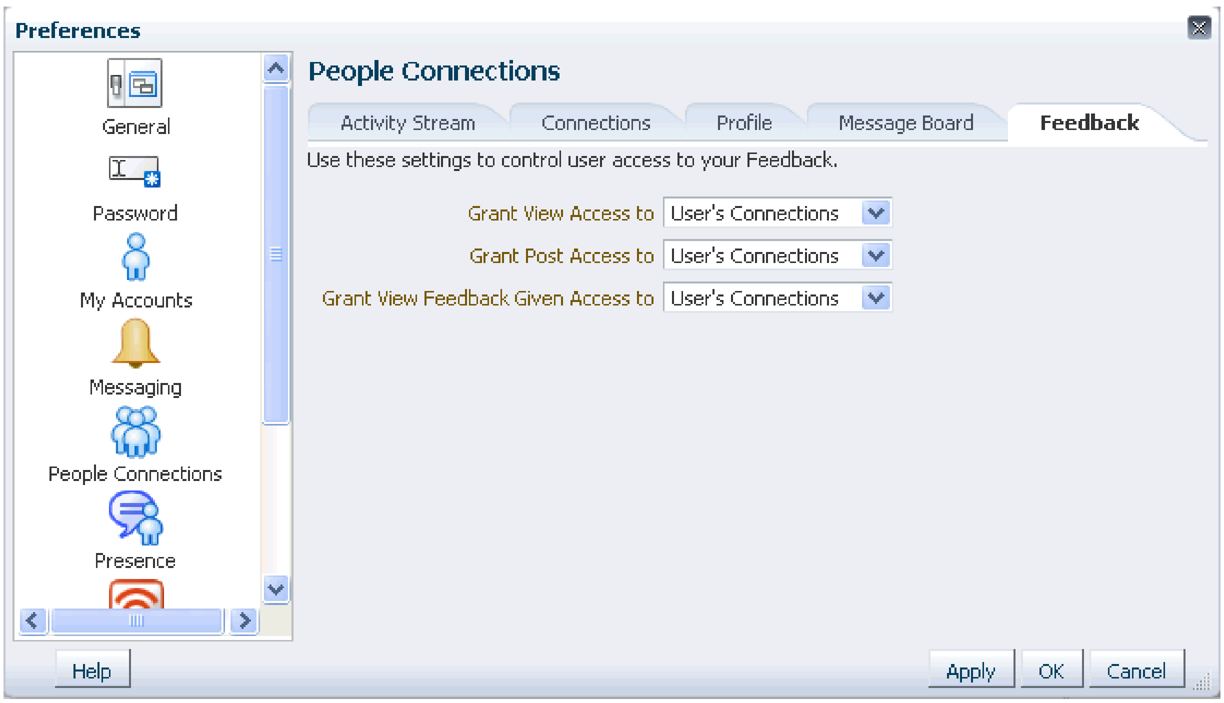
36.2.2 Setting Feedback Preferences

Use Feedback preferences to specify who can view the Feedback you have given and received and who can post Feedback in your view of Feedback task flows.

To set Feedback Preferences:

1. Open the Preferences dialog.
2. Click **People Connections** to display People Connections Preferences.
3. Click the **Feedback** tab to bring it forward (Figure 36–6).

Figure 36–6 Feedback Preferences



4. Set your Preferences for Feedback.

   Table 36–3 lists and describes each option.

Table 36–3 Feedback Preference Options

Option	Description
Grant View Access to	Select who can view Feedback given to you. ■ **Everyone**—All users, including users who are not logged in, can view the Feedback you have given. ■ **Authenticated Users**—Only users who are logged in can view the Feedback you have given. ■ **User's Connections**—Only you and your Connections can view the Feedback you have given. ■ **User Only**—Only you and the user for whom you have provided Feedback can view the Feedback you have given.
Grant Post Access to	Select who can provide Feedback to you. ■ **Everyone**—All users, including users who are not logged in, can post Feedback messages to you. ■ **Authenticated Users**—Only users who are logged in can post Feedback messages to you. ■ **User's Connections**—Only you and your Connections can post Feedback messages to you. ■ **User Only**—No one can post Feedback messages to you.
Grant View Feedback Given Access to	Select who can view Feedback you have received. ■ **Everyone**—All users, including users who are not logged in, can view Feedback you have received. ■ **Authenticated Users**—Only users who are logged in can view Feedback you have received. ■ **User's Connections**—Only you and your Connections can view Feedback you have received. ■ **User Only**—No one can view Feedback you have received.

5. Click **OK**.

36.3 Enabling Other Users to Post Messages and Feedback for You

To set up your Message Board and Feedback task flows so that users can post messages and Feedback specifically for you, you must add a Message Board or Feedback task flow to a page in your view of the Home space, and share that page with your connections. Additionally, you must set a parameter on the task flow to identify yourself as the task flow owner. Once this is set up, your connections can access this page and post messages and Feedback for you. This section steps you through this process.

To enable other users to post messages and Feedback for you:

1. Create or open the page in the Home space to which to grant access to your connections.

    See Also: For more information, see Section 32.4, "Working with Pages in the Home Space."

2. Set page access to enable your connections to view and personalize the page.

    See Also: For more information, see Section 17.7, "Controlling User Access to a Page."

Tip: When you share one of your personal pages in the Home space with other users, the shared page appears on their **Personalize Pages** page. Such users can use controls on the **Personalize Pages** page to show the page in their own view of the Home space.

3. Enter page edit mode and add a Message Board or Feedback task flow to the page.

   See Also: For information about editing a page and adding content, see Section 18.5, "Adding a Component to a Page."

4. Edit the task flow instance.

   See Also: For information about editing a task flow instance, see Section 18.6, "Modifying Page Components."

5. In the Component Properties dialog, bring the **Parameters** tab forward and enter your user name in the required field:

   - For Message Board and Message Board - Quick View task flows, enter your user name in the `User Name` field.
   - For the Feedback task flow, enter your user name in the `Resource Id` field.
   - For the Feedback - Quick View task flow, enter your user name in the `User Id` field.

6. Save your changes and exit page edit mode.

If you care to, you can send a link to this page to your connections, inviting them to leave you messages or Feedback whenever they are moved to do so. For more information, see Section 17.10, "Sending Mail with a Link to a Page."

All users who have access to the page see the Message Board or Feedback task flows that you place there. But only the users to whom you have granted access, through Preferences, see any content in the task flows.

See Also: For information about setting Message Board and Feedback Preferences, see Section 36.2, "Setting Message Board and Feedback Preferences."

36.4 Working with Message Board and Feedback Task Flows

This section steps you through using the features provided with Message Board and Feedback task flows. It includes the following subsections:

- Section 36.4.1, "Working with Message Board Task Flows"
- Section 36.4.2, "Working with Feedback Task Flows"

See Also: The properties available on a given task flow instance provide additional opportunities to affect the appearance and behavior of the task flow. For more information, see Section 36.5, "Setting Message Board and Feedback Task Flow Properties."

36.4.1 Working with Message Board Task Flows

Message Board task flows provide a means of viewing and posting messages to your connections and attaching files and URLs to your posts. This section discusses how to post messages and attachments and how to edit, hide, show, sort, filter, and delete messages. It includes the following subsections:

- Section 36.4.1.1, "Viewing Messages"
- Section 36.4.1.2, "Posting Messages"
- Section 36.4.1.3, "Editing Message Board Messages"
- Section 36.4.1.4, "Sorting and Filtering Message Board Messages"
- Section 36.4.1.5, "Hiding Messages in Your View of Message Board"
- Section 36.4.1.6, "Showing Hidden Messages"
- Section 36.4.1.7, "Deleting Message Board Messages"

36.4.1.1 Viewing Messages

Once you and your connections have set up your own Message Boards, you can see your own and, potentially, each other's messages. This section provides information about how to view each other's messages post-set-up. It includes the following subsections:

- Section 36.4.1.1.1, "Viewing Messages Others Have Left for You"
- Section 36.4.1.1.2, "Viewing Messages Others Have Received"
- Section 36.4.1.1.3, "Viewing Messages Sent to a Selected space"

> **Tip:** For information about setting up your view of Message Board, see Section 36.3, "Enabling Other Users to Post Messages and Feedback for You."

36.4.1.1.1 Viewing Messages Others Have Left for You To view Message Board messages other users have left for you, go to the personal page in the Home space that you have set up to receive Message Board messages (Figure 36–7).

Figure 36–7 Message Board Task Flow

36.4.1.1.2 Viewing Messages Others Have Received To view Message Board messages other users have received (including those you have left for them), go to the page the user has made available to you in your view of the Home space. You can access this page through the **Personalize Pages** page. For more information, see Section 51.11.3, "Opening a Page."

36.4.1.1.3 Viewing Messages Sent to a Selected space Message Boards placed in a space provide a means of viewing and posting messages within the space context. All default Message Board task flow instances within a given space display the same content: messages left by authorized users who are members of the space. All users with access to the space can see the posted messages.

36.4.1.2 Posting Messages

This section describes the various ways you can post messages and attachments. It includes the following subsections:

- Section 36.4.1.2.1, "Posting a Message to all of Your Connections"
- Section 36.4.1.2.2, "Posting a Message Scoped to a Selected space"
- Section 36.4.1.2.3, "Posting a Private Message"
- Section 36.4.1.2.4, "Sharing a Private Message"
- Section 36.4.1.2.5, "Attaching a File or URL to a Message Board Message"

36.4.1.2.1 Posting a Message to all of Your Connections Using the **Share** menu on the Message Board - Quick View task flow, you can select whether to post a message to all of your connections or to all of your connections who belong to a selected space.

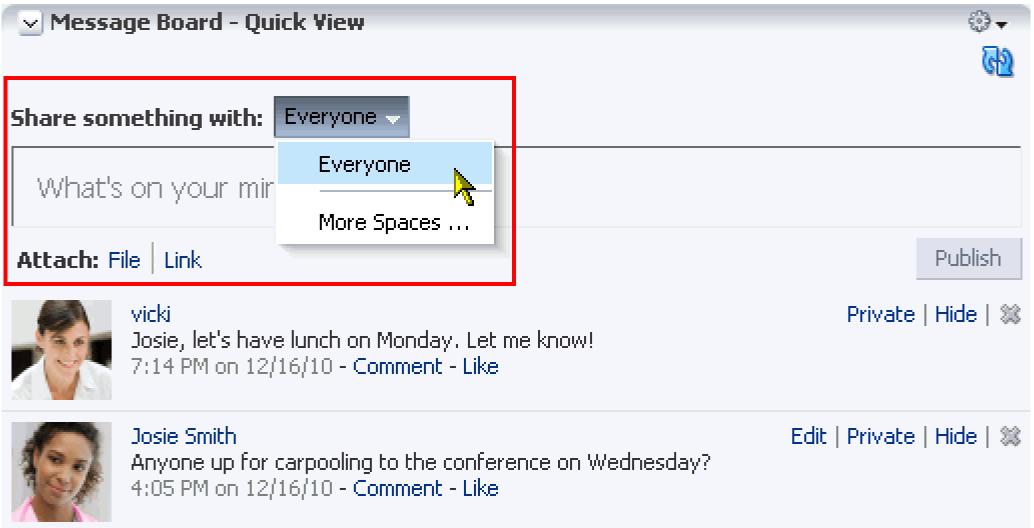
This section describes how to share a message with all of your connections. For information about sharing a message with all of your connections in a space, see Section 36.4.1.2.2, "Posting a Message Scoped to a Selected space."

> **See Also:** For information about Connections, see Chapter 34, "Creating Your Social Network."

To post a Message Board message to a selected audience:

1. Go to your view of the Message Board - Quick View task flow.
2. From the **Share something with** menu, select **Everyone** (Figure 36–8).

Figure 36–8 Share Option on Message Board - Quick View Task Flow



3. Enter a message in the field provided, and click **Publish** (Figure 36–9).

Figure 36–9 Publish Button on a Message Board - Quick View Task Flow

The message appears in all of your connections' views of Message Board and Activity Stream.

36.4.1.2.2 Posting a Message Scoped to a Selected space The Message Board - Quick View task flow provides a means of posting a message that is pushed to the Message Boards and Activity Streams of a selected space.

To post a message scoped to a selected space:

1. Go to your view of the Message Board - Quick View task flow.
2. From the **Share Something With** menu, select the space and go to step 5; or, if the space is not listed, select **More Spaces**, and go to step 3.
3. In the Select a space dialog, click the **Show spaces** menu and select to show:
   - **All**—all spaces that are available to you
   - **Joined**—The spaces you have joined

- **Public—**The spaces that do not require a user to be logged in
- **Moderated—**The spaces that you moderate

If you prefer, search for the space name using the provided field.

4. Select a space from the resulting list, and click **OK**.
5. Enter your message.
6. Optionally, attach a file or URL.

   See Also: For more information, see Section 36.4.1.2.5, "Attaching a File or URL to a Message Board Message."

7. Click **Share** to post your message.

   The message is posted to Message Boards and Activity Streams in the selected space.

36.4.1.2.3 Posting a Private Message Provided you are authorized to do so, you can post a private message to any of your connections. When you mark a message as *private*, only you and the recipient can see the message in your views of Message Board; however, all of your connections and all of the recipient's connections can see private messages in Activity Stream, unless the application is configured to omit Message Board activity from the Activity Stream or you have configured your Activity Stream preferences to do so.

See Also: For more information, see Section 6.4.3.2, "Configuring Activity Stream" and Section 35.2, "Setting Activity Stream Preferences."

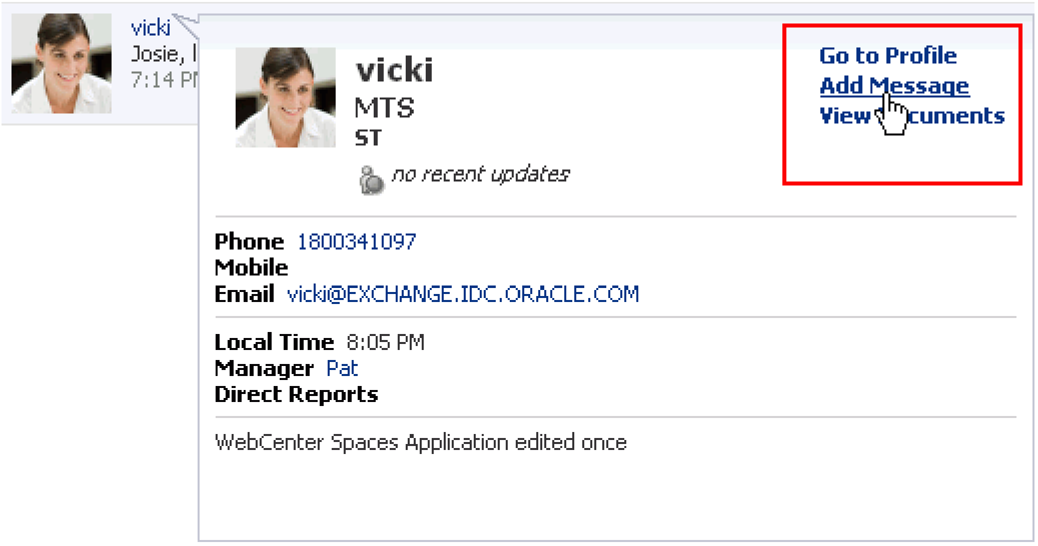
To post a private message:

1. Go to your **My Profile** page and click **Connections** to bring it forward.

   Tip: If necessary, set the **Show** menu to **All Connections**.

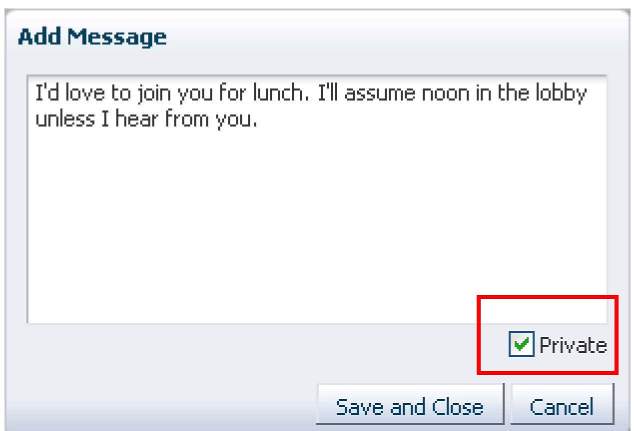
2. Click the name of the user for whom to leave a message to open the Profile popup, and click **Add Message** (Figure 36–10).

Figure 36–10 Add Message Link in Profile Popup



3. Enter your message in the Add Message dialog (Figure 36–11).

Figure 36–11 Add Message Dialog



4. Select the **Private** check box to allow only the recipient to see the message.
5. Click **Save and Close** when you have finished.

   The message appears in the recipient's views of Message Board and Activity Stream.

36.4.1.2.4 Sharing a Private Message When you receive a private message, you can opt to share that message with all users who have access to your Message Board by marking it as *shared*. When someone sends you a message marked *private*, only you and the sender can see it in the Message Board (though all of your connections and the sender’s connections can see the message in their Activity Streams, unless the Activity Stream in configured to omit Message Board activity).

See Also: For information about omitting services from Activity Stream at the application and personal levels, see Section 6.4.3.2, "Configuring Activity Stream" and Section 35.2, "Setting Activity Stream Preferences."

When you mark a private message as shared, you open it up to those permitted to see your view of the Message Board.

To mark a message as shared:

1. Go to the message you want to mark as shared in your view of the Message Board task flow.
2. Click the **Share** link next to the relevant message (Figure 36–12).

Figure 36–12 Share Link on a Private Message

The message can be viewed by everyone who can access your Message Board.

36.4.1.2.5 Attaching a File or URL to a Message Board Message Provided the task flow is configured to allow it, you can attach files and URLs to the messages you post to a Message Board - Quick View task flow in a Home space.

Note: Message Boards in spaces, other than the Home space, cannot be posted to any space other than the current space.

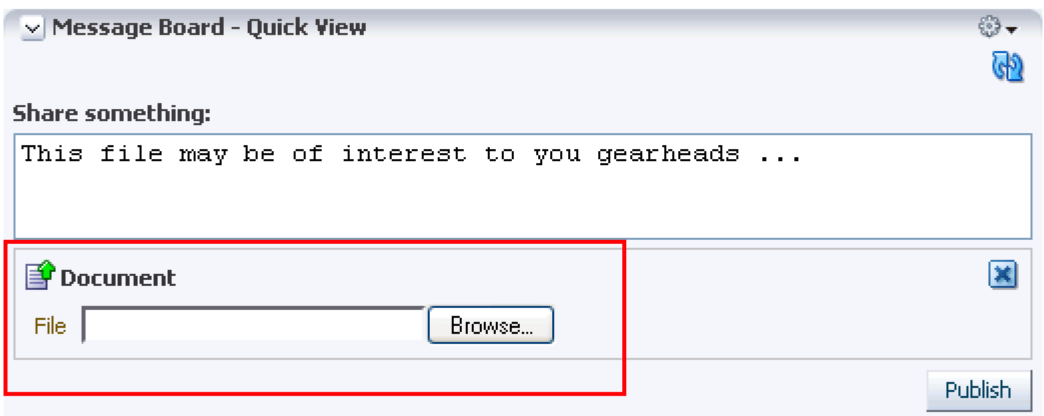
To attach a file or URL to a message:

1. Go to the Home space, and enter a message in a Message Board - Quick View task flow.
2. Next to **Attach**, click the **File** or **Link** icon (Figure 36–13).

Figure 36–13 Attach Options on a Message Board - Quick View Task Flow

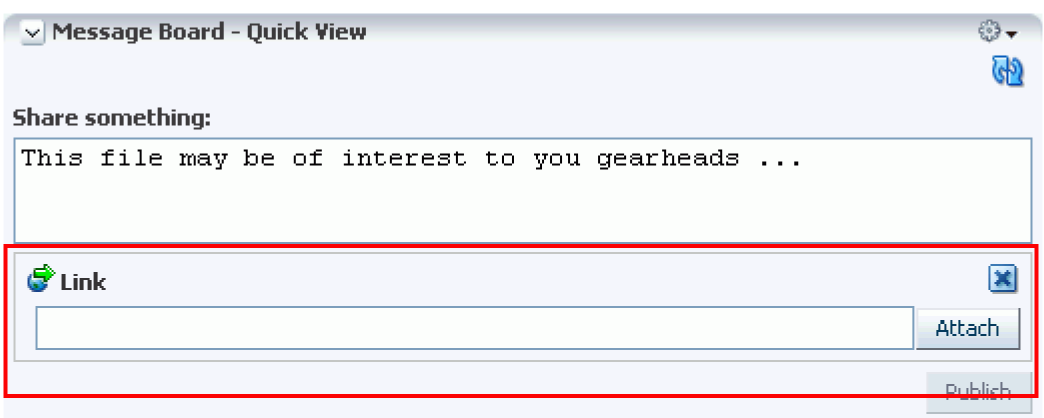
3. For **File**, click **Browse** to locate and select the file to share (Figure 36–14)

Figure 36–14 Attach File Feature



For **Link**, enter the target URL, and click **Attach** (Figure 36–15).

Figure 36–15 Attach Link Feature



4. Click **Share**.

36.4.1.3 Editing Message Board Messages

Your application administrator can configure the Message Board feature to enable users to revise the messages they leave. Provided this permission is in place, you can edit any message you post.

> **See Also:** For information about configuring application-level Message Board settings, see Section 6.4.3.5, "Configuring Message Board."

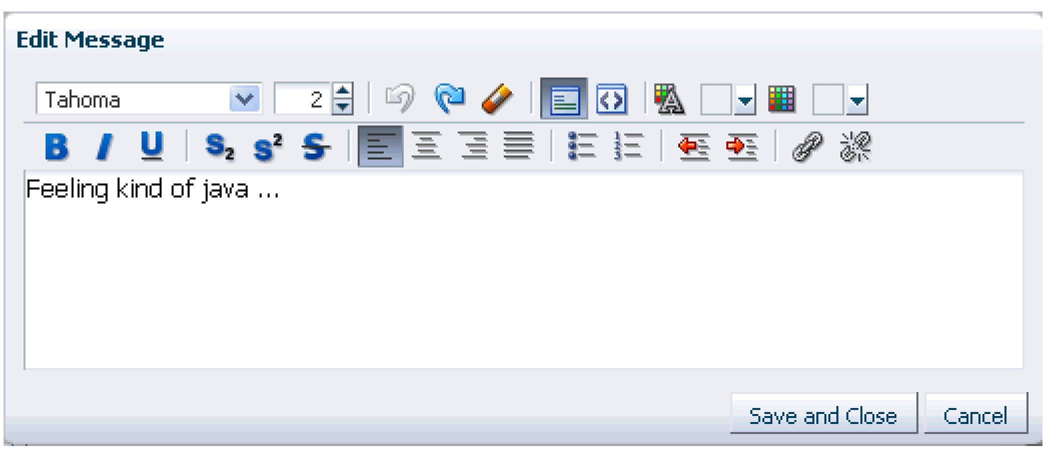
To edit a Message Board message:

1. Go to the message you want to edit.
2. Click the **Edit** link associated with the message (Figure 36–16).

Figure 36–16 Edit Link on a Message

The Edit Message dialog opens with a rich text editor prepopulated with your message text (Figure 36–17).

Figure 36–17 Edit Message Dialog



3. Revise your message, and click **Save**.

36.4.1.4 Sorting and Filtering Message Board Messages

Your full view of the Message Board task flow includes sorting and filtering features for managing your view of your messages. Use the sorting feature to sort your messages by date or by the person who left the message. Use the filtering feature to show messages posted on a particular date or within a given date range.

To sort and filter your Message Board messages:

1. Go to the Message Board task flow.
2. From the **Sort By** menu, select a sorting option (Figure 36–18):

Figure 36–18 Options on Sort By Menu

- **Date**—Sort your messages by the date they were posted, from most recent to oldest.
- **Person Name**—Sort your messages by the user name of the person who posted them, from A to Z.

3. To show messages between a particular range of dates, enter the beginning and end of the range respectively in the fields after **From** and **To** (Figure 36–19).

Figure 36–19 Sort By Date Range Options

Tip: Instead of entering dates, you can click the **Select Date** icon next to a field to select a date from a calendar.

Accessibility Note: In WebCenter Portal: Spaces, you cannot use the keyboard to select a date from the calendar that pops up when you click the **Select Date** icon. Instead, manually enter the date into the field.

---

4. Click the button to the right of the fields to apply the filter.

   The Message Board refreshes, showing only those messages that fit your sorting and filtering criteria.

   Tip: To remove the date filtering criteria from your Message Board view, click the **deselect Date** icon to the right of the date range fields.

36.4.1.5 Hiding Messages in Your View of Message Board

You can hide any message you have received on your Message Board. Hiding provides a means of removing messages from your own view without actually deleting them. It is a non-permanent way to reduce the visual clutter of your Message Board view.

Users to whom you have given access to your messages can still see the messages that you have hidden.

To hide Message Board messages:

1. Go to the message you want to hide in your view of the Message Board task flow.
2. Click the **Hide** link next to the message you want to hide (Figure 36–20).

Figure 36–20 Hide Link on a Message

The message is hidden in your view of the Message Board. Other users you have permitted to view your Message Board can see this message when they visit your view.

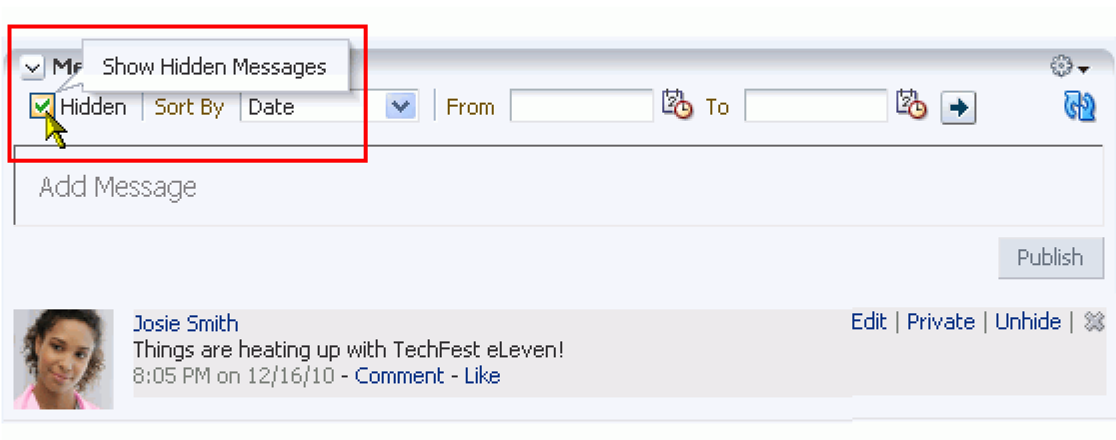
36.4.1.6 Showing Hidden Messages

Use the **Hidden** check box on the Message Board task flow to show all of the messages you have hidden. The **Hidden** check box provides a means of showing all hidden messages in one operation, making it available to be unhidden or deleted.

To show hidden Message Board messages:

1. In your view of the Message Board task flow, select the **Hidden** check box to show the messages you have hidden (Figure 36–21).

Figure 36–21 Hidden Checkbox on a Message Board Task Flow



2. Click the **Unhide** link next to the message you want to show (Figure 36–22).

Figure 36–22 Unhide Link on a Message Board Task Flow

3. Optionally, deselect the **Hidden** check box to hide the messages that are still marked as hidden.

36.4.1.7 Deleting Message Board Messages

Your application administrator can configure the Message Board to allow users to delete the messages they send. Provided this permission is in place, you can delete any message you send.

> **See Also:** For information about configuring application-level Message Board settings, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application."

To delete a message you sent:

1. Go to your view of the Message Board, and click the **Delete** icon next to the message you want to delete (Figure 36–23).

Figure 36–23 Delete Icon on a Message

2. In the resulting confirmation dialog, click the **Delete** button.

36.4.2 Working with Feedback Task Flows

Feedback provides a means of viewing and posting remarks on the job performance of your connections. In your own view of the Feedback task flow, you can view the Feedback you have posted and that was posted for you. In a connection's view of the Feedback task flow, you can post Feedback for that connection and view all of the Feedback left for that connection, provided he has granted you view and post access.

> **See Also:** Feedback is also posted to the Activity Stream, unless Activity Stream is configured not to show Feedback activity. For more information, see Section 36.1.2, "What You Should Know About Feedback."

When you view another user's Feedback, you can view only the Feedback they have received. To view the Feedback they have sent, you must go to the recipients' views of the Feedback task flow.

> **See Also:** Use Preferences settings to configure user access to your Feedback. For more information, see Section 36.2.2, "Setting Feedback Preferences."

This section discusses how to view, hide, show, sort, filter, post, and delete Feedback messages. It includes the following subsections:

- Section 36.4.2.1, "Viewing Feedback"
- Section 36.4.2.2, "Posting Feedback"
- Section 36.4.2.3, "Deleting Feedback"

36.4.2.1 Viewing Feedback

This section provides information about accessing the Feedback you have posted or received and hiding and unhiding posted Feedback. It includes the following sections:

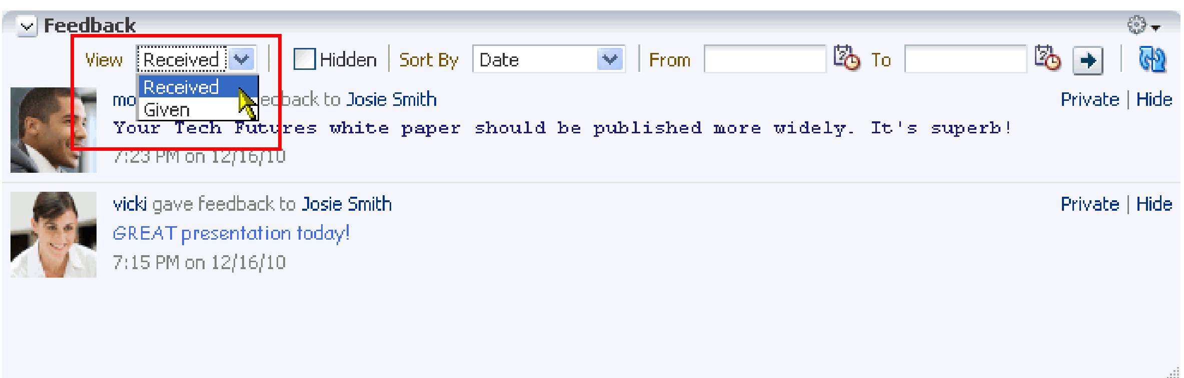
- Section 36.4.2.1.1, "Viewing Feedback You Have Posted or Received"
- Section 36.4.2.1.2, "Sorting and Filtering Feedback Posts"
- Section 36.4.2.1.3, "Hiding Feedback in Your Own View"
- Section 36.4.2.1.4, "Showing Hidden Feedback"
- Section 36.4.2.1.5, "Marking Feedback Received as Private"

36.4.2.1.1 Viewing Feedback You Have Posted or Received A **View** menu on Feedback task flows provides a means of viewing the Feedback you have posted for others and the Feedback you have received from others.

To view Feedback you have posted or received:

1. Go to your view of a Feedback task flow in the Home space.
2. Select an option from the **View** menu (Figure 36–24):
   - **Given**—To view the Feedback you have posted for others
   - **Received**—To view the Feedback others have left for you

Figure 36–24 Feedback Task Flow View Menu

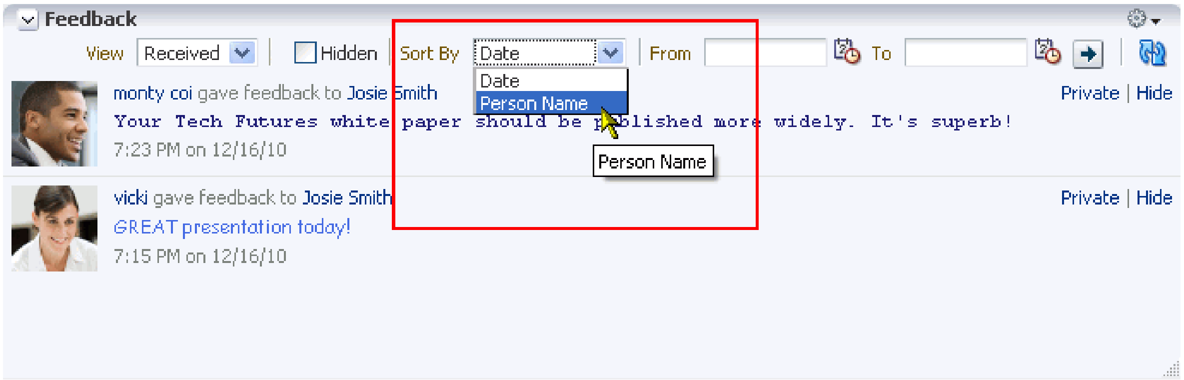


36.4.2.1.2 Sorting and Filtering Feedback Posts The main Feedback task flow includes sorting and filtering features for controlling what is shown in your view. Use the sorting feature to sort your Feedback by date or by person—that is, the user name of the person who left the Feedback. Use the filtering feature to display Feedback posted on a particular date or within a given date range.

To sort and filter your Feedback:

1. Go to your view of the main Feedback task flow.
2. Select an option from the **Sort By** menu (Figure 36–25):

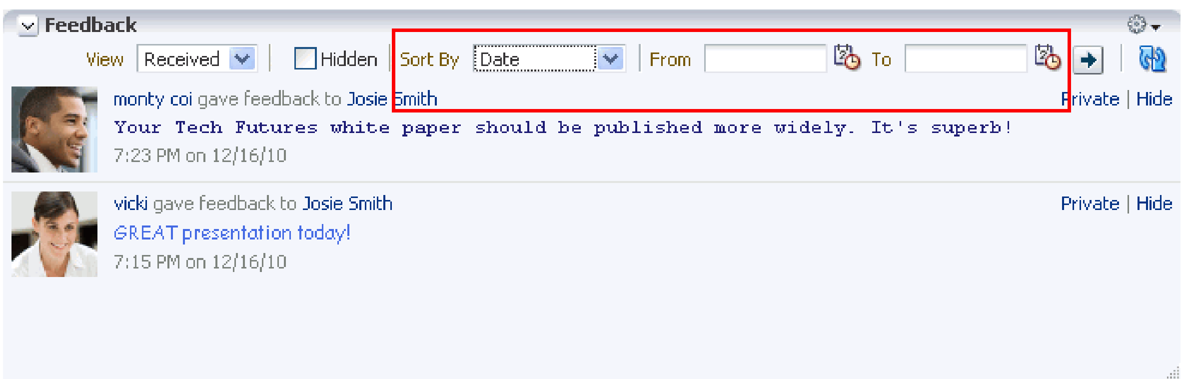
Figure 36–25 Sort By Menu on Feedback Task Flow



- **Date**—To sort Feedback posts from the most recent to the oldest.
- **Person Name**—To sort Feedback posts by the name of the user who left it for you (**View** is set to **Received**) or by the name of the user you left it for (**View** is set to **Given**).

3. To specify a date range, enter a start date in the field that follows **From** and enter an end date in the field that follows **To** (Figure 36–26).

Figure 36–26 Sort By Date Range Fields on Feedback Task Flow



Tip: You must enter both a start and end date, even when you want to view Feedback posts from a given day. In such a case, enter the same date in both fields.

Instead of entering dates, you can click the **Select Date** icon next to a field to select a date from a calendar.

Accessibility Note: In WebCenter Portal: Spaces, you cannot use the keyboard to select a date from the calendar that pops up when you click the **Select Date** icon. Instead, manually enter the date into the field.

---

4. Click the **Search Feedback** icon.

   All of the Feedback posts (either received or given) that fall within the specified date range appear in the Feedback task flow.

> **Tip:** To remove the date filtering criteria from your Feedback view, click the **deselect Date** icon.

36.4.2.1.3 Hiding Feedback in Your Own View You can hide any Feedback in your own view of the Feedback task flow. Hiding provides a means of removing Feedback posts from your own view without actually deleting them. Users to whom you have given access to your Feedback can still see the posts you have hidden.

> **See Also:** For information about undoing this action, see Section 36.4.2.1.4, "Showing Hidden Feedback."

To hide Feedback in your own view:

1. Go to your view of the main Feedback task flow.
2. Click the **Hide** link next to the Feedback message you want to hide (Figure 36–27).

Figure 36–27 Hide Link on a Feedback Message

36.4.2.1.4 Showing Hidden Feedback Use the **Hidden** check box on the Feedback task flow to show all the Feedback you have hidden. The **Hidden** check box provides a means of showing all hidden Feedback in one operation, making it available to be unhidden or deleted.

To show hidden Feedback posts:

1. Go to your view of the Feedback task flow.
2. Select the **Hidden** check box (Figure 36–28).

Figure 36–28 Hidden Checkbox on a Feedback Task Flow

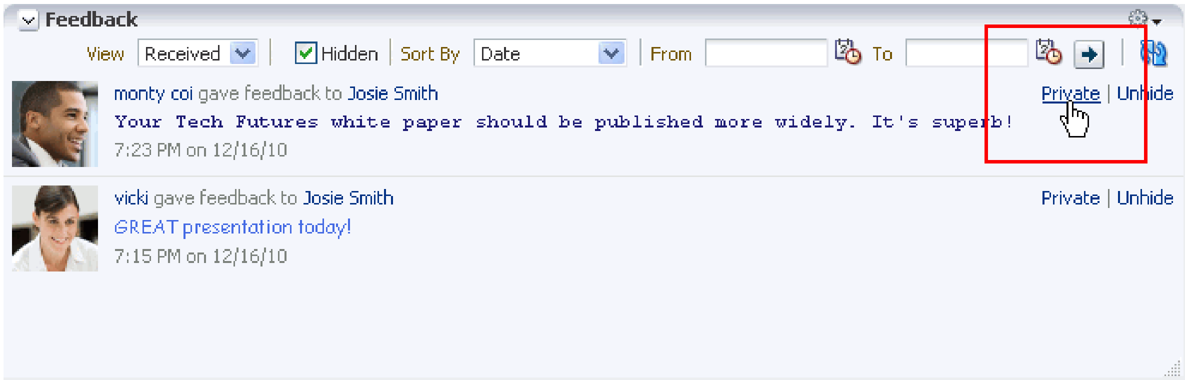
3. All the Feedback posts you have hidden are shown.
4. Click the **Unhide** link to the right of the Feedback you want to show (Figure 36–29).

Figure 36–29 Unhide Link on a Feedback Task Flow

5. To remove hidden Feedback posts from your view, deselect the **Hidden** check box.

36.4.2.1.5 Marking Feedback Received as Private When you view Feedback you have received, you typically have the option of clicking a **Private** link to shield the Feedback from other viewers (Figure 36–30).

Figure 36–30 Private Link on a Feedback Message



It is possible to set a property on the task flow that suppresses the **Private** link (for more information, see Section 36.5, "Setting Message Board and Feedback Task Flow Properties"). Also, unless Activity Stream is configured at the application level or the personal level (through Preferences) to omit Feedback activity, your connections and the poster's connections can see even private Feedback in their Activity Streams.

> **See Also:** For more information, see Section 6.4.3.2, "Configuring Activity Stream" and Section 35.2, "Setting Activity Stream Preferences."

36.4.2.2 Posting Feedback

Use Feedback to pass along remarks to your connections about their efforts and results. Keep in mind that a wider audience than just your connections may see your Feedback message.

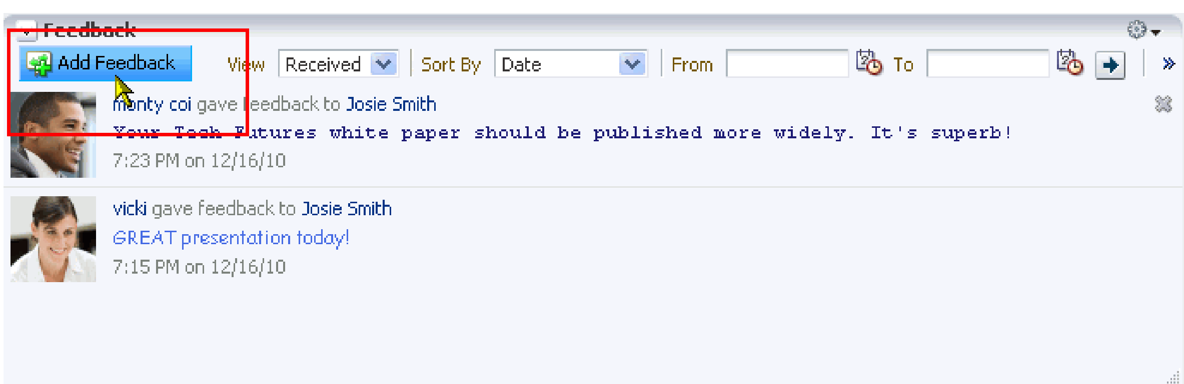
To post a Feedback message:

1. Go to the page the user has set up to receive Feedback.

   > **See Also:** For more information, see Section 36.3, "Enabling Other Users to Post Messages and Feedback for You."

2. Click **Add Feedback** (Figure 36–31).

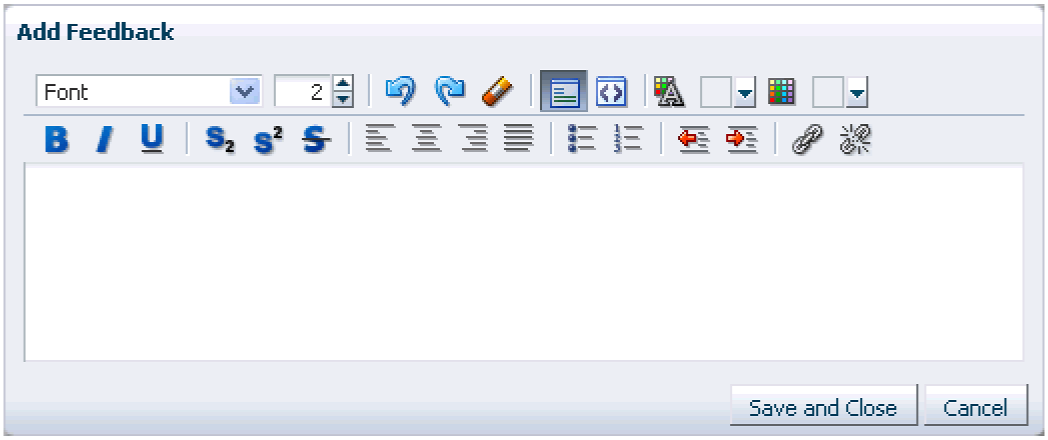
Figure 36–31 Add Feedback Button on a Feedback Task Flow



3. In the resulting Add Feedback dialog, enter your Feedback in the text area (Figure 36–32).

> **Tip:** The Add Feedback dialog provides an integrated rich text editor that enables you to add styles, links, and other HTML encoding to your Feedback.

Figure 36–32 Add Feedback Dialog with Rich Text Editor



4. When you finish entering text, click **Add**.

Once you click **Add**, your Feedback appears in the selected user's view of the Feedback task flow.

36.4.2.3 Deleting Feedback

You can delete Feedback you have posted to other users, provided your WebCenter Portal: Spaces administrator has enabled you to do so.

If Activity Stream is configured to show Feedback activity, deleted Feedback posts nonetheless continue to show in the Activity Stream of the recipient and all of your connections.

> **See Also:** for information about administrator-level Feedback settings, see Section 6.4, "Configuring People Connections Defaults for the Spaces Application." For information about configuring your personal Activity Stream Preferences, see Section 35.2, "Setting Activity Stream Preferences."

To delete Feedback you have posted:

1. Go to your view of the Feedback task flow.
2. From the **View** menu, select **Given**.
3. Click the **Delete** icon next to the post you want to delete (Figure 36–33).

Figure 36–33 Delete Icon on a Feedback Message

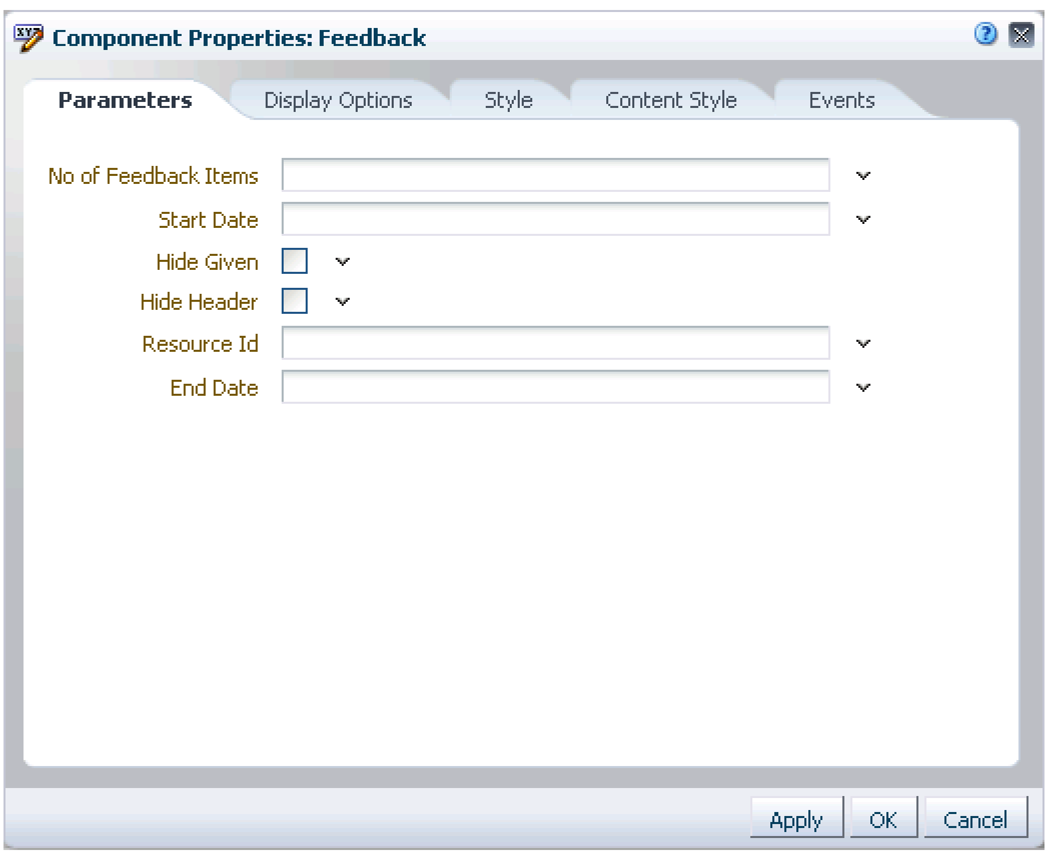
4. Click **Delete** in the resulting confirmation dialog.

   The Feedback is deleted from your view and from the view of the user for whom you left it.

36.5 Setting Message Board and Feedback Task Flow Properties

Both Message Board and Feedback task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 36–34).

Figure 36–34 Component Properties Dialog for a Feedback Task Flow



See Also: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of Message Board and Feedback task flows and describe the properties on the Parameters tab:

- Section 36.5.1, "What You Should Know About Message Board and Feedback Task Flow Properties"
- Section 36.5.2, "Message Board and Feedback Task Flow Parameters"
- Section 36.5.3, "Using Parameters to Configure Message Board and Feedback Task Flow Instances"

36.5.1 What You Should Know About Message Board and Feedback Task Flow Properties

When you set property values on a Message Board or Feedback task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the **Parameters** tab of the Component Properties dialog can affect the default task flow content. For descriptions of the parameters on this tab, see Section 33.6.2, "Profile Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

36.5.2 Message Board and Feedback Task Flow Parameters

Table 36–4 describes the parameters that are unique to Message Board and Feedback task flows.

Table 36–4 Message Board and Feedback Task Flow Parameters

Parameter	Description
`Display Message Size`	The number of characters to show for each Feedback message Messages exceeding the specified value are truncated. This parameter is associated with the Feedback – Quick View task flow.
`End Date`	The ending date for a date range within which to show messages and posts Use the format `YYYY/MM/DD`. Use this parameter with `Start Date`. This parameter is associated with the following task flows: ■ Feedback ■ Feedback - Quick View ■ Message Board
`Group Space`	Specifies the space for which to show messages Enter the space *internal name*. The space internal name is the name specified by the **space URL** on the **General** page of a space's administration settings. The space *display name* is specified by **Display Name**, and is the name that appears in the banner at the top of a space. This parameter is associated with the following task flows: ■ Message Board ■ Message Board - Quick View
`Hide Actions`	Specifies whether to show or hide the actions normally associated with a Feedback or Message Board entry, such as Private, Edit, Hide, and Delete ■ Select the check box to hide actions associated with a Feedback or Message Board entry (`#{true}`). ■ Deselect the check box to show such actions (`#{false}`). When no value is entered, this is the default. This parameter is associated with the following task flows: ■ Feedback – Quick View ■ Message Board – Quick View
`Hide Footer`	Specifies whether to hide the task flow footer ■ Select the check box to hide the task flow footer (`#{true}`). ■ Deselect the check box to show the task flow footer (`#{false}`). This parameter turns the **More** link on (`#{false}`) or off (`#{true}`). Note that it does not affect the **Previous** and **Next** links that may also display toward the bottom of the task flow. This parameter is associated with the following task flows: ■ Feedback - Quick View ■ Message Board - Quick View

Table 36–4 (Cont.) Message Board and Feedback Task Flow Parameters

Parameter	Description
`Hide Given`	Specifies whether to enable or disable the display of Feedback left for others ■ Select the check box to disable the display of Feedback left for others in a given task flow instance (`#{true}`). ■ Deselect the check box to allow the display of Feedback left for others in a given task flow instance (`#{false}`). Selecting `Hide Given` hides the **View** menu so that only Feedback received is shown. This parameter is associated with the following task flows: ■ Feedback ■ Feedback - Quick View
`Hide Header`	Specifies whether to show or hide the task flow header ■ Select the check box to hide the task flow header (`#{true}`). ■ Deselect the check box to show the task flow header (`#{false}`). This parameter is associated with the following task flows: ■ Feedback ■ Feedback - Quick View ■ Message Board ■ Message Board - Quick View
`Hide Publisher`	Specifies whether to show or hide the message entry field and the upload file and URL controls (the Publisher) ■ Select the check box to disable the display of the message entry field in a given task flow instance (`#{true}`). ■ Deselect the check box to allow the display of the message entry field in a given task flow instance (`#{false}`). This parameter is associated with the following task flows: ■ Message Board ■ Message Board - Quick View
`No of Feedback items`	The number of Feedback items to show in the task flow For example, enter `5` to specify that a maximum of five items can appear in the task flow. In quick view, a **More** link appears at the bottom of the task flow when there are more items than the specified number of items. Users click **More** to open the main view of the task flow where all items are accessible. In main view, **Previous** and **Next** links are shown. Users click these to page through entries. This parameter is associated with the following task flows: ■ Feedback ■ Feedback - Quick View

Table 36–4 (Cont.) Message Board and Feedback Task Flow Parameters

Parameter	Description
`No of Messages`	The number of messages to show in the task flow For example, enter `5` to specify that a maximum of five items can appear in the task flow. In quick view, a **More** link appears at the bottom of the task flow when there are more items than the specified number of items. Users click **More** to open the main view of the task flow where all items are accessible. In main view, **Previous** and **Next** links are shown. Users click these to page through entries. This parameter is associated with the following task flows: ■ Message Board ■ Message Board - Quick View
`Resource Id`	The ID of the user to show in the task flow This value is set automatically, `#{securityContext.userName}`, which returns the name of the current user. **Note:** For information about this and other EL expressions, see Appendix B, "Expression Language (EL) Expressions." This parameter is associated with the Feedback task flow.
`Start Date`	The starting date for a date range within which to show messages and posts Use the format `YYYY/MM/DD`. Use this parameter with `End Date`. This parameter is associated with the following task flows: ■ Feedback ■ Feedback - Quick View ■ Message Board
`User Id`	The ID of the user to show in the task flow This value is set automatically, `#{securityContext.userName}`, which returns the name of the current user. **Note:** For information about this and other EL expressions, see Appendix B, "Expression Language (EL) Expressions." This parameter is associated with the Feedback - Quick View task flow.
`User Name`	The ID of the user to show in the task flow This value is set automatically, `#{securityContext.userName}`, which returns the name of the current user. **Note:** For information about this and other EL expressions, see Appendix B, "Expression Language (EL) Expressions." This parameter is associated with the following task flows: ■ Message Board ■ Message Board - Quick View

36.5.3 Using Parameters to Configure Message Board and Feedback Task Flow Instances

The properties associated with Message Board and Feedback task flows make it possible to control such things as the number of messages to show, the maximum length of Feedback posts, the presence or absence of a message input field, and so on.

Setting task flow properties affects every users' view of the task flow instance.

This section provides examples of how to use task flow parameters to achieve these results. It includes the following subsections:

- Section 36.5.3.1, "Hiding Action Links and Icons on a Task Flow Instance"
- Section 36.5.3.2, "Limiting the Number of Messages and Feedback Posts Shown"
- Section 36.5.3.3, "Limiting the Length of Posts in a Feedback - Quick View Task Flow"
- Section 36.5.3.4, "Preventing Users from Adding Messages to a Message Board"
- Section 36.5.3.5, "Hiding the Feedback You Have Left for Others"
- Section 36.5.3.6, "Scoping the Display of Messages to a Named Space"
- Section 36.5.3.7, "Specifying the Date Range of Shown Messages and Feedback"

36.5.3.1 Hiding Action Links and Icons on a Task Flow Instance

Users with page edit privileges can set the `Hide Actions` parameter on a Message Board - Quick View or Feedback - Quick View task flow to hide the actions normally associated with each posted message. Such actions include the **Edit**, **Hide**, and **Private** links and the **Delete** icon (Figure 36–35).

Figure 36–35 Actions on a Feedback Message

To hide actions on a Message Board - Quick View or Feedback - Quick View task flow instance:

1. Edit the task flow instance's properties as described in Section 18.6, "Modifying Page Components."
2. In the Component Properties dialog, click the **Parameters** tab to bring it forward.
3. Select the **Hide Actions** check box.

> **Note:** To show hidden actions, deselect this check box.

4. When you finish revising component properties, click **OK**.
5. Save your changes, and exit page edit mode.

36.5.3.2 Limiting the Number of Messages and Feedback Posts Shown

Parameters on all Message Board and Feedback task flow types enable you to specify how many messages or Feedback posts to show in a given task flow instance. When the number of messages or posts exceeds the value that you provide:

- **Previous** and **Next** icons appear on the full task flow views, enabling users to page through all messages and posts.
- A **More** link appears on task flow quick views. Users click this to launch a dynamically-generated page that shows all messages or posts.

For Message Board and Message Board - Quick View task flows, use the `No of Messages` parameter. For Feedback and Feedback - Quick View task flows, use the `No of Feedback Items` parameter.

To limit the number of messages and Feedback posts shown in a given task flow instance:

1. Edit the task flow instance's properties as described in Section 18.6, "Modifying Page Components."
2. In the Component Properties dialog, click the **Parameters** tab to bring it forward.
3. Enter the number of messages or Feedback posts you want to allow in the task flow instance:
   - For Message Board and Message Board - Quick View task flows, enter a number for the parameter `No of Messages`.
   - For Feedback and Feedback - Quick View task flows, enter a number for the parameter `No of Feedback Items`.
4. When you finish revising component properties, click **OK**.
5. Save your changes, and exit page edit mode.

36.5.3.3 Limiting the Length of Posts in a Feedback - Quick View Task Flow

Use the `Display Message Size` parameter on a Feedback - Quick View task flow instance to limit the number of characters that can be entered for a given post. Posts that exceed the limit are truncated.

To limit the number of characters allowed for a post to a Feedback - Quick View task flow:

1. Edit the task flow instance's properties as described in Section 18.6, "Modifying Page Components."
2. In the Component Properties dialog, click the **Parameters** tab to bring it forward.
3. For the `Display Message Size` parameter, enter the number of characters to allow for a given post.
4. When you finish revising component properties, click **OK**.
5. Save your changes, and exit page edit mode.

36.5.3.4 Preventing Users from Adding Messages to a Message Board

You can use the `Hide Publisher` parameter to hide the message input field and its associated icons in a Message Board or Message Board - Quick View task flow instance. This is useful when you want a Message Board to be a window onto current messages without also being a point of input.

To prevent users from adding messages to a Message Board task flow instance:

1. Edit the task flow instance's properties as described in Section 18.6, "Modifying Page Components."
2. In the Component Properties dialog, click the **Parameters** tab to bring it forward.
3. Select the `Hide Publisher` check box to hide the message input field and its associated **Share document** and **Share link** icons.
4. When you finish revising component properties, click **OK**.
5. Save your changes, and exit page edit mode.

36.5.3.5 Hiding the Feedback You Have Left for Others

You can use the `Hide Given` parameter to prevent the display of the Feedback you have left for others in both types of Feedback task flows. Selecting `Hide Given` hides the **View** menu, so that only Feedback received is shown.

To hide the Feedback you have left for others:

1. Edit the task flow instance's properties as described in Section 18.6, "Modifying Page Components."
2. In the Component Properties dialog, click the **Parameters** tab to bring it forward.
3. Select the `Hide Given` check box to hide the Feedback you have left for others by hiding the **View** menu.
4. When you finish revising component properties, click **OK**.
5. Save your changes, and exit page edit mode.

36.5.3.6 Scoping the Display of Messages to a Named Space

Both types of Message Board task flows provide the `Group Space` parameter for specifying the space for which to display messages. For example, imagine that, from the Home space, you want to see the messages people are entering in the *Standards* space. You can place either type of Message Board task flow on a page in the Home space, and configure it to show the messages entered in the *Standards* space.

To scope the display of messages to a named space:

1. Edit the task flow instance's properties as described in Section 18.6, "Modifying Page Components."
2. In the Component Properties dialog, click the **Parameters** tab to bring it forward.
3. In the `Group Space` field, enter the internal name of the space of interest.

   Tip: The space *internal* name is the name specified by the **space URL** on the **General** page of a space's administration settings. The space *display name* is specified by **Display Name**, and is the name that appears in the banner at the top of a space.

4. When you finish revising component properties, click **OK**.
5. Save your changes, and exit page edit mode.

36.5.3.7 Specifying the Date Range of Shown Messages and Feedback

You can use the `Start Date` and `End Date` parameters on the Message Board, Feedback, and Feedback - Quick View task flows to limit the display of messages and Feedback posts to those entered between the two specified dates.

For both parameters, use the date format `YYYY-MM-DD`, for example `2010-01-02`.

To limit the display of messages and Feedback posts to those entered within a specified date range:

1. Edit the task flow instance's properties as described in Section 18.6, "Modifying Page Components."
2. In the Component Properties dialog, click the **Parameters** tab to bring it forward.
3. In the `Start Date` field, enter the date after which to show messages and posts.
4. In the `End Date` field, enter the date before which to show messages and posts.

5. When you finish revising component properties, click **OK**.
6. Save your changes, and exit page edit mode.

37

Liking, Commenting On, and Sharing Objects

Opportunities are available throughout your portal to express a favorable judgment on an application object, through *liking*, and associate a comment with an application object, through *commenting*. Opportunities to share application objects, files, and URLs are also readily available.

This chapter provides information about liking, commenting, and sharing in WebCenter Portal: Spaces. It includes the following sections:

- Section 37.1, "Liking and Unliking Application Objects"
- Section 37.2, "Commenting on Application Objects"
- Section 37.3, "Sharing Files, URLs, and Streamed Items with Other Users"

Audience

This chapter is intended for users assigned an application role that includes, minimally, the permission `People Connections: Update People Connections Data`. Users who plan to edit task flow properties must be assigned a role that also includes the permission `Edit Pages`. In a space (other than the Home space), users must be assigned a role that includes the permission `Edit Page Access and Structure`.

37.1 Liking and Unliking Application Objects

Liking is an accumulative rating system that enables you to see at a glance which objects are liked and who likes those objects. A counter keeps track of the number of users who like the object and a link is available for viewing the users who like it. In a group of objects, you can determine the most favored by its number of likes (Figure 37–1).

Figure 37–1 Like Link on a Streamed Item

You can like streamed items that include objects. For example, you can like "Jack has updated doc.xml," but you cannot like "Jack and Jill are now connected."

You can express liking for the following types of application objects:

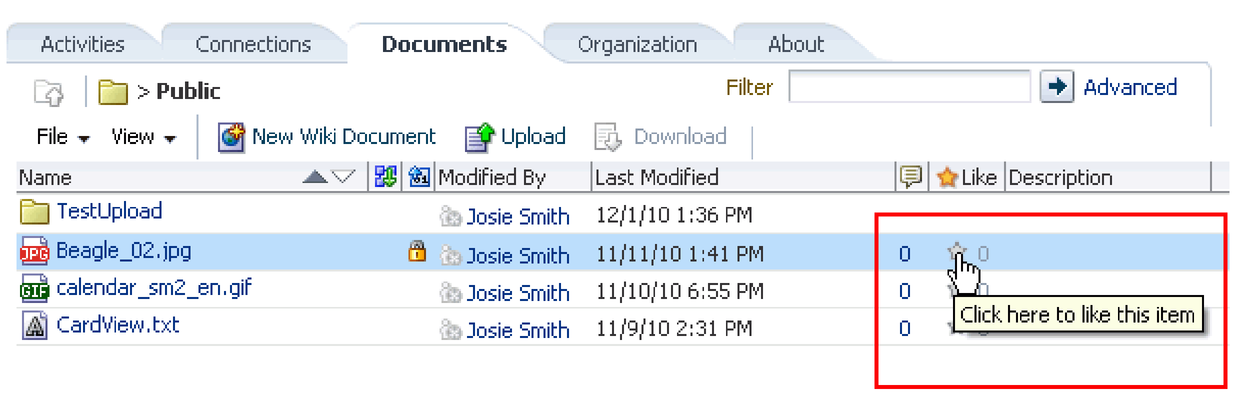
- Message Board messages (for more information, see Section 36.1.1, "What You Should Know About Message Board")
- Activity Stream items (for more information, see Section 35.1, "What You Should Know About Activity Stream")

  > **Tip:** Whether you or any user can like an Activity Stream or Message Board object depends on whether the administrator has enabled liking for these features. For more information, see Section 6.4.3, "Configuring the People Connections Service for Spaces."

- Documents (for more information, see Section 43.29, "Liking and Unliking a File")

To like something, click the **Like** link or icon (a star) (Figure 37–2).

Figure 37–2 Like Icon on a Document



To see who likes the document, click the number to the right of the star (X-REF TO IMAGE).

To remove your favorable rating (that is, *unlike* the object), click **Unlike** or click the **Like** icon again (Figure 37–3).

Figure 37–3 Unlike Link on a Streamed Item

37.2 Commenting on Application Objects

Commenting provides a means of adding your thoughts, opinions, and questions directly to a given application object.

You can comment on the following types of application objects:

- Message Board messages (for more information, see Section 36.1.1, "What You Should Know About Message Board")
- Activity Stream items (for more information, see Section 35.1, "What You Should Know About Activity Stream")

  Tip: You can comment on streamed items that include objects. For example, you can comment on "Jack has updated doc.xml," but you cannot comment on "Jack and Jill are now connected."

- Documents and other types of files (for more information, see Section 43.5.2, "Menus and Actions in the Document Viewer Preview Pane or Window")

  Tip: When you comment on a file through the Activity Stream, the comment appears with the file in the Document Library as well as in the Activity Stream.

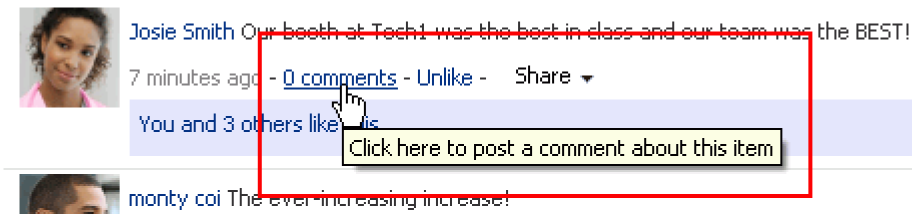
  Note: Public users viewing a public document cannot comment on the document.

- Wikis (for more information, see Chapter 49, "Working with Wiki Documents")
- Blogs (for more information, see Chapter 50, "Working with Blogs")

To comment on an object:

1. Click an object's associated **comments** link (Figure 37–4).

Figure 37–4 Comment Link on a Streamed Item



2. Enter your comments in the input area (Figure 37–5).

Figure 37–5 Write a Comment Text Field

3. Click **Comment** to display your comment below the object. The comment display is limited to 500 characters.

To delete the comment, click its associated **Delete** icon (Figure 37–6).

Figure 37–6 Delete Icon on a Comment

37.3 Sharing Files, URLs, and Streamed Items with Other Users

This section provides an overview of the different types of sharing that are available through WebCenter Portal: Spaces, and steps you through each type. It includes the following subsections:

- Section 37.3.1, "What You Should Know About Sharing"
- Section 37.3.2, "Sharing Streamed Items with a Wider Audience"

- Section 37.3.3, "Sharing Items, Files, and URLs Through the Publisher Task Flow"

37.3.1 What You Should Know About Sharing

Sharing provides a means of on-the-spot distribution of items, files, and URLs of particular interest to a selected audience. Sharing is available in a few different forms:

- Share an item you receive in your Activity Stream by posting it to your connections' Activity Streams (for more information, see Section 37.3.2.1, "Reposting Streamed Items").
- Share an item you receive in your Activity Stream through email (for more information, see Section 37.3.2.2, "Emailing Streamed Items").
- Share an item, file, or URL through the Publisher task flow (for more information, see Section 37.3.3, "Sharing Items, Files, and URLs Through the Publisher Task Flow").

To share an item directly from your Activity Stream, the item must contain an object. For example, you can share "Jack has updated doc.xml," but you cannot share "Jack and Jill are now connected." Less obvious, you can share anything you post through the Publisher task flow because the post itself is an object.

37.3.2 Sharing Streamed Items with a Wider Audience

You can share items that appear in your view of the Activity Stream with a wider audience. For example, when your view of the Activity Stream reports that one of your connections updated a document of great interest to all of your connections, you can share that streamed item with all of your connections.

You can do so by posting the streamed item to all of your connections' Activity Streams or to the Activity Streams of connections who belong to a named space. You can also share streamed items through email, enabling you to share it with users to whom you are not connected or to make use of mail distribution lists.

Note: To share an item directly from your Activity Stream, the item must contain an object. For more information, see Section 37.3.1, "What You Should Know About Sharing."

This section includes the following subsections:

- Section 37.3.2.1, "Reposting Streamed Items"
- Section 37.3.2.2, "Emailing Streamed Items"

37.3.2.1 Reposting Streamed Items

Use the **Share** menu's **This activity** option to share a streamed item with your connections through their view of the Activity Stream.

To repost a streamed item to your connections' Activity Streams:

1. Go to the item you want to share, and from the **Share** menu select **This activity** (Figure 37–7)

Figure 37–7 This Activity Option on the Share Menu

2. In the resulting Share dialog:

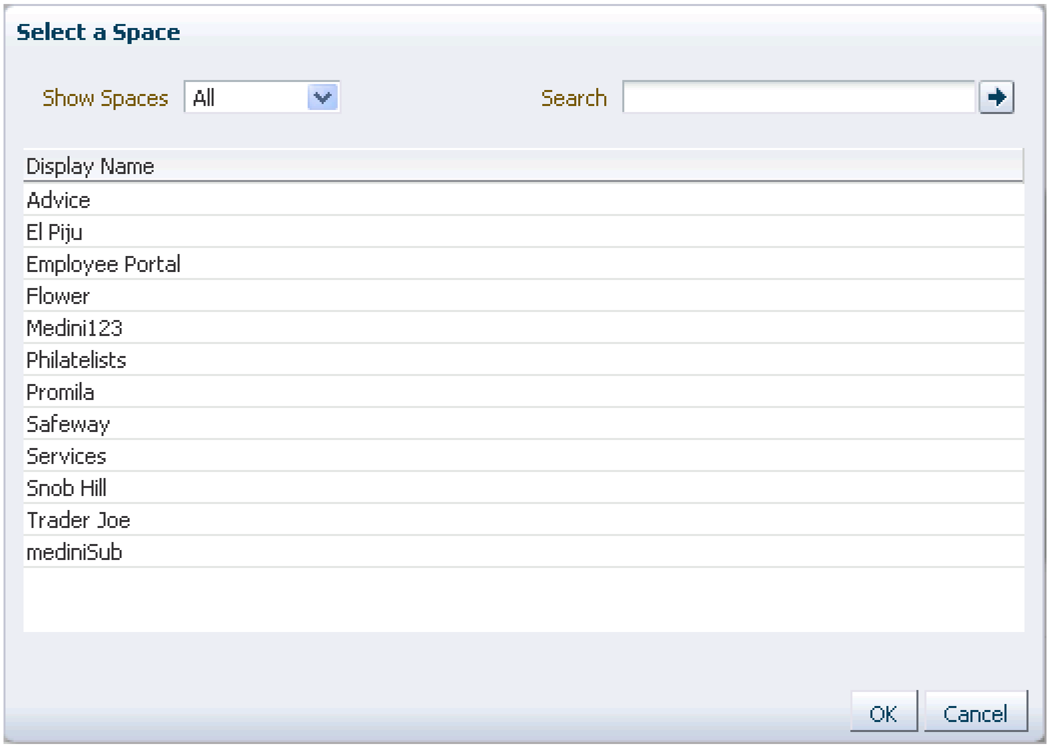
   - Select **Everyone** to share the item with all of your connections (Figure 37–8).

Figure 37–8 Everyone Option on Share Something With Menu

   - Select a space, or select **More spaces** to share the item with those of your connections who have access to the selected space.

     Selecting **More spaces** opens the Select a space dialog, from which you can select a space (Figure 37–9).

Figure 37–9 Select a space Dialog



From the **Show spaces** menu:

– Select **All** to show all of the spaces to which you have access.

– Select **Joined** to show all of the spaces you have explicitly joined.

– Select **Moderated** to show all of the spaces for which you are a moderator.

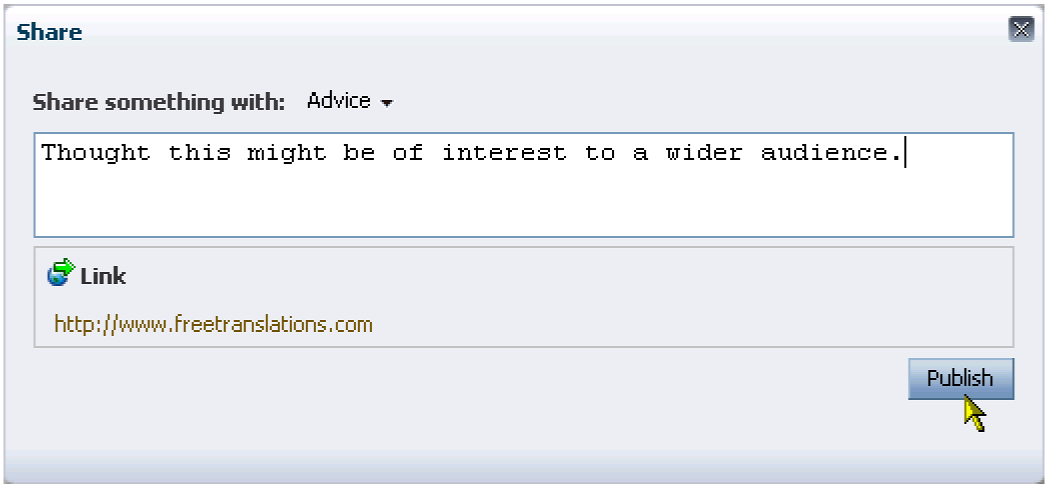
– Select **Public** to show all public spaces.

Alternatively, enter the name of a space in the **Search** field and execute the search. Results appear in the dialog.

Highlight a space, and click **OK**.

- Optionally, in the Share dialog, enter a message to accompany the link (Figure 37–10).

Figure 37–10 Adding a Message to a Shared Link



Note: When you share a message, rather than a file or a link, you cannot enter another message to accompany it.

- Click **OK**.

The item is posted to the Activity Streams of the selected recipients.

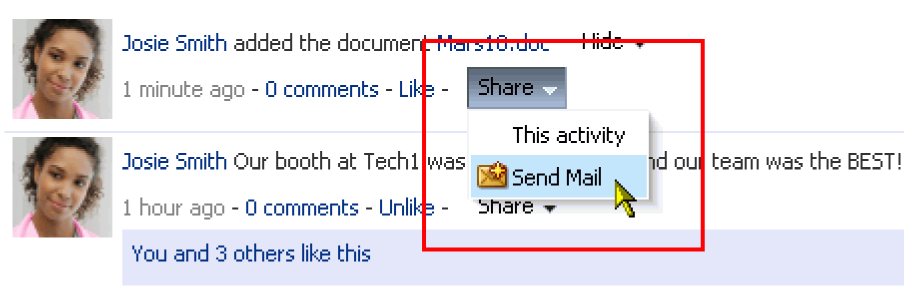
37.3.2.2 Emailing Streamed Items

Use the **Share** menu's **Send Mail** option to share a streamed item through email. The Send Mail option is available on streamed items that include objects, such as a document. It is otherwise not available.

To share a streamed item through email:

1. Go to the item you want to share, and from the **Share** menu select **Send Mail** (Figure 37–11)

Figure 37–11 Send Mail Option on the Share Menu



   A mail message opens, prepopulated with a link to the selected item.

2. Address, write, and send the message as you would any other email.

37.3.3 Sharing Items, Files, and URLs Through the Publisher Task Flow

The Publisher task flow provides a means of publishing messages, files, and URLs to the Activity Streams of all of your connections or to those connections who have access to a specified space. Publisher also has an associated property, `Is Update Status`, that enables users to publish a message as their Profile status message.

This section steps you through Publisher features and provides information about its associated properties. It includes the following subsections:

- Section 37.3.3.1, "What You Should Know About the Publisher Task Flow"
- Section 37.3.3.2, "Selecting the Recipients of a Published Message"
- Section 37.3.3.3, "Sharing Files Through the Publisher Task Flow"
- Section 37.3.3.4, "Sharing Links Through the Publisher Task Flow"
- Section 37.3.3.5, "Setting Publisher Task Flow Properties"

> **See Also:** For information about Activity Stream, see Chapter 35, "Tracking Your Connections' Activities." For information about Profiles, see Chapter 33, "Managing Your Profile." For information about properties associated with the Publisher task flow, see Section 37.3.3.5, "Setting Publisher Task Flow Properties."

37.3.3.1 What You Should Know About the Publisher Task Flow

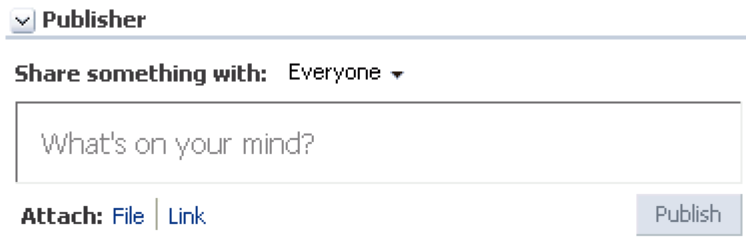
The Publisher task flow is very similar in operation to Message Board task flows (see Chapter 36, "Posting and Managing Messages and Feedback"). It differs in a few ways:

- You can use it to send out messages, but not to receive them. It provides no feature for viewing messages.
- It is specifically made to work in conjunction with Activity Stream, where the messages you enter are published.
- It has its own distinct set of properties (see Section 37.3.3.5, "Setting Publisher Task Flow Properties").
- It is not controlled by configuration settings at the application level nor through your own personal Preferences. You specify who sees your published messages through a control on the task flow itself. You can also exercise some control over the message destination through task flow properties. For example, the Publisher task flow has an associated property, `Is Update Status`, that enables users to publish a message as their Profile status message.

> **See Also:** For information about Profile, see Chapter 33, "Managing Your Profile."

There is one Publisher task flow (Figure 37–12).

Figure 37–12 Publisher Task Flow



In default WebCenter Portal: Spaces installations, the Publisher task flow is placed on the **Activities** business role page, which is provided in the Home space for all authenticated users (that is, users who are logged in).

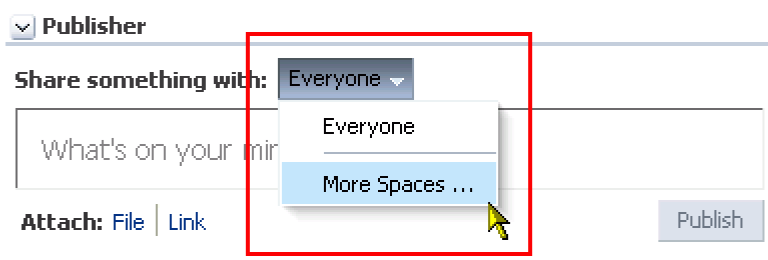
The default **Activities** business role page also contains an Activity Stream task flow where the messages you enter through the Publisher are published.

> **See Also:** For information about business role pages, see Section 7.1, "Working with Business Role Pages."

37.3.3.2 Selecting the Recipients of a Published Message

The Publisher task flow has a menu at the top where you can select who may see your message in their Activity Streams (Figure 37–13).

Figure 37–13 Share Something With Menu on Publisher Task Flow



To select the recipients of a published message:

1. Go to the **Activities** page in the Home space.

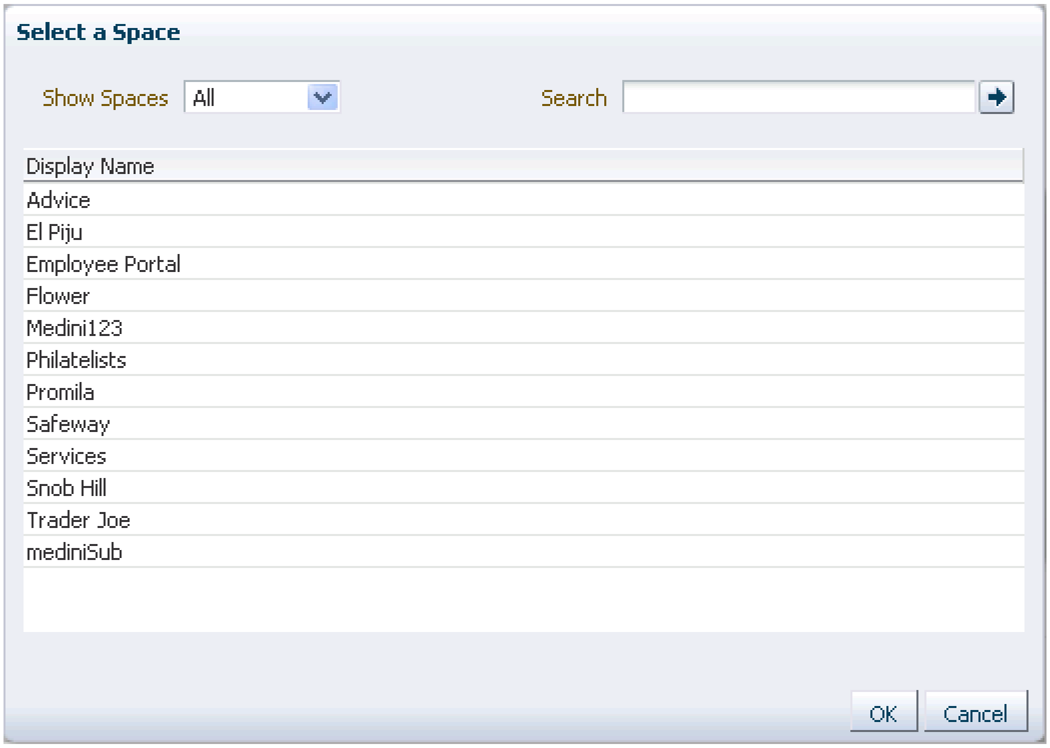
   > **Tip:** The way you access this page depends on the page template in use. For example, in a side navigation template, you may access it through an **Activities** link.

2. In the Publisher task flow, select a value from the **Share something with** menu:

   - Select **Everyone** to share the item with all of your connections.
   - Select a space, or select **More spaces** to share the item with those of your connections who have access to the selected space.

     Selecting **More spaces** opens the Select a space dialog, from which you can select a space (Figure 37–14).

Figure 37–14 Select a space Dialog



From the **Show spaces** menu:

– Select **All** to show all of the spaces to which you have access.

– Select **Joined** to show all of the spaces you have explicitly joined.

– Select **Moderated** to show all of the spaces for which you are a moderator.

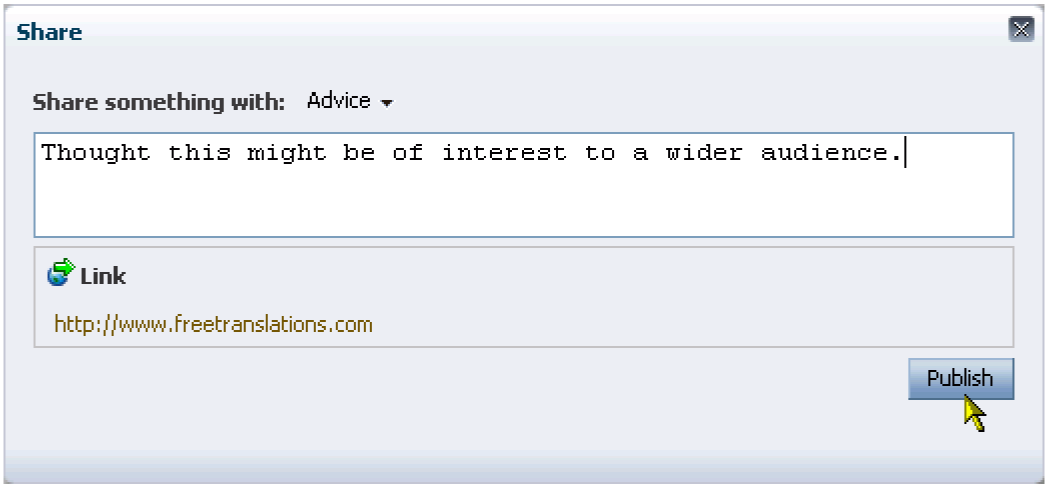
– Select **Public** to show all public spaces.

Alternatively, enter the name of a space in the **Search** field and execute the search. Results appear in the dialog.

Highlight a space, and click **OK**.

3. Click in the text area, and enter your message (Figure 37–15).

Figure 37–15 Adding a Message to a Shared Link



Note: When you share a message, rather than a file or a link, you cannot enter another message to accompany it.

---

4. Click **Share**.

   Your message appears in your view of the Activity Stream and in the Activity Streams of the selected recipients.

37.3.3.3 Sharing Files Through the Publisher Task Flow

In addition to sharing messages through the Publisher task flow, you can select to share files. When you share a file through the Publisher task flow, the uploaded file is also stored in the Public folder of your personal document library.

> **Tip:** If you prefer to have greater control over where a shared file is stored in your document library, you can upload it to the folder you prefer. Such uploads are also reported in your connection's activity streams, provided your Activity Stream is configured to show them. For more information, see Section 35.2, "Setting Activity Stream Preferences."

A Publisher task flow can be configured to hide the **Attach: File** link. If you do not see this link below the task flow, it could be because the instance is configure, through the `Hide Document Uploader` property, not to show it. For more information, see Section 37.3.3.5.3, "Prohibiting File Uploads Through a Publisher Task Flow Instance."

To share files through the Publisher task flow:

1. Go to an instance of the Publisher task flow, and select the recipients of your message.

   > **See Also:** For more information, see Section 37.3.3.2, "Selecting the Recipients of a Published Message."

2. Optionally, click in the text area and enter the message you want to accompany the file.

3. Next to **Attach**, click the **File** link to open a file upload feature (Figure 37–16)

Figure 37–16 Attach File Field on Publisher Task Flow

4. Click **Browse** to navigate to and select the file you want to share.
5. Click **Publish**.

   The file is streamed to your Activity Stream and to the Activity Streams of your selected recipients.

   > **See Also:** Whether a file or a link to a file is shown depends on how the Activity Stream task flow instance is configured. For more information, see Section 35.5.4.2, "Hiding File Previews in Streamed Items."

37.3.3.4 Sharing Links Through the Publisher Task Flow

In addition to sharing messages through the Publisher task flow, you can select to share links.

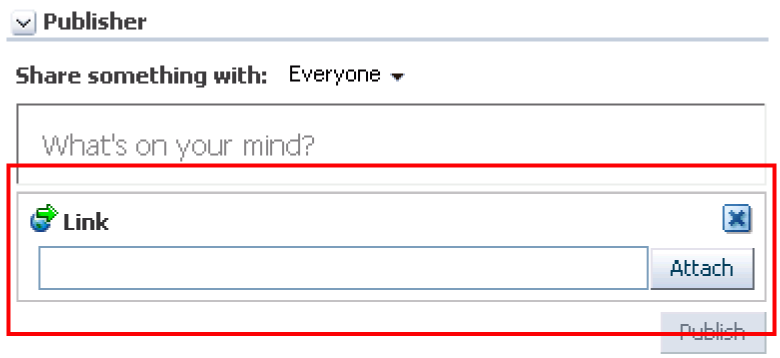
To share links through the Publisher task flow:

1. Go to an instance of the Publisher task flow, and select the recipients of your message.

   > **See Also:** For more information, see Section 37.3.3.2, "Selecting the Recipients of a Published Message."

2. Optionally, click in the text area and enter the message you want to accompany the link.
3. Next to **Attach**, click the **Link** link to open a field for entering a URL (Figure 37–17)

Figure 37–17 Attach Link Field on Publisher Task Flow



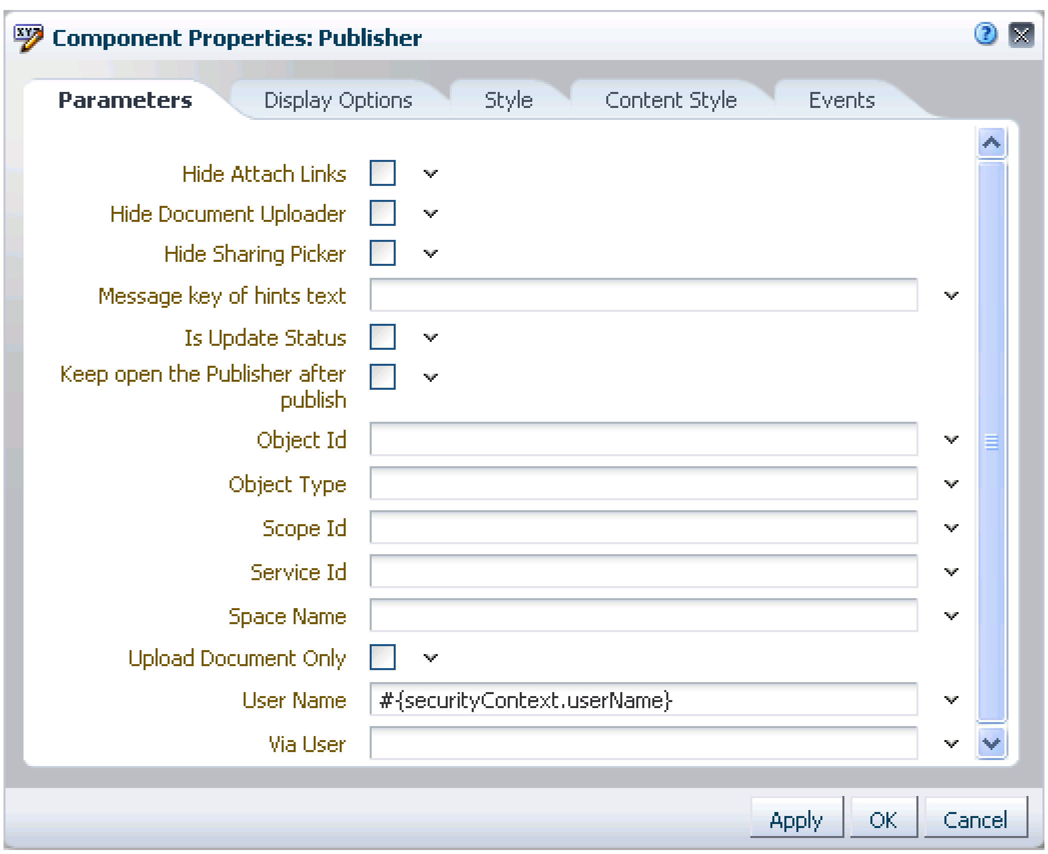
4. Enter the URL you want to share, and click **Attach**.
5. Click **Publish**.

   The link is streamed to your Activity Stream and to the Activity Streams of your selected recipients.

37.3.3.5 Setting Publisher Task Flow Properties

The Publisher task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 37–18).

Figure 37–18 Publisher Parameters in the Component Properties Dialog



> **See Also:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties associated with the Publisher task flow and describe the properties available on the Parameters tab:

- Section 37.3.3.5.1, "What You Should Know About Publisher Task Flow Properties"
- Section 37.3.3.5.2, "Publisher Task Flow Parameters"
- Section 37.3.3.5.3, "Prohibiting File Uploads Through a Publisher Task Flow Instance"
- Section 37.3.3.5.4, "Limiting the Scope of Recipients"
- Section 37.3.3.5.5, "Using the Publisher as a Profile Status Updater"
- Section 37.3.3.5.6, "Using the Publisher as a File Uploader"

37.3.3.5.1 What You Should Know About Publisher Task Flow Properties When you set property values on the Publisher task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the **Parameters** tab of the Component Properties dialog can affect the default task flow content. For descriptions of the parameters on this tab, see Section 37.3.3.5.2, "Publisher Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

> **Note:** Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.
>
> EL validation is not performed on non-generic display options.

37.3.3.5.2 Publisher Task Flow Parameters Table 37–1 describes the parameters that are unique to the Publisher task flow.

Table 37–1 Publisher Task Flow Parameters

Parameter	Description
`Hide Attach Links`	Specifies whether the **Attach: File | Link** option is shown or hidden ■ Check for `#{true}` to hide the **Attach: File | Link** option. ■ Deselect for `#{false}` to show the **Attach: File | Link** option.
`Hide Document Uploader`	Specifies whether the **Share document** icon is available on the task flow for uploading a document ■ Check for `#{true}` to hide the **Share document** icon ■ Deselect for `#{false}` to show the **Share document** icon.
`Hide Sharing Picker`	Specifies whether the **Share something with** option is shown or hidden ■ Check for `#{true}` to hide the **Share something with** option. ■ Deselect for `#{false}` to show the Share something with option.
`Is Update Status`	Indicates whether the message entered in the task flow instance should also be published as the user's Profile status message ■ Check for `#{true}` to publish the message as the user's Profile status message and in the selected recipients' Activity Streams. ■ Deselect for `#{false}` to publish the message only in the selected recipients' Activity Streams. If you attach a file or URL to a published message, then no matter what the state of `Is Update Status`, the message is not also used as a Profile status message. For information about Profiles, see Chapter 33, "Managing Your Profile."
`Keep open the Publisher after publish`	Specifies whether the text box remains active after a user clicks the **Publish** button ■ Check for `#{true}` to keep the text box open after a message is published. ■ Deselect for `#{false}` to close the text box after a message is published.
`Message key of hints text`	Specifies the resource bundle class and message key for hint text Use the format `key[,RBClass]. __EMPTY__` as the predefined key for no hint text. This is the default value.
`Object Id`	The ID of the object to be shared This property value assists in generating a link for use in navigating to the published object. It is not necessary to provide a value, unless you plan to do so using an EL expression. For information about EL expressions, see Appendix B, "Expression Language (EL) Expressions."
`Object Type`	The type of object to be shared This property value assists in generating a link for use in navigating to the published object. It is not necessary to provide a value, unless you plan to do so using an EL expression. For information about EL expressions, see Appendix B, "Expression Language (EL) Expressions."
`Scope Id`	The ID of the scope to which to publish This property value assists in generating a link for use in navigating to the published object. It is not necessary to provide a value, unless you plan to do so using an EL expression. For information about EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Table 37–1 (Cont.) Publisher Task Flow Parameters

Parameter	Description
`Service Id`	The service ID of the service to which the shared object belongs This property value assists in generating a link for use in navigating to the published object. It is not necessary to provide a value, unless you plan to do so by entering a specific service ID or using an EL expression. For a list of valid service IDs, see Table B–19, " Service IDs". For information about EL expressions, see Appendix B, "Expression Language (EL) Expressions."
`space Name`	The name of the space in which to publish the messages entered in this task flow instance Enter the space internal name and not the space display name. The space internal name is the name specified by the space URL on the **General** page of a space's administration settings. The space display name is specified by **Display Name**, and is the name that appears in the space banner at the top of the space.
`Upload Document Only`	Specifies that only the file upload feature is available in the task flow instance, hiding the text entry area and the **Share link** icon ■ Check for `#{true}` to show only the file upload feature and hide the text entry area and the **Share link** icon. ■ Deselect for `#{false}` to show the text entry area and the **Share link** and **Share document** icons.
`User Name`	The name of the user who owns the current view This value is supplied by default. We recommend that you do not change the default value, `#{o_w_w_i_v_b_resourceViewerBean.username}`.
`Via User`	The user name of the person who provided the object the current user is sharing For example, John is sharing a document with everyone that Jane originally shared with him. In this case, Jane is the via user.

37.3.3.5.3 Prohibiting File Uploads Through a Publisher Task Flow Instance You can use the `Hide Document Uploader` property to omit the display of the **Share document** icon on a Publisher task flow instance. Users will be able to share links but not files.

To prohibit file uploads through a Publisher task flow instance:

1. Edit the properties of a Publisher task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Select the check box for the property `Hide Document Uploader`.
4. Click **OK**.

37.3.3.5.4 Limiting the Scope of Recipients You can use the `Space Name` property to limit the scope of recipients of published messages to a user's connections in a particular space. When you do this, the message does not even stream to your own view of the Activity Stream in the Home space. It is streamed only to your and your connections' views of the Activity Stream in the named space.

To limit the scope of recipients to a particular space:

1. Edit the properties of a Publisher task flow instance.

See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Enter the internal name of the space in the `space Name` field.

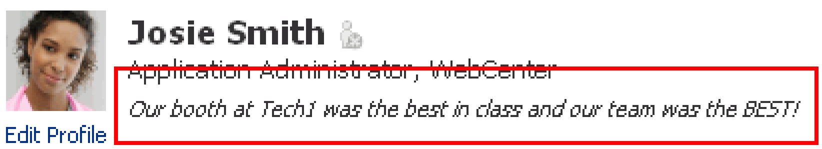
   Tip: The space internal name is the name specified by the space URL on the **General** page of a space's administration settings. The space display name is specified by **Display Name**, and is the name that appears in the space banner at the top of the space.

4. Click **OK**.

   Messages posted through that Publisher task flow instance will be shared with only those connections who have access to the named space.

37.3.3.5.5 Using the Publisher as a Profile Status Updater You can use the `Is Update Status` property to specify that all messages without attachments are published not only to specified recipients, but also as the user's Profile status message (Figure 37–19).

Figure 37–19 Published Message Used as Profile Status



Messages that have an attached file or link are not simultaneously published as a Profile status message.

To specify that messages are also published as Profile status messages:

1. Edit the properties of a Publisher task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Select the `Is Update Status` check box.
4. Click **OK**.

   Messages that do not include attachments that are posted through that Publisher task flow instance are also shared as the user's personal Profile status message.

37.3.3.5.6 Using the Publisher as a File Uploader You can use the `Upload Document Only` property to limit the functionality of the Publisher task flow to a file uploader (Figure 37–20).

Figure 37–20 Publisher Task Flow as Document Uploader

Files uploaded through the Publisher task flow are placed in the Public folder in the document library of the selected scope. That is:

- In the Home space:
  - Select **Everyone** to publish the file to the **Public** folder in each of your connections' personal Document Library.
  - Select a named space to publish the file to the **Public** folder in the selected space's Document Library.
- In a space, the file is published to the **Public** folder in the space's Document Library.

To use the Publisher task flow as a file uploader:

1. Edit the properties of a Publisher task flow instance.

   See Also: For information about editing task flow properties, see Section 18.6, "Modifying Page Components."

2. In the Component Properties dialog, bring the **Parameters** tab forward.
3. Select the `Upload Document Only` check box.
4. Click **OK**.

   The Publisher task flow instance renders as a file uploader (see Figure 37–20). The text area and the **Share link** icon are not rendered.

38

Setting Your Personal Preferences

Your personal preferences provide easy configuration settings for tailoring the application to your particular working style. These include settings for your preferred application display language; your preferred application look and feel; your Spaces application password; and the like. Additionally, Spaces application preferences provide an accessibility setting to optimize the application user interface for use with a screen reader, such as JAWS.

Preferences settings are a user-level customization that affects only your view of the Spaces application.

This chapter describes how to specify your personal preferences. It includes the following sections:

- Section 38.1, "Accessing the Preferences Dialog"
- Section 38.2, "Choosing Your Preferred Display Language"
- Section 38.3, "Setting Date and Time Preferences"
- Section 38.4, "Setting Your Accessibility Options"
- Section 38.5, "Changing the Home Space Look and Feel in Your View"
- Section 38.6, "Changing Your Application Password"
- Section 38.7, "Providing Login Information for External Applications"

See Also: Preferences associated with specific services are discussed in the chapters that cover each service.

For information about Messaging, Subscription, and Notifications preferences, see:

- Section 39.2, "Establishing and Managing Your Messaging Channels and Filters"
- Section 39.3.1, "Setting Application-Level Subscriptions"
- Section 39.4, "Viewing and Cancelling Your Subscriptions"

For information about People Connections preferences, see:

- Section 33.3, "Setting Profile Preferences"
- Section 34.2, "Setting Connections Preferences"
- Section 35.2, "Setting Activity Stream Preferences"
- Section 36.2, "Setting Message Board and Feedback Preferences"

For information about Instant Messaging and Presence preferences, see Section 64.2, "Identifying Your Preferred Instant Messaging Provider"

For information about Search preferences, see Section 58.5, "Setting Individual Preferences for Search Results"

For information about Mail preferences, see Section 67.3, "Selecting Your Preferred Mail Connection"

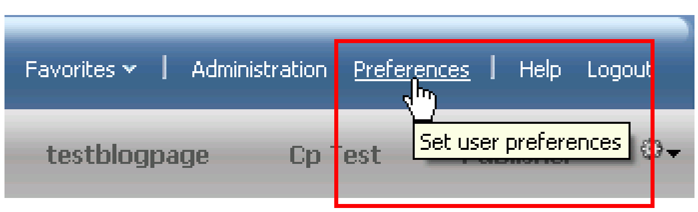
Audience

This chapter is intended for users minimally assigned the `authenticated-role` (that is, users who can log in to the Spaces application) who want to set general preferences. This includes selecting a display language, identifying preferred date and time formats, specifying a time zone, providing external application login information, and the like.

38.1 Accessing the Preferences Dialog

The easiest way to open the Preferences dialog is to click the **Preferences** link (Figure 38–1).

Figure 38–1 Preferences Link



The availability of navigational links, such as the **Preferences** link, is determined by the people who design and build your portal. This being so, you may not see a **Preferences** link. In such a case, ask your application administrator to make the **Preferences** link available.

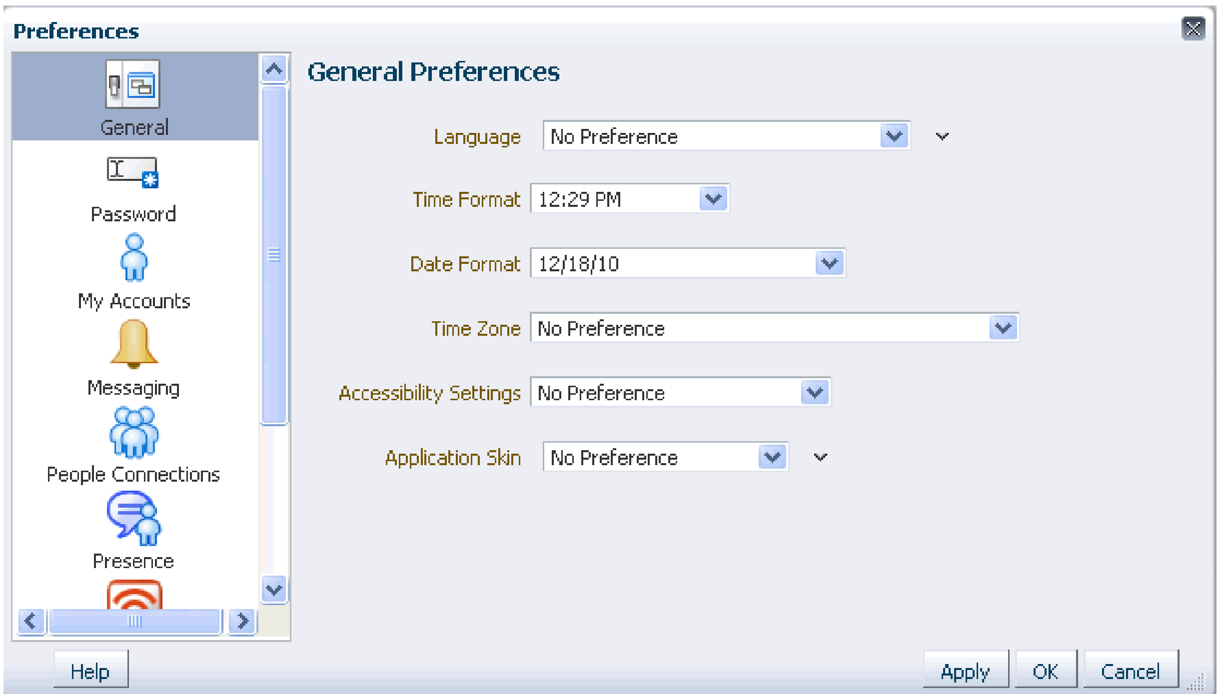
38.2 Choosing Your Preferred Display Language

The display language controls the language in which user interface (UI) elements are rendered in your browser. UI elements include button and field labels, application links, screen text, and so on. The display language also provides options for reflecting the current locale. Locale controls the appearance of symbols, such as monetary symbols, and the reading direction in which UI text is rendered.

To set a display language:

1. Open the Preferences dialog (Figure 38–2).

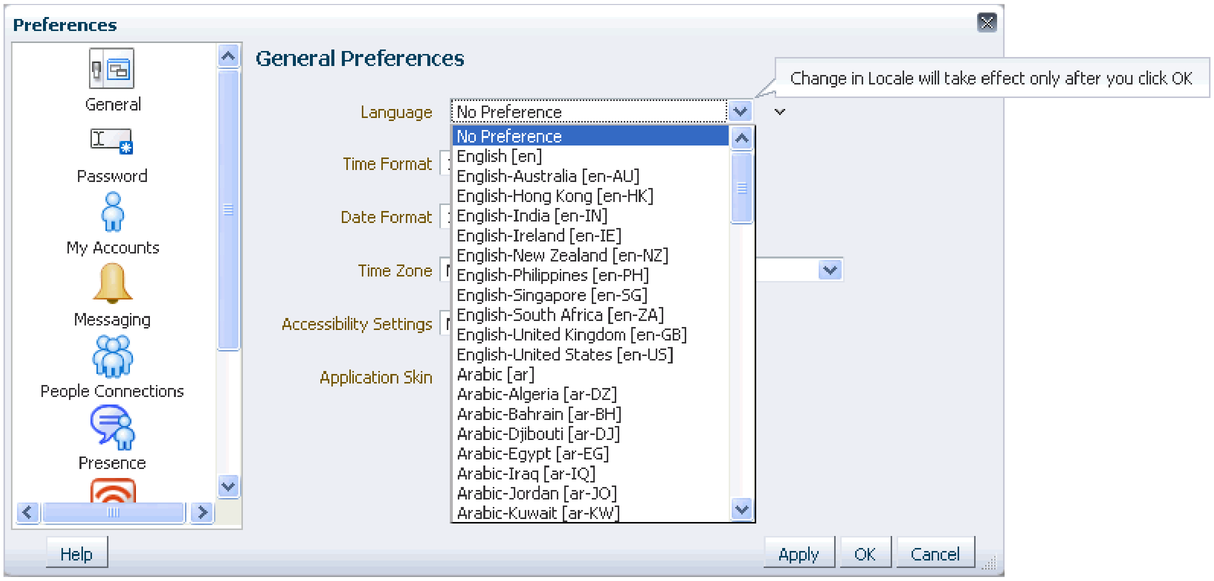
Figure 38–2 Preferences Dialog



> **See Also:** For information about accessing the Preferences dialog, see Section 38.1, "Accessing the Preferences Dialog."

2. Click **General** to access general preferences.
3. From the **Language** dropdown list, select your preferred display language-locale (Figure 38–3).

Figure 38–3 Language List in Preferences Dialog



Alternatively, select **No Preference** to accept the application-level default set by your Spaces application administrator.

> **See Also:** For information about setting the application-level default display language, see Chapter 5, "Configuring Global Defaults." For information about display languages in the Spaces application, see Chapter 27, "Working with Multilanguage Portals."

4. Click **OK** to save your change and exit the Preferences dialog, or click **Apply** to save your change without exiting.

38.3 Setting Date and Time Preferences

Use date and time preferences to specify your preferred date and time formats and your current locale's time zone:

> **Note:** Some services may be developed with an intrinsic time display format. In such cases, these services are not influenced by your date and time format selections.

To set your preferred time format, date format, and time zone:

1. Open the Preferences dialog (for more information, see Section 38.1, "Accessing the Preferences Dialog").
2. Click **General** to access general preferences.
3. Set your date and time preferences.

   Table 38–1 lists and describes the date and time options available on the **General** panel in the Preferences dialog.

Table 38–1 Date and Time Preference Settings

Preference	Setting Options
Time Format	The following list shows time formats; the formats in the Preferences dialog show the current time: ▪ **No Preference**—To display the default Time Format established by the administrator ▪ **H:M AM/PM**—To display hour, minutes, and AM or PM, such as `4:47 PM` ▪ **H:M:S AM/PM**—To display hour, minutes, seconds, and AM or PM, such as `4:47:52 PM` ▪ **H:M:S AM/PM Time Zone**—To display hour, minutes, seconds, AM or PM, and the abbreviation of the specified time zone, such as `4:47:52 PM PDT`
Date Format	The following list shows date formats; the formats in the Preferences dialog show the current date: ▪ **No Preference**—To use the default date format set by the administrator ▪ **M/D/YY**—To use a number format, such as `6/18/10` ▪ **MON D, YYYY**—To use an abbreviation format and the full year, such as `Jun 18, 2010` ▪ **MONTH D, YYYY**—To display the full month name and the full year, such as `June 18, 2010` ▪ **DAY, MONTH D, YYYY**—To display the full month name, the full year, and include the day of the week, such as `Friday, June 18, 2010`
Time Zone	From the **Time Zone** pick list, select your preferred time zone. Alternatively select **No Preference** to accept the application-level default set by the application administrator.

4. Click **OK** to save your changes and exit the Preferences dialog, or click **Apply** to save your changes without exiting.

38.4 Setting Your Accessibility Options

The **General** panel in the Preferences dialog provides options related to user accessibility. Select an option to optimize the application user interface (UI) for use with a screen reader, such as JAWS; to enable support of high-contrast colors; and to enable support for large fonts.

This section includes the following subsections:

- Section 38.4.1, "What You Should Know about Application Accessibility Options"
- Section 38.4.2, "Applying Accessibility Options"

38.4.1 What You Should Know about Application Accessibility Options

Although the Spaces application provides accessibility options to enable visually and non-visually impaired users to navigate successfully through the application user interface, there are some tips that can assist you in using them successfully.

If you use a screen reader such as JAWS, JAWS normally announces the links associated with a menu selection. With the **Actions** menu, JAWS does not announce the submenu items. For example, JAWS does not read the submenu items under **Manage** on the **Actions** menu. The workaround is to select the menu items using direct keyboard navigation. That is, instead of using JAWS Links Chooser, navigate to the **Manage** submenu of the **Actions** menu using the Tab key on your keyboard.

Not all drop-down menus, fields, and radio buttons on Spaces application administration pages are labeled. As a result, the JAWS screen reader renders a pound sign (#) instead of a label when the JAWS command Insert-F7 is invoked. The problem occurs in the following areas:

- Drop-down menus in space administration pages
- Radio buttons on space administration pages
- Fields on the **Documents** page

The workaround is to use the Tab and arrow keys to navigate to each individual form field in order to hear each form field read.

When you add resources from the Resource Catalog, JAWS announces all Resource Catalog items as *Add*. This makes it difficult to identify the selected resource. To work around this issue, press the Tab key to get to the Add link for the resource, then press the Down Arrow key. JAWS then reads the description of the resource.

38.4.2 Applying Accessibility Options

To apply accessibility options to the application UI:

1. Open the Preferences dialog (for more information, see Section 38.1, "Accessing the Preferences Dialog").
2. Click **General** to access general preferences.
3. From the **Accessibility Settings** pick list, select your preferred accessibility setting:
   - **I use a screen reader**—Specifically for the visually impaired, enables the use of JAWS, the screen reader software.

     Tip: If you use a screen reader and want to set preference options on other preferences panels: **Password**, **My Accounts**, **Messaging**, **People Connections**, **Presence**, **Subscriptions**, **Search**, and **Mail**, enable the screen reader option, click **OK** to exit the Preferences dialog, then re-open the Preferences dialog. The other preferences panels are redrawn as radio buttons, enabling the screen reader to detect and access them.

   - **I use high contrast colors**—Makes the Spaces application user interface compatible with operating systems or browsers that have high-contrast features enabled. For example, the Spaces application changes its use of background images and CSS styles in high-contrast mode to prevent the loss of visual information. Note that high-contrast mode is more beneficial if used in conjunction with your browser's or operating system's high-contrast mode. Also, some users might find it beneficial to use large-font mode along with high-contrast mode.
   - **I use large fonts**—Provides browser-zoom–friendly content. In default mode, most text and many containers have a fixed font size to provide a consistent and defined look. In large-font mode, text and containers are more scalable. This allows the Spaces application to be compatible with browsers that are set to larger font sizes and to work with browser-zoom capabilities. Note that if you are not using large-font mode or browser-zoom capabilities, you should disable large-font mode. Also, some users might find it beneficial to use high-contrast mode along with the large-font mode.
4. Click **OK** to save your change and exit the Preferences dialog, or click **Apply** to save your change without exiting.

Alternatively, click **Cancel** to cancel your change and exit the Preferences dialog.

38.5 Changing the Home Space Look and Feel in Your View

The **General** panel in the Preferences dialog provides a pick-list of application skins for your view of the Home space. Application skins specify the application background color, screen fonts, and, with some skins, the shapes and images used for application buttons and icons. The skin you select through the Preferences dialog affects the look and feel of your view of the Home space. No other users' views and no other areas of the application are affected.

To change the Home space skin in your view:

1. Open the Preferences dialog (for more information, see Section 38.1, "Accessing the Preferences Dialog").
2. Click **General** to access general preferences.
3. From the **Application Skin** pick list, select your preferred application skin:
   - **No Preference—**To defer to the application's configured skin setting
   - ***Skin_Name*—**To select a predefined application skin from the list of skins available to you
4. Click **OK** to save your change and exit the Preferences dialog, or click **Apply** to save your change without exiting.

   The application refreshes, using the skin you selected for your view of the Home space.

   > **See Also:** Advanced users can create custom application skins and deploy them to the Spaces application. For more information, see the chapter, "Creating and Managing Skins," in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

38.6 Changing Your Application Password

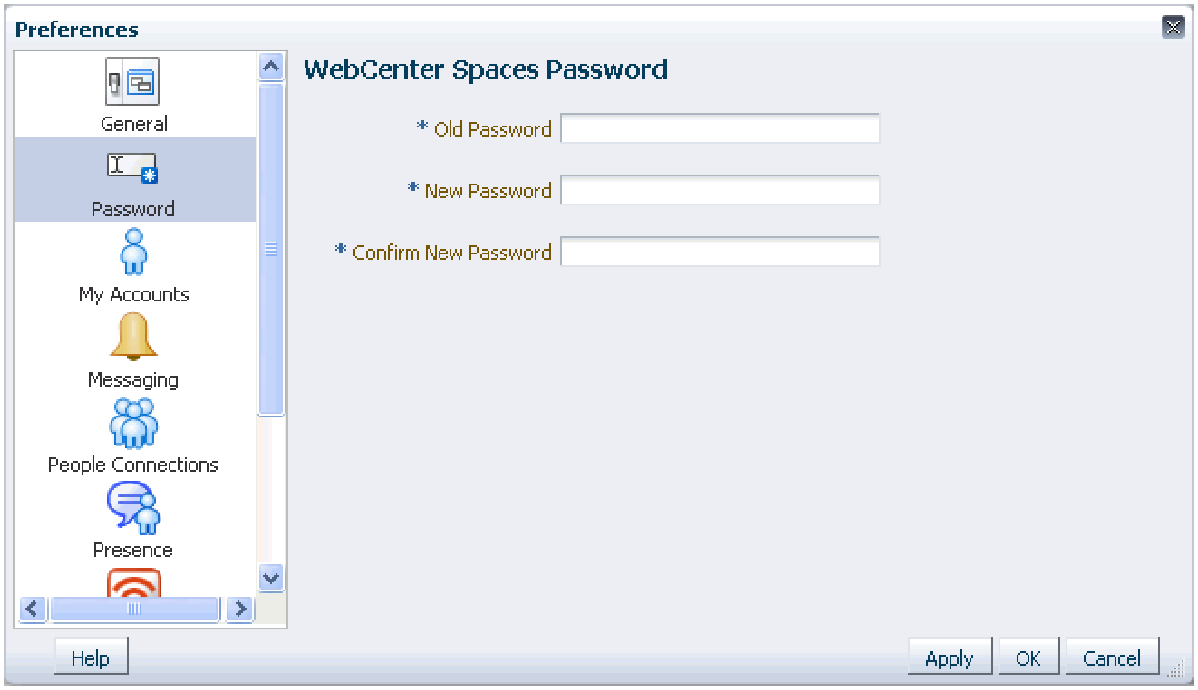
Provided your application administrator has enabled you to do so, you can change your Spaces application password. Changing your password on a regular basis is one way you can participate directly in securing your application software.

> **See Also:** Your application administrator can prohibit you from changing your application password. If this feature is disabled, you cannot take the steps described in this section. For more information, see Section 6.4.3.4, "Configuring Profile."

To change your Spaces application password:

1. Open the Preferences dialog (for more information, see Section 38.1, "Accessing the Preferences Dialog").
2. Click **Password** to open the **Password** panel (Figure 38–4).

Figure 38–4 Preferences Password Panel



3. In the **Old Password** field, enter your current password.
4. In the **New Password** field, enter your new password.

> **Note:** The requirements for this password are driven by the identity store that manages Spaces application application users. Every ID store has its own password policy that enforces rules such as password length, password history, and so on. If you have issues setting a new password, contact your application administrator for the password requirements and restrictions of your ID store.

5. In the **Confirm New Password** field, enter your new password again.
6. Click **OK** to save your change and exit the Preferences dialog, or click **Apply** to save your change without exiting.

38.7 Providing Login Information for External Applications

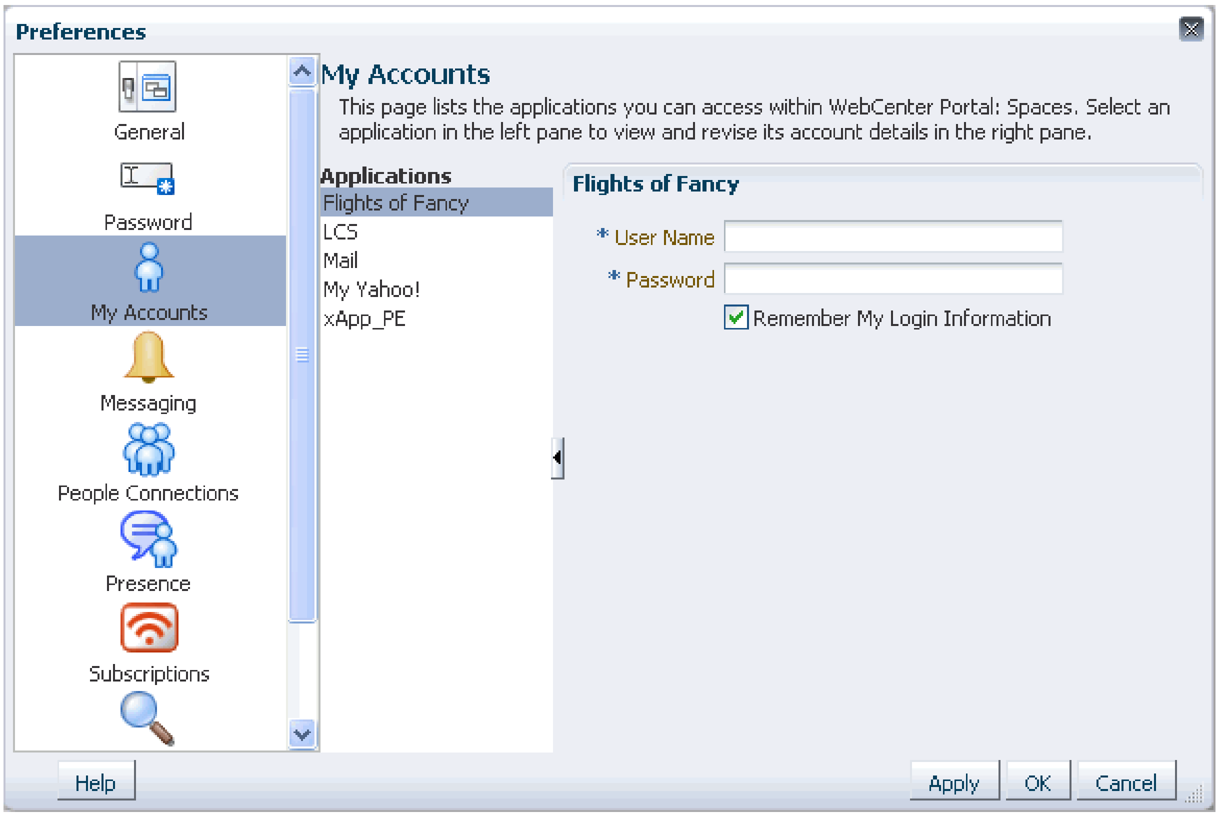
The **My Accounts** panel in the Preferences dialog provides one-stop access to login credentials for all external applications that have been configured by your application administrator. **My Accounts** provides a way to store application login credentials so that you provide them only once for the life of the credential. Once you have provided your credentials, every time you access an external application within the Spaces application, the login credentials are provided automatically. This gives you a single-sign-on type of experience where one login (to the Spaces application) provides access to multiple applications.

Note: If you change the login credentials for an application, you must enter them again into the **My Accounts** panel in the Preferences dialog as described in this section.

To provide login credentials for external applications:

1. Open the Preferences dialog (see Section 38.1, "Accessing the Preferences Dialog").
2. Click **My Accounts** to open the **My Accounts** panel (Figure 38–5).

Figure 38–5 Preferences My Accounts Panel



3. Select an application from the **Applications** list.

   Log-in credential fields and check boxes for the selected application are shown in the right pane.

   Tip: The applications you see on the **My Accounts** panel are the ones that were configured by your application administrator. Contact your application administrator to request additional applications.

4. Enter log-in credentials as required for the selected application.

   Fields requiring values are marked with an asterisk (*).

Note: Login credentials vary from one application to another. For example, some applications may require user name and password, while others may require those values along with additional values, such as your mail address.

---

5. Select **Remember my login information** to enable automatic authentication to the selected application every time you log in to the Spaces application.

Note: When you do not select **Remember my login information**, the login information that you enter is used only for the current user session. This means the next time you log in to the Spaces application, you must also log in to this application.

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6. Click **OK** to save your change and exit the Preferences dialog, or click **Apply** to save your change without exiting.

39

Setting Up Your Personal Subscriptions and Notifications

Use Subscriptions and Notifications to receive timely notice of changes to your portal and to content surfaced through your portal. Track changes that occur to your connections, your space memberships, and services scoped to specific spaces and to the application objects that are important to you. Specify how you are notified: through phone text, mail, or your Worklist.

This chapter describes how to subscribe and unsubscribe to spaces and application objects, specify how you are notified when they are changed, and manage your subscriptions.

This chapter includes the following sections:

- Section 39.1, "What You Should Know About Subscriptions and Notifications"
- Section 39.2, "Establishing and Managing Your Messaging Channels and Filters"
- Section 39.3, "Subscribing at the Application, Space, and Object Level"
- Section 39.4, "Viewing and Cancelling Your Subscriptions"
- Section 39.5, "Working with Notifications Task Flows"

Audience

This chapter is for users interested in being notified when changes occur to the spaces and application objects that are important to them.

Your application administrator can enforce certain application defaults that prevent you from setting subscription and notification preferences for yourself. In such cases, you will be unable to perform some of the actions described in this chapter.

> **See Also:** For information about administrative settings associated with Notifications, see the chapter, "Managing Subscriptions and Notifications," in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

39.1 What You Should Know About Subscriptions and Notifications

Notifications provides an automated means of triggering notices across different messaging channels. Messages are triggered when the spaces and application objects to which you have subscribed change.

Messaging channels can include phone text, mail, or Worklist (depending on how your administrator has configured Notifications). For example, you can receive a mail message when a particular document changes, a text message when someone responds to a particular discussion topic, a Worklist alert when you receive an invitation to connect. All messages contain links that take you to the scene of the change.

You can choose the objects that trigger a notice by subscribing to them. In Spaces, there are three levels of subscription:

- *Application*, which you can use to receive notices about changes to your space memberships, Message Board, Connections, and Feedback

  Such notifications occur only for application-level activities that involve you as the user.

- *Space*, for changes to a subscribed service, such as Events, Discussions, Announcements, Documents, and Blogs, that occur within the scope of a selected space
- *Object*, for changes to the application objects to which you have specifically subscribed, such as a particular document, wiki, blog, and so on

Table 39–1 describes the types of activities that can trigger a notification and indicates the level and location of the associated subscription (for more information, see Section 39.3, "Subscribing at the Application, Space, and Object Level").

> **Note:** Owning an object, such as a document, wiki, or blog, does not automatically subscribe you to that object. You must explicitly subscribe to an object to receive subscription-related notifications about it, unless the administrator has set and enforced company-wide subscription defaults. For more information about object-level subscriptions, see Section 39.3.3, "Setting Object-Level Subscriptions."

Table 39–1 Activities that Can Trigger Notifications

Activity	Level	Where to Subscribe
A user sends you an invitation to connect **Note:** Out of the box, the option to send notifications for invitations to connect is enabled and is not end-user configurable.	Application	Preferences (for more information, see Section 39.3.1, "Setting Application-Level Subscriptions")
Your space role changes, for example from `Participant` to `Moderator`	Application	Preferences
You are added as a member of a space	Application	Preferences
Your space membership is removed	Application	Preferences
A user posts a message to your Message Board	Application	Preferences
A user likes your Message Board post (messages explicitly set on a Message Board and not those added from Publisher to the Activity Stream)	Application	Preferences
A user comments on your Message Board post (messages explicitly set on a Message Board and not those added from Publisher to the Activity Stream)	Application	Preferences
A user posts feedback for you	Application	Preferences
An announcement is created	Space	On the space, for example, from the **Actions** menu on a space in Browse spaces (for more information, see Section 39.3.2, "Setting Space-Level Subscriptions")

Table 39–1 (Cont.) Activities that Can Trigger Notifications

Activity	Level	Where to Subscribe
A new event is created	Space	On the space
An event is updated	Space	On the space
An event is deleted	Space	On the space
A new discussion topic is created	Space	On the space
A new discussion forum is created	Space	On the space
A new document is created or uploaded	Space	On the space
A wiki document is created	Space	On the space
A new blog entry is posted	Space	On the space
A user replies to a discussion topic	Object	On the topic (for more information, see Section 39.3.3, "Setting Object-Level Subscriptions")
A user comments on a discussion topic	Object	On the topic
A user deletes a discussion topic	Object	On the topic
A user comments on a document	Object	On the document
A user likes a document	Object	On the document
A user updates a document	Object	On the document
A user deletes a document	Object	On the document
A user comments on a wiki document	Object	On the wiki
A user likes a wiki document	Object	On the wiki
A user updates a wiki document	Object	On the blog entry
A user deletes a wiki document	Object	On the blog entry
A user comments on a blog entry	Object	On the blog entry
A user likes a blog entry	Object	On the blog entry
A user updates a blog entry	Object	On the blog entry
A user deletes a blog entry	Object	On the blog entry

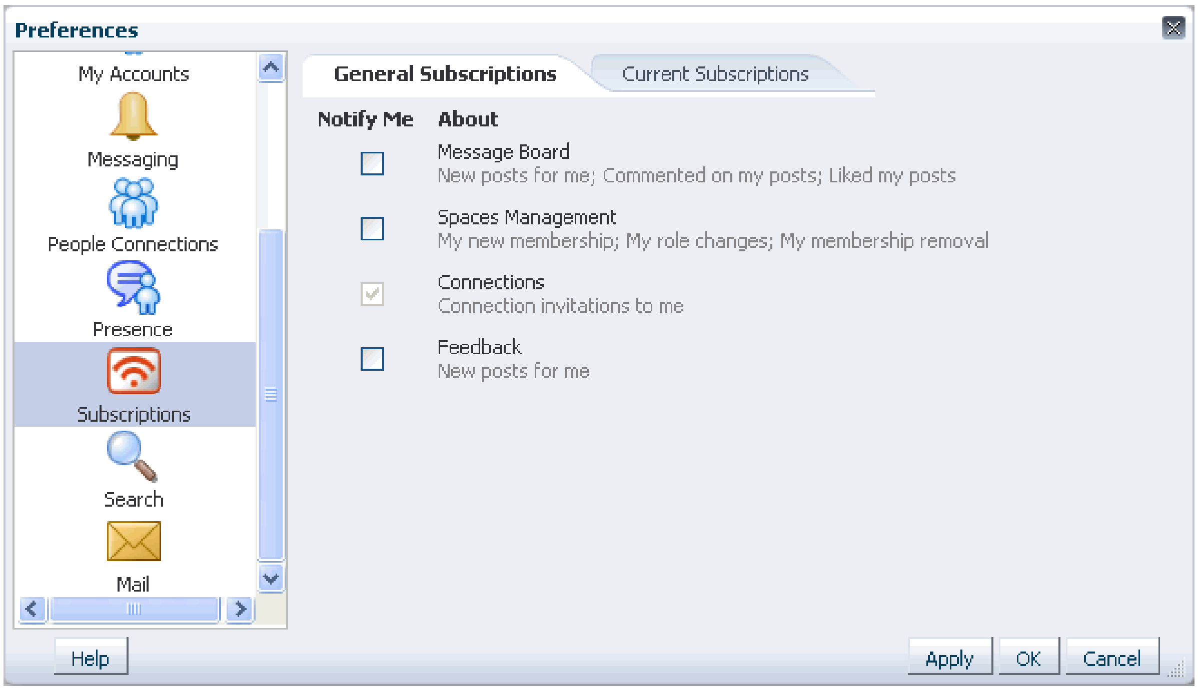
You can establish your preferred messaging channels through the **Messaging** panel in the Preferences dialog (for more information, see Section 39.2, "Establishing and Managing Your Messaging Channels and Filters"). Additionally, you can use messaging preferences to create filters for the types of notifications you want to receive.

Messaging configuration is available when your application administrator selects a BPEL server as the connection type for outbound notifications. If the administrator selects a Mail server, the only available messaging channel is mail; consequently, you are neither required nor able to configure your own messaging channels when your administrator selects a Mail server as the connection type for outbound notifications.

See Also: For information about administrative settings associated with Notifications, see the chapter, "Managing Subscriptions and Notifications," in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Default settings for application-level subscriptions are configurable by the application administrator. This means that your initial view of application-level Subscription Preferences is determined by these administrator defaults. Application-level subscriptions appear on the **General Subscriptions** tab of the **Subscriptions** panel in the Preferences dialog (Figure 39–1).

Figure 39–1 General Subscriptions Preferences



For each functional area or service on the **General Subscriptions** tab, the application administrator controls two settings:

- Is subscription enabled for the function or service?
- Are users allowed to change the default setting?

The answers to these questions determine how and whether general subscription options appear on your view of the tab. Table 39–2 illustrates how administrator-level subscription settings affect the appearance of the **General Subscriptions** tab.

Table 39–2 Effect of Administrator Defaults on Subscriptions Preferences

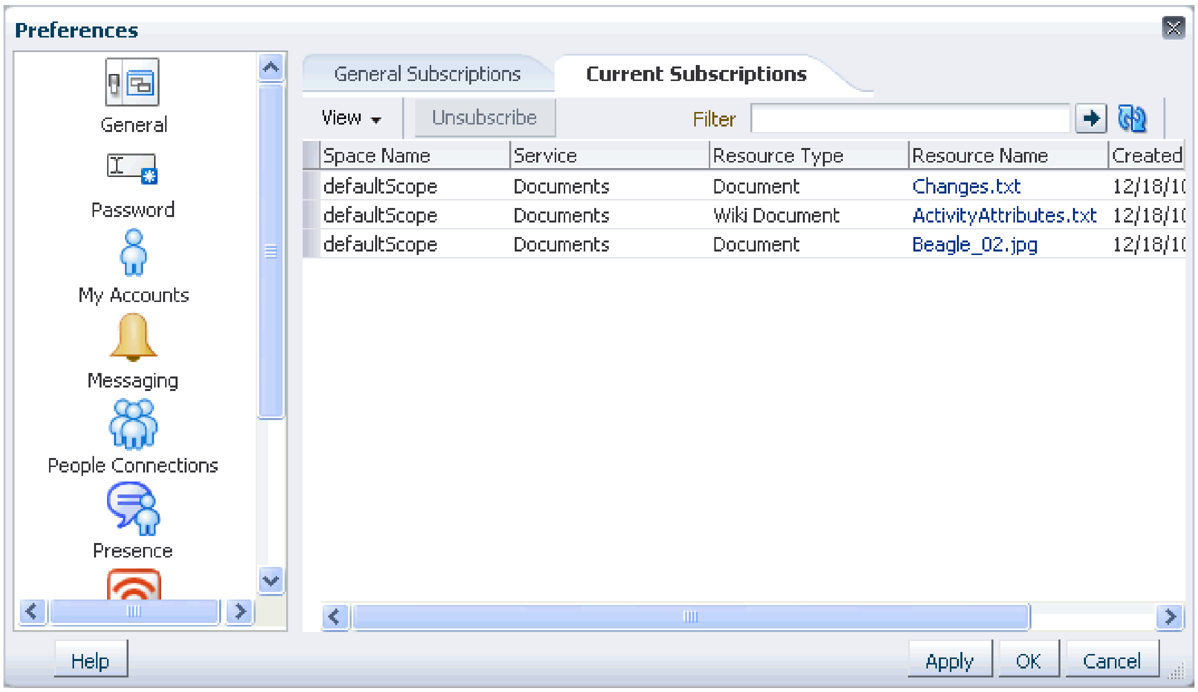
Subscription Enabled[1]	User Can Change Default	Option in Preferences
True	True	Rendered normally, check box checked
False	True	Rendered normally, check box deselected
True	False	Grayed out, check box checked
False	False	Hidden, check box hidden

[1] Rather than enabling or disabling the entire subscription capability, the `subscription-enabled` attribute merely sets the initial state of the preference option. For example, if `subscription-enabled="true"`, then the associated subscription option is checked by default in Spaces' Preferences dialog. If `subscription-enabled="false"`, then the associated subscription option is not checked by default in the dialog.

> **See Also:** For information about administrative settings associated with Notifications, see the chapter, "Managing Subscriptions and Notifications," in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

You can view and delete all of your subscriptions from one location: the **Current Subscriptions** tab on the **Subscriptions** panel in the Preferences dialog (Figure 39–2).

Figure 39–2 Current Subscriptions Preferences



Use the **Subscriptions** panel to view and manage all of your application-, space-, and object-level subscriptions. For more information, see Section 39.4, "Viewing and Cancelling Your Subscriptions."

39.2 Establishing and Managing Your Messaging Channels and Filters

Out of the box, your mail address is your default messaging channel, and, with no filters defined, a subscription is sufficient to trigger a notification, provided your administrator has configured the external application associated with the Mail server connection to contain shared credentials and provided mail is selected as the messaging default.

> **See Also:** For information about administrative settings associated with Notifications, see the chapter, "Managing Subscriptions and Notifications," in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
>
> The administrator's selection of a mail server as the messaging default presupposes that the administrator has also established a connection with a mail server. Additionally, the external application associated with the mail server connection must contain shared credentials. For information about connecting to a mail server, see the chapter "Managing the Mail Service," in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Once you have subscribed to an application object, no additional configuration is required to receive a notification through your mail when that object changes.

However, if you want to receive notifications over your phone, through your Worklist, or via an alternate mail address, a little configuration is required. First you must establish a messaging channel. Then you must define a messaging filter. The channel identifies the delivery medium and its associated address (user ID, mail, or phone number). The filter refines the types of notifications you receive and sets the conditions under which a notification is triggered.

This section steps you through the process of setting up your messaging channels and filters. It includes the following subsections:

- Section 39.2.1, "Accessing Messaging Configuration Settings"
- Section 39.2.2, "Establishing a Messaging Channel"
- Section 39.2.3, "Editing a Messaging Channel"
- Section 39.2.4, "Deleting a Messaging Channel"
- Section 39.2.5, "Creating and Applying Messaging Filters"
- Section 39.2.6, "Editing Messaging Filters"
- Section 39.2.7, "Deleting Messaging Filters"

39.2.1 Accessing Messaging Configuration Settings

The **Messaging** panel in the Spaces application's Preferences dialog provides a **Manage Configuration** button for navigating to User Messaging Preferences.

User Messaging Preferences derive from the User Messaging Service.

> **See Also:** For information about the User Messaging Service, see the *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

To access messaging configuration settings:

1. Open the Preferences dialog, and click **Messaging** to bring the **Messaging** panel forward.
2. Click the **Manage Configuration** button to open User Messaging Preferences login page.

Note: The **Manage Configuration** button is active only when a BPEL server is configured with the Spaces application. Because the BPEL server provides notification features to services, the **Manage Configuration** button may be active even when your application administrator elects to use a mail server in lieu of a BPEL server for Notifications.

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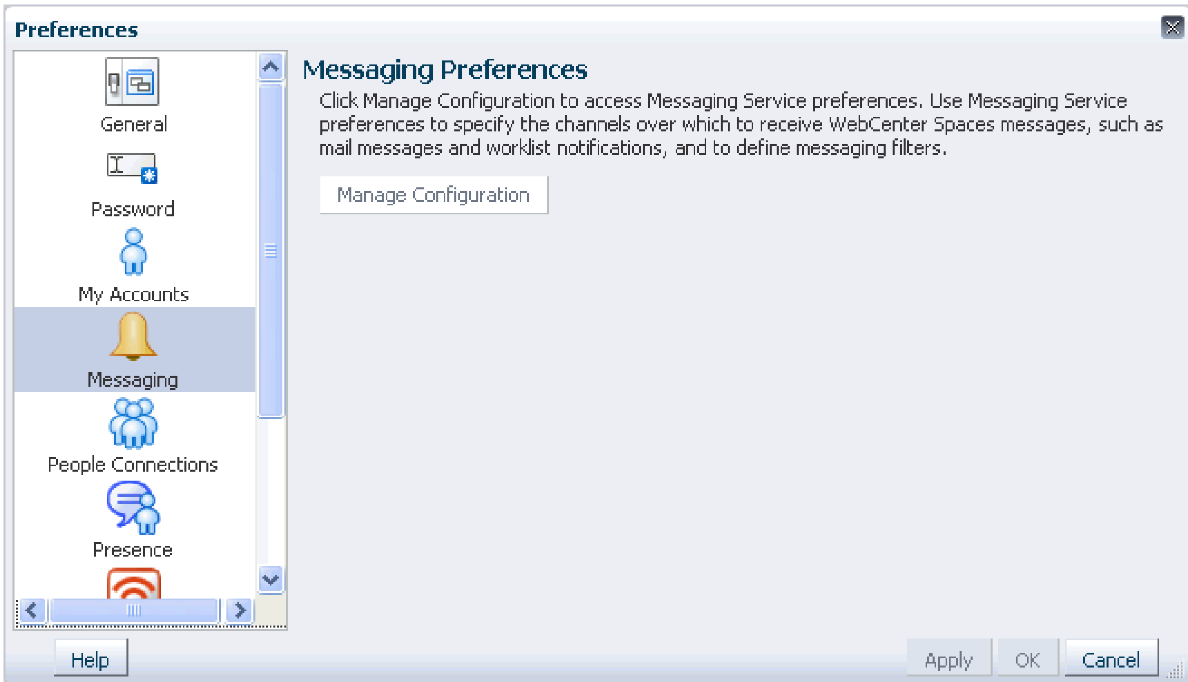
3. Log in to the User Messaging Server (this is not required if single sign-on is implemented).

   This opens the User Messaging Preferences panel (Figure 39–3).

Figure 39–3 Messaging Panel in Preferences Dialog



The **Messaging Channels** tab provides controls for creating and managing messaging channels and a view of all configured messaging channels, such as WORKLIST, EMAIL, and SMS. The EMAIL channel is always available. By default, it uses your email address from the LDAP identity store. If the WORKLIST driver is deployed by your application administrator, it is also automatically added for each user.

The **Messaging Filters** tab provides a means of defining the conditions under which you are notified and associating a messaging channel with a defined set of conditions.

For information about messaging configuration, see the following subsections:

- Section 39.2.2, "Establishing a Messaging Channel"
- Section 39.2.3, "Editing a Messaging Channel"
- Section 39.2.4, "Deleting a Messaging Channel"
- Section 39.2.5, "Creating and Applying Messaging Filters"
- Section 39.2.6, "Editing Messaging Filters"

- Section 39.2.7, "Deleting Messaging Filters"

Note: In environments where multiple BPEL connections are registered against the WebCenter Portal's Worklist component, the messaging preferences repository is shared by all. When you set messaging preferences for one connection, you set them for all.

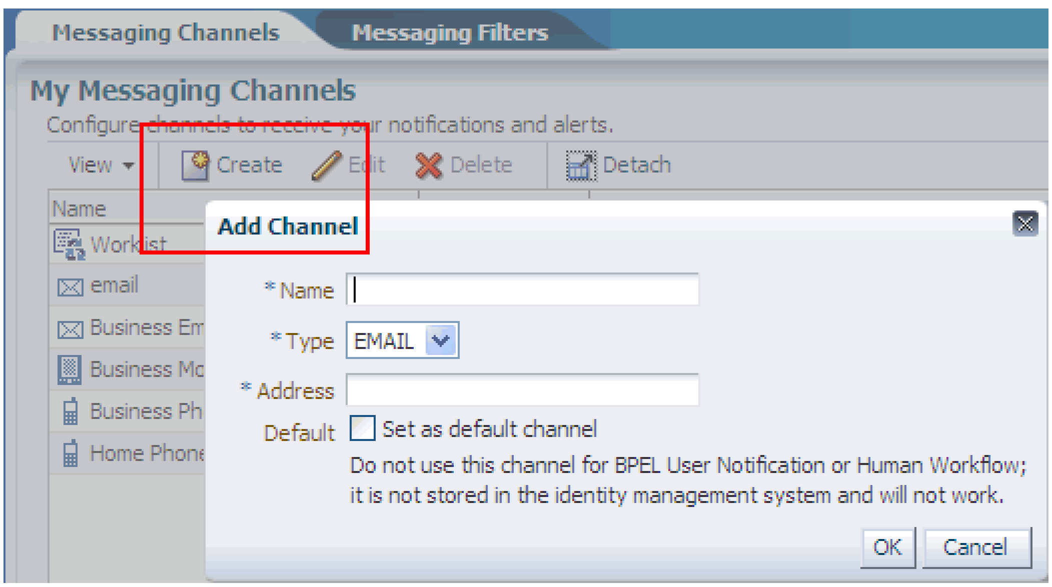
39.2.2 Establishing a Messaging Channel

Establishing a messaging channel involves selecting the channel over which a notification is sent and providing the delivery address for that channel.

To establish a messaging channel:

1. Go to the User Messaging Preferences page as described in Section 39.2.1, "Accessing Messaging Configuration Settings."
2. If necessary, click the **Messaging Channels** tab to bring it forward.
3. Click the **Create** icon to open the Add Channel dialog (Figure 39–4).

Figure 39–4 Create Icon and Add Channel Dialog



4. In the **Name** field, enter a display name for the channel.

   For example, enter `MyPhone`.
5. From the **Type** list, select the channel over which to send notifications:

   Tip: The presence of a channel is determined by the application administrator, who deploys them and makes them available.

   - **EMAIL** to specify that notifications are sent to you through your mail
   - **SMS** to specify that notifications are sent as text messages to your phone
   - **WORKLIST** to specify that notifications are posted to your Worklist
6. In the **Address** field, enter an address for the selected type:

- For EMAIL, enter the address of the mail account to which to send notifications, for example, `my.name@mycompany.com`.
- For SMS, enter the phone number to which to send notifications in the format *<country_code><area_code><number>*, for example, 14154444444.
- For WORKLIST, your user name is provided as a read-only value.

7. For the **Default** check box:

   - Select to identify one or more channels as the default channel over which to send notifications.

     Default channels are the channels over which are sent all notifications that do not meet any of your defined filtering conditions.

   - Deselect to prevent selected channels from being used as defaults.

8. Click **OK** to save your changes and exit the dialog.

To complete your configuration, see Section 39.2.5, "Creating and Applying Messaging Filters."

39.2.3 Editing a Messaging Channel

To revise messaging channel values:

1. Go to the User Messaging Preferences page as described in Section 39.2.1, "Accessing Messaging Configuration Settings."
2. If necessary, click the **Messaging Channels** tab to bring it forward.
3. Select the messaging channel you want to revise, and click the **Edit** icon to open the Modify Channel dialog.
4. Change values as desired.
5. Click **OK** to save your changes and exit the dialog.

39.2.4 Deleting a Messaging Channel

When you delete a messaging channel, any filters that rely on the deleted channel revert to the channel identified as the default. In the absence of a specifically identified default channel, the mail channel is used for sending notifications.

To delete a messaging channel:

1. Go to the User Messaging Preferences page as described in Section 39.2.1, "Accessing Messaging Configuration Settings."
2. If necessary, click the **Messaging Channels** tab to bring it forward.
3. Select the messaging channel you want to delete, and click the **Delete** icon.
4. Click **OK** in the resulting Confirmation dialog.

39.2.5 Creating and Applying Messaging Filters

Messaging filters enable you to qualify the types of notifications you want to receive and weed out the notifications of no interest. Filters also provide a means of associating a selected messaging channel with a particular type of notification. For example, using messaging filters, you can specify that all notifications about document updates go to mail while all notifications about event changes go to your phone, provided your administrator has configured Notifications to use multiple messaging channels.

Two important things to know about setting up messaging filters:

- Text values in your filtering conditions are case-sensitive. For example, messaging filters differentiate between *Document* and *document*.
- Create separate conditions for multiple terms. For example, for a `Subject` that contains *Monty gave feedback*, create three filtering conditions, one for each term.

To create and apply messaging filters:

1. Go to the User Messaging Preferences page as described in Section 39.2.1, "Accessing Messaging Configuration Settings."
2. If necessary, click the **Messaging Filters** tab to bring it forward.
3. Click the **Create** icon to open a filter-creation page.
4. In the **Filter Name** field, enter a display name for the filter.
5. Optionally, enter a filter description in the **Description** field.
6. From the **Matching** list, select from:
   - **All of the following conditions** to require that all of the conditions you specify are met
   - **Any of the following conditions** to require that at least one of the conditions you specify is met
7. From the first **Add Filter Condition** list, select from:
   - **Subject** to base a condition on words appearing in the message subject

     It is likely that the most useful filter condition option is `Subject`. The subjects of notification messages are standardized and can therefore be anticipated. This makes subjects ideal for setting up filtering conditions. See Table 39–4 for a list of standard notification message subjects and examples of filter conditions.
   - **From** to base a condition on the message sender

     All notification messages are sent from the same entity—as configured by your application administrator.
   - **Date** to base a condition on when the message was generated

     `Date` and `Time` options may be useful for ad hoc situations, for example, you want to ensure that any notifications about events delivered on the day of the event are sent right to your phone.
   - **Time** to base a condition on the time the message was generated

   Note: Of all the filter conditions available on the **Add Filter Condition** list, `Subject`, `From`, `Date`, and `Time` are the options that are relevant to and work with the types of messages generated by Notifications. The other options have no effect.

8. From the second **Add Filter Condition** list, select an operator for the condition.

   See Also: See Table 39–3 for an alphabetical list of operators that are relevant to the attributes `Subject`, `From`, `Date`, and `Time`.

9. Click the **Click to add filter condition** icon.
10. From the **Messaging Option** list, select from:
    - **Send No Messages** to omit notification for the defined filter conditions
    - **Send Messages to all Selected Channels** to send notification through all channels selected from the **Add Notification Channel** list
    - **Send to the First Available Channel** to send notification through the first open channel of all the selected channels
11. From the **Add Notification Channel** list, select the channel over which to send the notification messages that meet your defined filter conditions, and then click the **Click to add channel to this filter** icon.

    The **Add Notification Channel** list is populated with the channels that are defined on the **Messaging Channels** tab. You can add multiple channels in turn.
12. Click **OK** to save and apply the messaging filter.

> **Tip:** If your defined filtering conditions do not match an incoming notification, the User Messaging Server will send notifications over all the channels you have identified as default channels.

Table 39–3 provides an alphabetical list of operators that are relevant to the attributes `Subject`, `From`, `Date`, and `Time` and describes the values they require.

Table 39–3 Operators relevant to Subject, From, Date, and Time

Operator	Value[1]	Attributes
`Between`	In the fields provided: ■ For Date, enter a start date and end date between which to apply the filter ■ For Time, select a start time (hours and minutes) and end time between which to apply the filter	Date, Time
`Contains`	Enter a string that must be included in the message Subject or return address (From) Separate multiple values with commas.	Subject, From
`isEqual`	Enter the literal value that must be used for the message Subject, Date, Time, or return address (From)	Subject, From, Date, Time
`isGreaterThan`	Enter the message delivery date beyond which to apply the filter	Date
`isGreaterThanOrEqual`	Enter the message delivery date on which to start applying the filter	Date
`isLessThan`	Enter the message delivery date before which to start applying the filter	Date
`isLessThanOrEqual`	Enter the message delivery date on which to stop applying the filter	Date
`isNotEqual`	Enter a literal value that must be ignored for the message Subject, Date, Time, or return address (From)	Subject, From, Date, Time

Table 39–3 (Cont.) Operators relevant to Subject, From, Date, and Time

Operator	Value[1]	Attributes
`isWeekday`	No value is required. This operator applies to messages sent on weekdays.	Date
`isWeekend`	No value is required. This operator applies to messages sent on weekends.	Date
`NotContains`	Enter a string that must be excluded from the message Subject or return address (From). Separate multiple values with commas.	Subject, From

[1] String values are case sensitive. Multiple values in strings must be separated by a comma.

Table 39–4 provides a list of standard notification message subjects and examples of condition formulations.

Table 39–4 Standard Notification Message Subjects

Standardized Notification Subject	Example Filter Conditions
`userName` has invited you to become a connection	■ `Subject Contains connection` ■ `Subject Contains Monty` You can set the condition action to route or ignore all messages concerning a named user for any subject that includes a user name.
`userName` posted message on your message board	■ `Subject Contains message` ■ `Subject Contains board`
`userName` commented on your message board posting	`Subject Contains commented`
`userName` likes on your message board posting	`Subject Contains likes`
`userName` gave feedback to you	■ `Subject Contains gave` ■ `Subject Contains feedback`
Space Membership Change	`Subject isEqual Space Membership Change`
`userName` created the *`documentType documentName`* **Note:** For `documentType`, either `Document` or `Wiki Document` is returned. This means that all file types, except wikis, are identified in the subject as Document.	■ `Subject Contains Document` ■ `Subject Contains Wiki` ■ `Subject Contains java.txt` ■ `Subject Contains Monty`
`userName` changed the *`documentType documentName`*	■ `Subject Contains changed` ■ `Subject Contains myFile.docx`
`userName` deleted the *`documentType documentName`*	■ `Subject Contains deleted` ■ `Subject Contains document` ■ `Subject isNotEqual java.txt`
`userName` posted a comment on the *`documentType documentName`*	■ `Subject Contains Monty` ■ `Subject Contains comment` ■ `Subject Contains movingforward.docx`
`userName` likes the *`documentType documentName`*	■ `Subject Contains likes` ■ `Subject Contains movingforward.docx`
`userName` created the blog post *`blogName`*	■ `Subject Contains kirk` ■ `Subject Contains tribbles`

Table 39–4 (Cont.) Standard Notification Message Subjects

Standardized Notification Subject	Example Filter Conditions
userName changed the blog post *blogName*	`Subject NotContains tribbles`
userName deleted the blog post *blogName*	■ `Subject Contains deleted` ■ `Subject Contains blog`
userName posted a comment on the blog post *blogName*	■ `Subject Contains comment` ■ `Subject Contains blog`
userName likes the blog post *blogName*	■ `Subject Contains like` ■ `Subject Contains blog`
userName created the forum *forumName*	■ `Subject Contains Monty` ■ `Subject Contains created` ■ `Subject Contains forum`
userName created the discussion topic *topicName*	■ `Subject Contains Monty` ■ `Subject Contains topic` This example affects both *created* and *deleted* topics. Consider adding the verb, for example, *created* or *deleted*, in the filter condition when you want to make a distinction between the two types of actions. Note, however, that the verb alone is not likely to have the effect you want. For example, if you set the filter condition, `Subject Contains deleted`, messages for all types of objects upon which a delete action is performed are handled by the filter.
userName replied to the discussion topic *topicName*	■ `Subject Contains replied` ■ `Subject Contains topic` ■ `Subject Contains NewTech`
userName deleted the discussion topic *topicName*	■ `Subject Contains deleted` ■ `Subject Contains topic`
userName posted a comment on the discussion topic *topicName*	■ `Subject Contains comment` ■ `Subject Contains topic` ■ Subject Contains NewTech
userName likes the discussion topic *topicName*	■ `Subject Contains likes` ■ `Subject Contains NewTech`
userName created the event *eventName*	■ `Subject Contains Java` ■ `Subject Contains Summit`
userName changed the event *eventName*	■ `Subject Contains Java` ■ `Subject Contains Summit` ■ `Subject Contains changed`

Table 39–4 (Cont.) Standard Notification Message Subjects

Standardized Notification Subject	Example Filter Conditions
`userName` deleted the event `eventName`	■ `Date isEqual 5/31/10` ■ `Subject Contains event` ■ `Subject Contains Java` ■ `Subject Contains Summit` On the day of the event, all notifications concerning the Java Summit event are routed to a selected channel. You can omit the term *event*, and receive other related notifications, such as an announcement concerning Java Summit.
`userName` created the announcement `announcementName`	■ `Subject Contains created` ■ `Subject Contains announcement`
`userName` changed the announcement `announcementName`	■ `Subject Contains Monty` ■ `Subject Contains announcement`
`userName` deleted the announcement `announcementName`	■ `Subject Contains announcement` ■ `Subject Contains mySpace`

39.2.6 Editing Messaging Filters

To edit a messaging filter:

1. Go to the User Messaging Preferences page as described in Section 39.2.1, "Accessing Messaging Configuration Settings."
2. If necessary, click the **Messaging Filters** tab to bring it forward.
3. Select the filter condition to edit, and click the **Edit** icon.
4. Make your changes.
5. Click **OK** to save and apply your changes.

39.2.7 Deleting Messaging Filters

To delete a messaging filter:

1. Go to the User Messaging Preferences page as described in Section 39.2.1, "Accessing Messaging Configuration Settings."
2. If necessary, click the **Messaging Filters** tab to bring it forward.
3. Select the filter condition to delete, and click the **Delete** icon.
4. Click **OK** in the resulting Confirmation dialog.

> **Note:** You can remove a filtering condition without deleting the entire filter. Follow the steps in Section 39.2.6, "Editing Messaging Filters," and click the **Delete** icon next to the condition to remove.

39.3 Subscribing at the Application, Space, and Object Level

Where you perform a subscription varies according to the level at which the subscription is applied as well as the type of object being subscribed to. For example:

- Application-level subscriptions are made through your personal preferences.

- Space-level subscriptions are made on the space's **Actions** menu on the **Browse Spaces** page.
- Object-level subscriptions are made on the object itself.

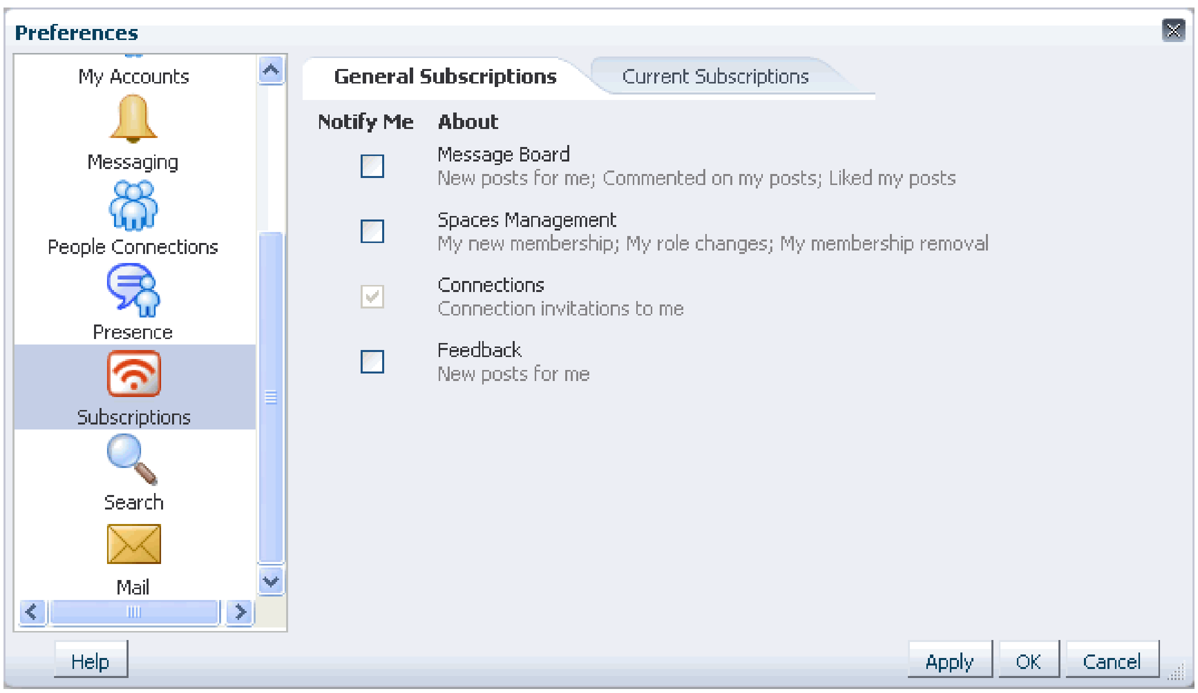
This section steps you through these subscription scenarios. It includes the following subsections:

- Section 39.3.1, "Setting Application-Level Subscriptions"
- Section 39.3.2, "Setting Space-Level Subscriptions"
- Section 39.3.3, "Setting Object-Level Subscriptions"

39.3.1 Setting Application-Level Subscriptions

Set application-level subscriptions on the **Subscriptions** panel in the Preferences dialog (Figure 39–5).

Figure 39–5 General Subscriptions Preferences



You can use subscription preferences to specify whether to receive notifications from the People Connections service for activities related to Connections, Feedback, and Message Board. Additionally, you can use subscriptions preferences to subscribe to space management activities, such as changes to any of your space memberships or roles.

Application-level subscriptions are affected by the defaults set by the application administrator. In your view of Preferences, some subscription options may appear but be unavailable, while others may be hidden completely. For more information, see Section 39.1, "What You Should Know About Subscriptions and Notifications."

To set application-level subscriptions:

1. Open the Preferences dialog, click **Subscriptions** to open the **Subscriptions** panel, and, if necessary, click the **General Subscriptions** tab to bring it forward.

2. Select the check box next to an option for which to receive notifications through mail or other selected channels.

   See Also: For more information about messaging channels, see Section 39.2, "Establishing and Managing Your Messaging Channels and Filters."

   Select from:

   - **Message Board** to receive notification when other users post messages to your Message Board, like your posts, and comment on your posts
   - **Space Management** to receive notification when you are added or removed as a member or your role changes
   - **Connections** to receive notification when another user invites you to connect
   - **Feedback** to receive notification when other users leave feedback for you

   Deselect the check box next to the options for which to omit notifications.

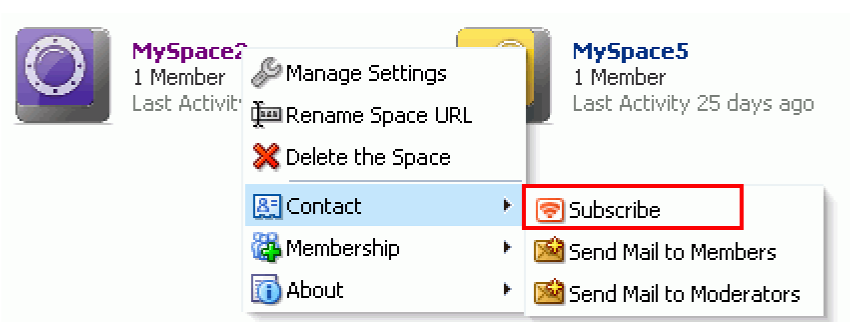
3. Click **Apply** to apply your changes and remain in the dialog; or click **OK** to save your changes and exit the dialog.

   See Also: For information about managing application-level subscriptions, see Section 39.4.1, "Viewing and Cancelling Application-Level Subscriptions."

39.3.2 Setting Space-Level Subscriptions

Subscribe to a space on the space's **Actions** menu on the **Spaces** page (Figure 39–6).

Figure 39–6 Subscribe Option on Space's Actions Menu



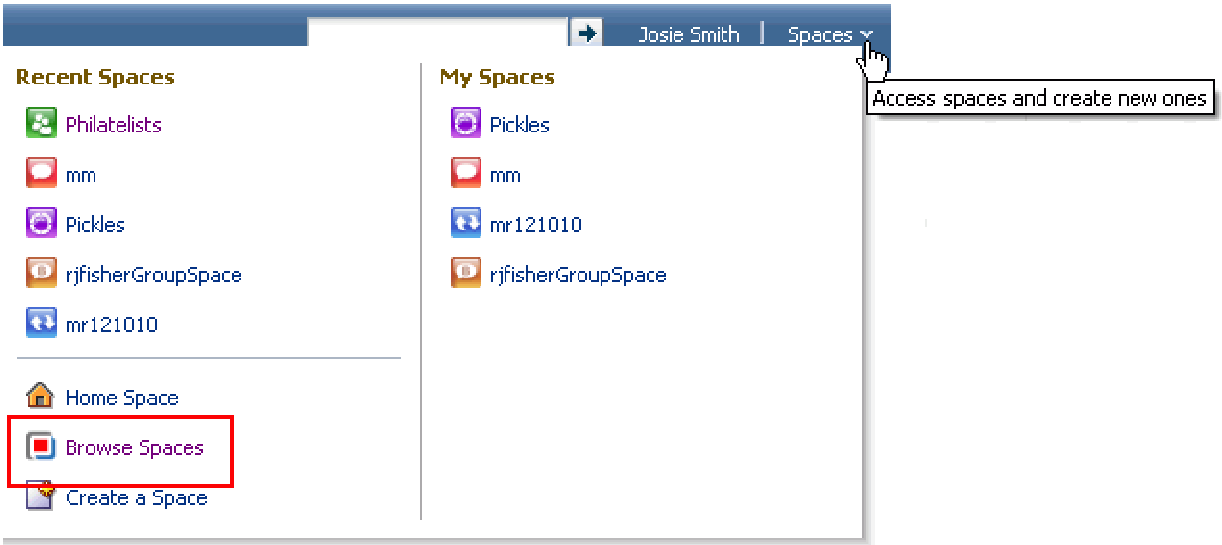
You can use space-level subscriptions to trigger notification messages whenever any of the following actions occur within the scope of the subscribed space:

- An announcement is created
- An event is created, updated, or deleted
- A discussion forum or topic is created
- A document is created or uploaded
- A wiki document is created
- A blog entry is posted

To subscribe to a space:

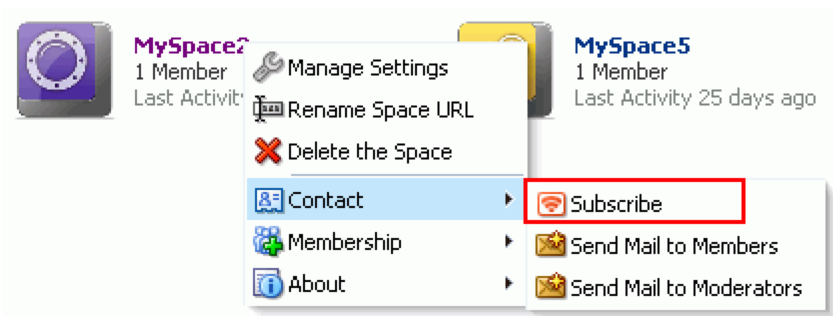
1. Navigate to the **Spaces** page (Figure 39–7).

Figure 39–7 Browse Spaces Option on the Spaces Menu



2. Right-click the space's icon or name, and select **Contact** and then **Subscribe** (Figure 39–8).

Figure 39–8 Subscribe Option on Space's Actions Menu



3. In the Subscribe dialog, select one or more of the following options:

Note: An option appears in this dialog only when its associated service has been provided to the space. For example, if the space is not provided with the Discussions service, the Discussions option does not appear in this dialog.

- **Space Event**, to receive notice whenever an event is created, updated, or deleted from this space
- **Documents**, to receive notice whenever a document is created or uploaded to this space

See Also: To see a more detailed level of notifications regarding a specific document, such as when it is updated, subscribe to the document at the object level. For more information, see Section 39.3.3.1, "Subscribing to a File."

- **Blogs**, to receive notice whenever a blog entry is posted in this space

  See Also: To see a more detailed level of notifications regarding a specific blog entry, such as when it is edited, liked, or commented on, subscribe to the blog entry at the object level. For more information, see Section 39.3.3.3, "Subscribing to a Blog Entry."

- **Discussions**, to receive notice whenever a discussion topic is created in this space

  See Also: To see a more detailed level of notifications regarding a specific discussion topic, such as when it is edited, liked, or commented on, subscribe to the topic at the object level. For more information, see Section 39.3.3.4, "Subscribing to a Discussion Topic."

- **Announcements**, to receive notice whenever an announcement is created in this space

4. Click **Save** to save your settings and exit the dialog.

Once you have subscribed to a space, the subscription is reflected on the **Current Subscriptions** tab on the **Subscriptions** panel in the Preferences dialog. Here you can view all of your space- and object-level subscriptions. For more information, see Section 39.4.2, "Viewing and Cancelling Space- and Object-Level Subscriptions."

39.3.3 Setting Object-Level Subscriptions

You can use object-level subscriptions to trigger notification messages for actions performed on a selected document, wiki, blog entry, or discussion topic. This section describes how to subscribe to each. It includes the following subsections:

- Section 39.3.3.1, "Subscribing to a File"
- Section 39.3.3.2, "Subscribing to a Wiki Document"
- Section 39.3.3.3, "Subscribing to a Blog Entry"
- Section 39.3.3.4, "Subscribing to a Discussion Topic"

39.3.3.1 Subscribing to a File

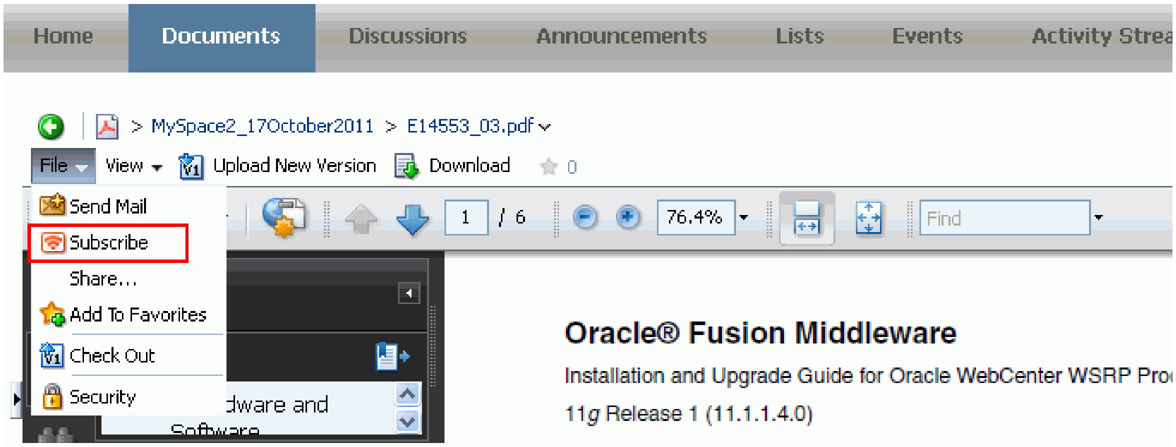
When you subscribe to a file, whenever a user revises or deletes the file, or likes or comments on it, you are notified through your selected messaging channel.

> **See Also:** For more information, see Section 39.2, "Establishing and Managing Your Messaging Channels and Filters."

To subscribe to a file:

1. Go to the location where the file you want to subscribe to is listed.
2. Click the file link to open the file in the Document Viewer.
3. From the File menu, select **Subscribe** (Figure 39–9).

Figure 39–9 Subscribe Option on a File Menu



See Also: For information about unsubscribing, see Section 39.4.2, "Viewing and Cancelling Space- and Object-Level Subscriptions."

39.3.3.2 Subscribing to a Wiki Document

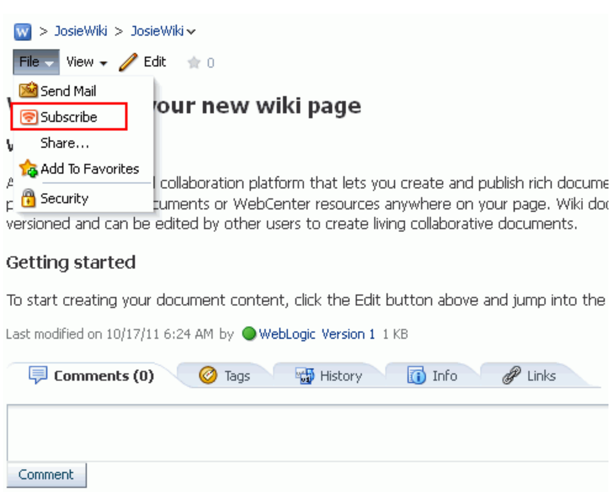
When you subscribe to a wiki, whenever a user performs a major edit on, deletes, likes, or comments on the selected wiki, you are notified through your selected messaging channel.

Tip: Users can identify a wiki document edit as major, in which case notification is sent. If the edit is not marked as major, no notification is sent.

To subscribe to a wiki:

1. Go to the wiki you want to subscribe to.
2. Open the **File** menu, and select the **Subscribe** option (Figure 39–10).

Figure 39–10 Subscribe Option on a File Menu



See Also: For information about unsubscribing, see Section 39.4.2, "Viewing and Cancelling Space- and Object-Level Subscriptions."

39.3.3.3 Subscribing to a Blog Entry

When you subscribe to a blog entry, whenever a user edits, likes, comments on, or deletes the selected blog entry, you are notified through your selected messaging channel.

> **See Also:** For more information, see Section 39.2, "Establishing and Managing Your Messaging Channels and Filters."

To subscribe to a blog entry:

1. Go to the blog that contains the entry you want to subscribe to.
2. Click the link to the blog entry of interest to display its content.
3. From the **File** menu, select **Subscribe** (Figure 39–11).

Figure 39–11 Subscribe Option on a File Menu

> **See Also:** For information about unsubscribing, see Section 39.4.2, "Viewing and Cancelling Space- and Object-Level Subscriptions."

39.3.3.4 Subscribing to a Discussion Topic

When you subscribe to a discussion topic, whenever a user, edits, deletes, likes, or comments on the selected discussion topic, you are notified through your selected messaging channel.

> **See Also:** For more information, see Section 39.2, "Establishing and Managing Your Messaging Channels and Filters."

To subscribe to a discussion topic:

1. Go to the discussion topic you want to subscribe to.
2. Click the **Subscribe** link at the top of the topic (Figure 39–12).

Figure 39–12 Subscribe Link on a Discussion Topic

See Also: For information about unsubscribing, see Section 39.4.2, "Viewing and Cancelling Space- and Object-Level Subscriptions."

39.4 Viewing and Cancelling Your Subscriptions

Where you view and cancel your current subscriptions depends on the level of the subscription:

- In addition to making application-level subscriptions, you can view and cancel application-level subscriptions on the **General Subscriptions** tab on the **Subscriptions** panel in the Preferences dialog.
- View and cancel space- and object-level subscriptions on the **Current Subscriptions** tab on the **Subscriptions** panel in the Preferences dialog.

See Also: The settings available on the **Current Subscriptions** tab are also provided through the Subscriptions Viewer task flow. For more information, see Section 39.5, "Working with Notifications Task Flows."

This section provides information about how to view and cancel your application-level subscriptions and how to view and cancel your space- and object-level subscriptions. It includes the following subsections:

- Section 39.4.1, "Viewing and Cancelling Application-Level Subscriptions"
- Section 39.4.2, "Viewing and Cancelling Space- and Object-Level Subscriptions"

39.4.1 Viewing and Cancelling Application-Level Subscriptions

View and cancel application-level subscriptions through Preferences or through the Subscription Preferences task flow (for more information, see Section 39.5, "Working with Notifications Task Flows").

To view or cancel application-level subscriptions:

1. Open the Preferences dialog, click **Subscriptions** to open the **Subscriptions** panel, and, if necessary, click the **General Subscriptions** tab to bring it forward.

   Here you can readily view and change your current application-level subscriptions.

2. To cancel a subscription, deselect its check box.

39.4.2 Viewing and Cancelling Space- and Object-Level Subscriptions

Both space- and object-level subscriptions are listed in the Preferences dialog on the **Subscriptions** panel. Use the controls on the **Current Subscriptions** tab to adjust your view of these subscriptions and to cancel (or unsubscribe from) a space- or object-level subscription.

> **Tip:** Space- and object-level subscriptions can be cancelled through the same action you took to create the subscription. At the space- and object-levels, subscription options toggle between subscribed and unsubscribed. Follow the steps outlined in Section 39.3.2, "Setting Space-Level Subscriptions," and Section 39.3.3, "Setting Object-Level Subscriptions," but select to unsubscribe instead.

> **See Also:** The settings available on the **Current Subscriptions** tab are also provided in the Subscriptions Viewer task flow. For more information, see Section 39.5, "Working with Notifications Task Flows."

To view and cancel space- and object-level subscriptions:

1. Open the Preferences dialog, click **Subscriptions** to open the **Subscriptions** panel, and, if necessary, click the **Current Subscriptions** tab to bring it forward.
2. Use the **View** menu to control the display order of columns and to hide or show individual columns.
3. To cancel or unsubscribe from a space- or object-level subscription, select the subscription, and click **Unsubscribe**.
4. In the resulting Unsubscribe Notification Subscription dialog, click **Unsubscribe**.

   The selected subscription no longer appears on the list of subscriptions.
5. Click **OK** to exit the Preferences dialog.

39.5 Working with Notifications Task Flows

The Notifications task flows duplicate the features provided through Notifications preferences, with the added benefit of flexibility. That is, you can place Notifications task flows on any page on which you have Edit permission. Additionally, the Subscription Preferences task flow changes scope according to where it is placed.

The options available through Notifications task flows duplicate those available in Subscription Preferences and in space-level subscription dialogs. These options are discussed in Section 39.3, "Subscribing at the Application, Space, and Object Level."

This section provides an overview of Notifications task flows and catalogs their associated task flow parameters. It includes the following subsections:

- Section 39.5.1, "What You Should Know About Notifications Task Flows"
- Section 39.5.2, "Adding Notifications Task Flows to a Page"
- Section 39.5.3, "Setting Notifications Task Flow Properties"

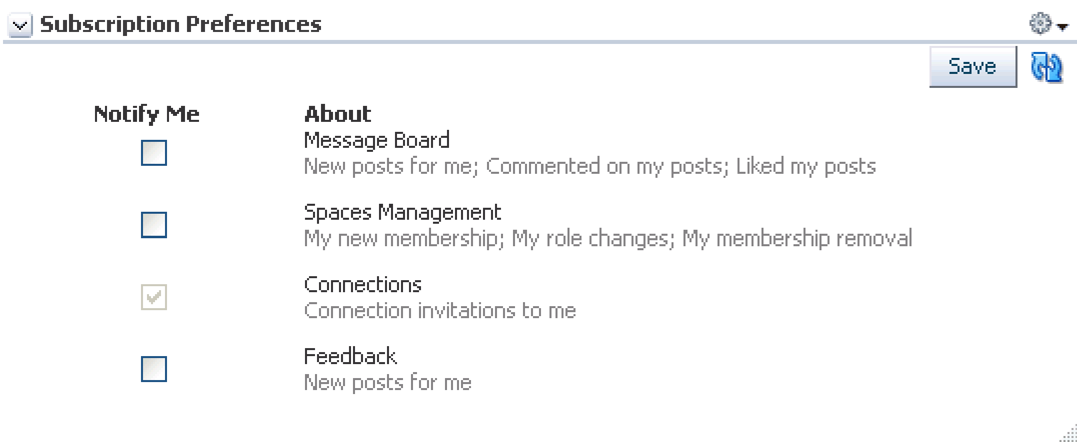
39.5.1 What You Should Know About Notifications Task Flows

Two Notifications task flows are available through the Resource Catalog:

Note: The content of the Resource Catalog is determined by the application administrator. For example, by default, the Subscription Preferences task flow is not available in the Resource Catalog, but your application administrator can add it. Consequently, it is documented here. For more information, see Section 16.3.1.2, "Adding Resources."

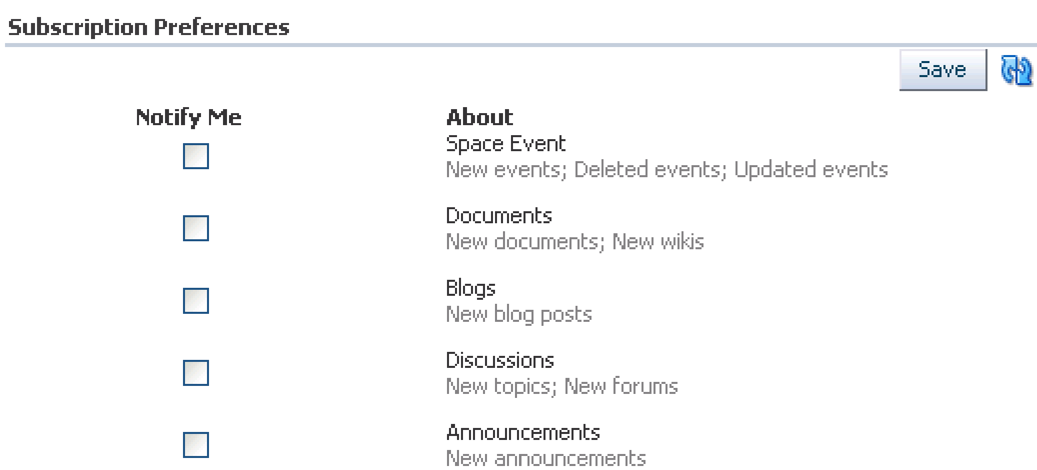
- **Subscription Preferences**, which provides subscription options according to where its is placed:
  - A Subscription Preferences task flow on a Home space page provides application-level subscription options (Figure 39–13).

Figure 39–13 Subscription Preferences Task Flow on a Home Space Page



  - A Subscription Preferences task flow on a space page provides space-level subscription options (Figure 39–14).

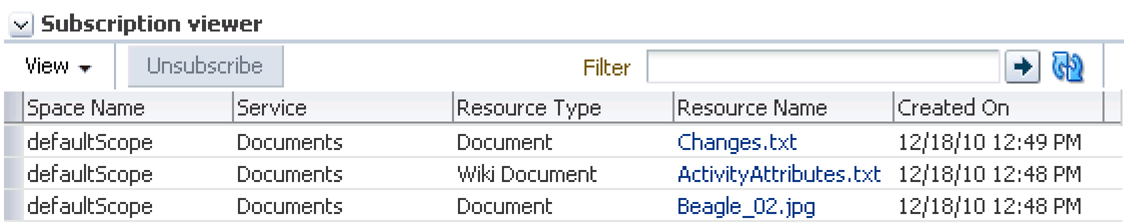
Figure 39–14 Subscription Preferences Task Flow on a Space Page



> **See Also:** For information about controls for:
>
> - Application-level subscriptions, see Section 39.3.1, "Setting Application-Level Subscriptions," and Section 39.4.1, "Viewing and Cancelling Application-Level Subscriptions."
> - Space-level subscriptions, see Section 39.3.2, "Setting Space-Level Subscriptions," and Section 39.4.2, "Viewing and Cancelling Space- and Object-Level Subscriptions."

- **Subscription Viewer**, which provides the same controls that are available on the **Current Subscriptions** tab of the **Subscriptions** panel in the Preferences dialog (Figure 39–15)

Figure 39–15 Subscription Viewer Task Flow



> **See Also:** For information about the controls that are available on the **Current Subscriptions** tab, see Section 39.4.2, "Viewing and Cancelling Space- and Object-Level Subscriptions."

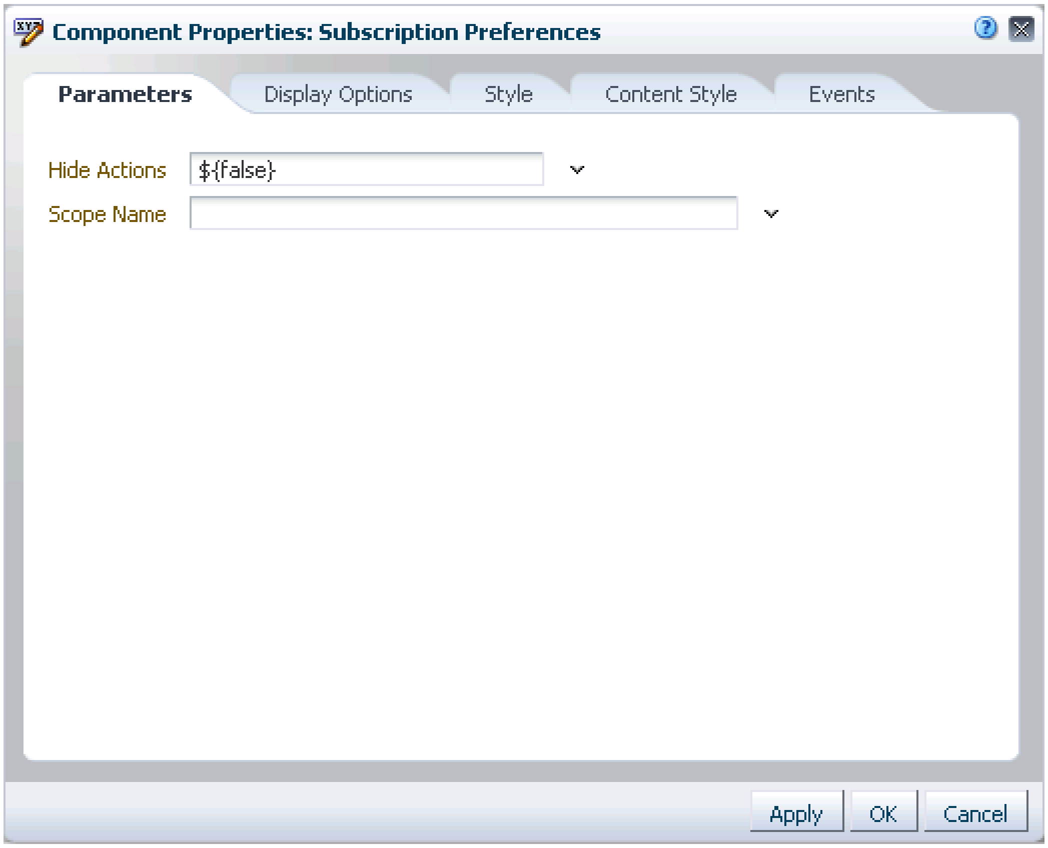
39.5.2 Adding Notifications Task Flows to a Page

The process of adding a Notifications task flow to a page is the same for all task flows (for more information, see Section 18.5, "Adding a Component to a Page.").

39.5.3 Setting Notifications Task Flow Properties

Notifications task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 39–16)

Figure 39–16 Subscription Preferences Task Flow Component Properties



See Also: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties associated with Notifications task flows and describe the properties available on the Parameters tab:

- Section 39.5.3.1, "What You Should Know About Notifications Task Flow Properties"
- Section 39.5.3.2, "Notifications Task Flow Parameters"
- Section 39.5.3.3, "Hiding Save and Refresh Actions on Subscription Preferences"
- Section 39.5.3.4, "Displaying Subscription Controls for One Space in Another"

39.5.3.1 What You Should Know About Notifications Task Flow Properties

When you set property values on a Notifications task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the **Parameters** tab of the Component Properties dialog can affect the default task flow content. For descriptions of the parameters on this tab, see Section 39.5.3.2, "Notifications Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

> **Note:** Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.
>
> EL validation is not performed on non-generic display options.

39.5.3.2 Notifications Task Flow Parameters

Table 39–5 describes the parameters that are unique to the Subscription Preferences task flow. The Subscription Viewer task flow does not have associated parameters.

Table 39–5 Subscription Preferences Task Flow Parameters

Parameter	Description
`Hide Actions`	A control for showing or hiding the **Save** button and **Refresh** icon ■ `true` to hide these controls ■ `false` to show them (default)
`Scope Name`	The name of the space for which to display space-level subscription options Use the space internal name, available on the **General Settings** page of the space administration. The space internal name is at the end of the value in the **space URL** field. For example, in the following URL, the space internal name is `standards`: `http://myHost[...]/webcenter/spaces/standards`

39.5.3.3 Hiding Save and Refresh Actions on Subscription Preferences

The Subscription Preferences task flow has an associated parameter, named `Hide Actions`, that you can use to hide the **Save** button and **Refresh** icon on a selected task flow instance.

To hide the **Save** and **Refresh** actions on a task flow instance:

1. Go to the page that contains the task flow instance you want to change.
2. Open the page in edit mode.
3. Click the **Edit** icon (wrench) on the task flow header to open the Component Properties dialog.
4. Click the **Parameters** tab to bring it forward.

5. Click the menu icon next to **Hide Actions**, and select **Expression Builder** to open an Expression Language (EL) editor.
6. Select **Type a value or expression**, remove the current value in the field, and enter `#{true}`.
7. Click **OK** to exit the editor.
8. Click **OK** to exit the Component Properties dialog.
9. Click **Save** to save the page, and click **Close** to exit edit mode.

> **Tip:** To show the **Save** and **Refresh** actions, repeat the steps in this section, entering `#{false}` in lieu of the current value.

39.5.3.4 Displaying Subscription Controls for One Space in Another

The Subscriptions Preferences task flow has an associated parameter, named `Scope Name`, that enables you to display the subscription options for one space in another space.

`Scope Name` can be handy in a few use cases. For example, normally, a Subscription Preferences task flow shows application-level subscription options when it is situated in the Home space. Instead, you could use `Scope Name` to control your subscription options for a particular space from the Home space. You could also set up a control center from which to control settings for various spaces from one location.

To display subscription controls for one space in another:

1. Go to the page that contains the task flow instance you want to change.
2. Open the page in edit mode.
3. Click the **Edit** icon (wrench) on the task flow header to open the Component Properties dialog.
4. Click the **Parameters** tab to bring it forward.
5. In the **Scope Name** field, enter the name of the space for which to display subscription controls.

> **Note:** Use the space internal name, available on the **General** page of the space administration. The space internal name is at the end of the value in the **Space URL** field. For example, in the following URL, the space internal name is `standards`:
>
> ```
> http://myHost[...]/webcenter/spaces/standards
> ```

6. Click **OK** to exit the Component Properties dialog.
7. Click **Save** to save the page, and click **Close** to exit edit mode.

> **Tip:** To change the instance to show subscription controls for the current scope, repeat the steps in this section, but remove the value in the **Scope Name** field.

40

Creating and Managing Your Personal Favorites

Use Favorites to keep your own personal list of favorites to access from any browser you choose. This chapter describes how to create, organize, and manage a list of personal favorites.

This chapter includes the following sections:

Audience

This chapter is intended for users who want to create and manage portable links to their favorite and most useful web sites.

40.1 What You Should Know About Favorites

The great advantage to Spaces application Favorites is their portability. They are not dependent on a particular type of browser, so any browser you use to access your Spaces application provides access to your Spaces Favorites. You can create favorite links to sites internal or external to the Spaces application. This makes Spaces the best choice for managing and tracking your favorites list.

Favorites are personal. The favorites you see on the **Favorites** menu are the favorites you create. No other user sees your favorites, and you do not see any other user's favorites. If you like, though, you can share favorites with other users, by making one or more of them discoverable in a search.

Favorites are created at the application level; consequently, when you move from one space to another, the favorites on the **Favorites** menu stay the same.

The Spaces application provides a Manage Favorites dialog, which you can use to further customize your favorites. Use the Manage Favorites dialog to:

- Control the order of display of links on the **Favorites** menu
- Specify a method for opening a favorite target
- Create folders for organizing your favorites
- Create, edit, or delete favorite links and folders

For more information about the Manage Favorites dialog, see Section 40.5, "Managing Favorites."

40.2 Accessing the Favorites User Interface

The easiest way to access the Favorites user interface is to open the **Favorites** menu. However, the availability of navigational links and menus, such as the **Favorites** menu, is determined by the people who design and build your portal. This being so, you may not see a **Favorites** menu.

The Favorites Menu and Add To Favorites link are available as spaces components. If the Spaces application administrator adds these components to the Resource Catalog that is used for personal pages, then you can edit the page (provided you are authorized) and add the Add To Favorites or Favorites Menu component to your page.

In a space, these components must be included in the Resource Catalog that is provided for all spaces or the space of interest.

> **See Also:** For information about Resource Catalogs and spaces components, see the following:
>
> - For information about adding components to a Resource Catalog, see Section 16.3.1.2, "Adding Resources."
> - For information about configuring the application or a space to use a particular Resource Catalog, see Section 16.10.1, "Configuring the Application-Level Resource Catalog," and Section 16.10.2, "Configuring the Space-Level Resource Catalog."
> - For more information, see Section 21.2.4, "Add to Favorites," and Section 21.2.14, "Favorites Menu," in Chapter 21, "Adding Spaces Components to a Page or Page Template."

40.3 Adding Favorites

Add favorite links for quick access to Spaces application pages and the web sites you find most useful. If you like, you can share favorites with other users by making one or more of them discoverable in a search. This section describes how to add new favorites and how to share them with other users.

> **Note:** This section describes how to add favorites through the **Favorites** menu. You can also add favorites through the Manage Favorites dialog. For more information, see Section 40.5.1, "Adding a Favorite Using the Manage Favorites Dialog."
>
> You can add files, including wikis and blogs, to your Favorites through the Document Previewer. For more information, see Section 43.30, "Adding a Folder or File to Your Favorites."

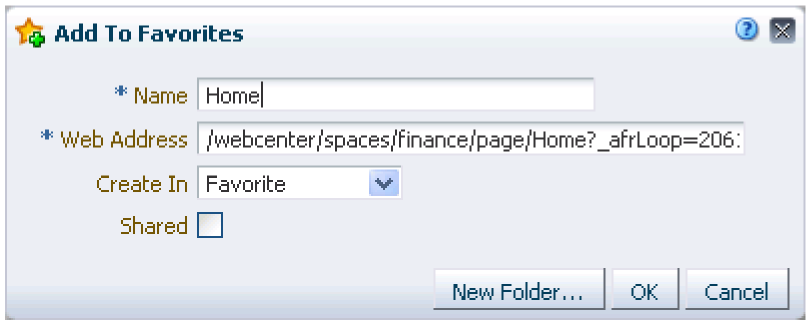
To add a favorite:

1. The way you obtain your favorite's URL differs depending on the circumstances:
   - For pages external to the Spaces application, go to a favorite web location and copy its URL.

   – For Spaces application pages, log in and go to the page you want to make a favorite.
   – If you know the URL, enter it manually when the time comes.

2. Open the Add To Favorites dialog (for more information, see Section 40.2, "Accessing the Favorites User Interface").
3. In the **Name** field, enter a display name for the favorite (Figure 40–1).

Figure 40–1 Add To Favorites Dialog



Note: The value you enter for **Name** becomes the favorite's link text. The name of the current page is provided by default. You can change this or leave it as is.

---

4. In the **Web Address** field, enter the target URL for the favorite.

   The default entry for this field is the URL of the current Spaces application page; you have three options:

   - Leave the default entry (the path to the current page) as is.
   - Paste the URL you copied in step 1.
   - Enter the URL manually.

5. From the **Create In** pick list, select the favorites folder in which to create the favorite.

   See Also: WebCenter provides one top-level default folder: **Favorites**. You can also create your own folders by clicking the **New Folder** button. For more information, see Section 40.4, "Adding Favorites Folders."

6. To enable this favorite to be discovered by other users during a search, select the **Shared** check box.

   Deselect the **Shared** check box if you do not want other users to have any kind of access to this favorite.

7. Click **OK** to add the favorite to the **Favorites** menu and the Manage Favorites dialog.

40.4 Adding Favorites Folders

To keep your list of favorites manageable, you can organize them into folders. The folder hierarchy you create appears on the **Favorites** menu and in the Manage Favorites dialog. Because the favorite folders you create are user-level customizations, they display only in your application view.

Note: This section describes one way to create favorites folders. You can also create them in the Manage Favorites dialog. For more information, see Section 40.5.3, "Editing Favorites and Favorites Folders."

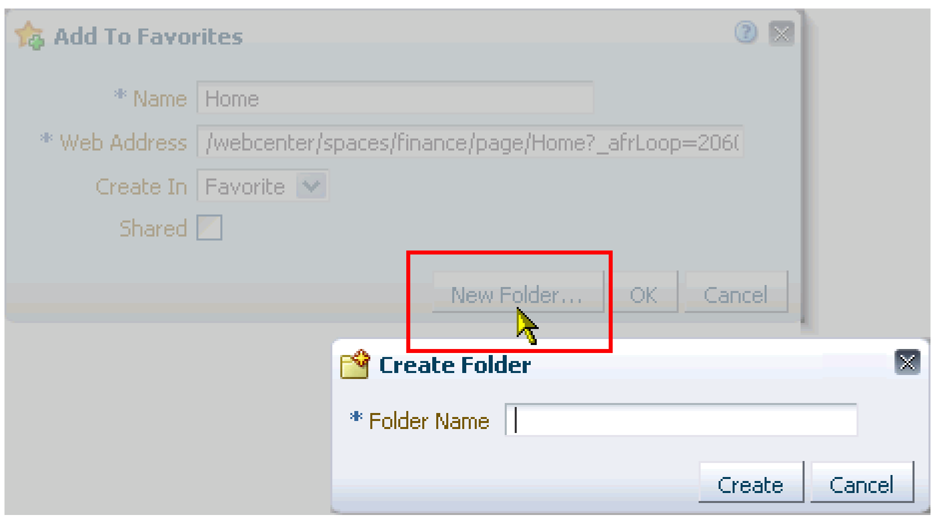
To add a favorites folder:

1. Open the Add To Favorites dialog.

   See Also: For more information, see Section 40.2, "Accessing the Favorites User Interface."

2. Click the **New Folder** button to open the Create Folder dialog (Figure 40–2).

Figure 40–2 New Folder Button and Create Folder Dialog



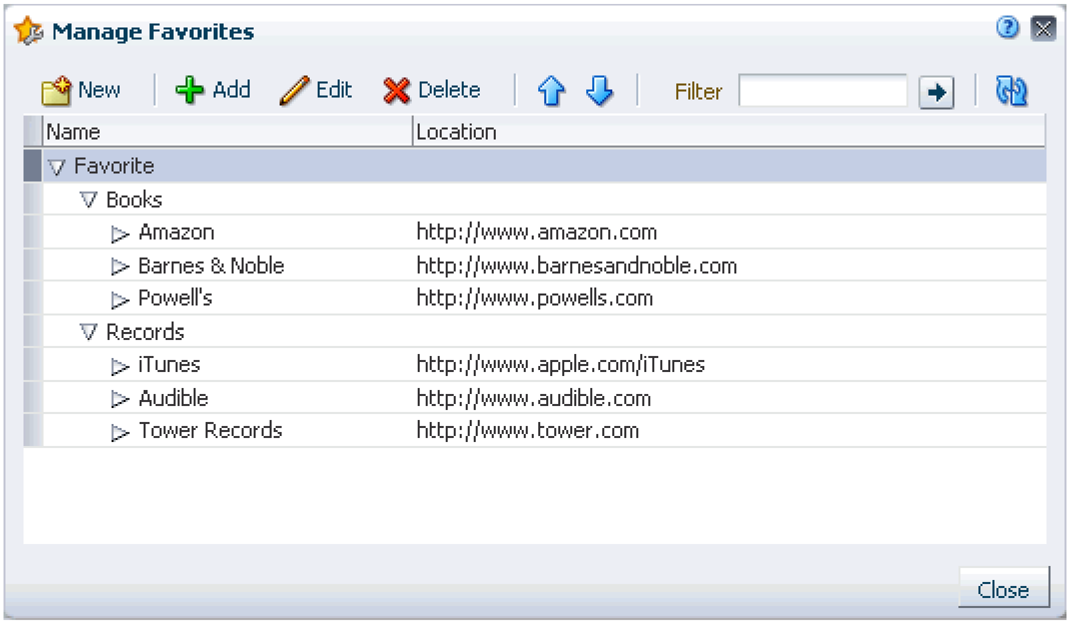
3. In the **Folder Name** field, enter a name for the new folder.
4. Click **Create** to save the new folder and close the Create Folder dialog.

   The new folder appears as a selection in the Add To Favorites dialog on the **Create In** pick list.
5. Click **OK** to close the Add To Favorites dialog.

40.5 Managing Favorites

The Spaces application Manage Favorites dialog provides a convenient, one-stop location for creating, editing, and deleting favorite links and folders and rearranging their display order on the **Favorites** menu (Figure 40–3).

Figure 40–3 Manage Favorites Dialog



This section describes how to use the controls available in the Manage Favorites dialog. It contains the following subsections:

- Section 40.5.1, "Adding a Favorite Using the Manage Favorites Dialog"
- Section 40.5.2, "Adding a Favorites Folder Using the Manage Favorites Dialog"
- Section 40.5.3, "Editing Favorites and Favorites Folders"
- Section 40.5.4, "Rearranging Favorites and Favorites Folders"
- Section 40.5.5, "Searching for Favorites"
- Section 40.5.6, "Deleting Favorites and Favorites Folders"

40.5.1 Adding a Favorite Using the Manage Favorites Dialog

When you want to add multiple favorites, the best place to do this is in the Manage Favorites dialog. This is because the Manage Favorites dialog remains open until you close it, saving you steps in the creation process.

To add favorites through the Manage Favorites dialog:

1. Go to the web page of interest, and copy its URL.

   You can skip this step if you plan to enter the URL manually. For information about getting the URL of an application page, see Section 17.11, "Viewing Information About a Page."

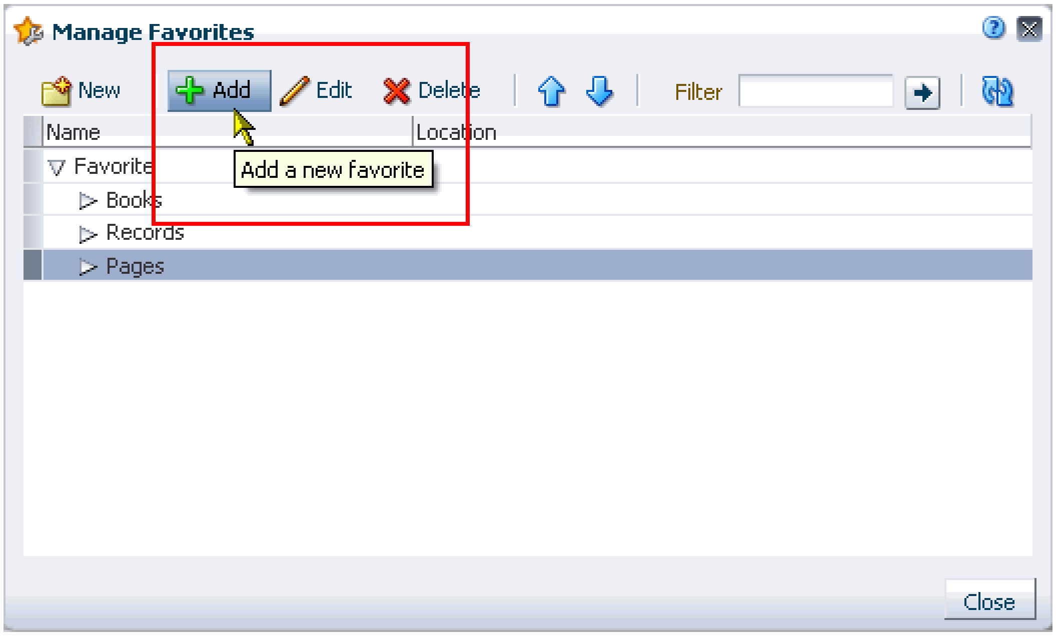
2. Open the Manage Favorites dialog (for more information, see Section 40.2, "Accessing the Favorites User Interface").

3. Select the folder of interest.

   Tip: Select a folder by clicking in its row.

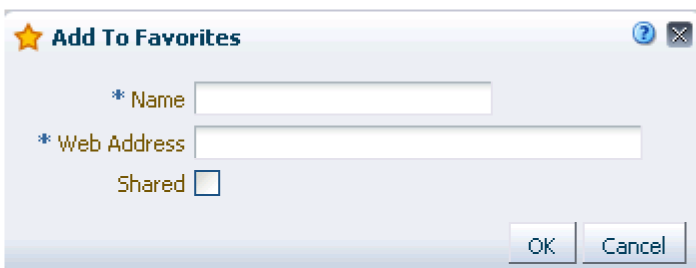
4. Click the **Add** button in the toolbar at the top of the window (Figure 40–4).

Figure 40–4 Add Button in Manage Favorites Dialog



5. In the resulting Add To Favorites dialog, go to the **Name** field and enter a display name for the favorite (Figure 40–5).

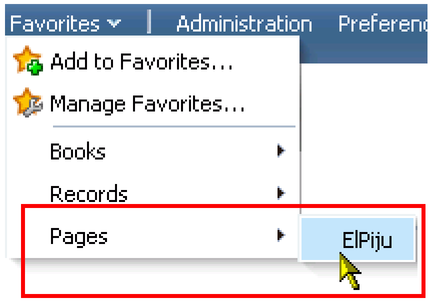
Figure 40–5 The Add To Favorites Dialog



6. In the **Web Address** field, paste the URL you copied in step 1, or enter a URL manually.
7. To enable the sharing of this favorite in other users' search results, select **Shared**.
8. Click **OK**.

   The new favorite appears in the Manage Favorites dialog and on the **Favorites** menu (Figure 40–6).

Figure 40–6 New Favorite on Favorites Menu



9. Click **Close** to exit the Manage Favorites dialog.

40.5.2 Adding a Favorites Folder Using the Manage Favorites Dialog

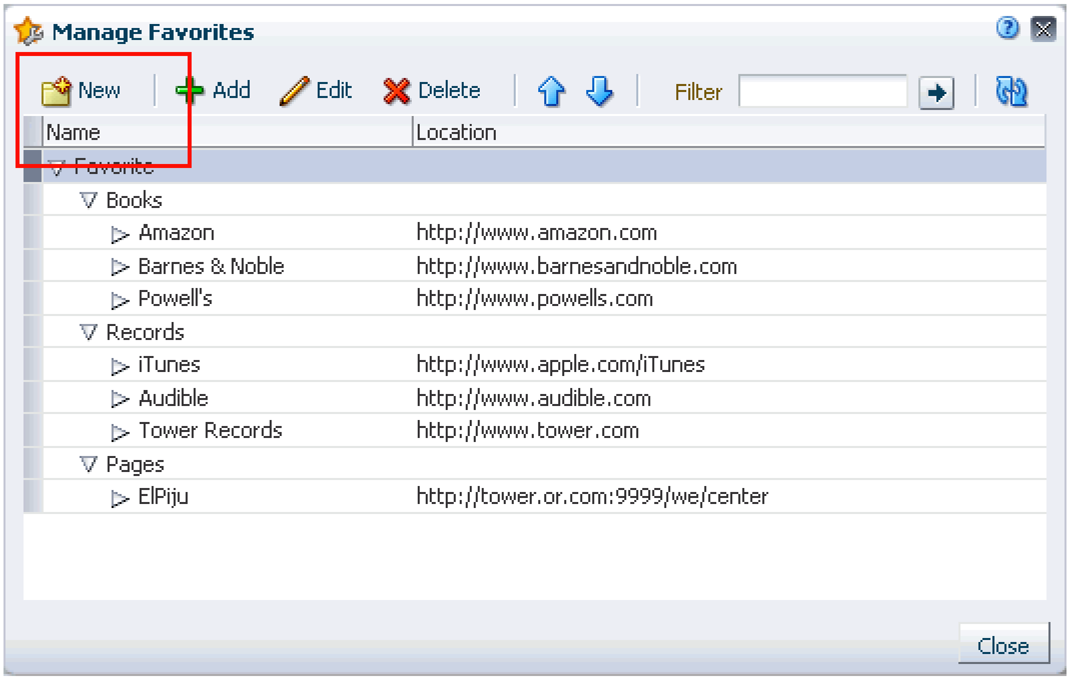
To keep your list of favorites manageable, you can organize them into folders. The folder hierarchy you create appears on the **Favorites** menu and in the Manage Favorites dialog. Because the favorite folders you create are user-level customizations, they display only in your application view.

In addition to adding favorites folders through the Add To Favorites dialog (see Section 40.4, "Adding Favorites Folders") you can add them through the Manage Favorites dialog.

To add a favorites folder through the Manage Favorites dialog:

1. Open the Manage Favorites dialog (for more information, see Section 40.2, "Accessing the Favorites User Interface").
2. Select the folder in which to create the new folder, and click the **New** button in the toolbar at the top of the window (Figure 40–7).

Figure 40–7 New Button in Manage Favorites Dialog



3. In the resulting Create Folder dialog, go to the **Folder Name** field and enter a display name for the favorite folder (Figure 40–8).

Figure 40–8 Create Folder Dialog

4. Click **Create**.

   The new folder appears in the Manage Favorites dialog and on the **Favorites** menu.

5. Click **Close** to exit the Manage Favorites dialog.

40.5.3 Editing Favorites and Favorites Folders

The Manage Favorites dialog provides controls for editing favorites and favorites folders. Use this feature to revise a folder or favorite name, a favorite target URL, or a favorite open behavior.

Open behavior determines how a favorite target URL opens from the **Favorites** menu or the Manage Favorites dialog. Choose from opening a favorite target in the current browser window or a new browser window or tab.

To edit a favorite or favorite folder:

1. Log in, and, navigate to the Manage Favorites dialog (for more information, see Section 40.2, "Accessing the Favorites User Interface").

2. If necessary, expand favorites folders to access the favorite or folder you want to edit.

   Tip: To expand a folder, click the Expand icon to the left of the folder.

3. Select the favorite or favorite folder you want to edit, and click the **Edit** button in the toolbar to open the Edit Favorite or Folder dialog (Figure 40–7).

   Tip: To select a favorite or a folder, click in its row.

Figure 40–9 Edit Favorite Dialog

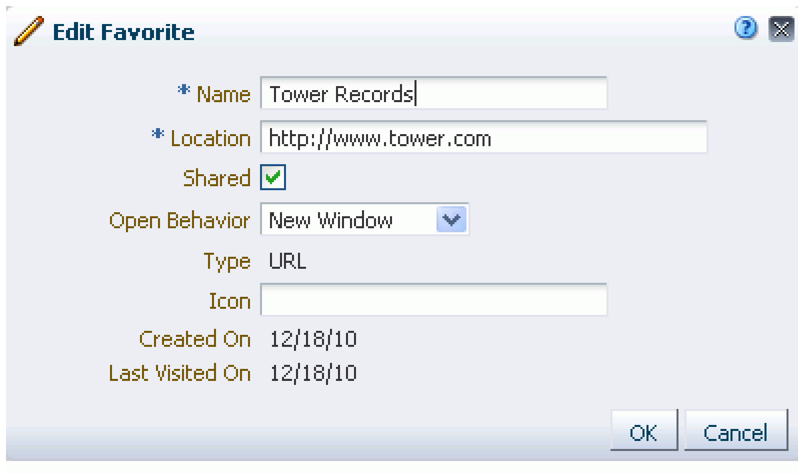


Table 40–1 lists and describes the types of values you can enter for the Edit Favorite and Edit Folder dialogs.

Table 40–1 Values Taken By Edit Favorite and Edit Folder Dialogs

Label	Applies To	Value
Name	Edit Favorite and Folder	The display name of the favorite or folder. This is the name that appears on the **Favorites** menu and in the Manage Favorites dialog. This field is editable.
Location	Edit Favorite	The favorite target URL. This field is editable
Shared	Edit Favorite	Specify whether to allow other users to discover this favorite through a search. Checked means yes, deselected means no. This check box is editable.

Table 40–1 (Cont.) Values Taken By Edit Favorite and Edit Folder Dialogs

Label	Applies To	Value
Open Behavior	Edit Favorite	Specifies how a favorite opens. Choose from: ■ **New Window**—The favorite opens in a new browser tab or window. **Note:** This option is not available for internal pages. Internal pages will always open in the current window. ■ **Current Window**—The current browser window redraws, displaying the favorite target. This field is editable. **Note:** The open behavior you specify for a Favorite does not apply to Favorites returned in a search. To control the open behavior of a Favorite returned in a search, right click the search result and select an open behavior from your browser's context menu.
Type	Edit Favorite	The link type, always URL. This field is read-only.
Icon	Edit Favorite and Folder	An option for providing an icon to display along with the display name shown in the **Favorites** menu. Enter the full URL to the icon. This field is editable.
Created On	Edit Favorite and Folder	The date the favorite or folder was created. This field is read-only.
Last Visited On	Edit Favorite	The date the favorite was last visited using the favorites link. This field is read-only.

4. Make your changes to the fields and pick lists.
5. Click **OK** to save your changes and close the Edit Favorites dialog.

40.5.4 Rearranging Favorites and Favorites Folders

The Manage Favorites dialog provides controls for moving a favorite or a favorite folder higher or lower on the **Favorites** menu. You can accomplish a move by clicking icons or by dragging and dropping. Use this feature to arrange your view of the **Favorites** menu exactly to your liking.

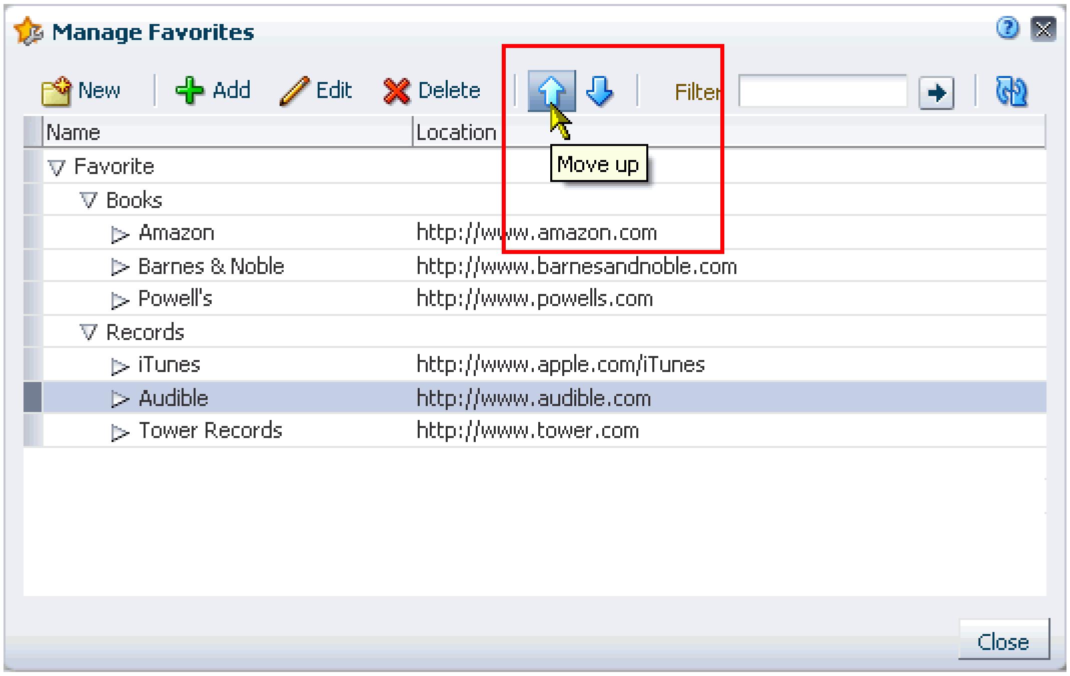
To rearrange favorites and favorites folders:

1. Open the Manage Favorites dialog (for more information, see Section 40.2, "Accessing the Favorites User Interface").
2. If necessary, expand favorites folders and then select the favorite or folder you want to rearrange.

   Tip: To select a favorite or a folder, click in its row.

3. Click the **Move Up** or **Move Down** icon in the toolbar to rearrange the selected favorite or folder (Figure 40–10).

Figure 40–10 Move Icons in Manage Favorites Dialog



Alternatively, drag the favorite or folder to its target position.

Accessibility Note: In the Spaces application, you cannot move a favorite into an existing folder using only the keyboard. To work around this issue, create a duplicate favorite within the target folder, then delete the original favorite.

---

4. Click **Close** to exit the Manage Favorites dialog.

   The favorite or folder is repositioned in the Manage Favorites dialog and on the **Favorites** menu.

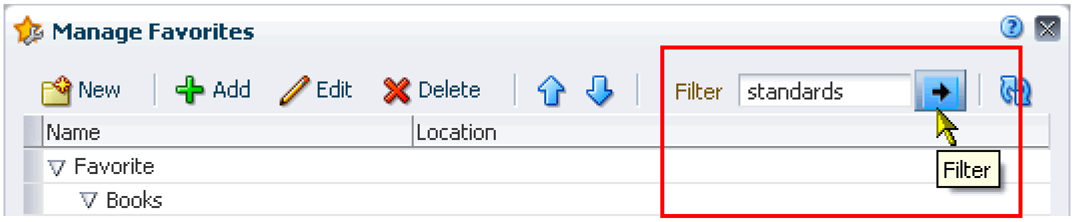
40.5.5 Searching for Favorites

The Manage Favorites dialog includes a search feature that enables you to locate favorites. You can use the favorites search feature to search for favorite display names or target URLs. This search feature does not search for favorite folder names. Search results display in the Manage Favorites dialog.

To search for favorites:

1. Open the Manage Favorites dialog (for more information, see Section 40.2, "Accessing the Favorites User Interface").
2. Enter a search term in the **Search** field, and click the **Search** icon (Figure 40–11).

Figure 40–11 Filter Feature in Manage Favorites Dialog



Results display in the Manage Favorites dialog.

> **Tip:** To exit search results, you must exit the Manage Favorites dialog. Alternatively, you can delete the search term from the **Search** field and click the **Search** icon. A search without a search term returns the Manage Favorites dialog to its default view.

3. Click **Close** to close the Manage Favorites dialog.

40.5.6 Deleting Favorites and Favorites Folders

When you delete a favorite or a favorites folder, it is permanently removed from both the **Favorites** menu and the Manage Favorites dialog. Additionally, when you delete a favorites folder all the favorites it contains are also deleted.

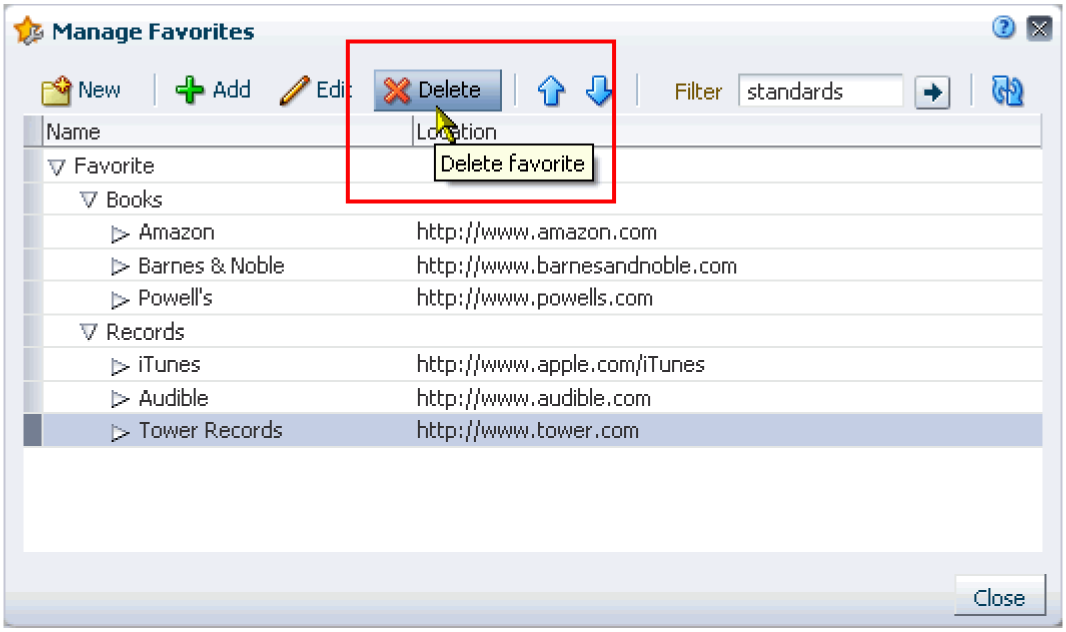
To delete favorites and favorites folders:

1. Open the Manage Favorites dialog (for more information, see Section 40.2, "Accessing the Favorites User Interface").
2. Select the favorite or favorite folder you want to delete.

   > **Tip:** To select a favorite or favorite folder, click in its row.

3. Click the **Delete** button on the toolbar (Figure 40–12).

Figure 40–12 Delete Button in Manage Favorites Dialog



4. In the confirmation dialog, click **Delete**.

   The selected favorite or favorite folder and any favorites the folder contained are permanently removed from the Manage Favorites dialog and the **Favorites** menu.

5. Click **Close** to close the Manage Favorites dialog.

Part X

Working with Content

Part X of the User's Guide provides information about the various content management features readily available in WebCenter Portal: Spaces.

Part X includes the following chapters:

41

Introduction to Adding and Managing Content

> **See Also:** For an overview of content management in Spaces, see Section 2, "Leveraging Content Management."

In a Spaces application, you can add content from one or more connected content repositories to the application in a variety of ways. You can use the Content Presenter task flow to precisely customize the selection and presentation of content, or you can use a Documents service task flow that suits your purposes for presenting content management functionality. You can also add individual folders and files to a page using links, images, or previews.

This chapter introduces the functionality available to add and manage content in a Spaces application in the following sections:

- Section 41.1, "What You Should Know About Adding and Managing Content"
- Section 41.2, "What You Should Know About Content Management Selections in the Resource Catalog"

Audience

This chapter is intended for Spaces users who want to learn about the functionality available in Spaces to add and manage content using Content Presenter and the Documents service.

41.1 What You Should Know About Adding and Managing Content

Spaces provides the following types of containers in which to display and manage content:

- **Content Presenter**. Enables you to precisely customize the selection and presentation of content in a Spaces application. The Content Presenter task flow is available only when the connected content repository is Content Server and your Spaces administrator has completed the prerequisite configuration. With Content Presenter, you can select a single item of content, contents under a folder, a list of items, query for content, or select content based on the results of a Personalization Conductor scenario, and then select a template to render the content on a page in a Spaces application. Content Presenter has no dependency on the Documents service for adding or managing the content it displays.

  > **Learn More:** For more information about Content Presenter, see Chapter 42, "Publishing Content Using Content Presenter."

- **Documents service task flows**. Provide a variety of formats to display folders and files, including wikis and blogs, on a page in a Spaces application. You can choose the task flows appropriate for your application to provide features for accessing, adding, and managing folders and files; configuring and viewing file and folder properties; and searching file and folder content in the connected content repositories. The Documents service task flows are available when the connected content repository is Content Server, Oracle Portal, or SharePoint, and your Spaces administrator has completed the prerequisite configuration.

  Learn More: For information about the Documents Service task flows available in Spaces, and the unique characteristics of each task flow, see Section 43.1, "What You Should Know About the Documents Service Task Flows."

- **Document components**. Display an individual file on a page as a linked document, an inline preview, or an image.

  Learn More: For information about document components you can add to a page in a Spaces application, see Section 43.2, "What You Should Know About Document Components."

- **Wikis**. Enable multiple users to create and edit content that is relevant, useful, and up-to-date.

  Learn More: For information about including wikis in a Spaces application, see Chapter 49, "Working with Wiki Documents."

- **Blogs**. Enable users to create and manage personal blogs to record experiences and opinions, and group related blog posts.

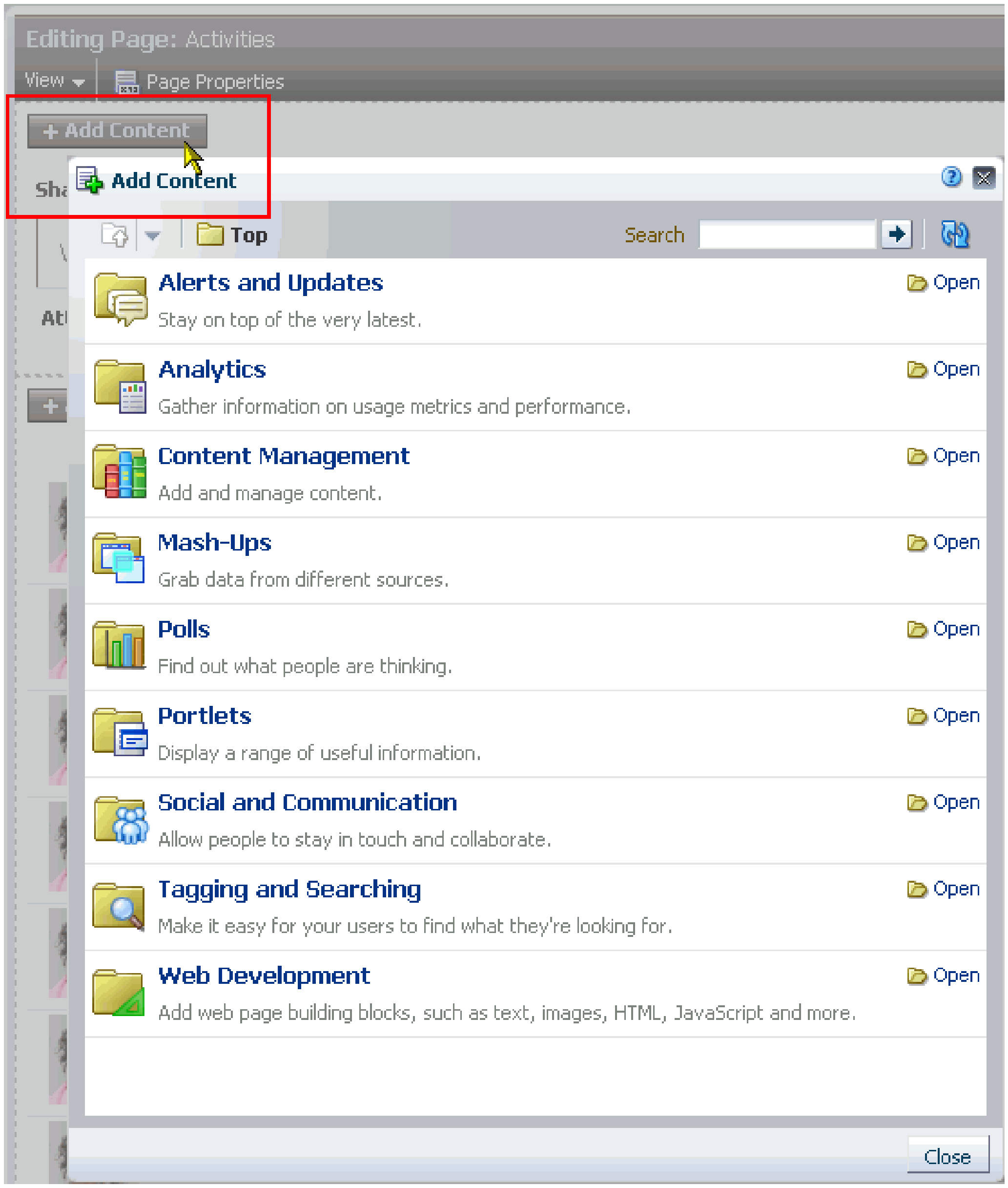
  Learn More: For information about including blogs in a Spaces application, see Chapter 50, "Working with Blogs"

41.2 What You Should Know About Content Management Selections in the Resource Catalog

Spaces users with permissions to edit pages use the Resource Catalog to add content to a page.

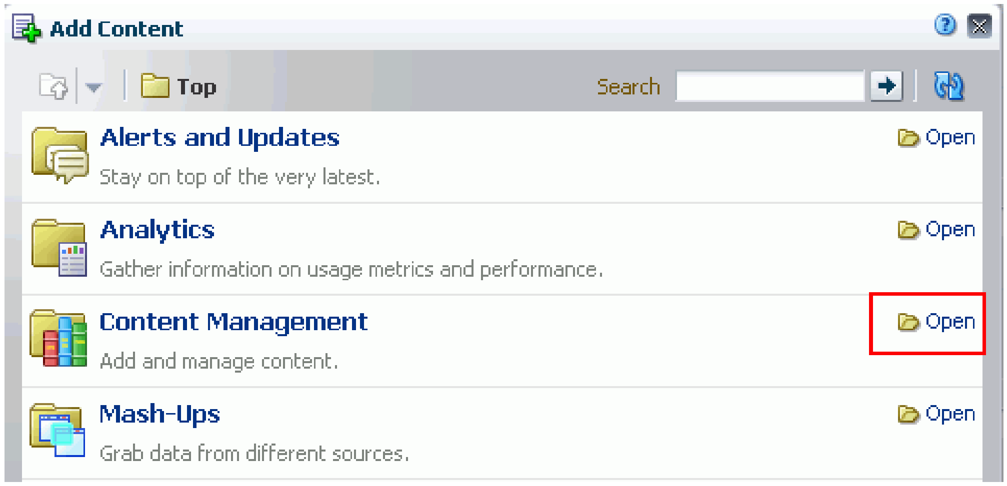
In Design view of page edit mode, you open the Resource Catalog by clicking the **Add Content** button on the region where you want to add content (Figure 41–1).

Figure 41–1 Add Content in Design View of Page Edit Mode Displaying Default Resource Catalog



The presence or location of the content selections in the Resource Catalog depends on how the Resource Catalog is configured. In the default Resource Catalog, open the **Content Management** section to expose the content task flows and document components (Figure 41–2).

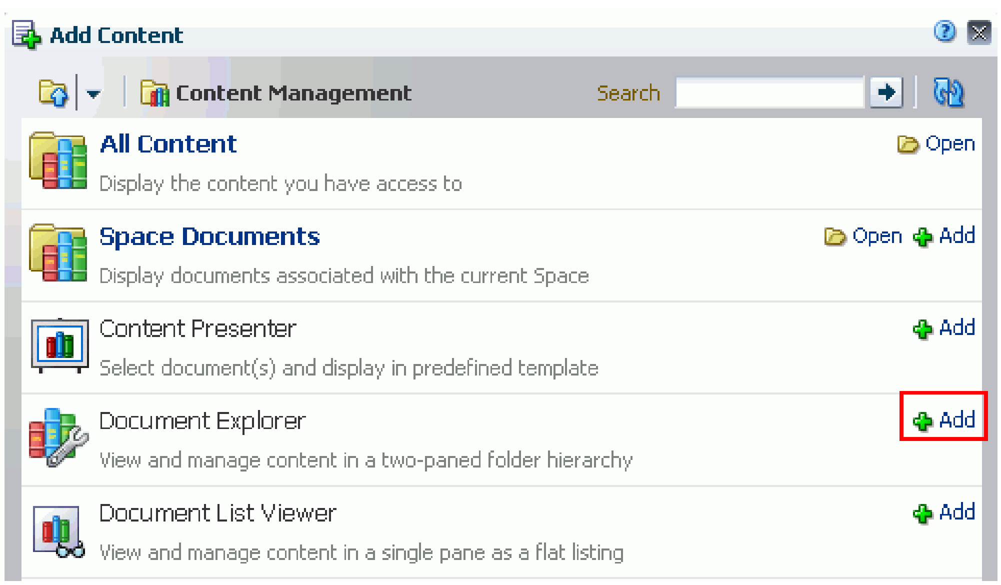
Figure 41–2 Opening the Content Management Section in the Resource Catalog



In the **Content Management** section of the Resource Catalog, you can add content containers in either of the following ways:

- Click **Add** next to a task flow to add the task flow standalone to the current page, independent of content (Figure 41–3). After adding the task flow, you can populate it with content.

Figure 41–3 Resource Catalog Content Management: Adding a Content Task Flow



- Click **Open** next to **All Content**, **Space Documents** (in a space), or **Personal Documents** (in the Home space) to drill down to a folder or file that you want to add to the current page, then click **Add** to display a menu where you can select the content container in which to display the folder or file (Figure 41–4, Figure 41–5, and Figure 41–6).

Figure 41–4 Resource Catalog Content Management: Adding a Folder

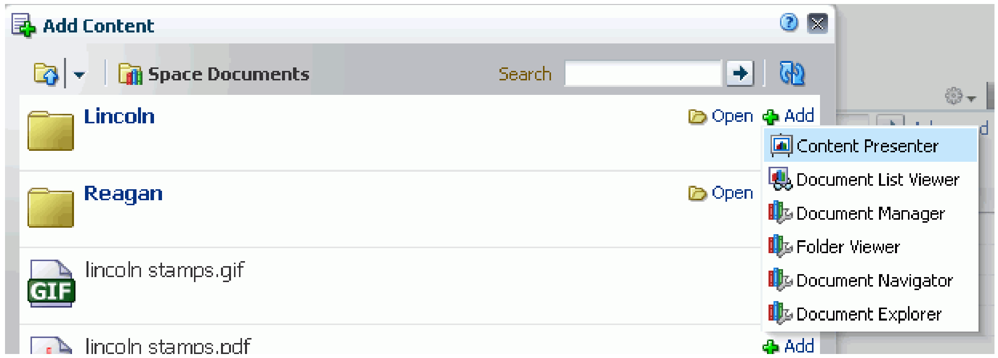


Figure 41–5 Resource Catalog Content Management: Adding an HTML File

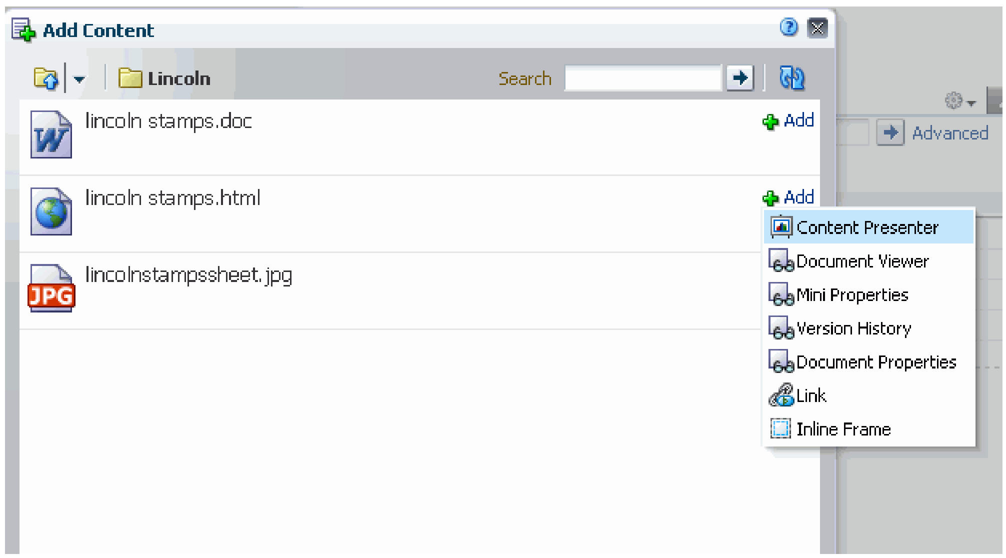
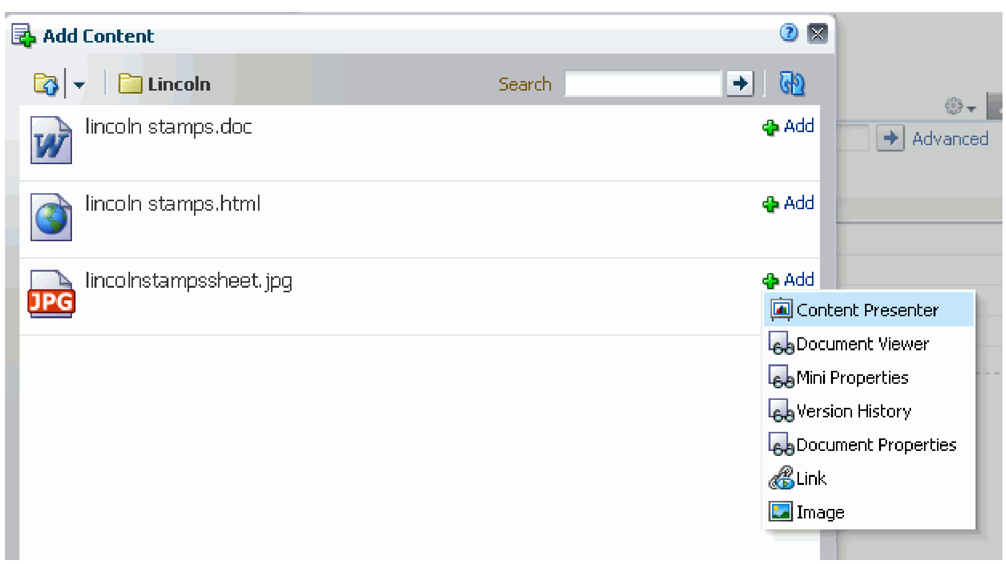


Figure 41–6 Resource Catalog Content Management: Adding an Image File



For detailed descriptions about the Documents service task flows and document components, and how to use them, see Chapter 43, "Working with the Documents Service Task Flows and Document Components."

42

Publishing Content Using Content Presenter

In a Spaces application, you can add content from one or more connected content repositories to the application, as described in Chapter 41, "Introduction to Adding and Managing Content."

This chapter describes how to publish content on a page in a Spaces application using the Content Presenter task flow:

Audience

This chapter is intended for Spaces users assigned, minimally, the `Pages-Edit Pages` permission who want to add content in a Content Presenter task flow to a page in a Spaces application.

42.1 What You Should Know About the Content Presenter Task Flow

Content Presenter enables you to precisely customize the selection and presentation of content in a Spaces application. The Content Presenter task flow is available only when the connected content repository is Content Server and your Spaces administrator has completed the prerequisite configuration.

See Also: For more information, see:

- "Content Server Prerequisites" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*
- "How to Create a Content Repository Connection Based on the Content Server Adapter" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*

With Content Presenter, you can select a single item of content, contents under a folder, a list of items, query for content, or select content based on the results of a Personalization Conductor scenario, and then select a template to render the content on a page in a Spaces application.

Notes:

- Content Presenter is intended to render (present) content, not to host HTML content. To host HTML content, use the Web Page component to render the HTML content from Content Server. For more information, see Section 19.12, "Working with the Web Page Component"
- Content Server exposes a content item only after it has a revision status of Released. If a content item does not have Released status, you will not be able to configure Content Presenter to show the item. You can find the status of a content item in Content Server on the Content Information Page, as described in "Determining the Revision Status" in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.

In addition to displaying the folders and files in Content Server, Content Presenter integrates with Oracle Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a Site Studio region template or a custom Content Presenter display template. For more information, see Section 42.1.1, "Understanding Site Studio Integration."

Content Presenter has no dependency on the Documents service for adding or managing the content it displays.

42.1.1 Understanding Site Studio Integration

Oracle Site Studio is a powerful, flexible web development application suite that offers a comprehensive approach to designing, building, and maintaining enterprise-scale web sites. Site Studio uses Content Server as the main repository for a web site.

Site Studio region templates are defined in Site Studio Designer. They define the layout and look-and-feel of the data in contribution regions within web pages. They are partial HTML files in that they do not have a `head` and `body` section. At runtime, the Site Studio contributor data file (a Content Server document) is merged with the Site Studio region template to create the HTML fragment. This allows Site Studio region templates to be inserted into other HTML code as the web pages are generated for the Site Studio site.

Content Presenter integrates with Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a Site Studio region template or a custom Content Presenter display template.

Note: Oracle Site Studio files can also be included in the Folder Viewer, Document Explorer, and Document Manager task flows, and previewed using the Document Viewer. See Section 43.1.7, "Understanding the Document Viewer Task Flow."

Before you can display Site Studio contributor data files in Content Presenter, the WebCenter Portal administrator must complete the followings tasks, described in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*:

- Enable Site Studio components, as described in "Configuring Content Server for WebCenter Portal Applications", specifically the section "Setting up Site Studio."
- Enable the `WebCenterConfigure` component to allow for adding and editing Site Studio documents from within Content Presenter, as described in "What You Should Know About the WebCenterConfigure Component."
- Configure the cookie path to the context root of your application to prevent losing your session when editing Site Studio content. In `weblogic.xml` (in the `WEB-INF` folder), add:

```
<session-descriptor>
  <cookie-path>/app_name</cookie-path>
</session-descriptor>
```

For proper surfacing in Content Presenter, the following link types can be used in both Site Studio region templates, as well as in a Site Studio contributor data file:

- Links to nodes in the default navigation model, as described in Section 42.7, "Adding Links from Content to Navigation Nodes."
- Links to inlined images.
- Links to documents (except for absolute or relative path links). When clicking the link at runtime, it renders within the context of the application and displays the document using the Default View display template.
- Absolute HTTP links, whether created in Site Studio contributor mode or in Site Studio Designer region template HTML.

The following Site Studio link types are *not* supported in Content Presenter:

- Links to Site Studio sections.
- Absolute or relative path links to Site Studio documents.

For guidelines on authoring recommendations for displaying a Site Studio contributor data file in Content Presenter, see Section 42.8, "Authoring Site Studio Content to Optimize Presentation in Content Presenter."

You can create and edit Site Studio contributor data files from the Content Presenter Configuration dialog (see Section 42.9, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog") or in-context when displayed in Content Presenter at runtime (see Section 42.10, "Creating and Editing Files In-Context in a Content Presenter Task Flow").

For more information about creating and using Site Studio contributor data files and Site Studio region templates, refer to the Oracle Site Studio documentation library.

42.2 Adding a Content Presenter Task Flow to a Page

To add a Content Presenter task flow to a page:

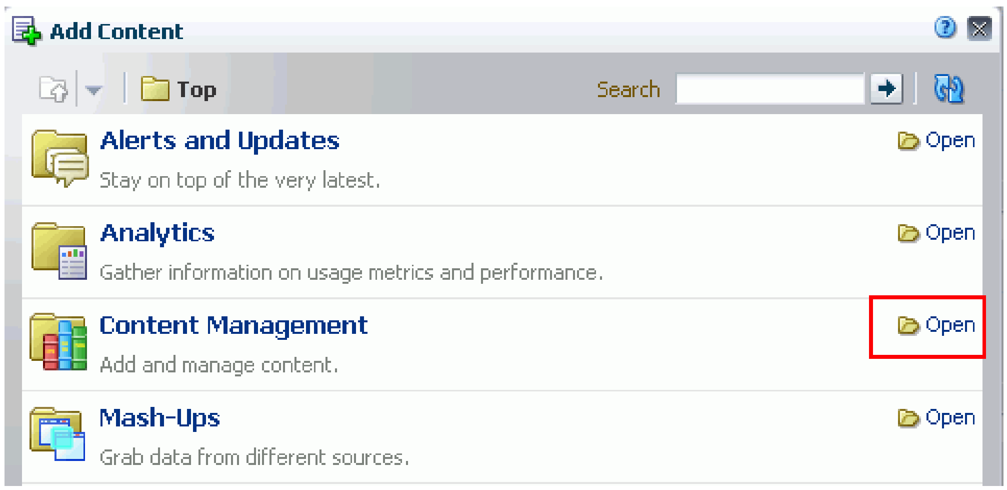
1. Open the page in edit mode.

   See Also: For more information, see Section 18.1, "Entering and Exiting Composer."

2. Click **Add Content** in the target region to open the Resource Catalog.
3. Navigate to the section of the Resource Catalog that provides access to the folders and files in the connected content repository.

   Tip: The presence or location of this section depends on how the Resource Catalog is configured. For example, in the default Resource Catalog, next to **Content Management**, click **Open** to expose the content selections (Figure 42–1).

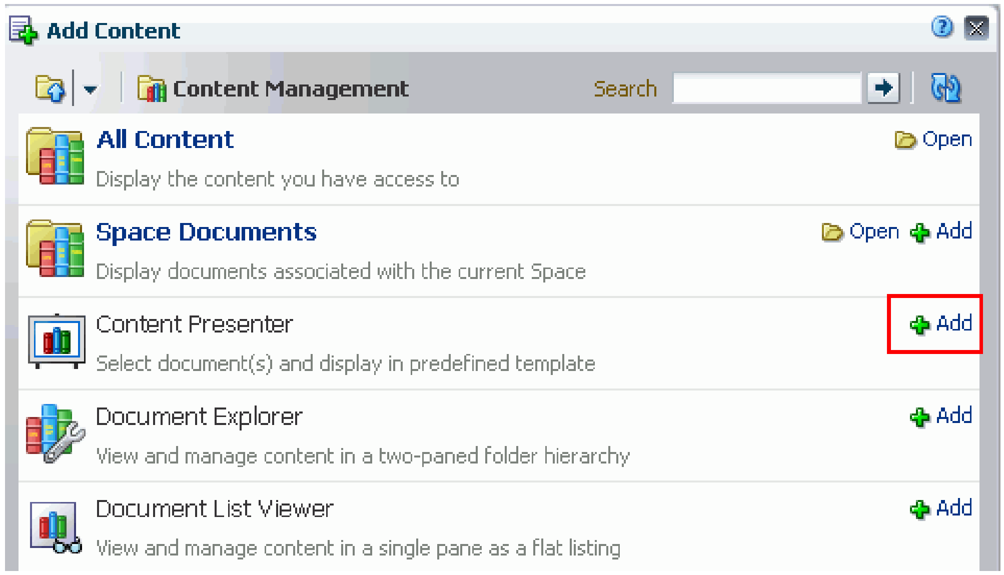
Figure 42–1 Opening the Content Management Section in the Resource Catalog



   For information about the selections shown in the default Resource Catalog, see Section 41.2, "What You Should Know About Content Management Selections in the Resource Catalog."

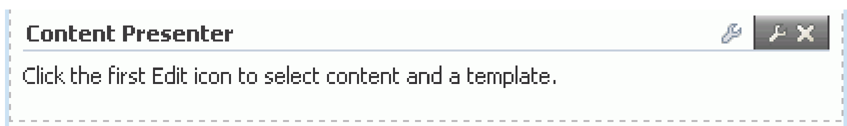
4. Add the Content Presenter task flow to the page in one of two ways:
   - Next to **Content Presenter**, click **Add** (Figure 42–2).

Figure 42–2 Adding a Content Presenter Task Flow to a Page



A new empty region appears on your page (Figure 42–3).

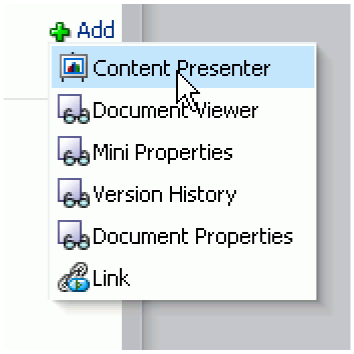
Figure 42–3 Adding a Content Presenter Task Flow to a Page



- Or, drill down in the Resource Catalog to the folder or file you want to display on the page: In the default Resource Catalog, next to **All Content** (or, in a Spaces application, **Space Documents** or **Personal Documents**), click **Open** until you locate the target content, then click **Add**, and select **Content Presenter** from the menu (Figure 42–4).

Note: Content Server exposes a content item only after it has a revision status of Released. If content item does not have Released status, you will not be able to configure Content Presenter to show the item. You can find the status of a content item in Content Server on the Content Information Page, as described in "Determining the Revision Status" in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.

Figure 42–4 Adding Content to a Content Presenter Task Flow



The selected folder or file displays in a default display template, as shown in Figure 42–5 and Figure 42–6.

:

Figure 42–5 Content Presenter Task Flow: Default Template for Word Document

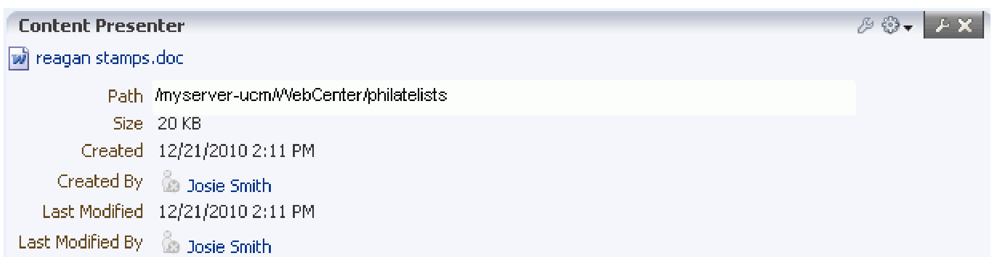
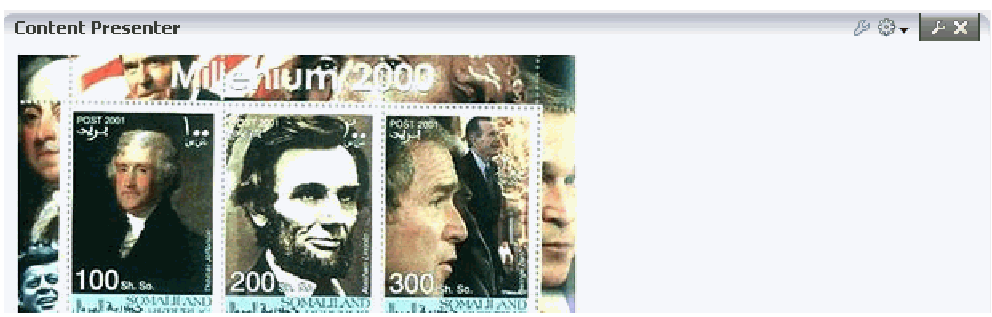


Figure 42–6 Content Presenter Task Flow: Default Template for Image File



42.3 Displaying the Content Presenter Configuration Dialog

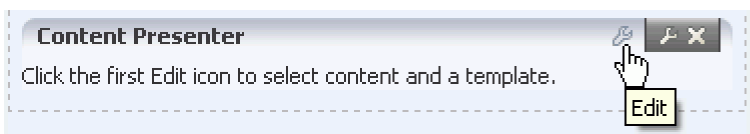
The Content Presenter Configuration dialog enables you to easily configure the Content Presenter task flow to select or change content, or select a different display template.

Note: You can also specify content and a display template by clicking the properties **Edit** icon (the second wrench icon in the task flow chrome) and specifying parameters on the **Parameters** tab of the Component Properties dialog. However, specifying parameters in this way is generally intended for use at design time by developers creating a WebCenter Portal: Framework application, or for advanced users who want to bind a parameter to an EL expression. If you modify a property value in the Component Properties dialog, the new value overrides the value specified in the Content Presenter Configuration dialog, and that value cannot subsequently be changed through the Content Presenter Configuration dialog. For information about Content Presenter task flow parameters, see Section 42.12, "Setting Content Presenter Task Flow Properties."

To display the Content Presenter Configuration dialog:

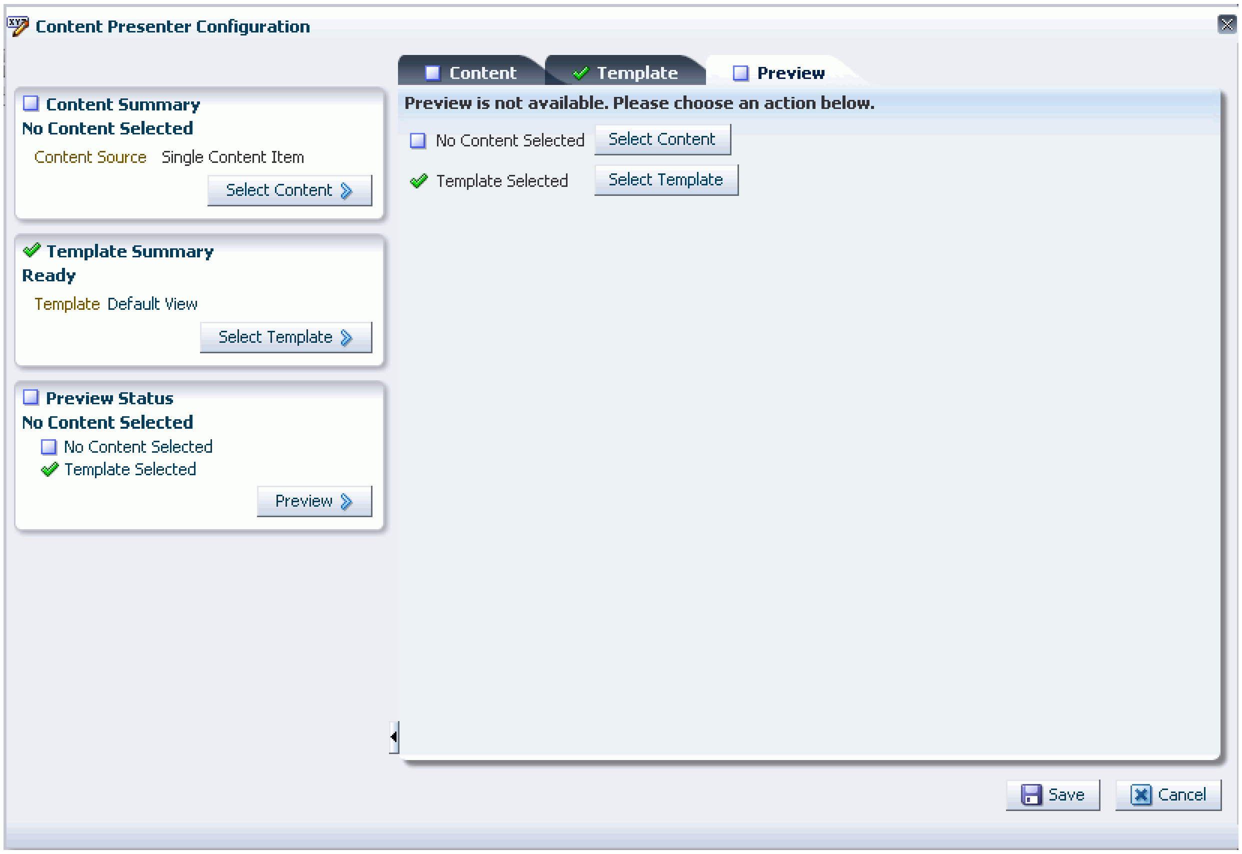
1. In the Content Presenter task flow (see Section 42.2, "Adding a Content Presenter Task Flow to a Page"), click the task flow **Edit** icon (the first wrench icon in the task flow chrome) (Figure 42–7).

Figure 42–7 Editing a Content Presenter Task Flow



The Content Presenter Configuration dialog opens (Figure 42–8).

Figure 42–8 Content Presenter Configuration Dialog



A green check mark alongside an item indicates that the required information is complete and valid.

42.4 Selecting Content

Note: Content Presenter does not support non-ASCII characters in files that are encoded using the non-UTF-8 character encoding. When users preview such files in Content Presenter, non-ASCII characters appear garbled.

Depending on the type of content you want to display, follow the steps in one of the following sections:

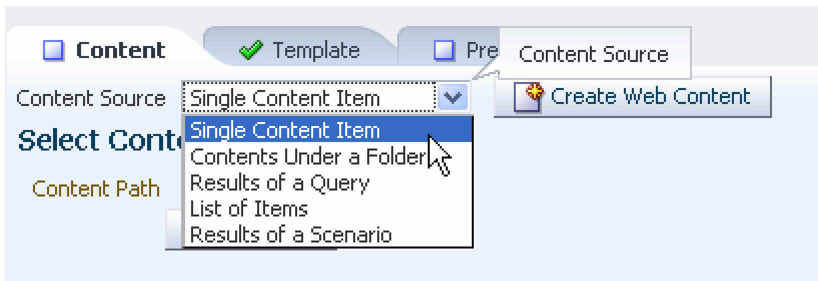
- Section 42.4.1, "Selecting a Single Content Item"
- Section 42.4.2, "Selecting the Contents of a Folder"
- Section 42.4.3, "Selecting Content Based on the Results of a Query"
- Section 42.4.4, "Selecting a List of Content Items"
- Section 42.4.5, "Selecting Content Based on the Results of a Scenario"

42.4.1 Selecting a Single Content Item

To select a specific item (including a Site Studio contributor data file) to display in a Content Presenter display template or Oracle Site Studio region template (see Section 42.1.1, "Understanding Site Studio Integration"):

1. In the Content Presenter Configuration dialog (see Section 42.3, "Displaying the Content Presenter Configuration Dialog"), click **Select Content** or the **Content** tab.
2. On the **Content** page, expand the **Content Source** list, and select **Single Content Item** (Figure 42–9).

Figure 42–9 Selecting the Content Source: Single Content Item

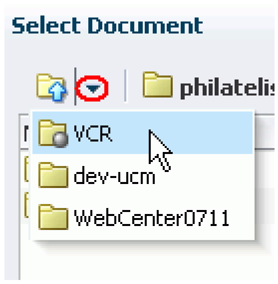


3. Click **Browse** to locate the content item.

> **Note:** Content Server exposes a content item in the **Browse** list only after it has a revision status of Released. The revision status of a new content item changes from Done to Released after it has reached its specified release date (specified by the `dInDate` property). Content items that do not have Released status will not appear in the **Browse** list. You can find the status of a content item in Content Server on the Content Information Page, as described in "Determining the Revision Status" in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.
>
> An alternative way to display a single content item in Content Presenter is to navigate to the file and select Content Presenter from its **Add** menu, as described in Section 43.3, "Adding a Selected Folder or File to a Page." However, even though you are able to select the content item in this way, it will display in Content Presenter only if it has a revision status of Released. If the content item has a different revision status, but had a status of Released in the past, then Content Presenter will display the Released version of the content item, not the latest version that is not yet released.

If the Spaces application is connected to multiple Content Server repositories, the browse tree shows the parent folder for the current user, or for the current space, in the repository that is specified as the primary connection. To access other connected repositories, click the navigation icon in the toolbar to expose the **VCR** parent node. Click **VCR** to show all connected content repositories.

Figure 42–10 Navigating to Other Content Repositories



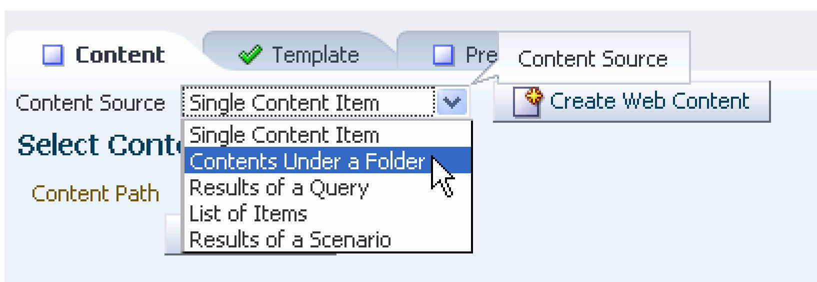
> **Note:** If the content repository includes an invalid type configuration, then no content displays when you click **Browse**. Instead, an error message reports `Unable to retrieve content type information`.

42.4.2 Selecting the Contents of a Folder

To select a folder to display its contents on a page (in the order stored in the folder) in a Content Presenter display template:

1. In the Content Presenter Configuration dialog (see Section 42.3, "Displaying the Content Presenter Configuration Dialog"), click **Select Content** or the **Content** tab.
2. On the **Content** page, expand the **Content Source** list, and select **Contents Under a Folder** (Figure 42–11).

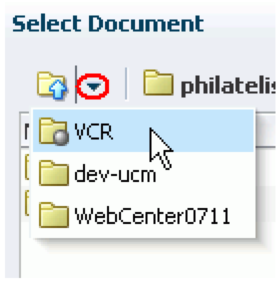
Figure 42–11 Selecting the Content Source: Contents Under a Folder



3. Click **Browse** to locate a folder. To select the folder as the content source, click in the folder row, not on the folder name (clicking the folder name navigates into the folder).

   If the Spaces application is connected to multiple Content Server repositories, the browse tree shows the parent folder for the current user, or for the current space, in the repository that is specified as the primary connection. To access other connected repositories, click the **Show Hierarchy** navigation icon to the left of the repository name to expose the **VCR** parent node. Click **VCR** to show all connected content repositories.

Figure 42–12 Navigating to Other Content Repositories



> **Note:** If the content repository includes an invalid type configuration, then no content displays when you click **Browse**. Instead, an error message reports `Unable to retrieve content type information`.

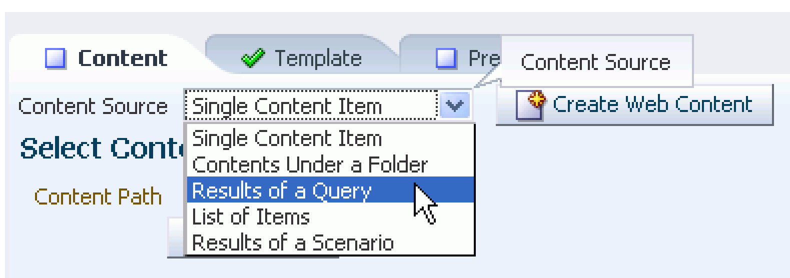
42.4.3 Selecting Content Based on the Results of a Query

> **Note:** To select content based on the results of a query against the connected Content Server repository, full-text search must be enabled in Content Server through OracleTextSearch, as described in "Configuring OracleTextSearch for Content Server" in *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*

To enter query criteria to refine the selection of the content to display in a Content Presenter display template:

1. In the Content Presenter Configuration dialog (see Section 42.3, "Displaying the Content Presenter Configuration Dialog"), click **Select Content** or the **Content** tab.
2. On the **Content** page, expand the **Content Source** list, and select **Results of a Query** (Figure 42–13).

Figure 42–13 Selecting the Content Source: Results of a Query



3. In the **Results of a Query** pane (Figure 42–14 and Figure 42–15), enter desired values in the fields that you want the query to retrieve, as described in Table 42–1.

Figure 42–14   Results of a Query Pane: All Content Types

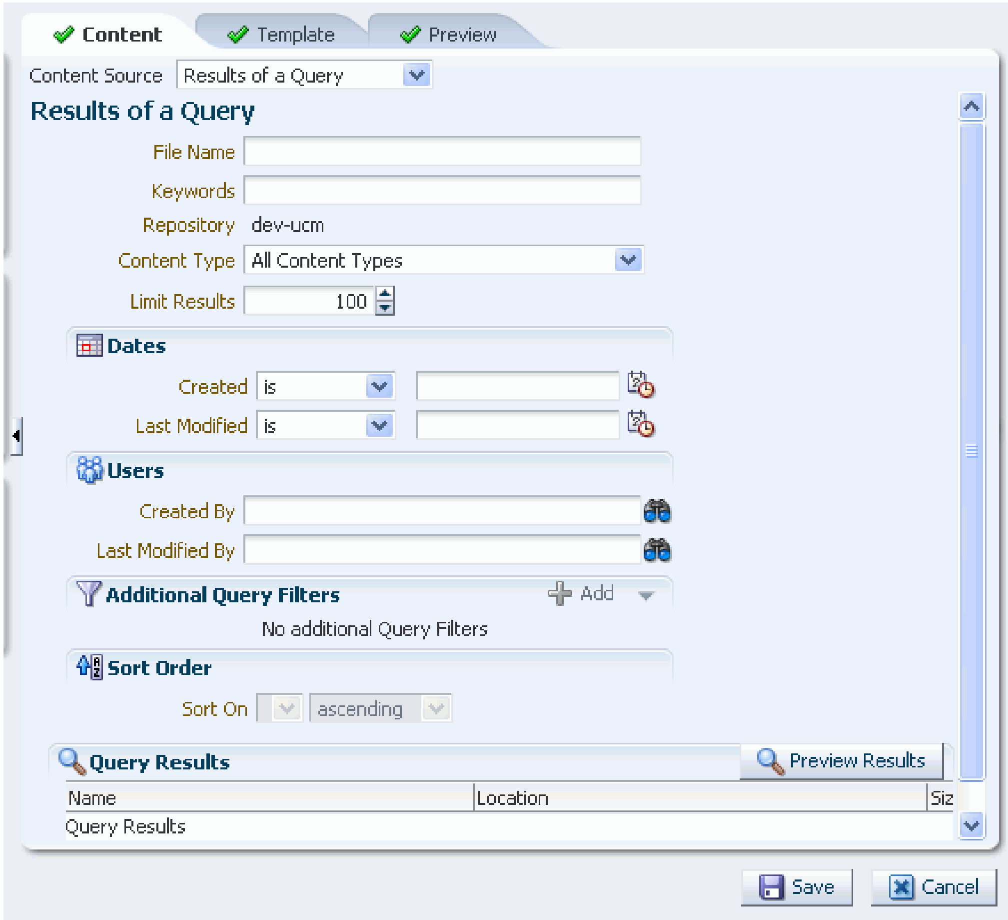


Figure 42–15 Results of a Query Pane: Selected Content Type

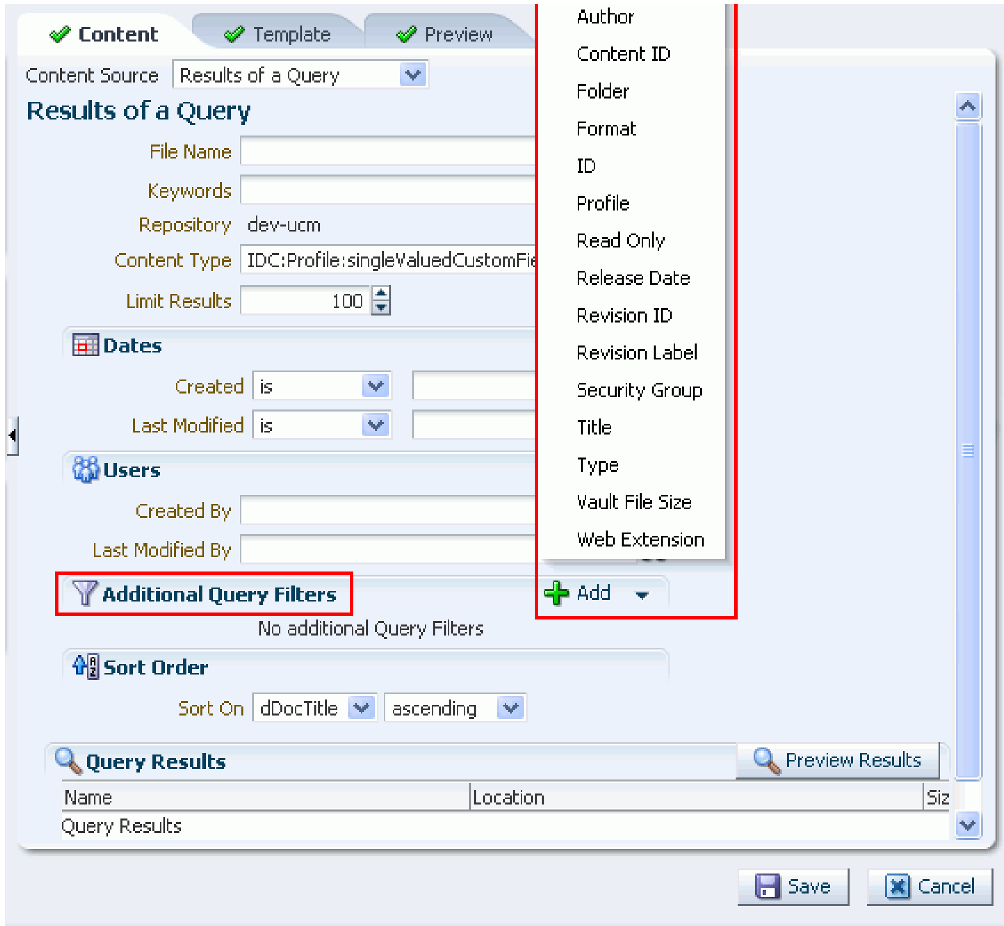


Table 42–1 Specifying Query Criteria for Results of a Query

Element	Description
File Name	Enter the name of a file in the specified **Repository** that you want to display in the selected template. You can use `*` as a wild card character to retrieve multiple files; for example: `*.jpg`.
Keywords	Enter any value that may be present in the content of the documents. The value may be one or more words or phrases.
Content Type	Select **All Content Types** to retrieve content items regardless of the content type. Or, select the name of a content type profile or Site Studio region template definition (see Section 42.1.1, "Understanding Site Studio Integration") defined in Content Server. A content type profile specifies properties that define a specific type of content (for example, a press release, or a news flash, or an image). The content type **IDC:GlobalProfile** is the name of a default content type profile defined in Content Server that can be applied if no other content type profiles are defined.
Limit Results	Specify the maximum number of content items to be returned by the query.

Table 42–1 (Cont.) Specifying Query Criteria for Results of a Query

Element	Description
Dates	In the **Created** and/or **Last Modified** fields, select a modifier to search for content items matching an exact date (**is**), a following date (**is after**), a preceding date (**is before**), or a date between two other dates (**is between**), which adds an additional date field for entering the second date. Click the **Select Date** icon to select a date in the correct format (`mm/dd/yy`), for example `11/18/11`, or enter a date manually.
Users	In the **Created By** (user who uploaded) and **Last Modified By** fields, enter a user name for the creator or last modifier of the content item, or click the **Browse** icon to open the Search Users dialog where you can select from a list of users or search for a user name. For tips on searching for a user in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."
Additional Query Filters	Not applicable when **Content Type** is set to **All Content Types**. For a selected content type profile (prefixed **IDC:**), click the **Add** icon to list all the properties that are defined for the selected profile (Figure 42–15). Select one or more properties to refine the query to find content items with specific property settings.
Sort Order	Not applicable when **Content Type** is set to **All Content Types**. For a selected content type profile (prefixed **IDC:**), specify a sort order for the properties shown in the **Sort On** list.

4. Click **Preview Results** to see the results of the query.

> **Note:** If the content repository includes an invalid type configuration, then no content displays when you click **Preview Results**. Instead, an error message reports `Unable to retrieve content type information`.

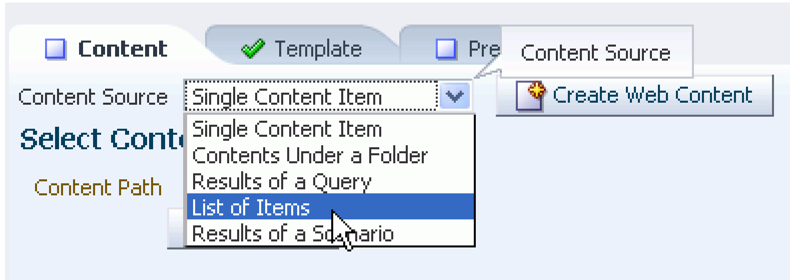
42.4.4 Selecting a List of Content Items

Content Presenter allows you to create a list of multiple content items. The order you use when creating the list is the order in which they are presented at runtime.

To browse or search for any number of items to add to a list, and delete or reorder the items before adding the list to a page in a Content Presenter display template:

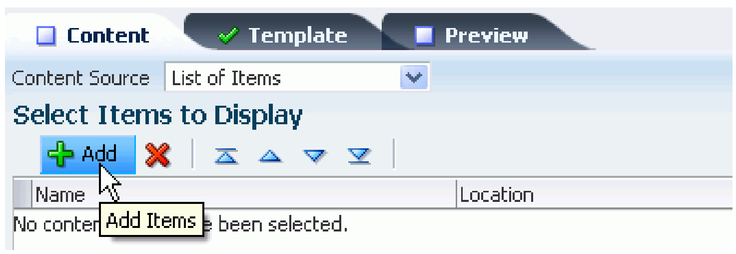
1. In the Content Presenter Configuration dialog (see Section 42.3, "Displaying the Content Presenter Configuration Dialog"), click **Select Content** or the **Content** tab.
2. On the **Content** page, expand the **Content Source** list, and select **List of Items** (Figure 42–16).

Figure 42–16 Selecting the Content Source: List of Items



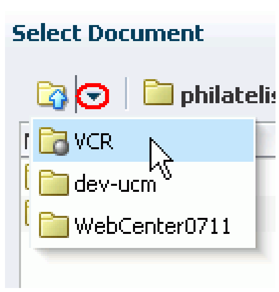
3. In the **Select Items to Display** pane (Figure 42–17), click **Add** to browse or search for any number of items to add to a list.

Figure 42–17 Selecting Items to Display



If your Spaces application is connected to multiple Content Server repositories, the browse tree shows the parent folder for the current user, or for the current space, in the repository that is specified as the primary connection. To access other connected repositories, click the **Show Hierarchy** navigation icon to the left of the repository name to expose the **VCR** parent node. Click **VCR** to show all connected content repositories.

Figure 42–18 Navigating to Other Content Repositories



Note: If the content repository includes an invalid type configuration, then no content displays when you click **Browse**. Instead, an error message reports `Unable to retrieve content type information`.

42.4.5 Selecting Content Based on the Results of a Scenario

If your Spaces application is configured to run Personalization Conductor scenarios using Content Presenter, you can select content based on the results of a WebCenter Personalization Conductor scenario. For more information, see the chapter "Managing

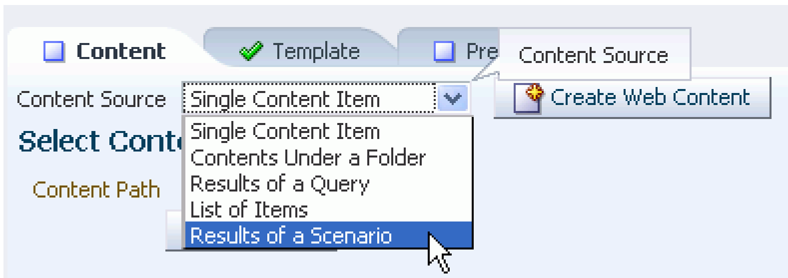
Personalization for WebCenter Portal" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*, specifically the sections "Configuring the WebCenter OPSS Trust Service" and "Configuring Content Presenter".

To enter Personalization Conductor scenario criteria to refine the selection of the content to display in a Content Presenter display template:

1. In the Content Presenter Configuration dialog (see Section 42.3, "Displaying the Content Presenter Configuration Dialog"), click **Select Content** or the **Content** tab.

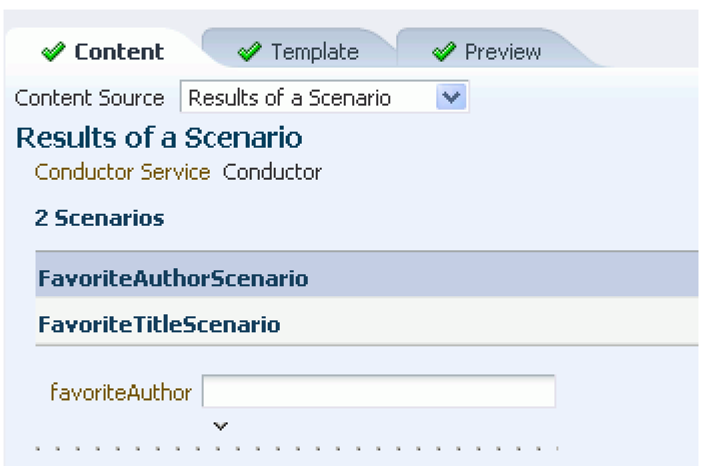
2. On the **Content** page, expand the **Content Source** list, and select **Results of a Scenario** (Figure 42–19).

Figure 42–19 Selecting the Content Source: Results of a Scenario



3. In the **Results of a Scenario** pane, review the list of scenarios that have been tagged for Content Presenter consumption, select those for which you want to generate results, and enter required parameters (Figure 42–20).

Figure 42–20 Results of a Scenario Pane



4. Click **Preview Results** to see the results of the selected scenarios.

Note: If the content repository includes an invalid type configuration, then no content displays when you click **Preview Results**. Instead, an error message reports `Unable to retrieve content type information`.

Any results that are returned from a scenario for use by Content Presenter must return a valid CMIS query, as Content Presenter takes the return value and runs it (as a CMIS query) against the repository specified within the Conductor URL. For information about how to format the query and examples, see *Oracle Fusion Middleware Content Management REST Service Developer's Guide*.

42.5 Selecting a Display Template

The display template for the content you have selected on the **Content** page of the Content Presenter Configuration dialog may be one of the out-of-the-box templates provided with Spaces (see Table 42–2 and Table 42–3), a custom template designed for your organization in JDeveloper, or a Site Studio region template (see Section 42.1.1, "Understanding Site Studio Integration").

For information about creating custom display templates in JDeveloper, and uploading them for use by your Spaces application, see "Creating Custom Content Presenter Display Templates" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*. For information about creating and using Site Studio region templates, refer to the Oracle Site Studio documentation library.

By default, Spaces selects an appropriate display template based on the type of content selected. You can change the default template as required.

The Spaces administrator can show, hide, and manage the custom display templates on the **Resources** page of the application administration settings. For more information, see Section 11.4, "Managing Resources."

To change the display template for the selected content:

1. In the Content Presenter Configuration dialog (see Section 42.3, "Displaying the Content Presenter Configuration Dialog"), click **Select Template** or the **Template** tab.

   The templates that are available for selection in the **Template** list are those that are identified by Content Presenter as suitable for displaying the selected content item(s). For more information, see "Identifying Display Templates for Selected Content Items" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

2. On the **Template** page:

   - If the **Content Source** selected on the **Content** page is a Site Studio contributor data file or any other single content item, select a Site Studio region template or a Content Presenter display template, respectively, from the **Template** list.

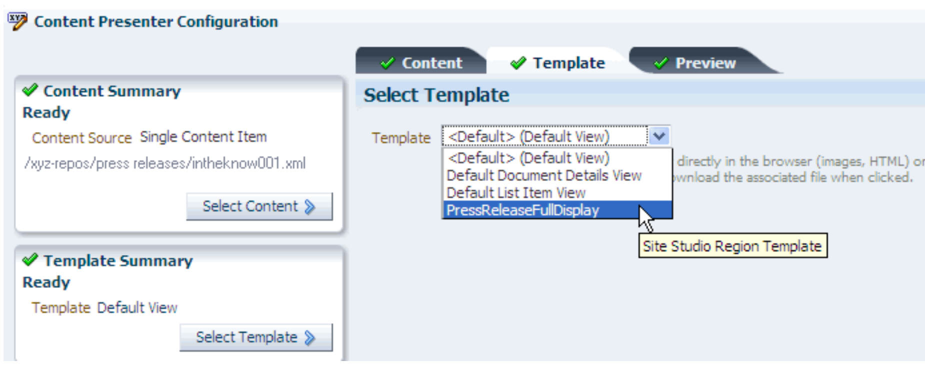
     The list of available Site Studio region templates includes only the templates that match the region definition of the Site Studio contributor data file selected on the **Content** page. To identify the Site Studio region templates, hover your mouse pointer over the templates in the list to display hint text identifying the Site Studio region templates. For more information, see Section 42.1.1, "Understanding Site Studio Integration."

Note: If you create a Site Studio contributor data file directly from the Content Presenter Configuration dialog, as described in Section 42.9, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog", the Site Studio region templates that match the region definition of the Site Studio contributor data file may not be immediately shown in the **Template** list. In this case, select the default template, and click **Save**. Then, open the Content Presenter Configuration dialog again to find the Site Studio region templates in the **Template** list.

The Content Presenter display templates in the list include the out-of-the-box templates for single content items (see Table 42–2). Other selections that may be available in the list are custom display templates that have been uploaded to your Spaces application (see Section 11.5.3, "Uploading a Resource"). Custom Content Presenter display templates are created in JDeveloper, as described in "Creating Content Presenter Display Templates" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

Figure 42–21 shows the **Template** list, with a Site Studio region template named **PressReleaseFullDisplay** selected.

Figure 42–21 Selecting the Custom Display Template



- If the **Content Source** selected on the **Content** page is a multiple content item (Contents Under a Folder, Results of a Query, or List of Items), select the desired **Template Category** (Figure 42–22), then the **Template** (Figure 42–23).

Figure 42–22 Selecting the Template Category (for Multiple Content Items)

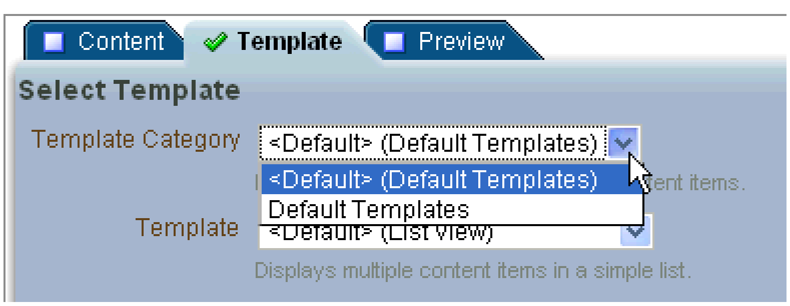
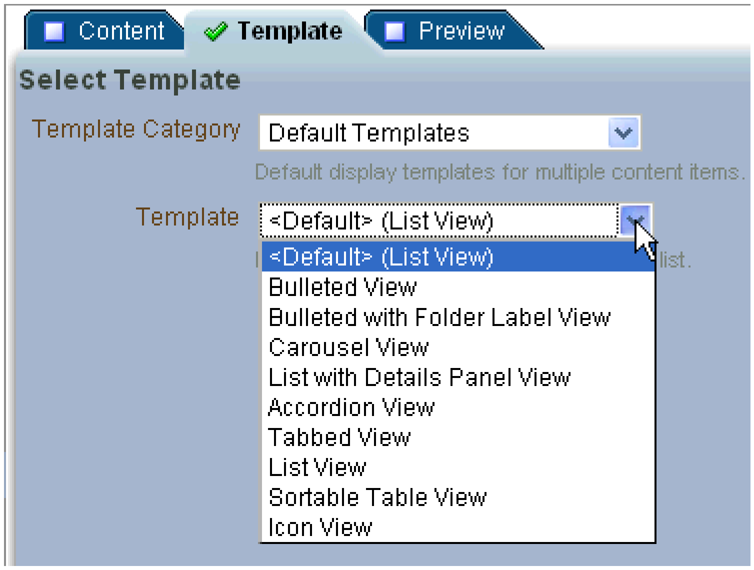


Figure 42–23 Selecting the Display Template (for Multiple Content Items)



By default, there is only one category: **Default Templates**. This selection defines the collection of out-of-the-box templates available for multiple content items (see Table 42–3).

Other selections that may be available in the list are custom display templates that have been uploaded to your Spaces application (see Section 11.5.3, "Uploading a Resource"). Custom Content Presenter display templates are created in JDeveloper, as described in "Creating Content Presenter Display Templates" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

Table 42–2 Out-of-the-Box Templates for Displaying Single Content Items

Single Content Item Templates	View ID	Description
Default Document Details View	`oracle.webcenter.content.templates.default.document.details`	Displays detailed information about any single content item including creation date, modification date, created by username, modified by username, path, and any comments.
Default List Item View	`oracle.webcenter.content.templates.default.list.item`	Displays a single line with an icon and item name as a link that either displays or downloads the item when clicked.
Default View (default when no template is selected)	`oracle.webcenter.content.templates.default.detail`	Displays any single content item, either directly in the browser (images, HTML, text) or as a link that downloads the associated file when clicked. For example, when the selected document type is `.doc`, the Default View template is assigned to be the Default Document Details View template.

Table 42–3 Out-of-the-Box Templates for Displaying Multiple Content Items

Multiple Content Item Templates	View ID	Description
Accordion View	`oracle.webcenter.content.templates.default.list.panel.accordion`	Displays multiple content items in an accordion format, where each item can be expanded to display its details.
Bulleted View	`oracle.webcenter.content.templates.default.list.bulleted`	Displays multiple content items in a bulleted list format. Only content items display; folder items are omitted.
Bulleted with Folder Label View	`oracle.webcenter.content.templates.default.list.bulleted.label`	Displays multiple content items in a bulleted list format. The name of the folder containing the first item in the list displays as a label above the list. This template is intended to be used with **Content Source** set to **Contents Under a Folder** to ensure that all items have the same parent folder. Only content items display; folder items are omitted.
Carousel View	`oracle.webcenter.content.templates.default.list.carousel`	Displays multiple content items in a carousel format, where items can be browsed by moving a slider left or right.
Icon View	`oracle.webcenter.content.templates.default.list.tile`	Displays multiple content items in a tiled format with large icons and file names.
List View (default when no template is selected)	`oracle.webcenter.content.templates.default.list.simple`	Displays multiple content items in a simple list.
List with Details Panel View	`oracle.webcenter.content.templates.default.list.details.panel`	Displays multiple content items in a list on the left, with a panel to the right displaying the details of a selected item.
Sortable Table View	`oracle.webcenter.content.templates.default.list.tabular`	Displays multiple content items in a sortable table that includes the document name, date created, and date modified.
Tabbed View	`oracle.webcenter.content.templates.default.list.panel.tabbed`	Displays multiple content items as tabs that can be selected to display item details.

42.6 Previewing the Results

To see a preview of your selected content before adding it to the page:

- Click **Preview** or the **Preview** tab.

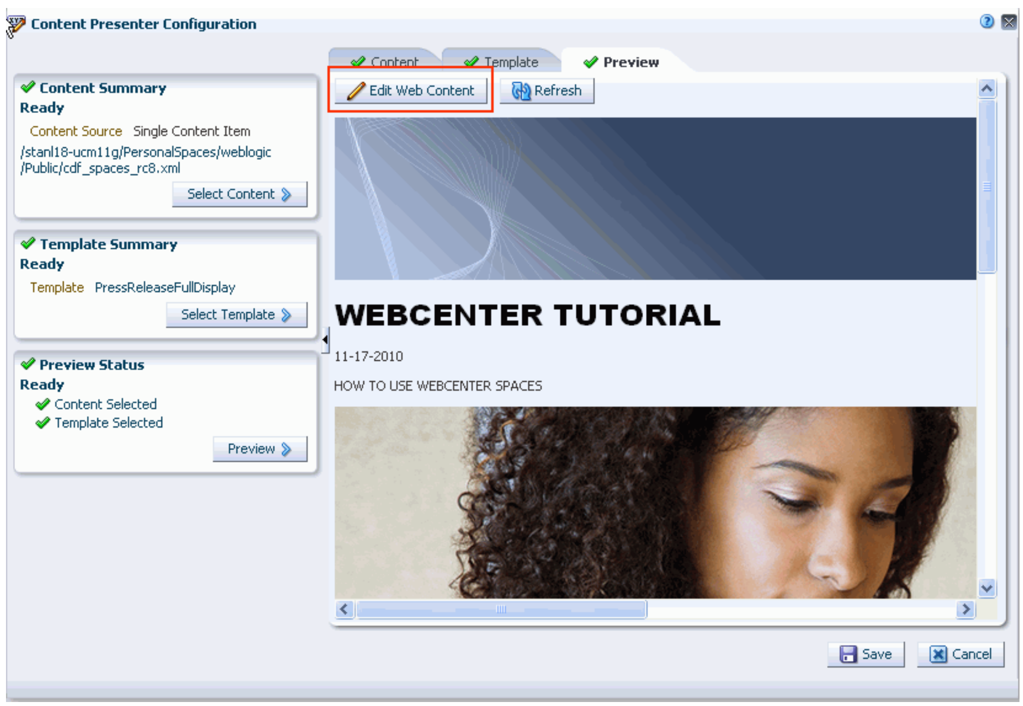
The appearance of the content on the **Preview** page is dependent on whether the selected display template uses a stretch or flow layout. While the final view of the task flow can be configured to use either a stretch layout or a flow layout, the **Preview** page only uses a flow layout. As a result, the preview of content using templates that were designed for a stretch layout displays unstretched at a fixed default size. This is the normal behavior of stretchable content when displayed in non-stretching flow layout. To allow stretchable content to stretch to its full size and fill the task flow space entirely, click the **Edit** icon for the task flow to display the Component Properties dialog, and select the `Stretch Content` property (on the **Display Options** tab). For more information, see Section 18.6.4, "Working with Component Display Options."

> **Note:** Content Presenter does not support non-ASCII characters in files that are encoded using the non-UTF-8 character encoding. When users preview such files in Content Presenter, non-ASCII characters appear garbled.

From the **Preview** tab, you can click **Edit Web Content** (Figure 42–24) to edit HTML and Site Studio files in-context, as described in Section 42.10, "Creating and Editing Files In-Context in a Content Presenter Task Flow".

If the file is in workflow, you will see a workflow notification area at the top, as described in Section 42.11, "Approving and Rejecting Files in Workflow."

Figure 42–24 Previewing an Oracle Site Studio Contributor Data File



42.7 Adding Links from Content to Navigation Nodes

When you expose content stored in a Content Presenter task flow, consider whether or not you want to add one or more links from the content to a node in the default navigation model (see Section 12.2.2.1.8, "Setting Display Options for Navigation Items").

When the content displays in Content Presenter at runtime, an end user can click the links to navigate to the desired navigation model node.

You can create a link in the following content items in:

- a document of MIME type `text/html` (typically HTML files)
- a Site Studio contributor data file (in a Rich Text element)

- a Site Studio region template

To add a link to a node in the default navigation model from a content item:

1. Edit the content item, as described in:
   - Section 42.9, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog"
   - Section 42.10, "Creating and Editing Files In-Context in a Content Presenter Task Flow"
2. Add a link using the following syntax:

   ```
   $wcUrl('externalId')
   ```

   where *externalId* is the external identifier as configured in the Spaces default navigation model.

   For example:

   ```
   <a target="" href="$wcUrl('NEWCUSTOMERSLINK')">New Customers</a>
   ```

42.8 Authoring Site Studio Content to Optimize Presentation in Content Presenter

Content Presenter integrates with Oracle Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a Site Studio region template or a custom Content Presenter display template. For more information, see Section 42.1.1, "Understanding Site Studio Integration."

To optimize the presentation of Oracle Site Studio content in Content Presenter, follow the guidelines provided in the following sections:

- Section 42.8.1, "Best Practices for Images"
- Section 42.8.2, "Best Practices for Defining Styles"
- Section 42.8.3, "Best Practices for JavaScript"

42.8.1 Best Practices for Images

Keep the following guidelines in mind as you work with images in Site Studio that will be displayed using Content Presenter:

- Store images in Content Server in a common location (filed).
- Insert images into WYSIWYG elements using the Site Studio Contributor image wizard.
- Set the `image` tag `src` attribute to a relative link to an image file in Content Server. This attribute is rewritten by Content Presenter during rendering to use the `GET_FILE` service.
- For performance improvement, use web proxy to cache artifacts at URLs from Content Server, and set expiration based on tolerance for updates in Content Server.

  Example for Apache `mod_cache`:

  – `CacheEnable mem /cs`

  – `CacheDefaultExpire 3600 (one hour)`

42.8.2 Best Practices for Defining Styles

Keep the following guidelines in mind as you work with style definitions for Site Studio contributor data files that will be displayed using Content Presenter:

- Define styles in CSS files.
- Store CSS files either in Content Server or in your Spaces application.
  - If stored in Content Server, add `<link>` in `<head>` of page template.
- Load style class names into WYSIWYG region element definitions.
- Select your CSS to format HTML in WYSIWYG elements.
- For performance improvement, use web proxy to cache artifacts at URLs from Content Server, and set expiration based on tolerance for updates in Content Server.

  Example for Apache `mod_cache`:
  - `CacheEnable mem /cs`
  - `CacheDefaultExpire 3600 (one hour)`

42.8.3 Best Practices for JavaScript

Keep the following guidelines in mind as you work with JavaScript in Site Studio contributor data files that will be displayed using Content Presenter:

- Recommended: Do not use JavaScript within web content that is rendered within Spaces applications.
- If your web content uses JavaScript, follow these guidelines:
  - Add `<link>` in `<head>` of page template
  - For performance improvement, use web proxy to cache artifacts at URLs from Content Server, and set expiration based on tolerance for updates in Content Server.

    Example for Apache `mod_cache`:
    - `CacheEnable mem /cs`
    - `CacheDefaultExpire 3600 (one hour)`

42.9 Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog

Content Presenter integrates with Oracle Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a Site Studio region template or a custom Content Presenter display template. For more information, see Section 42.1.1, "Understanding Site Studio Integration."

Note: To create or edit Oracle Site Studio content in a seamless interface within Spaces, *both* of the following two requirements must be met:

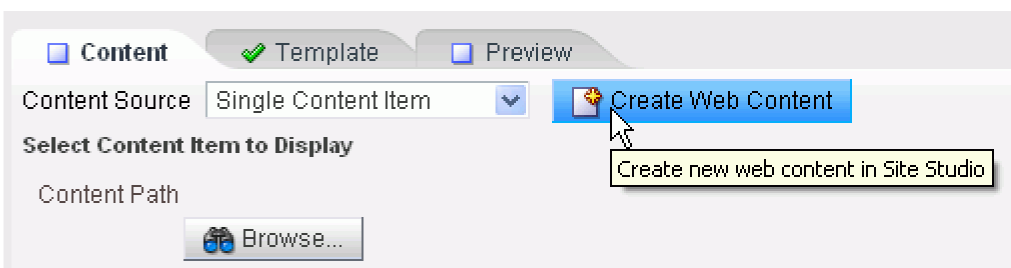
- You must access the Spaces application through Oracle HTTP Server (OHS) to expose Content Server and the Spaces application under the same host and port. For information about setting up OHS as the frontend to Spaces, see "Configuring Content Server for WebCenter Portal Applications" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- Spaces must be connected to a Content Server repository, with the `webContextRoot` parameter set to a Content Server host name. For information on setting `webContextRoot`, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. To set `webContextRoot` through WLST, see "`createJCRContentServerConnection`" and "`setJCRContentServerConnection`" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

Without this configuration, it is still possible to create or edit Site Studio content from within Content Presenter, but the create and edit actions launch new browser windows (or tabs) rather than opening within the Content Presenter task flow.

To create or edit Oracle Site Studio content from the Content Presenter Configuration dialog:

1. In the Content Presenter Configuration dialog (see Section 42.3, "Displaying the Content Presenter Configuration Dialog"), click **Select Content** or the **Content** tab.
2. On the **Content** page, click **Create Web Content** (Figure 42–25).

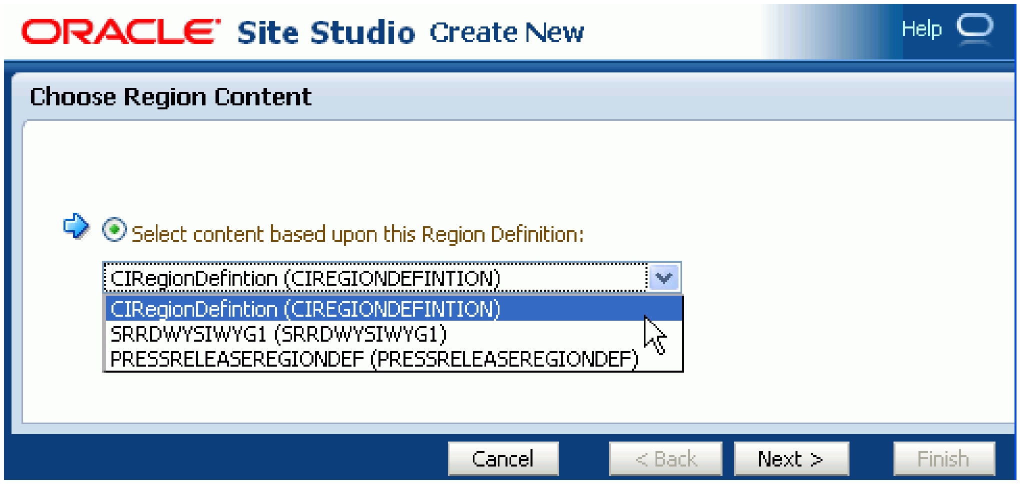
Figure 42–25 Selecting the Content Source: Site Studio



Tip: The **Create Web Content** button displays only when the **Content Source** field displays **Single Content Item** and when at least one Content Server repository (11*g* or higher) has the Site Studio component installed.

The Oracle Site Studio **Choose Region Content** pane opens (Figure 42–26).

Figure 42–26 Adding Site Studio Content: Choose Region Content



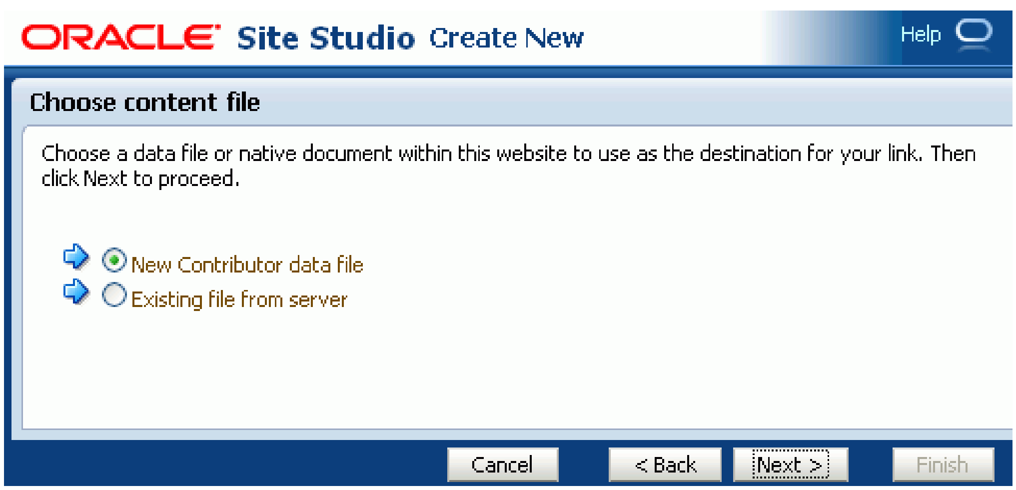
3. In the **Choose Region Content** pane, select a Site Studio region definition on which the content you want to create or edit is based.

> **Note:** To create or edit Oracle Site Studio content, at least one region definition must have been previously created in the Site Studio application.

4. Click **Next**.

   The **Choose content file** pane opens (Figure 42–27).

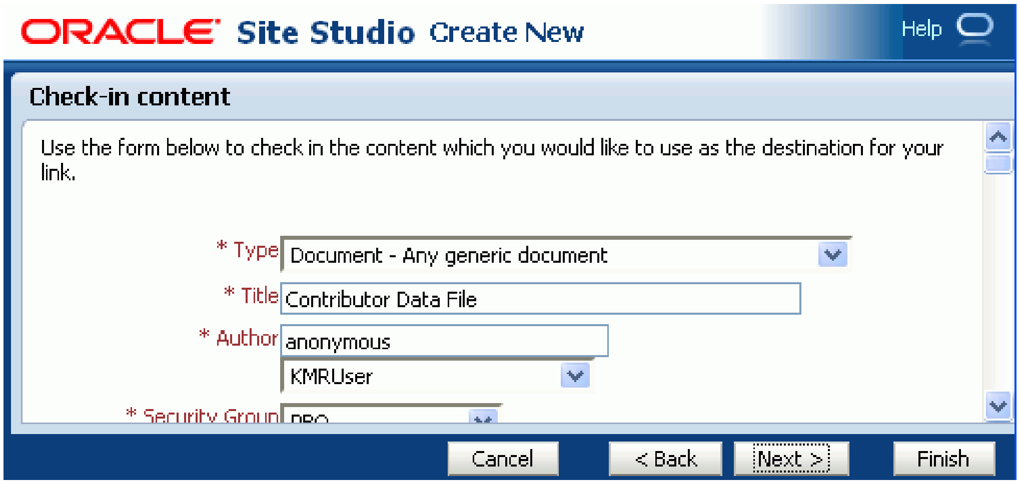
Figure 42–27 Adding Site Studio Content: Choose Content File



5. In the **Choose content file** pane, select one of the following:

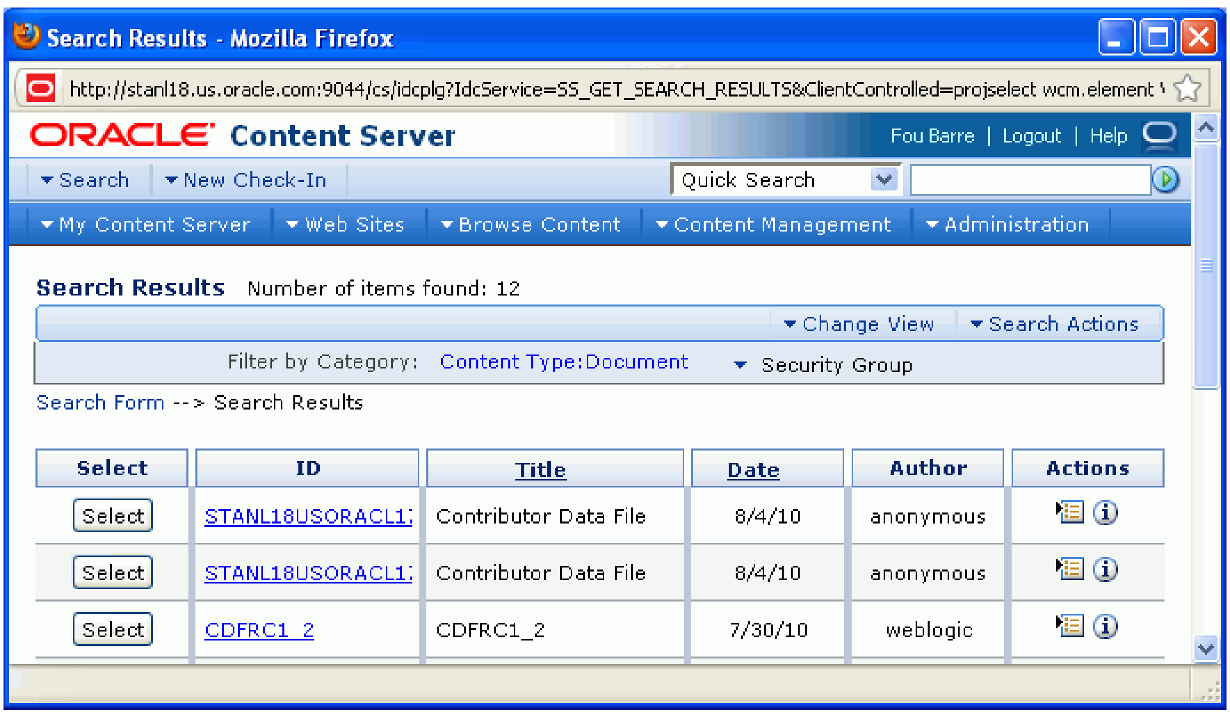
   - **New Contributor data file** to open the **Check-in Content** pane (Figure 42–28), where you can specify the standard document properties for the new Site Studio contributor data file that you want to check in to Content Server.

Figure 42–28 Adding Site Studio Content: Check-in Content



- **Existing file from server** to open Content Server (Figure 42–29), showing Site Studio contributor data files that are based on the selected region definition.

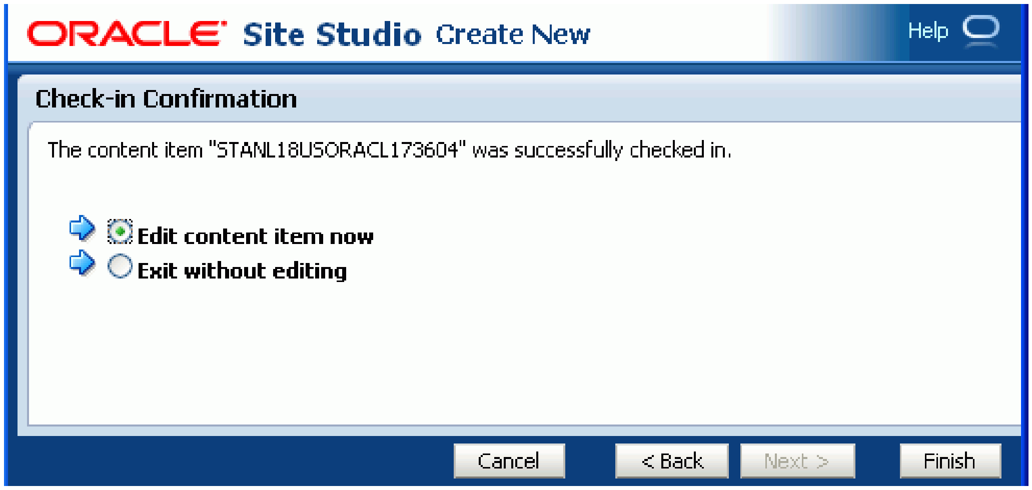
Figure 42–29 Content Server: Search Results



6. Make note of the file name, then click **Next**.

   The **Check-in Confirmation** pane opens (Figure 42–30).

Figure 42–30 Adding Site Studio Content: Check-in Confirmation



7. In the **Check-in Confirmation** pane, select one of the following:
   - **Edit content item now** to open the Site Studio Contributor editor, where you can edit the content item as described in Section 42.10.2, "Editing Site Studio Files In-Context" (beginning with Step 4).
   - **Exit without editing** to make no changes to the file.
8. Click **Finish** to return to the Content Presenter Configuration dialog.
   - If you access the Spaces application through Oracle HTTP Server (OHS) and have configured the `webContextRoot` parameter, as described in the Note at the top of this section, the Site Studio contributor data file you selected is shown auto-selected in the Content Presenter Configuration dialog.
   - If OHS and the `webContextRoot` parameter are not configured, you can now select the Site Studio contributor data file to display in the Content Presenter task flow: On the **Content** page, browse to the Site Studio file, select it, and click **Select**.
9. In the Content Presenter Configuration dialog, click **Save**.

42.10 Creating and Editing Files In-Context in a Content Presenter Task Flow

In-context editing refers to editing content directly in a Spaces application at runtime, where the editor opens in a separate window.

With appropriate permissions, end users can edit HTML and Site Studio content in-context in a Content Presenter task flow.

Note: Users must have permissions to view and edit the page containing the Content Presenter instance, as well as being assigned a role with write permissions on Content Server. For more information, see Chapter 23, "Understanding Security" and the chapter "Managing WebCenter Portal Application Security" in *Oracle Fusion Middleware System Administrator's Guide for Oracle Content Server*.

The following sections describe how to perform in-context editing:

- Section 42.10.1, "Editing Wiki Documents or HTML Files In-Context"
- Section 42.10.2, "Editing Site Studio Files In-Context"
- Section 42.10.3, "Creating New Site Studio Content In-Context"
- Section 42.10.4, "Changing the Edit Mode Key Sequence"

42.10.1 Editing Wiki Documents or HTML Files In-Context

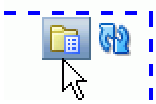
With appropriate permissions, end users can edit wiki documents or HTML files in-context in a Content Presenter task flow.

To edit a wiki or HTML file in a Content Presenter task flow:

1. In the Content Presenter task flow, click anywhere in the file content.
2. Press Ctrl-Shift-C to enter the in-context edit mode. The editable areas of the web page are highlighted with a dashed border.

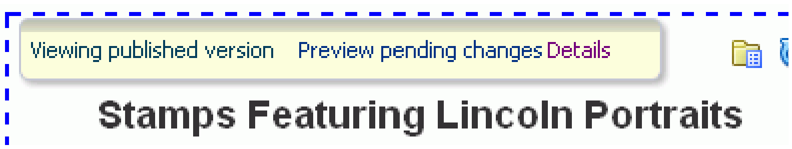
   Note that you can change the key sequence to enter in-context edit mode if you wish. See Section 42.10.4, "Changing the Edit Mode Key Sequence."
3. Click the **Edit** icon in the upper right corner of the document chrome (Figure 42–31) to open the file in the Document Viewer preview pane.

   Figure 42–31 Entering In-Context Edit Mode In a Content Presenter Task Flow

   If the file is in workflow, workflow controls also display (Figure 42–32). For more information, see Chapter 45, "Working with Workflow-Enabled Content."

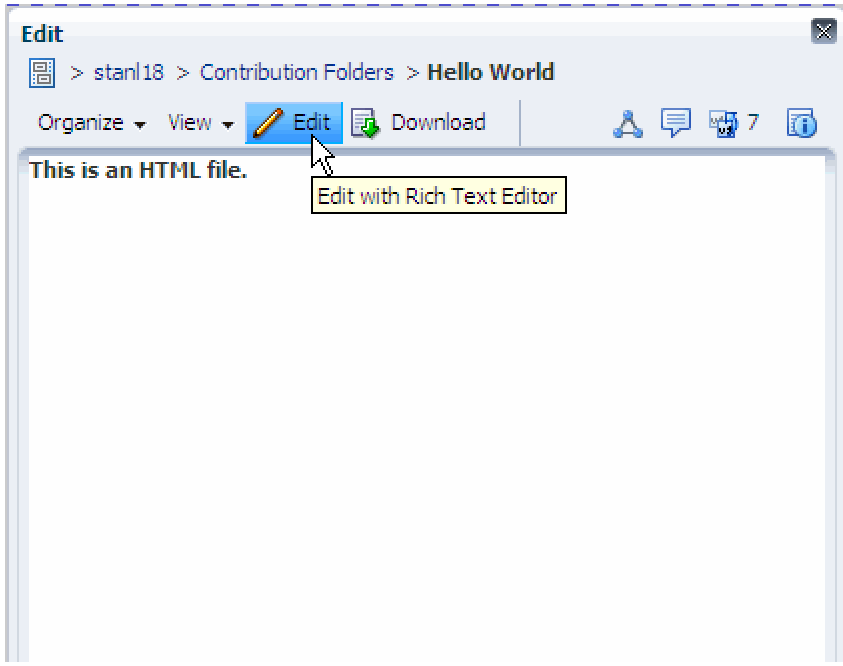
   Figure 42–32 Workflow Controls in In-Context Edit Mode in a Content Presenter Task Flow

4. In the Document Viewer preview pane, click the **Edit** action (Figure 42–33) to automatically check the file out and open it for editing in the Rich Text Editor (RTE).

   > **See Also:** For information about the RTE, see Section 43.11, "Using the Rich Text Editor (RTE)."

Figure 42–33 Opening the Rich Text Editor



5. Make required updates, then save and close the file.

   The modified file is automatically checked back in.

6. In the Content Presenter task flow in the Spaces application, press Ctrl-Shift-C again to exit the in-context editing mode.

42.10.2 Editing Site Studio Files In-Context

Content Presenter integrates with Oracle Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a Site Studio region template or a custom Content Presenter display template. For more information, see Section 42.1.1, "Understanding Site Studio Integration."

With appropriate permissions, end users can edit Site Studio contributor data files in-context in a Content Presenter task flow.

To edit a Site Studio file in a Content Presenter task flow:

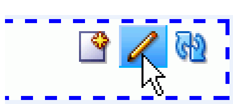
1. In the Content Presenter task flow, click anywhere in the Site Studio file content.

2. Press Ctrl-Shift-C to enter the in-context edit mode. The editable areas of the web page are highlighted with a dashed border.

   Note that you can change the key sequence to enter in-context edit mode if you wish. See Section 42.10.4, "Changing the Edit Mode Key Sequence."

3. Click the **Edit** icon in the upper right corner of the document chrome (Figure 42–34) to open the file in Site Studio Contributor

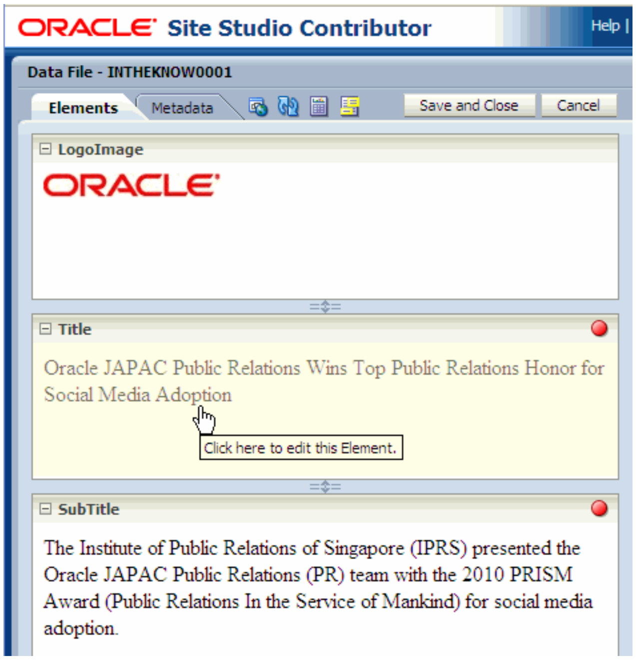
Figure 42–34 Entering In-Context Edit Mode in a Content Presenter Task Flow



4. In the Site Studio Contributor Data File editor, click a region to edit, as shown in Figure 42–35.

   For information about editing files in Site Studio Contributor, see the Oracle Site Studio documentation.

Figure 42–35 Editing a File in Site Studio Contributor



5. Click **Save And Close** to exit the Site Studio Contributor editor and return to the Spaces application.
6. In the Content Presenter task flow in the Spaces application, press Ctrl-Shift-C again to exit the in-context editing mode.

42.10.3 Creating New Site Studio Content In-Context

Content Presenter integrates with Oracle Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a Site Studio region template or a custom Content Presenter display template. For more information, see Section 42.1.1, "Understanding Site Studio Integration."

With appropriate permissions, end users can create new web content in Site Studio during in-context editing in a Content Presenter task flow.

In-context creation of Site Studio files is slightly different than creating Site Studio files in the Content Presenter Configuration dialog, as described in Section 42.9, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog." When creating a new Site Studio file in-context, you are limited to creating content that is of the same region definition, file location, security group, and document type as the content selected in the Content Presenter task flow. Additionally, the region definition must have been previously created in the Site Studio application.

To create a new Site Studio file in a Content Presenter task flow:

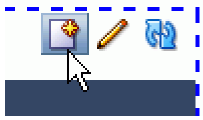
1. In the Content Presenter task flow, click anywhere in the currently displayed Site Studio file.

2. Press Ctrl-Shift-C to enter the in-context edit mode. The editable areas of the web page are highlighted with a dashed border.

   Note that you can change the key sequence to enter in-context edit mode if you wish. See Section 42.10.4, "Changing the Edit Mode Key Sequence."

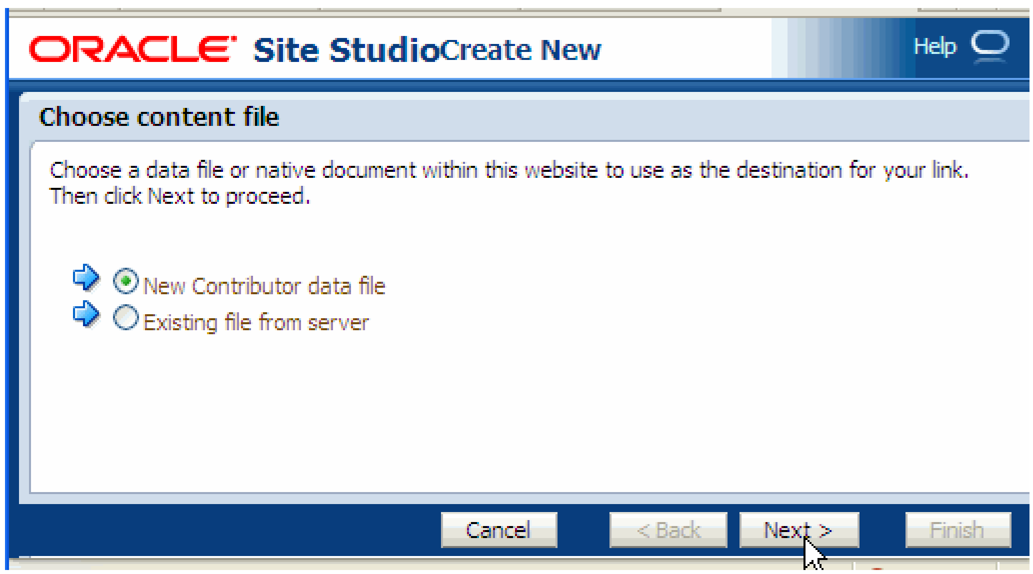
3. Click the **Create** icon in the upper right corner of the document chrome (Figure 42–36).

Figure 42–36 Selecting the Create Icon in a Site Studio File



4. In the Choose Content window, select **New Contributor data file**, then click **Next** (Figure 42–37).

Figure 42–37 Choose New Content File Window



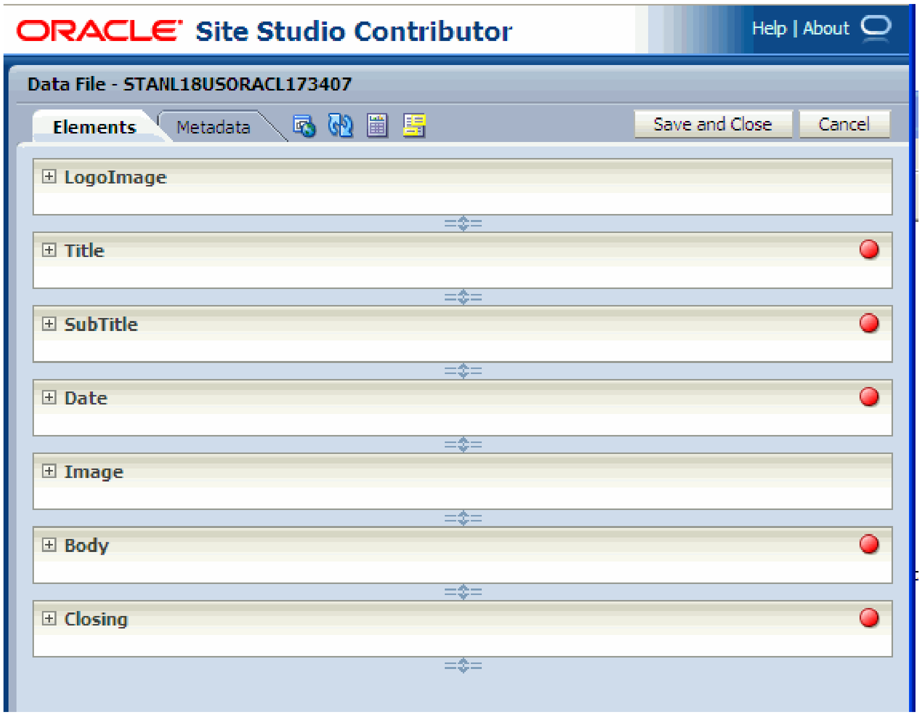
5. Fill out the Check-in Content form. This form provides the metadata for the contributor data file and checks the file into Content Server. The file is empty until you (or another contributor) edits it. For more information on filling out this form, see "Checking in Files" in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.

6. In the Check-in Confirmation window, select **Edit content item now**.

7. Click **Finish**.

   The Site Studio Contributor Data File editor opens (Figure 42–38).

Figure 42–38 Site Studio Contributor File Editor



8. Edit the file, then click **Save and Close**.

42.10.4 Changing the Edit Mode Key Sequence

To change the edit mode key sequence used to enter in-content editing mode for a Site Studio file in Content Presenter, edit the `<key-sequence>` entry in the application's `adf-config.xml` file:

```
******** Content Contributor Mode adf-config.xml entries ***************

<page-editor-config xmlns="http://xmlns.oracle.com/adf/pageeditor/config">
       <content-contribution>
         <enabled>true</enabled>
         <key-sequence>ctrl shift C</key-sequence>
       </content-contribution>
</page-editor-config>
```

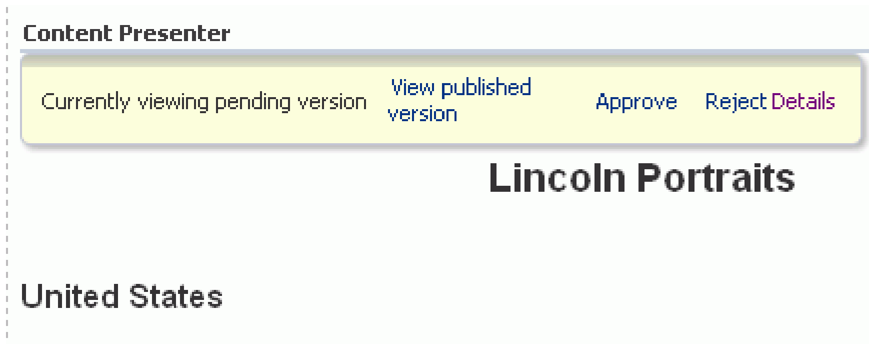
42.11 Approving and Rejecting Files in Workflow

You can view content items displayed in Content Presenter while they are in a workflow, including Site Studio contributor data files displayed in a Site Studio region template.

> **Note:** In order for a content item in workflow to display in Content Presenter, it must have had Released status at some point. If the content item has never had Released status, it will not display in Content Presenter.

As long as the content item has at some point had Released status in Content Server, if a subsequent revision of the content item is pending in workflow, Content Presenter allows approvers for the content item to toggle between the published version and the version in workflow in page edit mode (Figure 42–39) or in-context edit (contributor) mode, and also provides links to approve or reject the item in workflow, and view additional details about the item (including workflow name, steps performed, action performed, date of action, and who performed the action).

Figure 42–39 Preview File in Workflow to Approve or Reject in Content Presenter

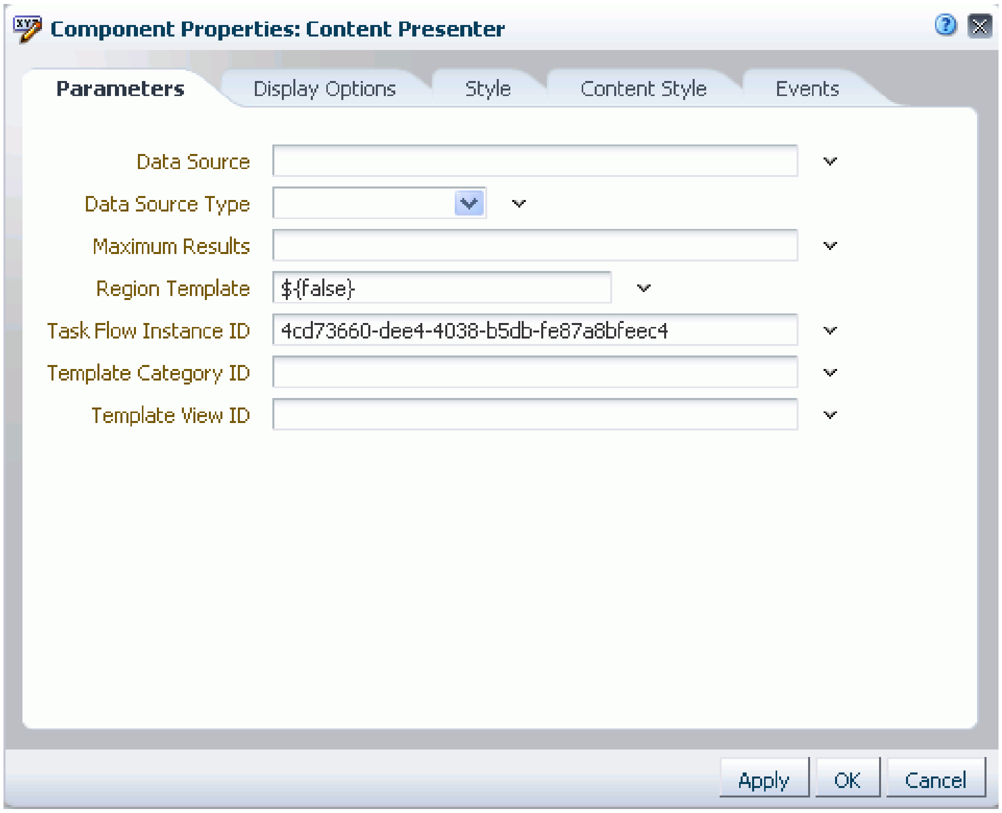


For more information about working with files in workflow in Content Presenter, see Section 45.3.2, "Viewing Workflow Files in a Content Presenter Task Flow."

42.12 Setting Content Presenter Task Flow Properties

The Content Presenter task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 42–40).

Figure 42–40 Content Presenter Task Flow Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Content Presenter task flow and describe the properties on the **Parameters** tab:

- Section 42.12.1, "What You Should Know About the Content Presenter Task Flow Properties"
- Section 42.12.2, "Content Presenter Task Flow Parameters"

42.12.1 What You Should Know About the Content Presenter Task Flow Properties

---

Note: The Content Presenter properties are intended for use at design time by developers creating a WebCenter Portal: Framework application (see "Adding Content Task Flows and Document Components to a Portal Page" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*), or for advanced users who want to bind a parameter to an EL expression. If you modify a property value in the Component Properties dialog, the new value overrides the value specified in the Content Presenter Configuration dialog, and that value becomes read-only in the Content Presenter Configuration dialog.

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 42.12.2, "Content Presenter Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6.4, "Working with Component Display Options" and Section 18.6.6, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

> **Note:** Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.
>
> EL validation is not performed on non-generic display options.

42.12.2 Content Presenter Task Flow Parameters

Table 42–4 describes the parameters that are unique to the Content Presenter task flow.

Table 42–4 Content Presenter Task Flow Parameters

Parameter	Description

`Data Source`	The data source of the content. The value depends on the value of `Data Source Type`:
	■ When `Data Source Type=Single Node`, set `Data Source` to a single node identifier in the format:
	`connection_name``#dDocName:`*`content_id`*
	For example: `myconnection.example.com#dDocName:STAN_IDC-007619`
	■ When `Data Source Type=Folder Contents`, set `Data Source` to a single node identifier in the format:
	`connection_name``#dCollectionID:`*`collection_id`*
	For example: `myconnection.example.com#dCollectionID:45535`
	■ When `Data Source Type=Query Expression`, set `Data Source` to a CMIS (Content Management Interoperability Services) query expression.
	Notes:
	■ Using a CMIS query as the `Data Source` requires a valid Task Flow Instance ID.
	Examples:
	`select * from cmis:document where cmis:name like \'test%\'`
	`connectionName=`*`connection_name`*`#select * from cmis:document where cmis:createdBy = \'weblogic\'`
	■ If `connectionName` is not specified, then the primary connection will be used.
	For more information about how to format the query and examples, see *Oracle Fusion Middleware Content Management REST Service Developer's Guide*.
	■ When `Data Source Type=Multi Node`, set `Data Source` to a set of comma-delimited node identifiers in the format:
	`connection_name``#dDocName:`*`content_id`*, *`connection_name`*`#dDocName:`*`content_id`*, ...
	For example: `myconn#dDocName:DOCUMENT_ID_12345,myconn#dDocName:DOCUMENT_ID_56789`

Table 42–4 (Cont.) Content Presenter Task Flow Parameters

Parameter	Description
`Data Source` (cont'd)	■ When `Data Source Type=Scenario Results`, set `Data Source` to the results from a scenario in the format: `conductor-connection-name=`*`conductor_conn_name`*`,`*`namespace=scenario_namespace`*`,scenario-name=`*`scenario_name`*`,`*`inputparm1=value1`*`,`*`inputparm2=value2,`* ... For example: `conductor-connection-name=ConductorServiceLocal,namespace=CPNamespace,scenario-name=GetRelatedDocsScenario,topic=outdoors,interests=hiking` For information about the Personalization Conductor and scenarios, see "Personalizing WebCenter Portal Applications" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*. where: ■ *`connection_name`* = the name of the content repository connection. ■ *`content_id`* = the `Content ID` for the content specified on the content information page for the item in Content Server, or the `CollectionID` value on the content server. ■ *`collection_id`* = the `dCollectionID` found in the URL for the folder information page in Content Server. ■ *`conductor_connection_name`* = the name of the URL connection that points to the Personalization Conductor (this name must start with `Conductor`). This value must match the `Reference name` attribute value in the `connections.xml` file for this URL connection. For more information, see "Configuring Content Presenter" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal* and the appendix "Files for WebCenter Portal Applications" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*. ■ *`namespace`* = the name of the namespace that contains the specified scenario. ■ *`scenario_name`* = the name of the scenario that Content Presenter will be using.
`Data Source Type`	The data source type of the content. Corresponds to the **Content Source** value in the Content Presenter Configuration dialog. Valid values are: ■ `Single Node`: A single content item. ■ `Folder Contents`: The contents of a folder. ■ `Query Expression`: The results of a query. ■ `Multi Node`: An ordered list of content items. ■ `Scenario Results`: The results of the specified scenario created using the Scenario Editor in JDeveloper. See "Personalizing WebCenter Portal Applications" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.
`Maximum Results`	The maximum number of results to display when `Data Source Type` is `Query Expression`. Default: `100`

Table 42–4 (Cont.) Content Presenter Task Flow Parameters

Parameter	Description
`Region Template`	Specifies whether the display template is a Site Studio region definition template. This value is valid only with Content Server 11*g* or higher: ■ `${true}`: Display template is a Site Studio region definition template. The `TemplateView ID` value is set to the Content ID of the region template. ■ `${false}` (default): Display template is not a Site Studio region definition template. For information about creating and using Site Studio region templates, see Section 42.1.1, "Understanding Site Studio Integration" and the Oracle Site Studio documentation library.
`Task Flow Instance ID`	The unique identifier of this task flow instance, used internally to maintain the association of the task flow instance with its customization and personalization settings. Do not edit this value. **Note**: Using a CMIS query as the `Data Source` requires a valid Task Flow Instance ID.
`Template Category ID`	The display template category ID to use in rendering results for multiple content items. This ID may reference the default template category for an out-of-the-box display template (Table 42–3) or a custom category created for a display template for multiple content items (see "Creating Content Presenter Display Templates" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*).
`Template View ID`	The display template view ID to use in rendering results for single content items. Enter the view ID of a template that is configured in the Resource Manager for a specific content type, or for list-based templates by category ID. This ID may reference one of the out-of-the-box display templates (Table 42–2), a custom display template (see "Creating Content Presenter Display Templates" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*), or set to the `contentID` of a region template if the content is a region.

43

Working with the Documents Service Task Flows and Document Components

In a WebCenter Portal: Spaces application, you can add content from one or more connected content repositories to the application, as summarized in Chapter 41, "Introduction to Adding and Managing Content."

> **See Also:** For an overview of content management in Spaces, see Section 2, "Leveraging Content Management."

This chapter describes how to use the Documents service task flows and document components to access, add, and manage folders and files in a Spaces application:

- Section 43.21, "Viewing and Deleting File Version History"
- Section 43.22, "Viewing and Modifying Folder and File Properties"
- Section 43.24, "Working with Links"
- Section 43.25, "Working with Recommendations"
- Section 43.26, "Opening or Saving PDF Files"
- Section 43.27, "Sharing the URL for a Folder or File"
- Section 43.23, "Setting Security Options on a Folder or File"
- Section 43.28, "Subscribing to a File"
- Section 43.29, "Liking and Unliking a File"
- Section 43.30, "Adding a Folder or File to Your Favorites"
- Section 43.31, "Searching for Documents"
- Section 43.32, "Troubleshooting Documents Service Issues"

Note: Many of the tasks described in this chapter can also be accomplished for Microsoft Office (Word, Excel, and PowerPoint) files using the task pane available through Microsoft Office shared document management functionality, as described in Chapter 48, "Working with Microsoft Office and Explorer Integration."

Audience

This chapter is intended for Spaces users who want to view, create, edit, and manage folders and files as individual items or in one of the Documents service task flows on a page in a Spaces application.

To perform the tasks described in this chapter, users need to be assigned a role that includes the `Edit Pages`, `View Documents`, `Create and Edit Documents`, and `Delete Documents` permissions. For information about roles and permissions, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

43.1 What You Should Know About the Documents Service Task Flows

The Documents service task flows provide a variety of formats to display folders and files, including wikis and blogs, on a page in a Spaces application. You can choose the task flows appropriate for your application to provide features for accessing, adding, and managing folders and files; configuring and viewing file and folder properties; and searching file and folder content in Content Server, Oracle Portal, or SharePoint content repositories, and your Spaces administrator has completed the prerequisite configuration.

Note: The availability of SharePoint as a content repository requires the installation of the SharePoint adapter. Administration for SharePoint is performed using WLST commands, not Oracle Enterprise Manager Fusion Middleware Control Console.

In a space, you can add Documents service task flows to a page without necessarily enabling the Documents service in the space. If the Documents service is *not* enabled in a space, adding a Documents service task flow to a page does not auto-populate the task flow with folders and files by default, unless you edit the default task flow properties. Once you enable the Documents service in the space (see Section 53.10.1, "Enabling and Disabling Services Available to a Space"), the following additional content functionality is made available:

- Documents service task flows added to the space are auto-populated by default with folder and file listings based on the default content repository connection.
- Documents added to the space are stored in a folder whose security is managed by the space.
- You can add a Documents service task flow that displays only the documents belonging to the current space (in the **Content Management** section of the Composer Resource Catalog, select **Space Documents**).

Table 43–1 provides an overview of the Documents service task flows, which offer different ways to display folder and file listings to add and manage content in the connected content repository, or to display individual files in Spaces.

Table 43–1 Documents Service Task Flows

	Folder and File Listings	Individual Folders	Individual Files
Document Explorer task flow. Displays folders and files in two panes, combining the functionality of the Document Navigator and Folder Viewer task flows. It provides in-place previewing and editing, and robust document management capabilities with an interface that should be familiar to users of Windows Explorer. Size: medium to full page width.	X	X	
Document List Viewer task flow. Displays folders and files in a single pane as a flat listing. It provides preview and editing in separate window, and some management capabilities. Size: narrow to medium page width.	X	X	
Document Manager task flow. Displays folders and files as specified by its `Layout` property: `Explorer`, `Table`, or `Tree Table`. The `Explorer` layout is identical to the Document Explorer task flow, without the properties `Show Documents`, `Show Folders`, and `Collapse Tree Navigation`.	X	X	
Document Navigator task flow. Displays a nested hierarchy of folders and files in a single pane, providing expand and collapse on folders to show the full hierarchy. Intended for use as a component of another Documents task flow (such as the Document Explorer task flow). Clicking folders and files in this task flow standalone performs no action. Size: narrow to medium page width.	X	X	
Folder Viewer task flow. Displays the contents of a folder in a single pane as a flat listing, providing in-place preview and editing, and robust document management capabilities with a straightforward interface that should be familiar to Windows users. Size: medium to full page width.	X	X	

Table 43–1 (Cont.) Documents Service Task Flows

	Folder and File Listings	Individual Folders	Individual Files
Recent Documents task flow. Displays a list of the files most recently created or modified in the current folder. This task flow is available only when the connected content repository is Content Server.	X		
Document Viewer task flow. Displays a preview of a file, or file properties for files that do not support a preview. A tabbed set of panes at the bottom of the task flow provide access to comments, tags, history, info (properties), and links.		X[1]	X
Document Mini Properties task flow. Displays the Basic properties of a file in a read-only view.		X[1]	X
Document Properties task flow. Displays both Basic and Advanced properties of a file, along with an **Edit** button to allow you to modify property values.		X[1]	X
Document Version History task flow. Displays a list of versions of a file, allowing for deletion of a selected version.			X

[1] To show folder information in a Document Viewer, Document Mini Properties, or Document Properties task flow, you can set the task flow's `Item ID` or `Resource ID` property to the ID of the target folder. See Chapter 44, "Setting Documents Service Task Flow and Document Component Properties."

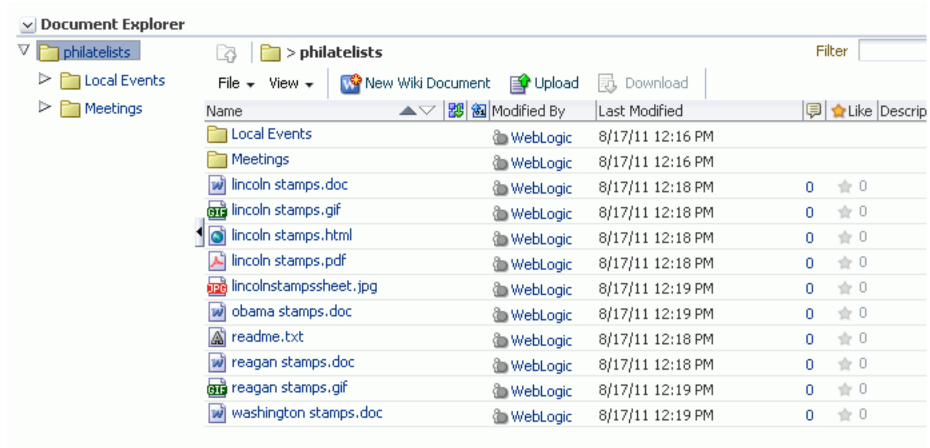
For more information about each Documents service task flow, refer to the following sections:

- Section 43.1.1, "Understanding the Document Explorer Task Flow"
- Section 43.1.2, "Understanding the Document List Viewer Task Flow"
- Section 43.1.3, "Understanding the Document Manager Task Flow"
- Section 43.1.4, "Understanding the Document Navigator Task Flow"
- Section 43.1.5, "Understanding the Folder Viewer Task Flow"
- Section 43.1.6, "Understanding the Recent Documents Task Flow"
- Section 43.1.7, "Understanding the Document Viewer Task Flow"
- Section 43.1.8, "Understanding the Document Mini Properties Task Flow"
- Section 43.1.9, "Understanding the Document Properties Task Flow"
- Section 43.1.10, "Understanding the Document Version History Task Flow"

43.1.1 Understanding the Document Explorer Task Flow

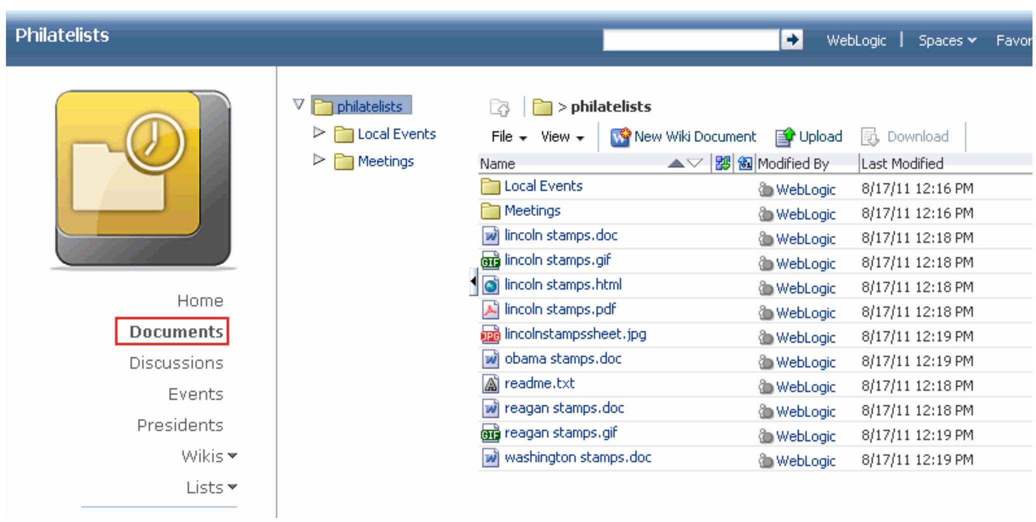
The Document Explorer task flow displays a list of folders and files in two panes, combining the functionality of the Document Navigator and Folder Viewer task flows. The left pane shows folders in a nested hierarchy, and the right pane shows the contents of the currently selected folder (Figure 43–1). This task flow provides robust document management capabilities with an interface that should be familiar to users of Windows Explorer. The size of this task flow is medium to full page width.

Figure 43–1 Document Explorer Task Flow



This is the task flow used to display folders and files on the **Documents** page in a space, as shown in Figure 43–2 (see Section 7.3.1, "What You Should Know About System Pages").

Figure 43–2 Documents Page in a Space



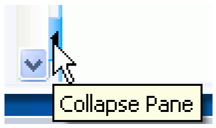
Note: The Documents service is exposed on the **Documents** page and administration settings in a space only with Content Server 11*g*. If the connected content repository is Content Server 10*g*, the **Documents** page is not shown in a space, and the Documents service is not available in the space administration settings (**Services** and **Roles**). To use the Documents service functionality in 10*g*, you can create a page in a space and add Documents service task flows to the page (see Section 43.4, "Adding a Documents Service Task Flow to a Page").

If you see only a single pane (default), click the **Restore Pane** icon to expose the left pane (Figure 43–3).

Figure 43–3 Restore Pane Icon

Conversely, click the Collapse Pane icon to hide the left pane (Figure 43–4).

Figure 43–4 Collapse Pane Icon



The Document Explorer task flow is a feature-rich Documents service task flow for viewing, managing, and collaborating on folders and files. In the Document Explorer task flow, you can:

- Click the expand and collapse icons for a folder to show and hide the subfolders.
- Click a *folder* in the left or right pane to display the contents of that folder in the right pane, and drill down further into subfolders.
- Click a *file* in the right pane to display a preview of the file contents in the Document Viewer preview pane, with file management options, including in-place editing for some file types. If the file type does not support a preview (for example, `.mp3` music files, video files, or `.zip` files), the preview pane displays the file properties (see Section 43.1.7, "Understanding the Document Viewer Task Flow").
- Click in a *row* (not on the folder or file name) in the right pane to perform menu actions on the folder or file in that row (see Section 43.5.1, "Menus and Actions in the Documents Service Task Flows").

  Alternatively, right-click a folder or file to display a context menu of available actions (see Section 43.5.1.6, "Folder Context Menu" and Section 43.5.1.7, "File Context Menu").
- Drag and drop folders and files in the task flow hierarchy to reorganize the file or folder structure.

To add a Document Explorer task flow to a page, refer to Section 43.4, "Adding a Documents Service Task Flow to a Page." In the default Resource Catalog, open **Content Management**, then click **Add** next to **Document Explorer** to display the default listing of folder and files in the root folder of the active content repository connection.

43.1.1.1 Changing the Document Explorer Task Flow Default Listing

You can change the default listing displayed in a Document Explorer task flow in either of the following ways:

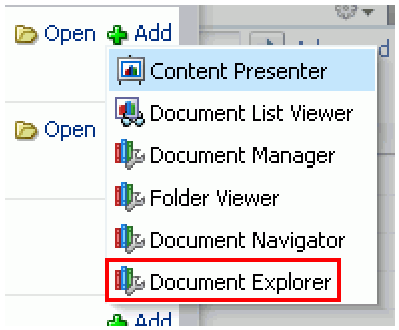
- Selecting a Specific Folder in the Resource Catalog
- Modifying Properties

Selecting a Specific Folder in the Resource Catalog

To change the default listing displayed in a Document Explorer task flow by selecting a specific folder to display:

- Drill down to a target folder in the Resource Catalog, then click the corresponding **Add** link, and select **Document Explorer** (Figure 43–5). For more information, see Section 43.3, "Adding a Selected Folder or File to a Page."

Figure 43–5 Add Menu for Folder



Modifying Properties

To change the default listing displayed in a Document Explorer task flow by modifying the task flow properties:

1. Edit the page, and click the properties **Edit** icon (wrench) in the task flow chrome (Figure 43–6) to open the Component Properties dialog.

Figure 43–6 Edit Icon in Task Flow Chrome

2. To change the target folder, set the `Connection Name` and `Root Folder Path` properties on the **Parameters** tab (see Table 44–1, " Document Explorer Task Flow Parameters").

43.1.2 Understanding the Document List Viewer Task Flow

The Document List Viewer task flow displays the contents of a folder in a single pane as a flat listing (Figure 43–7). In this task flow, you can navigate a folder hierarchy, and customize search queries. While this task flow may be useful for a specific need, its search functionality is replicated and enhanced by using the Content Presenter task flow instead. The size of this task flow is narrow to medium page width.

Figure 43–7 Document List Viewer Task Flow (with Show Folders enabled)

In the Document List Viewer task flow, you can:

- Click a *folder* to display the contents of that folder, and drill down further into subfolders.
- Click a *file* to display a preview of the file contents in a separate Document Viewer preview window, with file management options, including editing for some file types. If the file type does not support a preview (for example, `.mp3` music files, video files, or `.zip` files), the preview window displays the file properties. See Section 43.1.7, "Understanding the Document Viewer Task Flow."
- Click in a *row* to perform **View** menu actions on the folder or file in that row. **View** is the only menu available for this task flow.

To add a Document List Viewer task flow to a page, refer to Section 43.4, "Adding a Documents Service Task Flow to a Page." In the default Resource Catalog, open **Content Management**, then click **Add** next to **Document List Viewer**.

43.1.2.1 Changing the Document List Viewer Task Flow Default Listing

You can change the default listing displayed in a Document List Viewer task flow in any of the following ways:

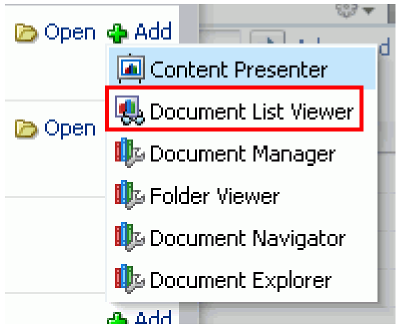
- Selecting a Specific Folder in the Resource Catalog
- Modifying Properties
- Specifying Detailed Content Source Criteria

Selecting a Specific Folder in the Resource Catalog

To change the default listing displayed in a Document List Viewer task flow by selecting a specific folder to display:

- Drill down to a target folder in the Resource Catalog, then click the corresponding **Add** link, and select **Document List Viewer** (Figure 43–8). For more information, see Section 43.3, "Adding a Selected Folder or File to a Page."

Figure 43–8 Add Menu for Folder

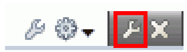


Modifying Properties

To change the default listing displayed in a Document List Viewer task flow by modifying the task flow properties:

1. Edit the page, and click the properties **Edit** icon (the second wrench icon in the task flow chrome) (Figure 43–9) to open the Component Properties dialog.

Figure 43–9 Properties Edit Icon in Document List Viewer Task Flow Chrome



2. To display folders as well as files, select the `Show Folders` parameter check box.
3. To change the target folder, set the `Connection Name` and `Root Folder Path` properties on the **Parameters** tab (see Table 44–2, " Document List Viewer Task Flow Parameters").

Specifying Detailed Content Source Criteria

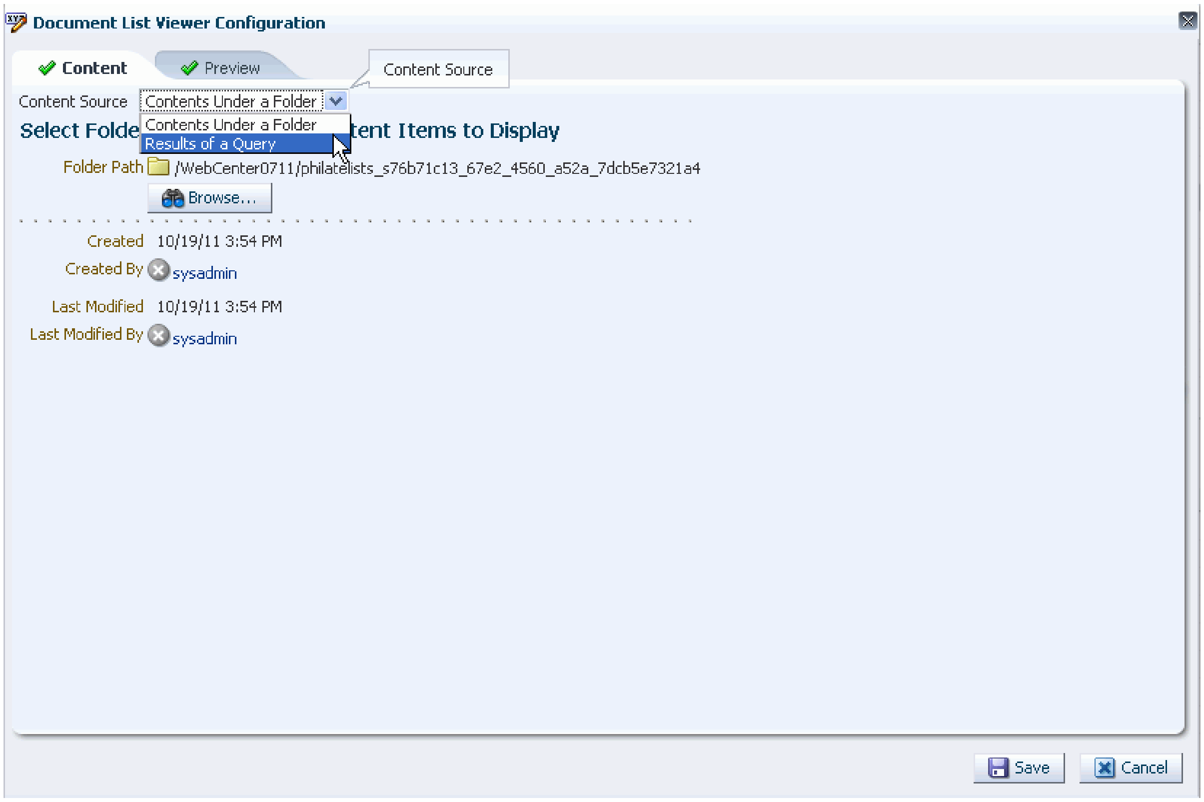
To change the default listing displayed in a Document List Viewer task flow to list content that matches specified criteria:

1. In the task flow heading, click the configuration **Edit** icon (the first wrench icon in the task flow chrome) (Figure 43–10) to open the Document List Viewer Configuration dialog.

Figure 43–10 Configuration Edit Icon in Document List Viewer Task Flow Chrome

2. In the Document List Viewer Configuration dialog (Figure 43–11), select from the **Content Source** dropdown list:

Figure 43–11 Document List Viewer Configuration Dialog



- **Contents Under a Folder** (folders display in the task flow pane only when the `Show Folders` parameter is selected). Click the **Browse** icon, navigate to and select the folder with the content you want to initially display in the task flow, then click **Save**.
- **Results of a Query**. In the **Results of a Query** pane (Figure 43–12 and Figure 43–13), enter desired values in the fields that you want the query to retrieve, as described in Table 43–2.

Figure 43–12 Results of a Query Pane: All Content Types

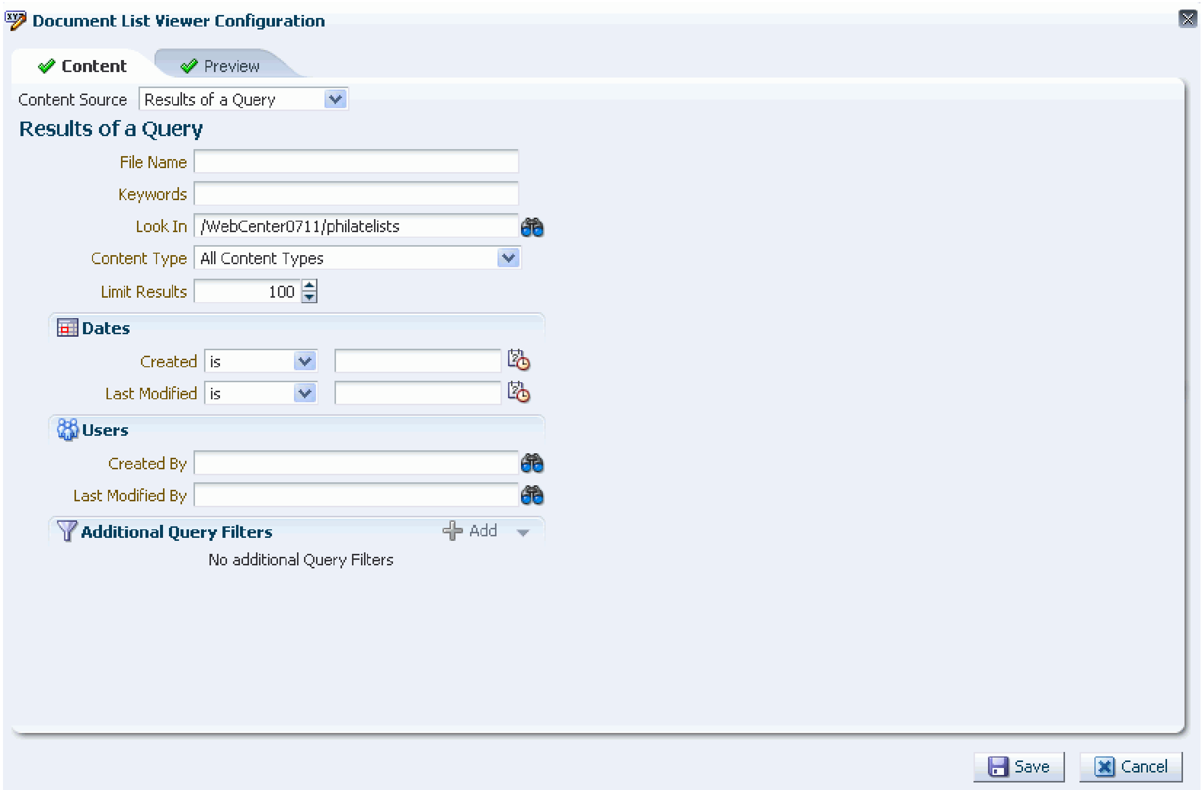


Figure 43–13 Results of a Query Pane: Selected Content Type

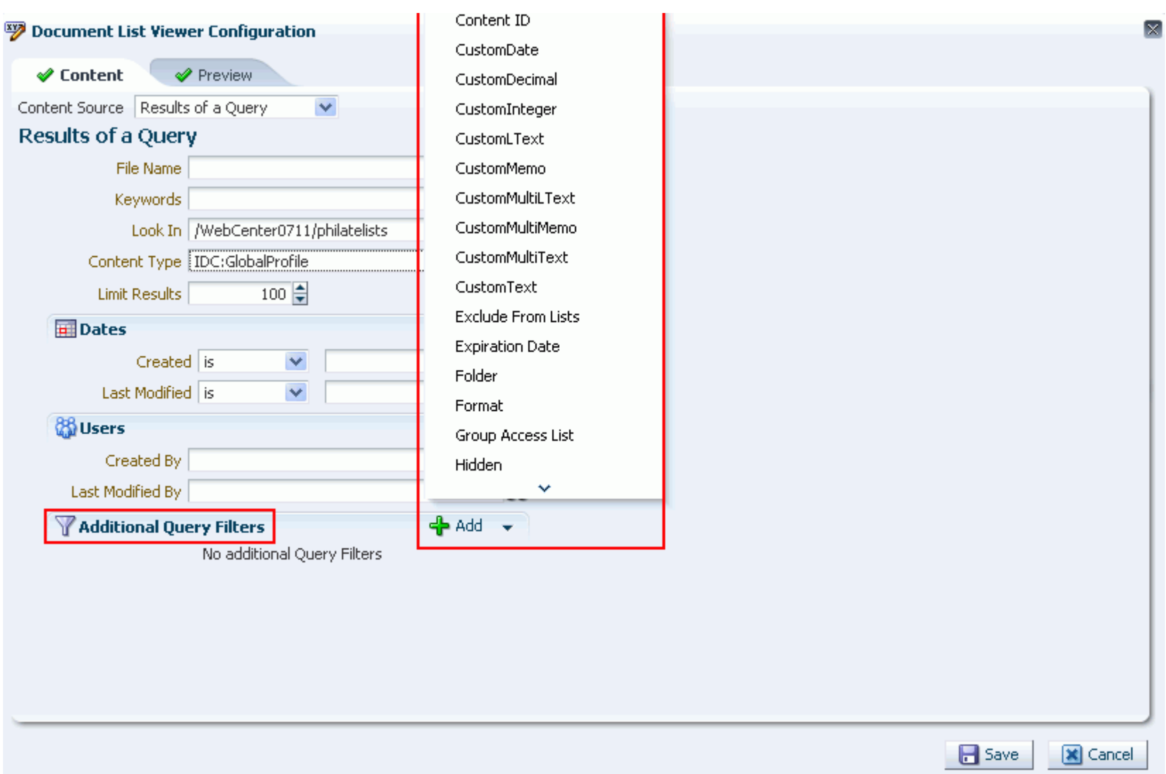


Table 43–2 Specifying Query Criteria for Results of a Query

Element	Description
File Name	Enter the name of a file in the specified **Repository** that you want to display in the Document List Viewer task flow. You can use `*` as a wild card character to retrieve multiple files; for example: `*.jpg`.
Keywords	Enter any value that may be present in the content of the documents. The value may be one or more words or phrases. Keyword search requires full-text search to be configured in Content Server by enabling **FullText Search Option**, as described in "Configuring the Oracle Content Server Instance" in *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*.
Content Type	Select **All Content Types** to retrieve content items regardless of the content type. Or, select the name of a content type profile defined in Content Server. A content type profile specifies properties that define a specific type of content (for example, a press release, or a news flash, or an image). The content type **IDC:GlobalProfile** is the name of a default content type profile defined in Content Server that can be applied if no other content type profiles are defined.
Limit Results	Specify the maximum number of content items to be returned by the query.
Dates	In the **Created** and/or **Last Modified** fields, select a modifier to search for content items matching an exact date (**is**), a following date (**is after**), a preceding date (**is before**), or a date between two other dates (**is between**), which adds an additional date field for entering the second date. Click the **Select Date** icon to select a date in the correct format (`mm/dd/yy`), for example `11/18/11`, or enter a date manually.
Users	In the **Created By** (user who uploaded) and **Last Modified By** fields, enter a user name for the creator or last modifier of the content item, or click the **Browse** icon to open the Search Users dialog where you can select from a list of users or search for a user name. For tips on searching for a user in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."
Additional Query Filters	Not applicable when **Content Type** is set to **All Content Types**. For a selected content type profile (prefixed **IDC:**), click the **Add** icon to list all the properties that are defined for the selected profile (Figure 43–13). Select one or more properties to refine the query to find content items with specific property settings.
Sort Order	Not applicable when **Content Type** is set to **All Content Types**. For a selected content type profile (prefixed **IDC:**), specify a sort order for the properties shown in the **Sort On** list.

3. Click the **Preview** tab to view the content that will display in the Document List Viewer task flow.

> **Note:** If the content repository includes an invalid type configuration, then no content displays on the **Preview** tab. Instead, an error message reports `Unable to retrieve content type information`.

43.1.3 Understanding the Document Manager Task Flow

The Document Manager task flow displays folders and files as specified by its `Layout` property (see Section 44.4, "Setting Document Manager Task Flow Properties"):

- **Explorer layout** (default): Displays folders and files in two panes; the left pane shows folders, and the right pane show the contents of the currently selected folder (Figure 43–14). This layout is identical to the Document Explorer task flow, without the properties `Show Documents`, `Show Folders`, and `Collapse Tree Navigation` (see Section 44.2, "Setting Document Explorer Task Flow Properties").
- **Table layout**: Displays only the contents of the current folder in a single pane, with the capability to click a folder to drill down, refreshing the pane with the folder contents (Figure 43–15).
- **Tree Table layout**: Displays the folder hierarchy in a single pane, beginning with the root folder, with the capability to expand and collapse folders (Figure 43–16). This layout may be familiar to Mac OS X users.

Figure 43–14 Document Manager Task Flow: Explorer Layout

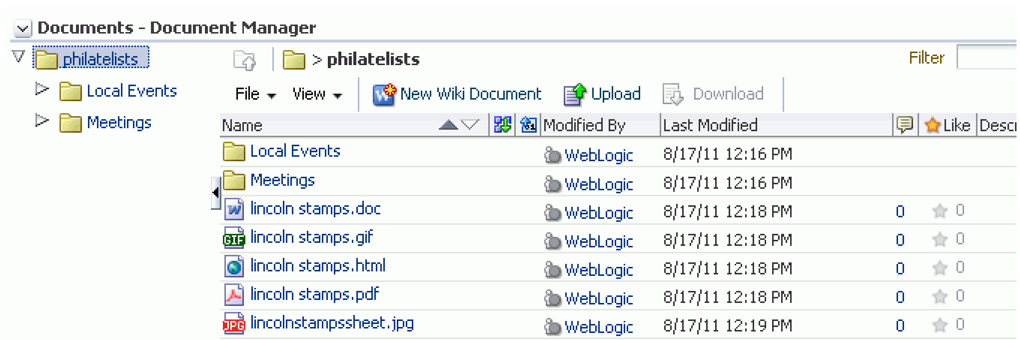


Figure 43–15 Document Manager Task Flow: Table Layout

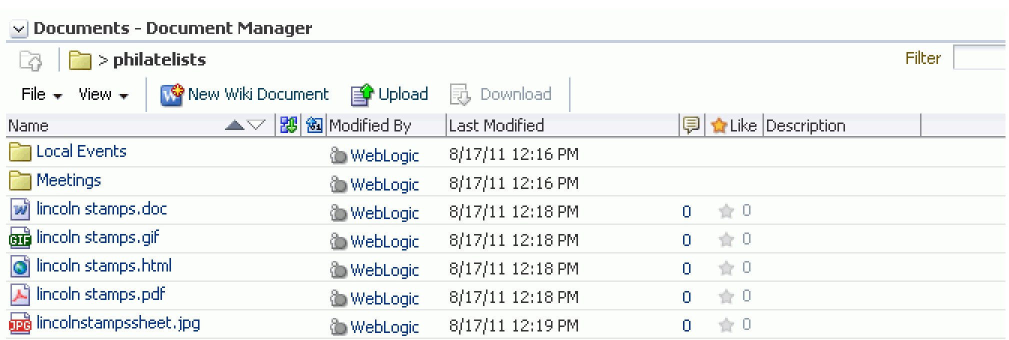
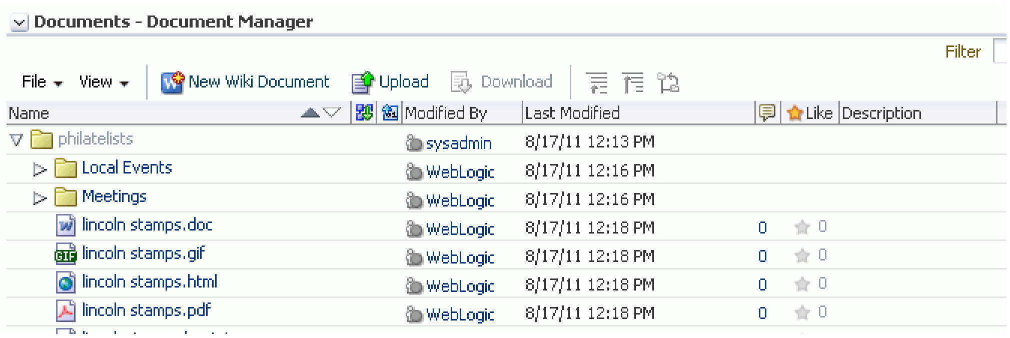


Figure 43–16 Document Manager Task Flow: Tree Table Layout



In the Document Manager task flow, you can:

- Click the expand and collapse icons for a folder to show and hide the contents in the folder within the folder hierarchy.
- Click a *folder* to display the contents of only that folder, and drill down further into subfolders.
- Click a *file* to display a preview of the file contents in the Document Viewer preview pane, with file management options, including in-place editing for some file types. If the file type does not support a preview (for example, `.mp3` music files, video files, or `.zip` files), the preview pane displays the file properties. See Section 43.1.7, "Understanding the Document Viewer Task Flow."
- Click in a *row* (not on the folder or file name) in the right pane to perform menu actions on the folder or file in that row (see Section 43.5.1, "Menus and Actions in the Documents Service Task Flows").

  Alternatively, right-click a folder or file to display a context menu of available actions (see Section 43.5.1.6, "Folder Context Menu" and Section 43.5.1.7, "File Context Menu").
- Drag and drop folders and files in the task flow hierarchy to reorganize the file or folder structure.

To add a Document Manager task flow to a page, refer to Section 43.4, "Adding a Documents Service Task Flow to a Page." In the default Resource Catalog, open **Content Management**, then click **Add** next to **Document Manager** to display the default listing of folders and files in the root folder of the active content repository connection.

Note: The Document Manager task flow is not shown under **Content Management** in the default Resource Catalog provided out-of-the-box with Spaces, so you will only see an entry for this task flow if it has been added to a custom Resource Catalog that has been made available to the page. However, if you navigate to a specific folder in the default Resource Catalog, this task flow is selectable from the **Add** menu for the folder (Figure 43–17).

For information about creating a custom Resource Catalog, see Chapter 16, "Working with Resource Catalogs", specifically Section 16.3.1.2, "Adding Resources" (in the Add Resource Catalog Item dialog, select **Task Flows**, then scroll to **Documents** for a list of all available content task flows).

43.1.3.1 Changing the Document Manager Task Flow Default Listing

You can change the default listing displayed in a Document Manager task flow in either of the following ways:

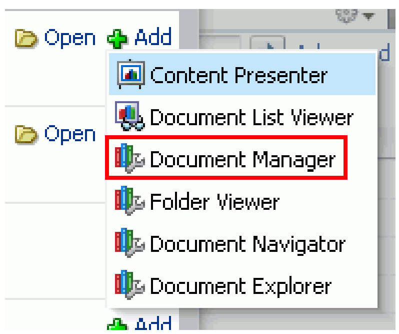
- Selecting a Specific Folder in the Resource Catalog
- Modifying Properties

Selecting a Specific Folder in the Resource Catalog

To change the default listing displayed in a Document Manager task flow by selecting a specific folder to display:

- Drill down to a target folder in the Resource Catalog, then click the corresponding **Add** link, and select **Document Manager** (Figure 43–17). For more information, see Section 43.3, "Adding a Selected Folder or File to a Page."

Figure 43–17 Add Menu for Folder



Modifying Properties

To change the default listing displayed in a Document Manager task flow by modifying the task flow properties:

1. Edit the page, and click the properties **Edit** icon (wrench) in the task flow chrome (Figure 43–18) to open the Component Properties dialog.

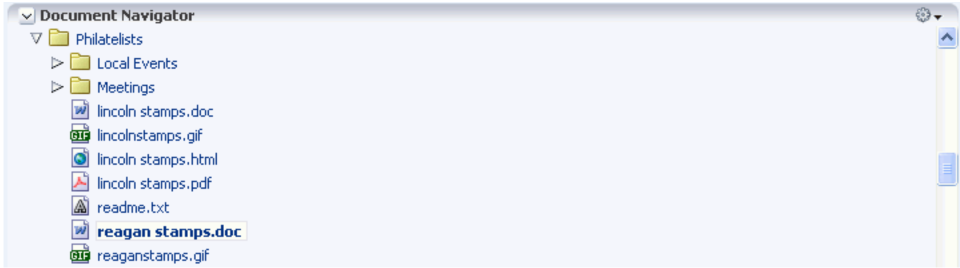
Figure 43–18 Edit Icon in Task Flow Chrome

2. To change the target folder, set the `Connection Name` and `Root Folder Path` properties on the **Parameters** tab (see Table 44–3, " Document Manager Task Flow Parameters").

43.1.4 Understanding the Document Navigator Task Flow

The Document Navigator task flow displays a nested hierarchy of folders and files in a single pane, with the capability to expand and collapse folders to view folder hierarchy within the current folder (Figure 43–19). There are no menu options available for this task flow. This task flow is intended for use as a component of another Documents service task flow (such as the Document Explorer task flow). Clicking folders and files in this task flow standalone performs no action. The size of this task flow is narrow to medium page width.

Figure 43–19 Document Navigator Task Flow



In the Document Navigator task flow, you can:

- Click the expand and collapse icons for a folder to show and hide the contents in the folder within the folder hierarchy.
- Drag and drop folders and files in the task flow hierarchy to reorganize the file or folder structure.

To add a Document Navigator task flow to a page, refer to Section 43.4, "Adding a Documents Service Task Flow to a Page." In the Resource Catalog, open **Content Management**, then click **Add** next to **Document Navigator** to display the default listing of folders in the root folder of the active content repository connection.

Note: The Document Navigator task flow is not shown under **Content Management** in the default Resource Catalog provided out-of-the-box with Spaces, so you will only see an entry for this task flow if it has been added to a custom Resource Catalog that has been made available to the page. However, if you navigate to a specific folder in the default Resource Catalog, this task flow is selectable from the **Add** menu for the folder (Figure 43–20).

For information about creating a custom Resource Catalog, see Chapter 16, "Working with Resource Catalogs,", specifically Section 16.3.1.2, "Adding Resources" (in the Add Resource Catalog Item dialog, select **Task Flows**, then scroll to **Documents** for a list of all available content task flows).

43.1.4.1 Changing the Document Navigator Task Flow Default Listing

You can change the default listing displayed in a Document Navigator task flow in either of the following ways:

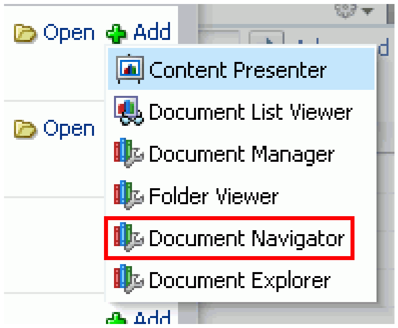
- Selecting a Specific Folder in the Resource Catalog
- Modifying Properties

Selecting a Specific Folder in the Resource Catalog

To change the default listing displayed in a Document Navigator task flow by selecting a specific folder to display:

- Drill down to a target folder in the Resource Catalog, then click the corresponding **Add** link, and select **Document Navigator** (Figure 43–20). For more information, see Section 43.3, "Adding a Selected Folder or File to a Page."

Figure 43–20 Add Menu for Folder



Modifying Properties

To change the default listing displayed in a Document Navigator task flow by modifying the task flow properties:

1. Edit the page, and click the properties **Edit** icon (wrench) in the task flow chrome (Figure 43–21) to open the Component Properties dialog.

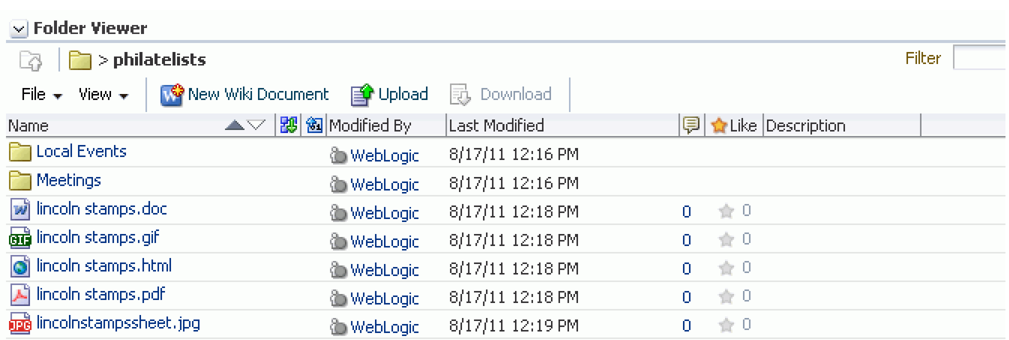
Figure 43–21 Edit Icon in Task Flow Chrome

2. To change the target folder, set the `Connection Name` and `Start Folder Path` properties on the **Parameters** tab (see Table 44–4, " Document Navigator Task Flow Parameters").

43.1.5 Understanding the Folder Viewer Task Flow

The Folder Viewer task flow displays the contents of a folder in a single pane as a flat listing (Figure 43–22), providing in-place preview and editing of the contents of the folder, and robust document management capabilities with a straightforward interface that should be familiar to Windows users. The size of this task flow is medium to full page width.

Figure 43–22 Folder Viewer Task Flow



In the Folder Viewer task flow, you can:

- Click a *folder* to display the contents of that folder, and drill down further into subfolders.

- Click a *file* to display a preview of the file contents in the Document Viewer preview pane, with file management options, including editing for some file types. If the file type does not support a preview (for example, `.mp3` music files, video files, or `.zip` files), the preview pane displays the file properties. See Section 43.1.7, "Understanding the Document Viewer Task Flow."
- Click in a *row* (not on the folder or file name) in the right pane to perform menu actions on the folder or file in that row (see Section 43.5.1, "Menus and Actions in the Documents Service Task Flows").

  Alternatively, right-click a folder or file to display a context menu of available actions (see Section 43.5.1.6, "Folder Context Menu" and Section 43.5.1.7, "File Context Menu").
- Drag and drop folders and files in the task flow hierarchy to reorganize the file or folder structure.

To add a Folder Viewer task flow to a page, refer to Section 43.4, "Adding a Documents Service Task Flow to a Page." In the default Resource Catalog, open **Content Management**, then click **Add** next to **Folder Viewer** to display the default listing of folders and files in the root folder of the active content repository connection.

43.1.5.1 Changing the Folder Viewer Task Flow Default Listing

You can change the default listing displayed in a Folder Viewer task flow in either of the following ways:

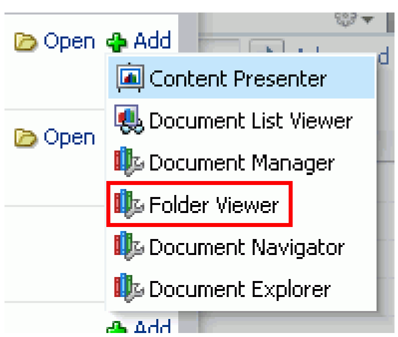
- Selecting a Specific Folder in the Resource Catalog
- Modifying Properties

Selecting a Specific Folder in the Resource Catalog

To change the default listing displayed in a Folder Viewer task flow by selecting a specific folder to display:

- Drill down to a target folder in the Resource Catalog, then click the corresponding **Add** link, and select **Folder Viewer** (Figure 43–23). For more information, see Section 43.3, "Adding a Selected Folder or File to a Page."

Figure 43–23 Add Menu for Folder



Modifying Properties

To change the default listing displayed in a Folder Viewer task flow by modifying the task flow properties:

1. Edit the page, and click the properties **Edit** icon (wrench) in the task flow chrome (Figure 43–24) to open the Component Properties dialog.

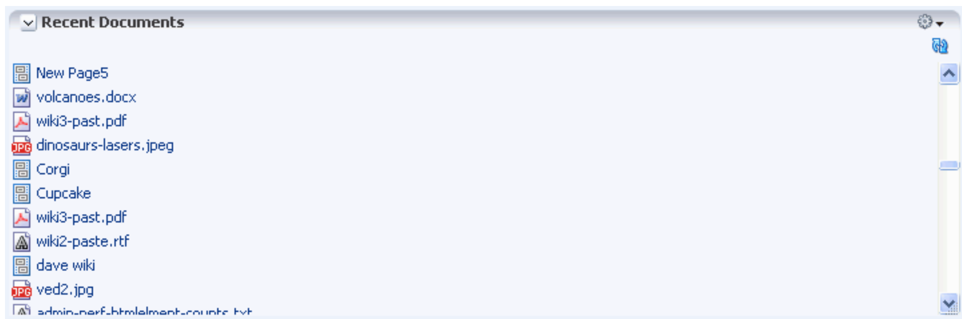
Figure 43–24 Edit Icon in Task Flow Chrome

2. To change the target folder, set the `Connection Name` and `Start Folder Path` properties on the **Parameters** tab (see Table 44–5, " Folder Viewer Task Flow Parameters").

43.1.6 Understanding the Recent Documents Task Flow

The Recent Documents task flow displays a listing of the files most recently created or modified by the current user (Figure 43–25).

Figure 43–25 Recent Documents Task Flow



In the Recent Documents task flow, you can:

- Click a *file* to display a preview of the file contents in a separate Document Viewer preview window, with file management options, including editing for some file types. If the file type does not support a preview (for example, `.mp3` music files, video files, or `.zip` files), the preview window displays the file properties. See Section 43.1.7, "Understanding the Document Viewer Task Flow."

To add a Recent Documents task flow to a page, refer to Section 43.4, "Adding a Documents Service Task Flow to a Page." In the default Resource Catalog, open **Content Management**, then click **Add** next to **Recent Documents** to display the most recently created or modified files in the current space.

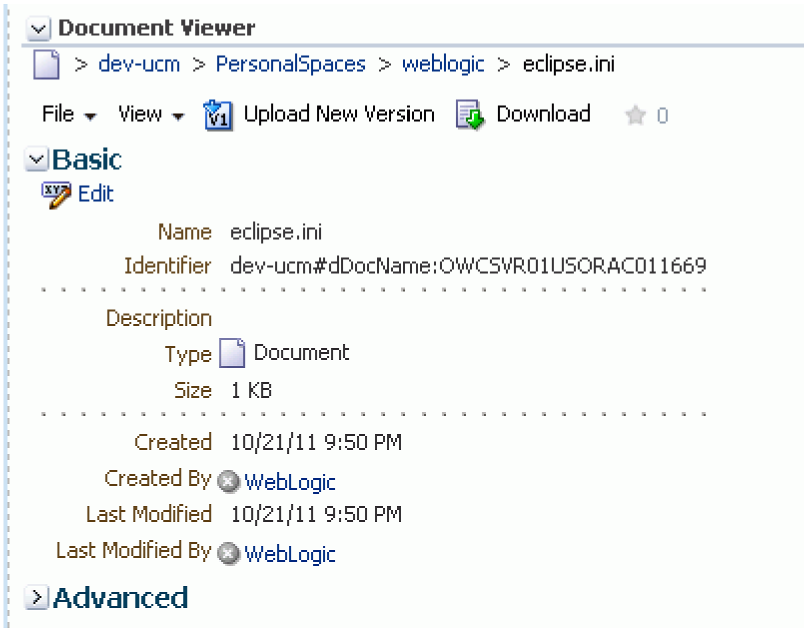
The default property settings add a listing of the most recently created or modified files in the entire root folder of the active content repository connection to the page. See Section 44.7, "Setting Recent Documents Task Flow Properties" to modify the property settings for the Recent Documents task flow.

43.1.7 Understanding the Document Viewer Task Flow

The Document Viewer task flow can display:

- Folder properties and settings. To show folder information in a Document Viewer task flow, you can set the task flow's `Item ID` property to the ID of the target folder. See Section 44.8, "Setting Document Viewer Task Flow Properties."
- For files that do not support a preview (for example, `.mp3` music files, video files, or `.zip` files), the file's properties (Figure 43–26).

Figure 43–26 Document Viewer: File Properties in Preview Pane



- For file types that support a preview, a preview of the file's content. Under the preview, the Document Viewer includes the following tabbed panes:
  - **Comments**: Enter or delete comments for a file to provide additional information that you want to convey to other users about the file. See Section 43.19, "Viewing, Entering, and Deleting Comments on a File."
  - **Tags**: Specifies keywords related to the content of the file. Tags are useful for making a file more widely discoverable in search results. See Section 43.20, "Working with Tags."
  - **History**: Provides version information about the current file, and allows you to selectively delete versions. For more information, see Section 43.21, "Viewing and Deleting File Version History."
  - **Info**: Provides the option to edit some properties such a file name and description. In the Advanced section, displays metadata property settings for the file. See Section 43.22, "Viewing and Modifying Folder and File Properties."
  - **Links**: Provides a way to view, access, and associate related information by linking a file to a discussion, document, event, note, or URL. For example, you can create a link to associate a project plan document with a list of project issues. See Section 43.24, "Working with Links."
  - **Recommendations**: Provides suggestions of other documents you might want to view, based on the current document. This list uses the Similar Items task flow of the Activity Graph service, which must be configured to display this pane. See Section 43.25, "Working with Recommendations."

For file types that support content preview, the Document Viewer task flow includes selections unique to the file type:

- A preview of a Microsoft Office document includes an **Edit with *`Application`*** action to open the file in-place in its Microsoft Office application (Figure 43–27).

- A preview of an image includes only the selections available to all file types: **File** menu, **View** menu, **Upload New Version** action, and **Download** action (Figure 43–28).
- A preview of an HTML file or a wiki document includes an **Edit** action to open the HTML file or wiki document in the Rich Text Editor (RTE) (Figure 43–29).
- A preview of an Oracle Site Studio file includes a **Select Template** menu for choosing a Site Studio region display template or a custom Content Presenter display template to preview how the Site Studio file will look in the selected template (Figure 43–30).

Note: The Document Viewer task flow is intended to provide only a preview of Site Studio content based on a selected template. To publish the content on a page, use the Content Presenter task flow. See Chapter 42, "Publishing Content Using Content Presenter."

Figure 43–27 Document Viewer Task Flow for Microsoft Office Word Document

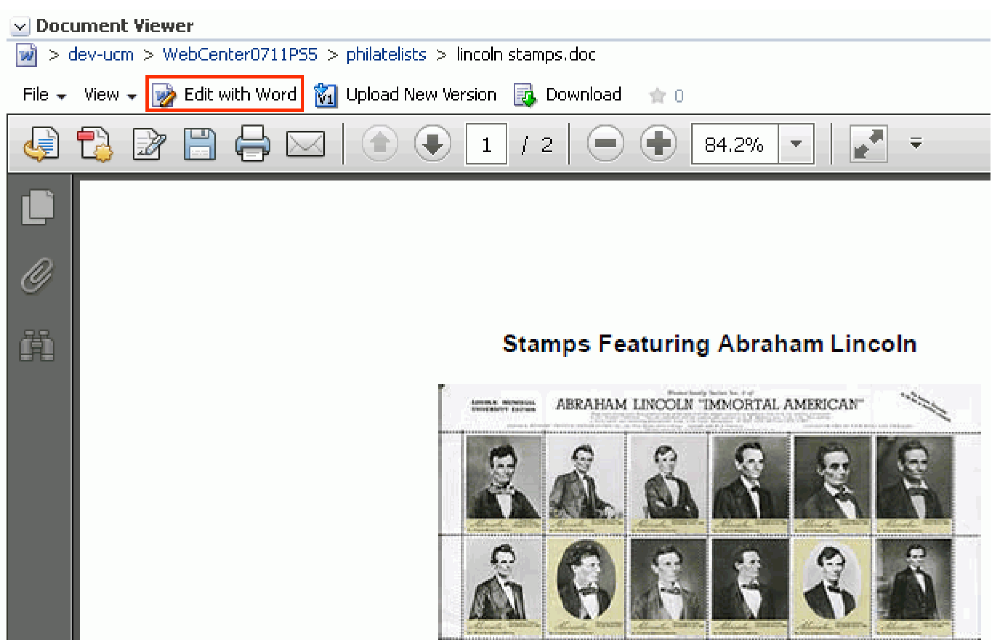


Figure 43–28 Document Viewer Task Flow for Image File

Figure 43–29 Document Viewer Task Flow for HTML Document

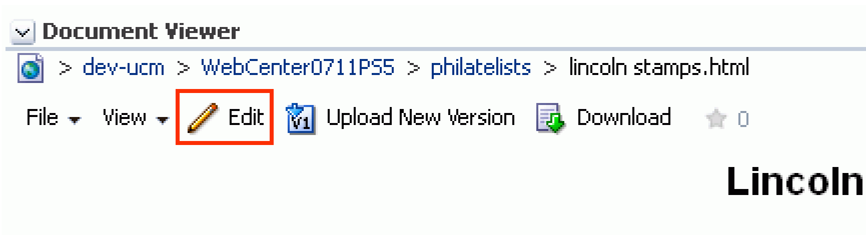
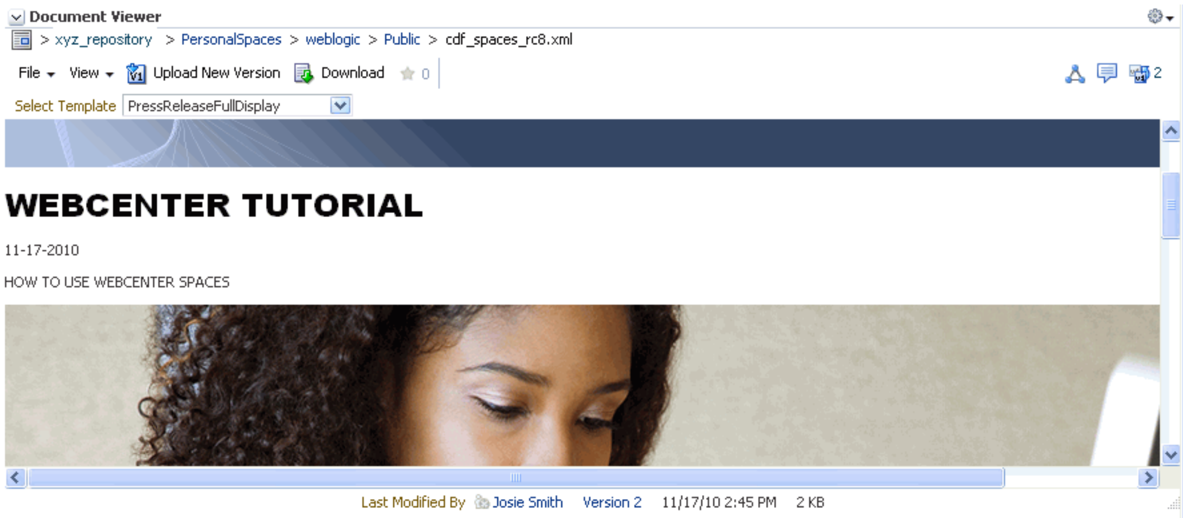


Figure 43–30 Document Viewer Task Flow for Site Studio File



To add a Document Viewer task flow to a page, refer to Section 43.3, "Adding a Selected Folder or File to a Page." In the default Resource Catalog, open **Content Management**, navigate to the folder or file that you want to add to the page, then click the **Add** link next to the folder or file, and select **Document Viewer**.

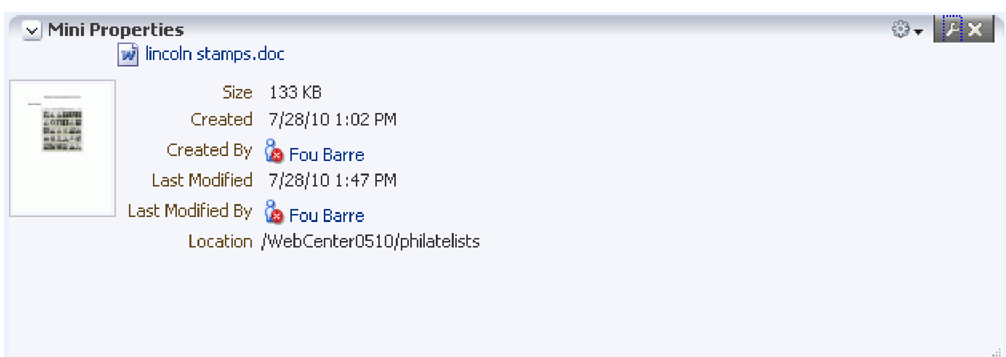
For information about setting properties on the Document Viewer task flow, see Section 44.8, "Setting Document Viewer Task Flow Properties."

43.1.8 Understanding the Document Mini Properties Task Flow

The Document Mini Properties task flow can display:

- Folder properties and settings. To show folder information in a Document Mini Properties task flow, you can set the task flow's `Resource ID` property to the ID of the target folder. See Section 44.9, "Setting Document Mini Properties Task Flow Properties."
- The Basic properties of an individual file in a read-only view (Figure 43–31). This choice is available for all file types.

Figure 43–31 Mini Properties Task Flow for File



To add a Document Mini Properties task flow to a page, refer to Section 43.3, "Adding a Selected Folder or File to a Page." In the default Resource Catalog, open **Content Management**, navigate to the folder or file that you want to add to the page, then click the **Add** link next to the folder or file, and select **Mini Properties**.

For information about setting properties on the Mini Properties task flow, see Section 44.9, "Setting Document Mini Properties Task Flow Properties."

43.1.9 Understanding the Document Properties Task Flow

The Document Properties task flow can display:

- Folder properties and settings. To show folder information in a Document Properties task flow, you can set the task flow's `Item ID` property to the ID of the target folder. See Section 44.10, "Setting Document Properties Task Flow Properties."
- Both Basic and Advanced properties of an individual file, along with an **Edit** button to allow you to modify property values (Figure 43–32). This choice is available for all file types. See Section 43.22, "Viewing and Modifying Folder and File Properties."

Figure 43–32 Document Properties Task Flow for File

To add a Document Properties task flow to a page, refer to Section 43.3, "Adding a Selected Folder or File to a Page." In the default Resource Catalog, open **Content Management**, navigate to the folder or file that you want to add to the page, then click the **Add** link next to the folder or file, and select **Document Properties**.

For information about setting properties on the Document Properties task flow, see Section 44.10, "Setting Document Properties Task Flow Properties."

43.1.10 Understanding the Document Version History Task Flow

The Document Version History task flow displays a list of versions of an individual file, allowing for deletion of a selected version (Figure 43–33 and Figure 43–34). This choice is available for all file types. See Section 43.21, "Viewing and Deleting File Version History."

Figure 43–33 Version History Task Flow for File: vertical layout (Horizontal Layout property deselected (default))

Figure 43–34 Version History Task Flow for File: Horizontal Layout property selected

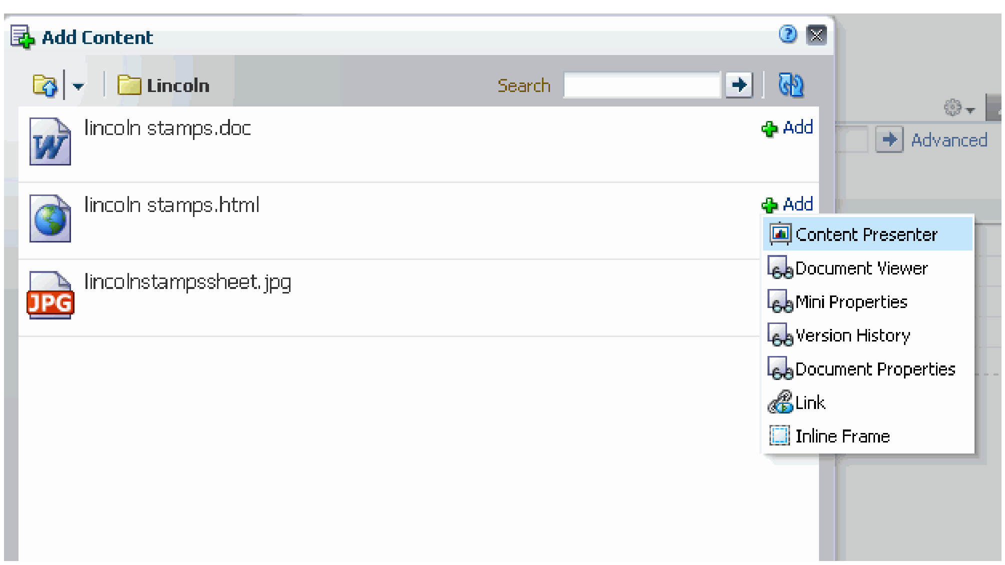
To add a Document Version History task flow to a page, refer to Section 43.3, "Adding a Selected Folder or File to a Page." In the default Resource Catalog, open **Content Management**, navigate to the file that you want to add to the page, then click the **Add** link next to the file, and select **Version History**.

You can set the `Horizontal Layout` property of the task flow to specify whether you want the version history information to format vertically (Figure 43–33) or horizontally (Figure 43–34). For information about setting properties on the Document Version History task flow, see Section 44.11, "Setting Document Version History Task Flow Properties."

43.2 What You Should Know About Document Components

The Documents service provides features for adding document components to a page in a Spaces application. As described in Section 43.3, "Adding a Selected Folder or File to a Page", you use the Resource Catalog to add a document component to a page as a container for a selected folder or file (Figure 43–35).

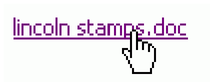
Figure 43–35 Add Menu for HTML File in Resource Catalog



Document components enable you to display an individual file on a page in a variety of ways, depending on the file type:

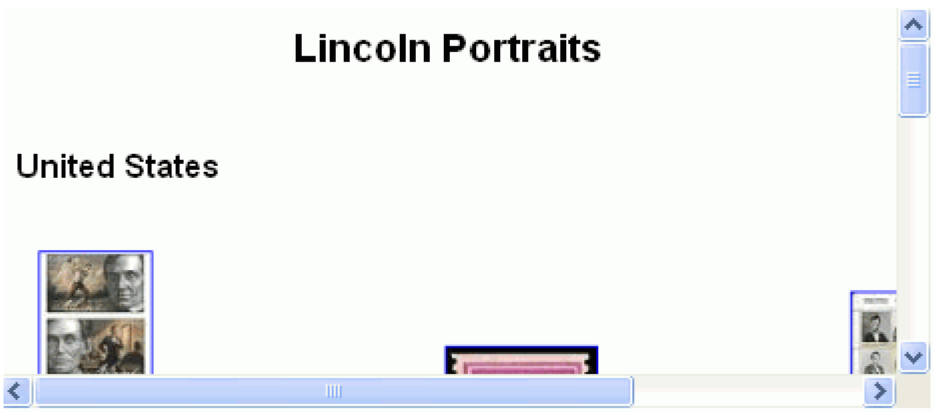
- A document **Link** displays the name of a selected file as a link, which end users can click to display the file content in its native application (Figure 43–36).

Figure 43–36 Link Component (for Microsoft Word file)



- A document **Inline Frame** displays the content of a selected file as a preview (Figure 43–37).

Figure 43–37 Inline Frame Component (for HTML file)



- A document **Image** displays a selected file as an image (Figure 43–38).

Figure 43–38 Image Component (for JPEG file)

Table 43–3 shows the content types that support each of these document components.

Table 43–3 Components for Folders and Files

Content Type	Document Components
Documents of various types (XML, PDF, JAVA, TXT, DOC, XLS, HTM)	Link
Documents that can be rendered in a browser (HTML, flash, PDF and image)	Inline frame

Table 43–3 (Cont.) Components for Folders and Files

Content Type	Document Components
Images (PNG, JPG, GIF)	Link Inline Frame Image

To display a folder or file using one of these document components, see Section 43.3, "Adding a Selected Folder or File to a Page."

43.3 Adding a Selected Folder or File to a Page

You can display an individual folder or file from a connected content repository on a page, by choosing the required container for the selected folder or file in the Resource Catalog, as shown in Figure 43–39 and Figure 43–40.

Note: When you add a folder or file from Content Server to a page in a Spaces application, it can be viewed and managed from within Spaces. However, any folder shortcuts created in Content Server cannot be viewed and managed from within Spaces.

Figure 43–39 Add Menu for Folder in Resource Catalog

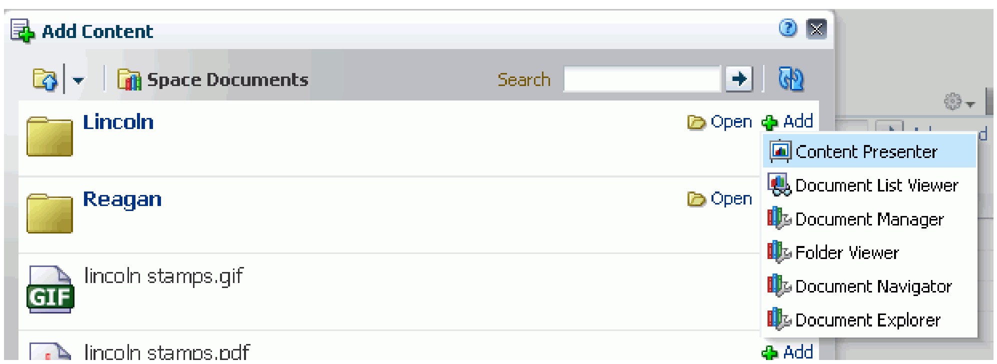


Figure 43–40 Add Menu for Image File in Resource Catalog

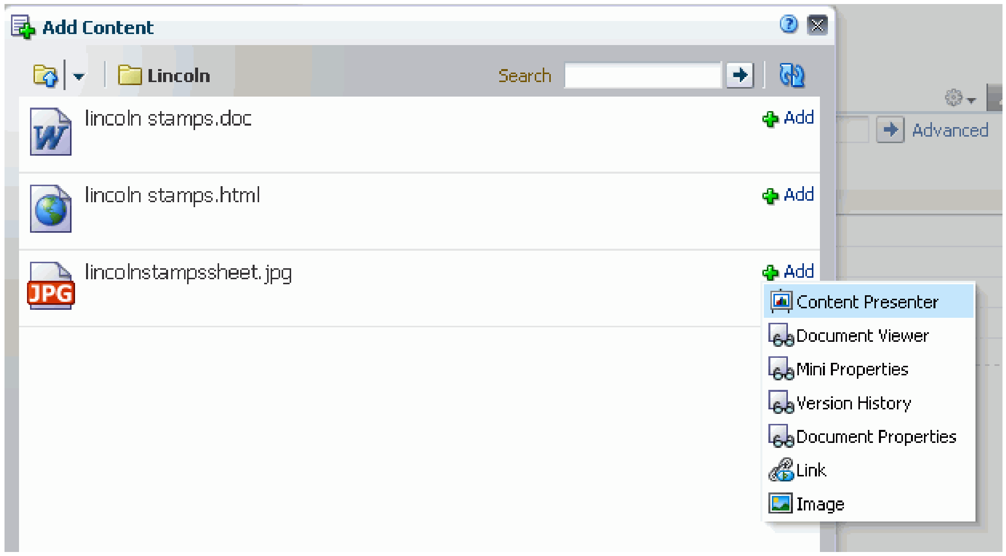


Table 43–4 lists all containers available for displaying folders and files on a portal page.

Table 43–4 Adding Individual Folders and Files to a Page

For Folders	For Individual Files
■ Content Presenter task flow	■ Content Presenter task flow
■ Document Explorer task flow	■ Document Viewer task flow
■ Document List Viewer task flow	■ Document Mini Properties task flow
■ Document Manager task flow	■ Document Properties task flow
■ Document Navigator task flow	■ Document Version History task flow
■ Folder Viewer task flow	■ Document Link component
■ Document Viewer task flow[1]	■ Document Inline Frame component
■ Document Mini Properties task flow[1]	■ Document Image component
■ Document Properties task flow[1]	

[1] To show folder information in a Document Viewer, Document Mini Properties, or Document Properties task flow, you can set the task flow's `resource ID` parameter to the ID of the target folder. See Chapter 44, "Setting Documents Service Task Flow and Document Component Properties."

For more information about any of the containers listed inTable 43–4, see Section 42.1, "What You Should Know About the Content Presenter Task Flow," Section 43.1, "What You Should Know About the Documents Service Task Flows," and Section 43.2, "What You Should Know About Document Components."

Note: Another way of adding folders and files to a page is through a custom navigation model added to a page. Spaces application designers can build custom navigation models, which can be added to the page templates for a space to allow end users to navigate the documents in the space. For more information, see Section 12.2.2.1.1, "Adding a Document to a Navigation Model."

Note: When an item that is stored in a content repository is added to a page, the Spaces application instructs the browser to check whether the content is up-to-date before a cached copy, if available, displays in the browser. The default content validation process supports collaboration use cases that require real-time content exchange.

For static content or content that does not change frequently, content validation checks incur an unnecessary performance overhead. For static content, Oracle recommends the following:

- **Content Server**: use Content Presenter to display static content stored in Content Server. Content Presenter shows the latest released version of content; and provides controls to preview unreleased content that is in workflow.
- **Other content repositories**, such as SharePoint: ask your administrator to override the default content cache setting by editing the Web Tier `mod_wl_ohs` configuration file (`mod_wl_ohs.conf`). This is fully explained in "Setting the Cache-Control Response Header" in the white paper "Integrating the SharePoint 2007 Adapter with Spaces" available from Oracle Technology Network at `http://www.oracle.com/technetwork/middleware/webcenter/overview/index.html`.

To add a selected folder or file to a page in a Spaces application:

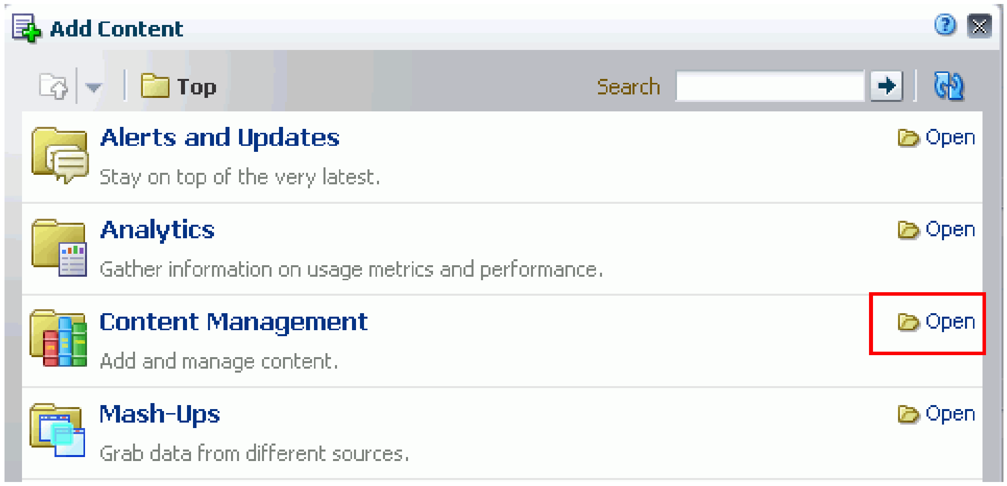
1. Go to the page where you want to add a folder or file, and open the page in edit mode.

   See Also: For more information, see Section 18.1, "Entering and Exiting Composer."

2. Click **Add Content** in the target region to open the Resource Catalog.
3. Navigate to the section of the Resource Catalog that provides access to the folders and files in the connected content repository.

   Tip: The presence or location of this section depends on how the Resource Catalog is configured. For example, in the default Resource Catalog, next to **Content Management**, click **Open** to expose the content selections (Figure 43–41).

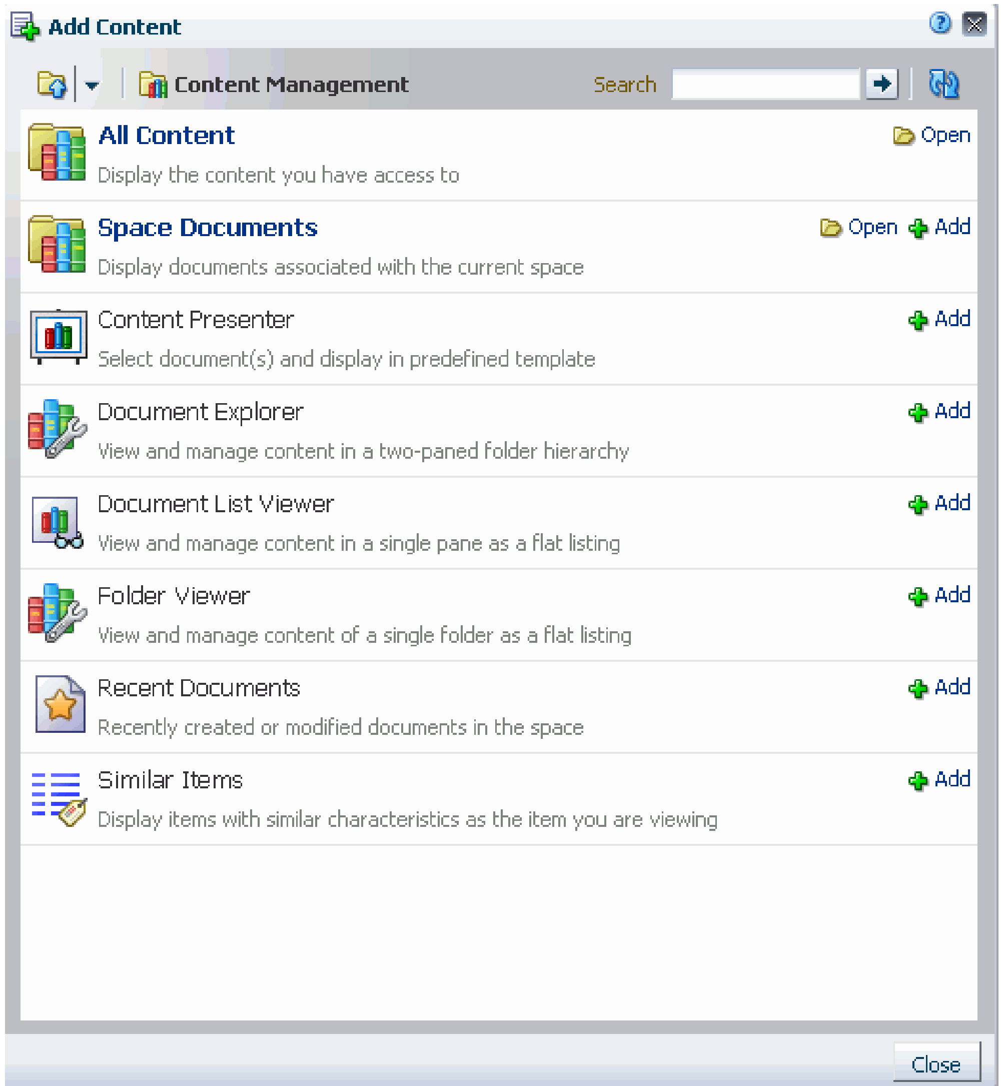
Figure 43–41 Opening the Content Management Section in the Resource Catalog



4. The next link you click depends on your current location in the application. If you are using the default Resource Catalog (Figure 43–42):

- Click **All Content** to display all folders and files to which you have access.
- In a space, click **Space Documents**, which provides a shortcut to a list of all of the folders and files to which you have access in the current space. This selection is shown only if the Documents service is enabled in the space (see Section 53.10, "Managing Space Services").
- In the Home space, click **Personal Documents**, which provides a shortcut to a list of all the folders and files to which you have access in the Home space.

Figure 43–42 Content Selections in a Space



5. Continue to drill down into folders until you arrive at the folder or file that you want to add to the page, then click the **Add** link next to the folder or file to display a menu of available containers for the folder or file, applicable to the file type (Figure 43–43, Figure 43–44, Figure 43–45, and Figure 43–46).

> **Note:** When you drill down to the folders and files in the connected content repository, you are drilling into the live connection with the content repository. The documents you see listed are not static resources, but reflect the latest status of folders and files in the content repository associated with your Spaces application.

Figure 43–43 Add Menu for Folder in Resource Catalog

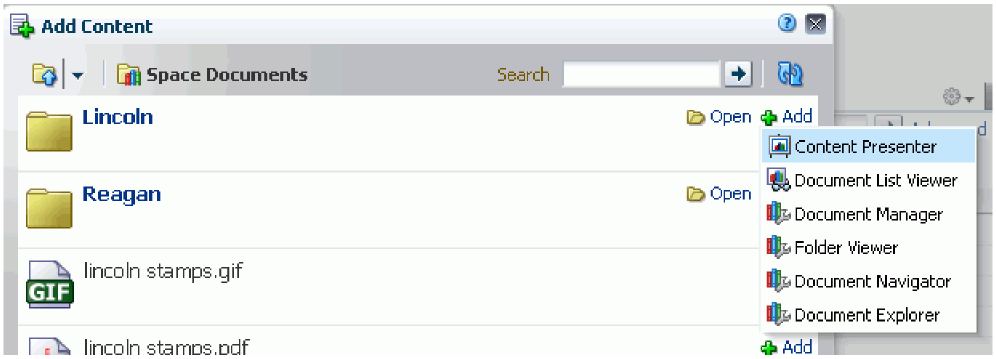


Figure 43–44 Add Menu for Microsoft Word File in Resource Catalog

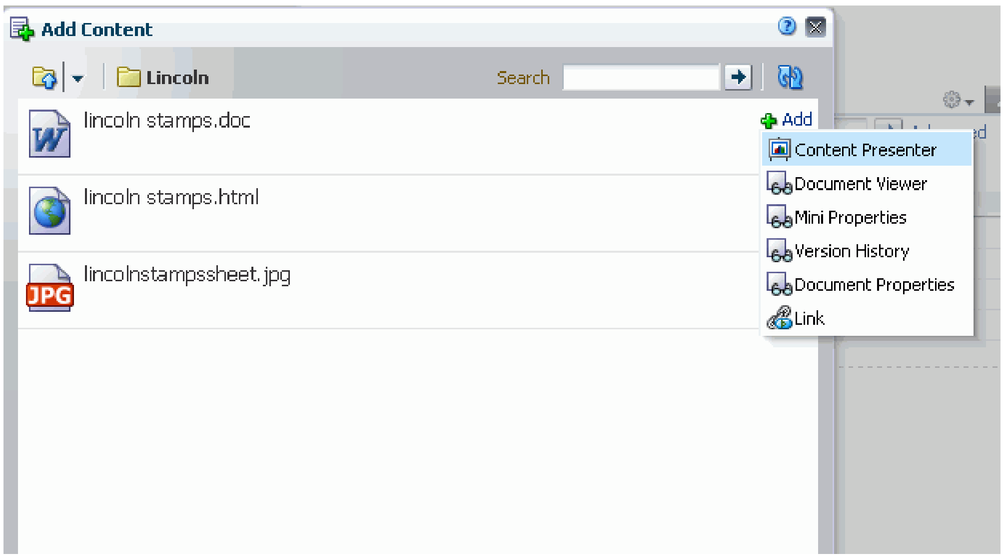


Figure 43–45 Add Menu for HTML File in Resource Catalog

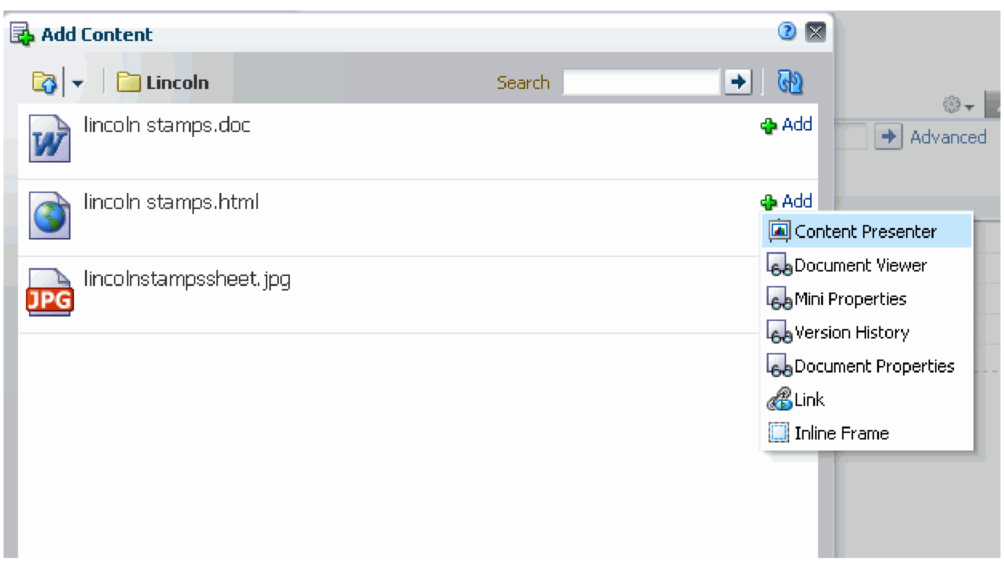
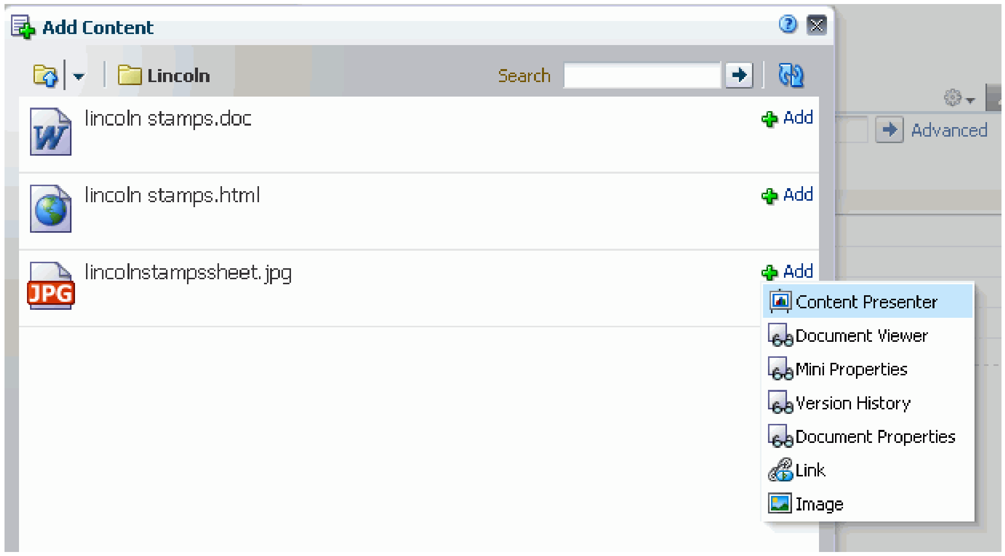


Figure 43–46 Add Menu for Image File in Resource Catalog



6. Select the content task flow or document component that you wish to use. The menu displays only those containers that support the selected folder or file.

> **Note:** The Content Presenter task flow is available only when the connected content repository is Content Server. When you select the Content Presenter task flow, the folder or file displays in a default display template for its type. For more information, see Chapter 42, "Publishing Content Using Content Presenter."

7. Click **Save**, then **Close**.

43.4 Adding a Documents Service Task Flow to a Page

See Section 43.1, "What You Should Know About the Documents Service Task Flows" to help you select the task flow most appropriate for your needs.

If you want to add and manage a specific folder or file in a Documents service task flow, refer to Section 43.3, "Adding a Selected Folder or File to a Page." This section describes how to select and add a Documents service task flow independent of a specific folder or file. The task flow is autopopulated with the folders and files in the connected content repository.

To add a Documents service task flow to a page in a Spaces application:

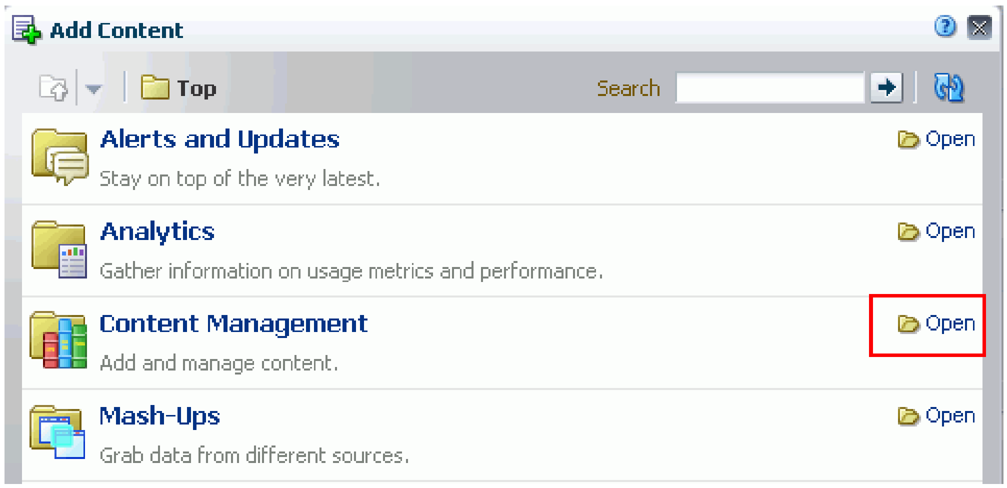
1. Open the page in edit mode.

   See Also: For more information, see Section 18.1, "Entering and Exiting Composer."

2. Click **Add Content** in the target region to open the Resource Catalog.
3. Navigate to the section of the Resource Catalog that provides access to the folders and files in the connected content repository.

> **Tip:** The presence or location of this section depends on how the Resource Catalog is configured. For example, in the default Resource Catalog, next to **Content Management**, click **Open** to expose the content selections (Figure 43–47).

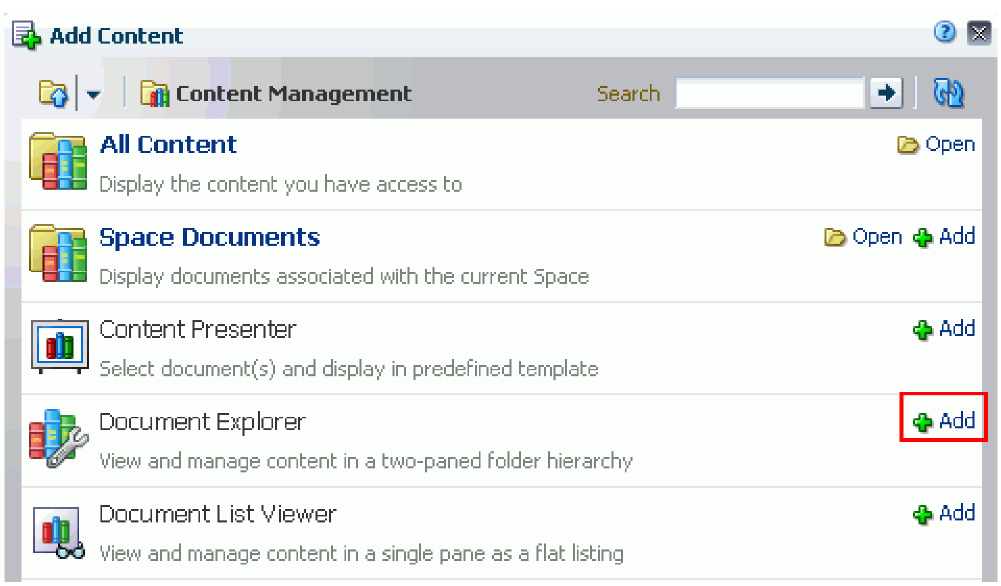
Figure 43–47 Opening the Content Management Section in the Resource Catalog



For information about the selections shown in the default Resource Catalog, see Section 41.2, "What You Should Know About Content Management Selections in the Resource Catalog."

4. Click **Add** next to the task flow that you want to add to your page (Figure 43–48).

Figure 43–48 Adding a Content Task Flow



Note: The Document Manager and Document Navigator task flows are not shown under **Content Management** in the default Resource Catalog provided out-of-the-box with Spaces, so you will only see entries for these task flows if they have been added to a custom Resource Catalog that has been made available to the page. However, if you navigate to a specific folder in the default Resource Catalog, these task flows are selectable from the **Add** menu for the folder (see Section 43.3, "Adding a Selected Folder or File to a Page").

For information about creating a custom Resource Catalog, see Chapter 16, "Working with Resource Catalogs", specifically Section 16.3.1.2, "Adding Resources" (in the Add Resource Catalog Item dialog, select **Task Flows**, then scroll to **Documents** for a list of all available content task flows).

In a space, if the Documents service is enabled (see Section 53.10, "Managing Space Services"), the selected task flow will by default display folders and files based on the primary content repository connection, or you can display only documents belonging to the space. If the Documents service is *not* enabled in a space, folders and files will not display in the task flow unless you edit the default task flow properties to specify a content repository (see Chapter 44, "Setting Documents Service Task Flow and Document Component Properties").

Use the menus and actions available in the Documents service task flow you have added to work with folders and files in the connected content repository, as described in Section 43.5, "Understanding the Documents Service Task Flow Menus and Actions."

43.5 Understanding the Documents Service Task Flow Menus and Actions

The Documents service task flows that offer content management functionality are Document Explorer, Folder Viewer, Document Manager, and the Document Viewer preview pane. The menus and actions for working with folders and files in these task flows are summarized in the tables below:

- Table 43–5, " Documents Service Task Flow Menus and Actions for Folders and Files"
- Table 43–6, " Document Viewer Preview Pane Menus and Actions for Folders and Files"

More detail is provided in the following sections:

- Section 43.5.1, "Menus and Actions in the Documents Service Task Flows"
- Section 43.5.2, "Menus and Actions in the Document Viewer Preview Pane or Window"

Table 43–5 Documents Service Task Flow Menus and Actions for Folders and Files

Menu	Actions	In Document Explorer, Folder Viewer, and Document Manager, applicable to:
File Menu	Edit[1]	file
	Upload New Version[2]	file
	Check Out[3]	file
	Cancel Check Out[4]	file
	New Folder	folder
	Rename	folder or file
	Cut	folder or file
	Copy	folder or file
	Paste	folder or file
	Delete	folder or file
	Share	file
	Security[5]	folder or file
View Menu	Details	folder or file
	Get a Link	folder or file
	Containing Folder Info	folder or file
	Refresh Content	folder or file
	Hide Folders	folder or file
	Columns submenu	folder or file
	Reorder Columns	folder or file
	New Wiki Document Action	file
	Upload Action	file
	Download Action	file

1 Folder/file listing pane: In-place editing available for wiki documents, blog posts, HTML, and Microsoft Office (Word, Excel, PowerPoint) files only. Wiki documents and HTML files open in RTE; Office files open in their corresponding application.

2 Upload New Version not available for wiki documents.

3 Check Out not available for wiki documents.

4 Cancel Check Out not available for wiki documents.

5 Security available only if the Spaces administrator has configured item-level security between Content Server and Spaces.

The *Document Viewer preview pane* opens when you:

- Right-click a *folder* and select **Details** from the folder context menu (Figure 43–54) to display the details of that folder.
- Click a *file* to display a preview of file contents. This allows for file previewing and editing for some file types. If the file type does not support a preview (for example, `.mp3` music files, video files, or `.zip` files), the Document Viewer preview pane displays details about the file. See Section 43.1.7, "Understanding the Document Viewer Task Flow."

Table 43–6 summarizes the folder and file management options in the Document Viewer preview pane.

Table 43–6 Document Viewer Preview Pane Menus and Actions for Folders and Files

Menu	Actions	In Document Explorer, Folder Viewer, and Document Manager, applicable to:
File Menu in Document Viewer	Send Mail	folder or file
	Subscribe	file
	Share	file
	Add To Favorites	folder or file
	Check Out[1]	file
	Worklow Settings [2]	folder
	Security[3]	folder or file
View Menu in Document Viewer	Open in Browser[4]	file
	Open as PDF[5]	file
	Download PDF[6]	file
	Comments	file
	Version History	file
	Properties	file
	Get a Link	folder or file
	Refresh Content	folder or file
	Edit Action[7]	file
	Upload New Version Action[8]	file
	Download Action	file

1 Check Out not available for wiki documents.

2 Workflow Settings available only when content repository is Content Server and the Spaces administrator has completed the prerequisite configuration

3 Security available only if the Spaces administrator has configured item-level security between Content Server and Spaces.

4 Open in Browser available for image, text, and HTML files only.

5 Open as PDF available for any file type for which Content Server is configured to convert to PDF.

6 Download PDF available any file type for which Content Server is configured to convert to PDF.

7 Edit or Edit with *Application* action available for wiki documents, blog posts, HTML, and Microsoft Office (Word, Excel, PowerPoint) files only.

8 Upload New Version not available for wiki documents.

43.5.1 Menus and Actions in the Documents Service Task Flows

The following sections describe the purpose of the menus and actions listed in Table 43–5 when viewing a listing of folders and/or files in a Documents service task flow:

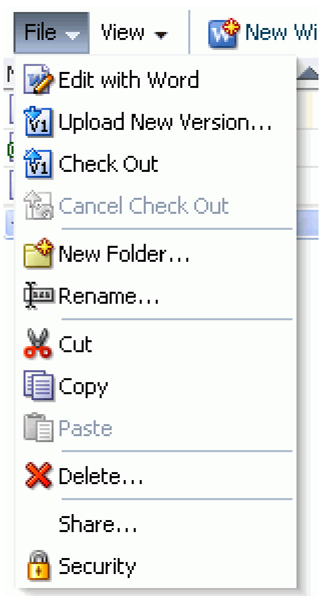
- Section 43.5.1.1, "File Menu"
- Section 43.5.1.2, "View Menu"
- Section 43.5.1.3, "New Wiki Document Action"

- Section 43.5.1.4, "Upload Action"
- Section 43.5.1.5, "Download Action"
- Section 43.5.1.6, "Folder Context Menu"
- Section 43.5.1.7, "File Context Menu"

43.5.1.1 File Menu

The **File** menu is available in the Document Manager, Document Explorer, and Folder Viewer task flows for folders and files. The actions available on the **File** menu (Figure 43–49) are:

Figure 43–49 File Menu



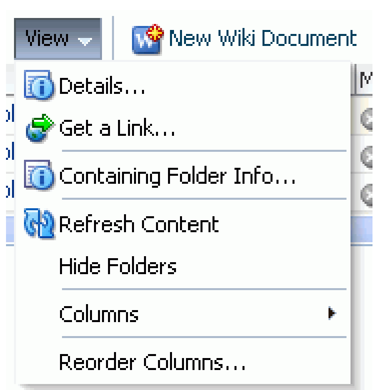
- **Edit** or **Edit with *Application***: Active for wiki documents, HTML, and Microsoft Office (Word, Excel, and PowerPoint) files only. For a selected file, opens the file in-place in the application that corresponds to the file type and automatically checks the file out. See Section 43.12.4, "Editing Files In-Place."
- **Upload New Version**: Inactive for folders and wiki documents. If you have write permissions on a selected file, opens the Upload Document pane where you can specify a new version of the file to upload to replace the existing file. See Section 43.12.5, "Uploading a New Version of an Existing File."
- **Check Out**: Inactive for folders and wiki documents. For a selected file, checks the file out, locking it for update by other users. See Section 43.12.1, "Checking a File Out."
- **Cancel Check Out**: Inactive for folders and wiki documents. For a selected file, cancels the checked out status without updating it, unlocking it to allowing other users to update it. See Section 43.12.1, "Checking a File Out."
- **New Folder**: Opens the Create Folder dialog where you can specify a name for a new folder. The location of the new folder is dependent on the Documents service task flow used, and the current selection. See Section 43.7, "Creating a Folder."
- **Rename**: Opens the Rename dialog where you can rename the selected folder or file. See Section 43.13, "Renaming a Folder or File."

- **Cut**: Stores the path to the selected folder(s) or file(s) to paste elsewhere. If a folder or file is not subsequently pasted, it is restored to the location where it was cut. If a folder or file is deleted at the source location before pasting, it will not be moved to the paste location. See Section 43.15, "Moving Folders and Files."
- **Copy**: Stores the path to the selected folder or file to paste as a copy elsewhere. If a folder or file is deleted at the source location before pasting, it will not be copied to the paste location. See Section 43.14, "Copying and Pasting Folders and Files."
- **Paste**: Pastes the folder or file in the buffer to the current folder. See Section 43.14, "Copying and Pasting Folders and Files."
- **Delete**: Deletes the selected folder or file. See Section 43.16, "Deleting Folders and Files."
- **Share**: Opens a dialog where you specify the users, groups, or select a space where the URL for the selected file will be published in activity streams, along with a message. See Section 43.27.3, "Publishing the URL for a File to Activity Streams."
- **Security**: Available only if the Spaces administrator has configured item-level security between Content Server and Spaces. Opens the Security Settings dialog, where you can set custom access permissions for the selected file, or select to inherit the permissions of the parent folder. For more information, see Section 43.23, "Setting Security Options on a Folder or File."

43.5.1.2 View Menu

The **View** menu is available in the Document Manager, Document Explorer, and Folder Viewer task flows, as well as the Document List Viewer task flow, for folders and files. The actions available on the **View** menu (Figure 43–50) are:

Figure 43–50 View Menu



- **Details**: For a folder, opens a Properties pane (see Section 43.22, "Viewing and Modifying Folder and File Properties"). For a file, opens a preview of an individual file's content or properties. Previewing the content of a file is available for all file types that support a preview. For files that do not support a preview, such as audio or video files, the preview displays the file properties. Under the preview, the Document Viewer includes the following tabbed panes:
  - **Comments**: Enter or delete comments for a file to provide additional information that you want to convey to other users about the file. See Section 43.19, "Viewing, Entering, and Deleting Comments on a File."

- **Tags**: Specifies keywords related to the content of the file. Tags are useful for making a file more widely discoverable in search results. See Section 43.20, "Working with Tags."
- **History**: Provides version information about the current file, and allows you to selectively delete versions. For more information, see Section 43.21, "Viewing and Deleting File Version History."
- **Info**: Provides the option to edit some properties such a file name and description. In the Advanced section, displays metadata property settings for the file. See Section 43.22, "Viewing and Modifying Folder and File Properties."
- **Links**: Provides a way to view, access, and associate related information by linking a file to a discussion, document, event, note, or URL. For example, you can create a link to associate a project plan document with a list of project issues. See Section 43.24, "Working with Links."
- **Recommendations**: Provides suggestions of other documents you might want to view, based on the current document. This list uses the Similar Items task flow of the Activity Graph service, which must be configured to display this pane. See Section 43.25, "Working with Recommendations."

By default, the **Comments** pane displays as the active pane. If you have previously launched the Document Viewer to preview a file in the current session, then select another file to preview, the active pane in the Document Viewer is the pane that you last selected when previewing the prior file.

- **Get a Link**: Opens the Get a Link dialog, where **Direct URL** provides a direct link to open the folder or file in Spaces or a WebCenter Portal: Framework application. For files, the **Download URL** provides a direct link to allow users to open the file in its default application, or choose to save the file to their local file system. See Section 43.27, "Sharing the URL for a Folder or File."
- **Containing Folder Info**: Opens the Properties pane of the parent folder of the current folder or file. See Section 43.22, "Viewing and Modifying Folder and File Properties."
- **Refresh Content**: Retrieves the contents of the current folder from the content repository to reflect all changes since the last retrieval. See Section 43.17, "Refreshing Folder Contents."
- **Hide Folders**: Refreshes the listing to show only files in the current folder, or show folders if this action is currently active. See Section 43.18, "Hiding and Showing Folders."
- **Columns**: Provides a submenu to select the columns that you want to display in the task flow. See Section 43.6.1, "Hiding and Showing Columns."
- **Reorder Columns**: Opens the Reorder Columns dialog where you can organize the displayed columns into a different order. See Section 43.6.2, "Reordering Columns."

43.5.1.3 New Wiki Document Action

The **New Wiki Document** action is available in the Document Manager, Document Explorer, Document Viewer, and Folder Viewer task flows (Figure 43–51).

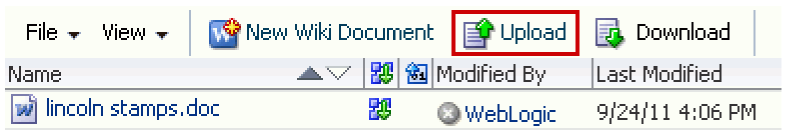
Figure 43–51 New Wiki Document Action

You can click this action to open the Rich Text Editor where you can define a new wiki document, created at the same level as the currently selected file, or in the current folder. See Section 43.8.2, "Creating a Wiki Document."

43.5.1.4 Upload Action

The **Upload** action is available in the Document Manager, Document Explorer, and Folder Viewer task flows (Figure 43–52).

Figure 43–52 Upload Action



You can click this action to upload files from your local file system or a network drive. See Section 43.8.1, "Uploading Files."

43.5.1.5 Download Action

The **Download** action is available in the Document Manager, Document Explorer, and Folder Viewer task flows (Figure 43–53).

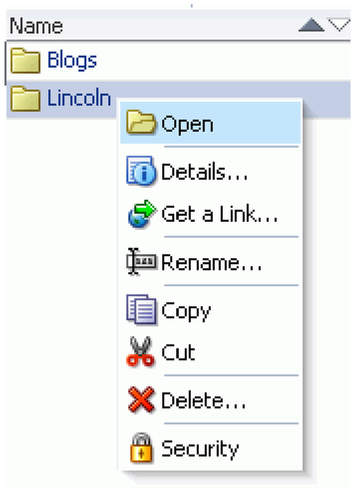
Figure 43–53 Download Action

You can click this action to save files to your local file system. See Section 43.12.3, "Downloading a File."

43.5.1.6 Folder Context Menu

You can right-click a folder on the **Documents** page or in a Documents service task flow to display a context menu that provides a shortcut to many menu actions (Figure 43–54).

Figure 43–54 Folder Context Menu in Documents Service Task Flows

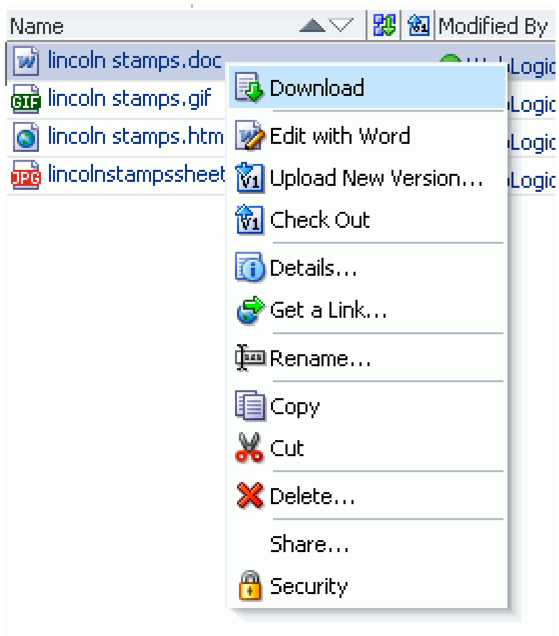


- **Open**: Opens a folder to display its contents and make it the top-level folder. See Section 43.9, "Opening a Folder."
- **Details**: Opens a Properties pane. See Section 43.22, "Viewing and Modifying Folder and File Properties."
- **Get a Link**: Opens the Get a Link dialog, where **Direct URL** provides a direct link to open the folder in Spaces, and the **Download URL** provides a direct link to allow users to open the folder in its default application, or choose to save the file to their local file system. See Section 43.27, "Sharing the URL for a Folder or File."
- **Rename**: Opens the Rename dialog where you can rename the selected folder. See Section 43.13, "Renaming a Folder or File."
- **Copy**: Stores the path to the selected folder to paste as a copy elsewhere. If a folder is deleted at the source location before pasting, it will not be copied to the paste location. See Section 43.14, "Copying and Pasting Folders and Files."
- **Cut**: Stores the path to the selected folder(s) to paste elsewhere. If a folder is not subsequently pasted, it is restored to the location where it was cut. If a folder or file is deleted at the source location before pasting, it will not be moved to the paste location. See Section 43.15, "Moving Folders and Files."
- **Delete**: Deletes the selected folder. See Section 43.16, "Deleting Folders and Files."
- **Security**: Available only if the Spaces administrator has configured item-level security between Content Server and Spaces. Opens the Security Settings dialog, where you can set custom access permissions for the selected folder, or select to inherit the permissions of the parent folder. For more information, see Section 43.23, "Setting Security Options on a Folder or File."

43.5.1.7 File Context Menu

You can right-click a file on the **Documents** page or in a Documents service task flow to display a context menu that provides a shortcut to many menu actions (Figure 43–55):

Figure 43–55 File Context Menu in Documents Service Task Flows



- **Download**: Available in the Document Manager, Document Explorer, and Folder Viewer task flows for saving files to the local file system. See Section 43.12.3, "Downloading a File."
- **Edit** or **Edit with *Application***: Active for wiki documents, HTML, and Microsoft Office (Word, Excel, and PowerPoint) files only. For a selected file, opens the file in-place in the application that corresponds to the file type and automatically checks the file out. See Section 43.12.4, "Editing Files In-Place."
- **Upload New Version**: Inactive for folders and wiki documents. If you have write permissions on a selected file, opens the Upload Document pane where you can specify a new version of the file to upload to replace the existing file. See Section 43.12.5, "Uploading a New Version of an Existing File."
- **Check Out/Cancel Check Out**: Inactive for folders and wiki documents. For a selected file, checks the file out, locking it for update by other users; or, cancels the checked out status without updating it, unlocking it to allowing other users to update it. See Section 43.12.1, "Checking a File Out."
- **Details**: For a file, opens the Properties pane, with the option to edit some properties such a file name and description. In the Advanced section of the Properties pane, displays tabs for Comments, Tags, History, Links, and (if configured), Recommendations.
- **Get a Link**: Opens the Get a Link dialog, where **Direct URL** provides a direct link to open the file in Spaces, and the **Download URL** provides a direct link to allow users to open the file in its default application, or choose to save the file to their local file system. See Section 43.27, "Sharing the URL for a Folder or File."
- **Rename**: Opens the Rename dialog where you can rename the selected file. See Section 43.13, "Renaming a Folder or File."
- **Copy**: Stores the path to the selected file to paste as a copy elsewhere. If a file is deleted at the source location before pasting, it will not be copied to the paste location. See Section 43.14, "Copying and Pasting Folders and Files."

- **Cut**: Stores the path to the selected file(s) to paste elsewhere. If a folder or file is not subsequently pasted, it is restored to the location where it was cut. If a file is deleted at the source location before pasting, it will not be moved to the paste location. See Section 43.15, "Moving Folders and Files."
- **Delete**: Deletes the selected file. See Section 43.16, "Deleting Folders and Files."
- **Share**: Opens a dialog where you specify the users, groups, or select a space where the URL for the selected file will be published in activity streams, along with a message. See Section 43.27.3, "Publishing the URL for a File to Activity Streams."
- **Security**: Available only if the Spaces administrator has configured item-level security between Content Server and Spaces. Opens the Security Settings dialog, where you can set custom access permissions for the selected file, or select to inherit the permissions of the parent folder. For more information, see Section 43.23, "Setting Security Options on a Folder or File."

43.5.2 Menus and Actions in the Document Viewer Preview Pane or Window

Table 43–5 shows which menus and actions are available when previewing a folder or file in the Document Viewer preview pane or window. The following sections describe the purpose of each available menu and action:

- Section 43.5.2.1, "File Menu in Document Viewer"
- Section 43.5.2.2, "View Menu in Document Viewer"
- Section 43.5.2.3, "Edit Action"
- Section 43.5.2.4, "Upload New Version Action"
- Section 43.5.2.5, "Download Action"

To open a folder or file in the Document Viewer:

- Right-click a *folder* and select **Details** from the folder context menu (Figure 43–54) to display the details of that folder.
- Click a *file* to display a preview of file contents. This allows for file previewing and editing for some file types. If the file type does not support a preview (for example, `.mp3` music files, video files, or `.zip` files), the Document Viewer preview pane displays details about the file. See Section 43.1.7, "Understanding the Document Viewer Task Flow."

43.5.2.1 File Menu in Document Viewer

In the Document Viewer preview pane or window, you can select actions from the **File** menu for a folder (Figure 43–56) or a file (Figure 43–57).

Figure 43–56 Document Viewer: File Menu for a Folder

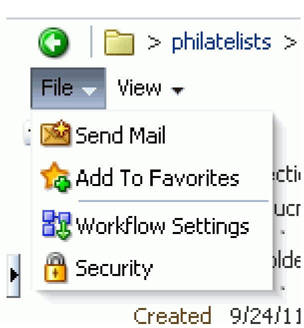
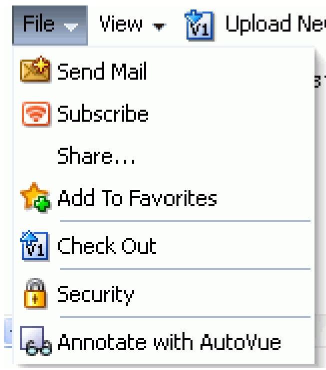


Figure 43–57 Document Viewer: File Menu for a File



The **File** menu includes the following actions:

- **Send Mail**: Opens your mail application with the body of the mail message showing the direct URL to the currently open folder or file, as well as the URL to the current space, if applicable. See Section 43.27.2, "Mailing the URL for a Folder or File."
- **Subscribe**: Activates monitoring of the activities on a file. Whenever any change is made to the file, you will be notified in your personal Activity Stream in the Home space. See Section 43.28, "Subscribing to a File."
- **Share**: Opens a dialog where you specify the users, groups, or select a space where the URL for the selected file will be published in activity streams, along with a message. See Section 43.27.3, "Publishing the URL for a File to Activity Streams."
- **Add To Favorites**: Adds the selected folder or file to your Spaces Favorites list. See Section 43.30, "Adding a Folder or File to Your Favorites."
- **Check Out**: Inactive for wiki documents. Checks the current file out, locking it from update by other users. See Section 43.12.1, "Checking a File Out."
- **Workflow Settings**: Available only when the connected content repository is Content Server and the Spaces administrator has completed the prerequisite configuration. Opens the Workflow Settings dialog, where you can assign workflow to the selected folder in a space. For more information, see Section 45.2, "Assigning a Workflow to a Folder in a Space."
- **Security**: Available only if the Spaces administrator has configured item-level security between Content Server and Spaces. Opens the Security Settings dialog, where you can set custom access permissions for the selected folder or file, or select to inherit the permissions of the parent folder. For more information, see Section 43.23, "Setting Security Options on a Folder or File."
- **Annotate with AutoVue**: Available only when Oracle AutoVue is installed and the Spaces administrator has configured Oracle AutoVue functionality. Opens the selected file in the AutoVue file viewer on Content Server, where you can provide comments and individualized mark-up. For more information, see Section 47.3, "Collaborating on Documents Using Oracle AutoVue."

43.5.2.2 View Menu in Document Viewer

In the Document Viewer preview pane or window, you can select actions from the **View** menu for a folder (Figure 43–58) or a file (Figure 43–60).

Figure 43–58 Document Viewer: View Menu for a Folder

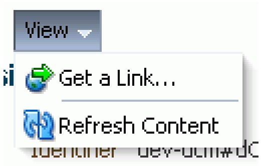


Figure 43–59 Document Viewer: View Menu for a Wiki Document

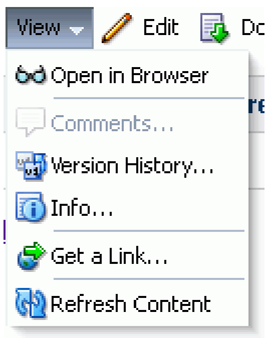
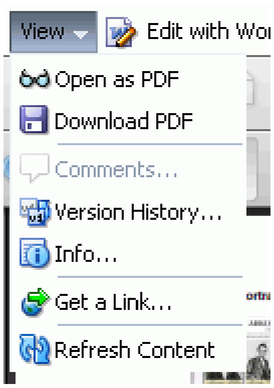


Figure 43–60 Document Viewer: View Menu for a Word Document



The **View** menu includes the following actions:

- **Open in Browser**: Active for images, text, wiki documents, and HTML files only. Opens the current file in your default browser application. See Section 43.10, "Opening a File."
- **Open as PDF**: Active for any file type for which Content Server is configured to convert to PDF. Opens the current file in the Document Viewer preview pane in PDF. See Section 43.10, "Opening a File" and Section 43.26, "Opening or Saving PDF Files."
- **Download PDF**: Active for any file type for which Content Server is configured to convert to PDF. Opens a browser dialog where you can choose to open the file with Adobe Acrobat Reader, or save it to your local file system as a PDF file. See Section 43.12.3, "Downloading a File" and Section 43.26, "Opening or Saving PDF Files."
- **Comments**: Opens the Comments pane for the current file in the tabbed pane area at the bottom of the Document Previewer, providing a text input area where you can enter a comment for the file. See Section 43.19, "Viewing, Entering, and Deleting Comments on a File."

- **Version History**: Opens the History pane for the currently selected file in the tabbed pane area at the bottom of the Document Previewer, showing the existing versions of the file, where you can delete selected versions. See Section 43.21, "Viewing and Deleting File Version History."
- **Info**: Opens the Info pane for the currently selected file in the tabbed pane area at the bottom of the Document Previewer, where you can view and edit Basic and Advanced properties. See Section 43.22, "Viewing and Modifying Folder and File Properties."
- **Get a Link**: Opens the Get a Link dialog for the current folder or file, where **Direct URL** provides a direct link to open the folder or file in Spaces, and the **Download URL** provides a direct link to allow users to open the folder or file in its default application, or choose to save the file to their local file system. See Section 43.27, "Sharing the URL for a Folder or File."
- **Refresh Content**: Retrieves the current folder or file from the content repository to reflect all changes since the last retrieval.

43.5.2.3 Edit Action

The **Edit** or **Edit with *Application*** action is active for wiki documents, HTML, and Microsoft Office 2003 or higher files (Word, Excel, and PowerPoint) only, as shown in Figure 43–61 for a wiki document and Figure 43–62 for a Microsoft Word file.

Figure 43–61 Edit Action in Document Viewer for Wiki Document

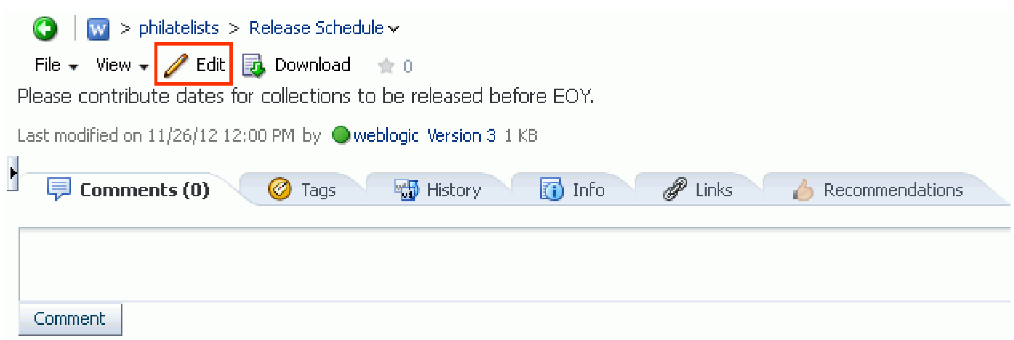
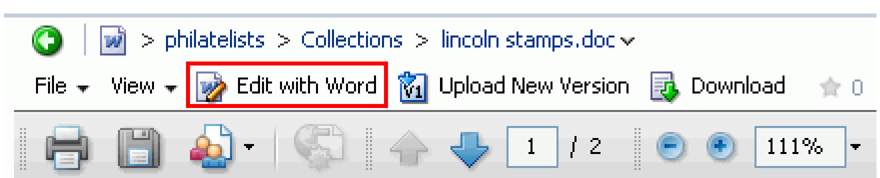


Figure 43–62 Edit Action in Document Viewer for Microsoft Word File

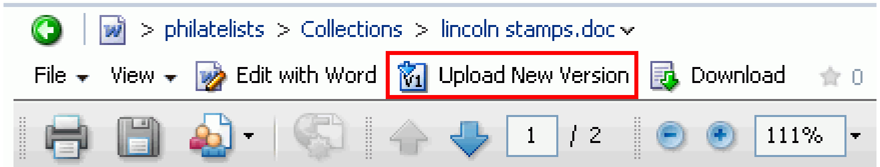


Select this action to automatically check the current file out, and open it in-place in the Rich Text Editor (RTE) or its Microsoft application. See Section 43.12.4, "Editing Files In-Place."

43.5.2.4 Upload New Version Action

The **Upload New Version** action is active for all files except for wiki documents (Figure 43–63).

Figure 43–63 Upload New Version Action in Document Viewer

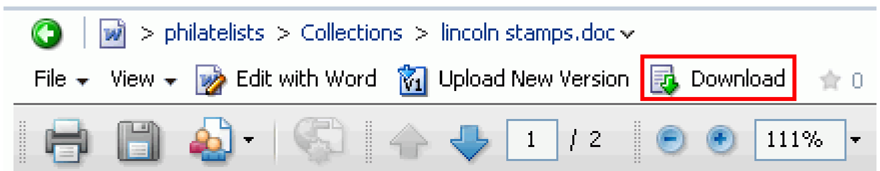


If you have write permissions on the current file, select this action to open the Upload Document screen where you can specify a new version of the file to upload. See Section 43.12.5, "Uploading a New Version of an Existing File."

43.5.2.5 Download Action

The **Download** action is active for all files (Figure 43–64).

Figure 43–64 Download Action in Document Viewer



Select this action to open a dialog to download the current file to your local file system. See Section 43.12.3, "Downloading a File."

43.6 Personalizing Your View of Documents

The Documents service supports personalizations that enable you to change your own view of a Documents service task flow by hiding or showing columns and by rearranging the list of documents according to the sort order of a particular column, as described in the following sections:

- Section 43.6.1, "Hiding and Showing Columns"
- Section 43.6.2, "Reordering Columns"
- Section 43.6.3, "Sorting Files and Folders"

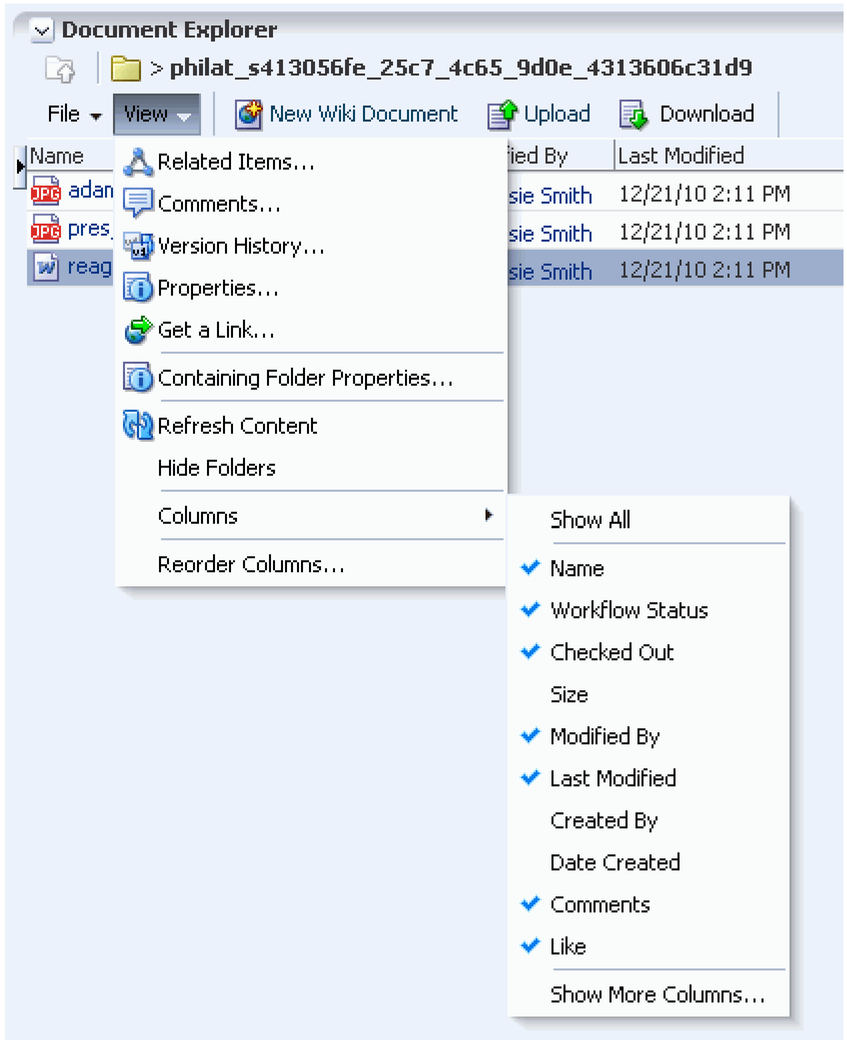
43.6.1 Hiding and Showing Columns

Hiding and showing one or more informational columns is useful for simplifying or expanding the details that are displayed with folders and files.

To hide or show informational columns in your unique view of a task flow:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click the **View** menu, and select **Columns** (Figure 43–65).

Figure 43–65 View Menu in Document Explorer Task Flow



2. Select or deselect individual columns to show or hide them, or select **Show All** to display all available columns.

   If changes do not display immediately, click the **View** menu, and select **Refresh Content.**

43.6.2 Reordering Columns

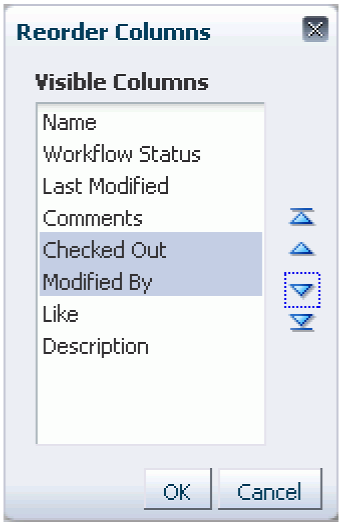
Reordering the informational columns is useful for prioritizing the details that are displayed with folders and files, depending on the information in which you are most interested.

To reorder the informational columns in your unique view of a task flow:

1. On the **Documents** page or in a Document Explorer, Document List Viewer, Document Manager, or Folder Viewer task flow, click the **View** menu, and select **Reorder Columns**.

   The Reorder Columns dialog opens (Figure 43–66).

Figure 43–66 Reorder Columns Dialog



2. Select one or more columns, then click the reorder icons to rearrange the order of the columns in the task flow.

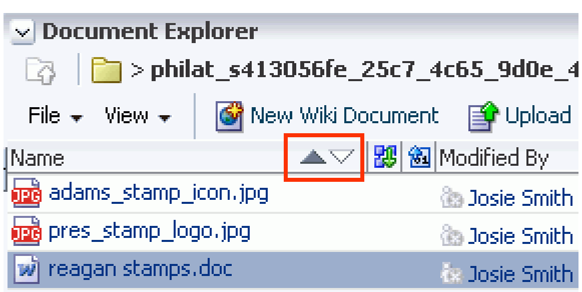
43.6.3 Sorting Files and Folders

Sorting columns enables you to quickly rearrange the order of files and folders in your view. Each task flow column provides a one-click sorting feature that you can use to instantly rearrange all task flow content according to the ascending (1, 2, 3, A, B, C) or descending (C, B, A, 3, 2, 1) order of a particular column.

To sort folders and files in your unique view of a Documents service task flow:

1. On the **Documents** page or in a Document Explorer, Document List Viewer, Document Manager, or Folder Viewer task flow, move your cursor over the header of the column you want to use to sort folders and files.
2. Click the **Sort Ascending** icon to sort the column in ascending order (1, 2, 3, A, B, C, or smallest to largest), or click the **Sort Descending** icon to sort the column in descending order (C, B, A, 3, 2, 1, or largest to smallest) (Figure 43–67).

Figure 43–67 Sort Ascending and Sort Descending Icons



Note: The sorting icons display over the column that is the current sorting column. For other columns, the icons display when you hover your mouse pointer over the column name.

43.7 Creating a Folder

With appropriate permissions, you can create a folder in any Documents service task flow that displays folders. In the Document Manager task flow, when the task flow is configured as a Tree Table layout (see Section 43.1.3, "Understanding the Document Manager Task Flow") and the currently selected item is a file, the new folder is created in the same folder as that file; if the currently selected item is a folder, the new folder is created within that folder. In the Document Explorer or Folder Viewer task flows, the new folder is always created at the same level as the current location. When you create a new folder, this action is not reflected in the Activity Stream in the Home space

If you create a subfolder in a parent folder that is assigned a worfklow (see Section 45.2, "Assigning a Workflow to a Folder in a Space"), the subfolder inherits the workflow assignment of the parent folder.

Note: Other methods to create and copy folders when the backend content repository is Content Server are:

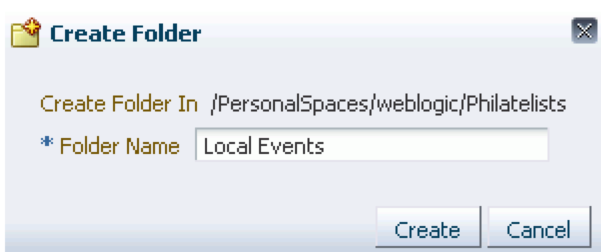
- Create a network place to a space, then use Windows Explorer to create and copy folders, as described in Section 48.4, "Working with Microsoft Windows Explorer Integration."
- Use the task pane available through Microsoft Office shared document management functionality to create a new folder in a space, as described in Section 48.3.3.3, "Adding a New Folder."

To create a folder:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, navigate to the folder under which to create the new folder.
2. From the **File** menu, select **New Folder**.

   The Create Folder dialog opens (Figure 43–68).

Figure 43–68 Create Folder Dialog



3. In the **Folder Name** field, enter a name for the folder; for example, `Local Events`.
4. Click **Create** to create the folder and close the dialog.

43.8 Creating a File

You can add new files to the connected content repository by either uploading them, or creating a new wiki document, as described in the following sections:

- Section 43.8.1, "Uploading Files"

- Section 43.8.2, "Creating a Wiki Document"

43.8.1 Uploading Files

Notes: By default, the maximum upload size for files is 2 MB for Spaces applications. Your system administrator can customize the maximum file upload size by editing the `uploadedFileMaxDiskSpace` parameter in the `webcenter-config.xml` file. For details, see "webcenter-config.xml" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

You can upload new files from your local file system or a mapped network drive to the connected content repository, or refresh multiple existing files with new versions.

To upload a new version of a *single* existing file that already exists in the connected content repository, see Section 43.12.5, "Uploading a New Version of an Existing File."

Note: Spaces does not support uploading a new wiki document or a new version of a wiki document from the file system. If you upload an HTML file, you cannot convert it to a wiki document due to differences in underlying metadata. For information about wiki documents in Spaces, see Chapter 49, "Working with Wiki Documents."

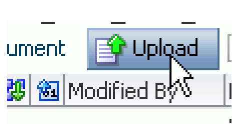
Note: Other methods to upload files when the backend content repository is Content Server are:

- Create a Windows network place to a space, then use Windows Explorer to add files of any type, as described in Section 48.4, "Working with Microsoft Windows Explorer Integration."
- Use the Microsoft Office shared document management functionality to save a local Microsoft Word, Excel, or PowerPoint file, or use the task pane to add files of any type to the Content Server repository, as described in Section 48.3.3.2, "Adding a File."
- Use WebDAV, which is installed with Content Server out-of-the-box, to establish a connection to your Spaces application, then drag and drop content in your Content Server repository to the folder assigned to the target space, or drag and drop content between spaces. When dragging and dropping content to the target folder, do not drag the source folder to the target; drag and drop only the content that is stored under the folder. If you do not know the WebDAV URL for the Content Server that is used to store documents, contact your Fusion Middleware Administrator. If the base URL for that Content Server is `http://`*`host`*`:`*`port`*`/`*`relative_web_root`*, the WebDAV root URL will be `http://`*`host`*`:`*`port`*`/`*`relative_web_root`*`/idcplg/webdav`. For example: `http://wchost:16200/dav/cs/idcplg/webdav/`
- Use the Batch Loader utility, as described in "Batchloading Content" in *Oracle Fusion Middleware System Administrator's Guide for Oracle Content Server*.

To upload files to the connected content repository:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, navigate to the folder for the file(s) you plan to upload or create a new folder (see Section 43.7, "Creating a Folder").
2. Click the **Upload** action (Figure 43–69).

Figure 43–69 Upload Action



The Upload Document pane opens, providing an area where you can add the file(s) to be uploaded.

Note: Your system administrator can set the appearance of the Upload Document pane. You will either:

- (Default) Add files through drag and drop or multi-select, optionally providing a single description that applies to all files (see Section 43.8.1.1.1, "Using the Default Upload Document Pane").
- Or, add files one at a time, optionally providing a description for each file (see Section 43.8.1.1.2, "Using the Multi-Description Upload Document Pane").

For information about this setting, see “Modifying the Upload Document Pane” in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

---

3. Follow the steps in one of the following sections, depending on whether or not a file is associated with a content profile in Content Server:
   - Section 43.8.1.1, "Uploading One or More Files without a Content Profile"
   - Section 43.8.1.2, "Uploading a File with a Content Profile"

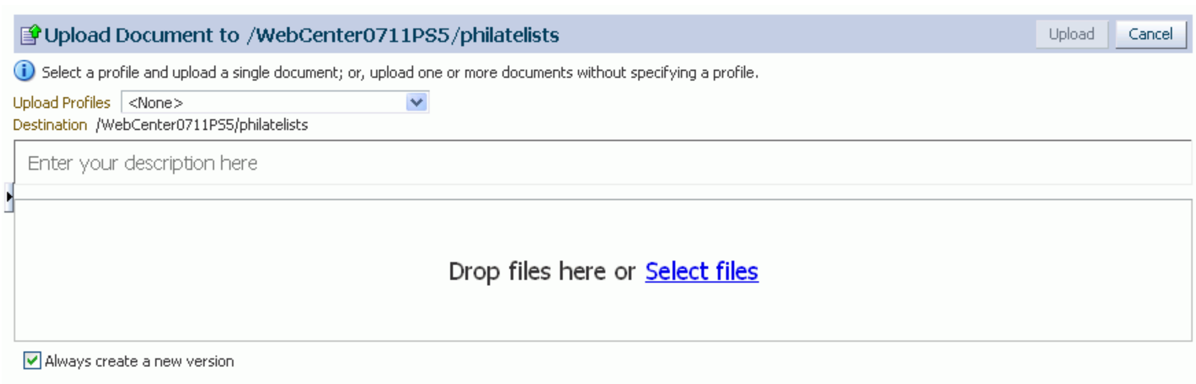
43.8.1.1 Uploading One or More Files without a Content Profile

To upload one or more files without an associated content profile, follow the steps for the Upload Document pane configured by your system administrator:

- Section 43.8.1.1.1, "Using the Default Upload Document Pane"
- Section 43.8.1.1.2, "Using the Multi-Description Upload Document Pane"

43.8.1.1.1 Using the Default Upload Document Pane To upload files when the Upload Document pane looks like Figure 43–70:

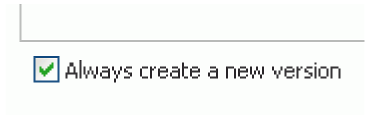
Figure 43–70 Option 1: Upload Document Pane (in FireFox browser)



1. Select the file(s) to upload, in either of the following ways:
   - (In FireFox, Chrome, or Safari browsers) Select the file(s) in your local file system and drag them into the Upload Document pane.
   - Or, click **Select files** to navigate to and select the file(s) you want to upload.

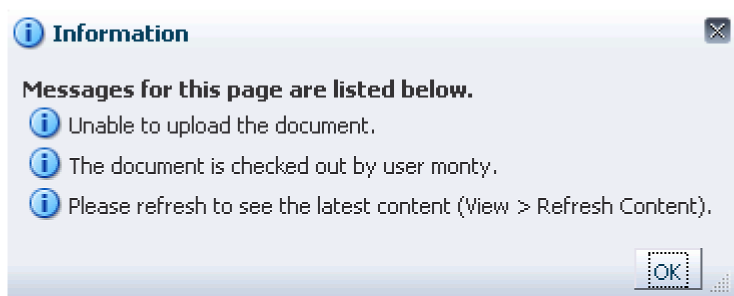
2. In the Upload Document pane, optionally enter a description of the file(s) in the **Description** field. This description is assigned to all the files in the upload set.

   If the file(s) already exist in the connected content repository, select **Always create a new version** to create a new version of the file(s). Deselect the check box if you want to be notified if a file with the same name already exists in the target folder in the content repository.

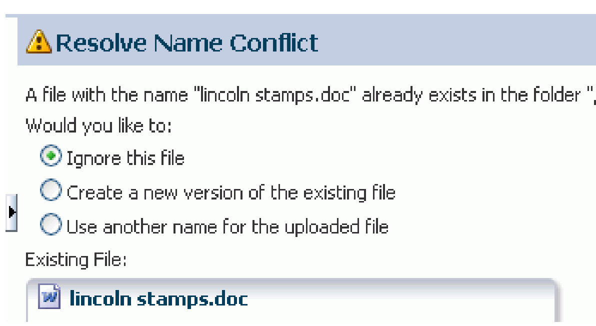


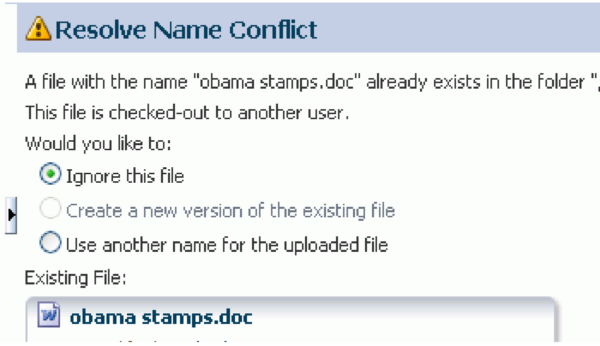
3. Click **Upload** to add the specified files at the same level as the currently selected file, or under the currently selected folder.

   - If a file with the same name already exists in the target folder, and **Always create a new version** is selected, a new version of the file is added at same level as the currently selected file. See Section 43.21, "Viewing and Deleting File Version History."
   - If a file with the same name already exists in the target folder, and **Always create a new version** is selected, *but the file is checked out by another user*, an Information dialog notifies you that the file cannot be uploaded and provides the name of the user who has it checked out.



   - If a file with the same name already exists in the target folder, and **Always create a new version** is *not* selected, the Resolve Name Conflict pane opens. The figures below show the panes for files that are checked in, and checked out by another user, respectively.





Select the desired action:

– **Ignore this file** to cancel the upload operation for the current file. This is useful when uploading multiple files to skip only the current file, and continue to upload subsequent files in the batch.

– **Create a new version of the existing file** to create a new version of the file. See Section 43.21, "Viewing and Deleting File Version History."

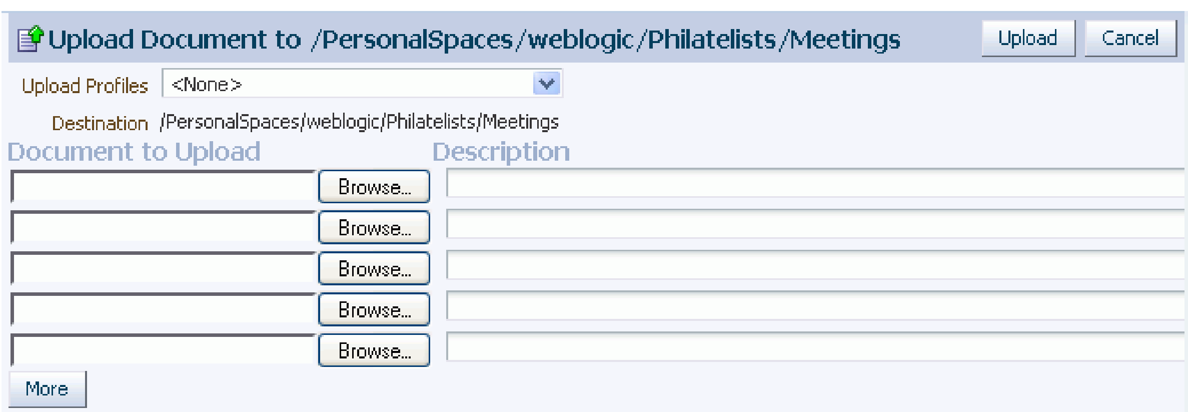
  If the file is already checked out to another user, this selection is disabled.

  If you do not have the permissions required to create a new version or overwrite the file, this selection is disabled.

– **Use another name for the uploaded file** to display a **Name** field where you can enter a new name for the file. If you specify a name that matches another existing file, a message notifies you to enter a different name.

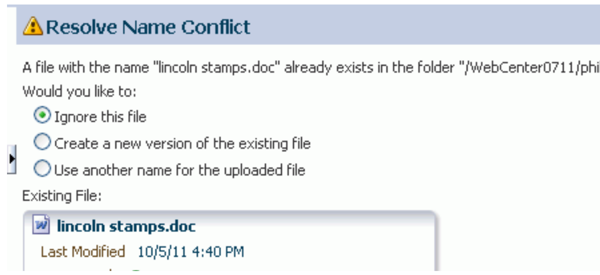
43.8.1.1.2 Using the Multi-Description Upload Document Pane To upload files when the Upload Document pane looks like Figure 43–71:

Figure 43–71 Option 2: Upload Document Pane (in FireFox browser)



1. For each file you want to upload:
   - Click **Browse**, and then navigate to and select the file you want to upload.
   - Optionally, provide a description of the file in the **Description** field.
2. Click **More** to add more files, up to a maximum of ten files.
3. Click **Upload** to add the specified files at the same level as the currently selected file, or under the currently selected folder.

- If the file is already checked out to another user, the pane displays the message **This file is checked-out to another user**.
- If a file with the same name already exists in the target folder, the Resolve Name Conflict pane opens.



Select the desired action:

– **Ignore this file** to cancel the upload operation for the current file. This is useful when uploading multiple files to skip only the current file, and continue to upload subsequent files in the batch.

– **Create a new version of the existing file** to create a new version of the file. See Section 43.21, "Viewing and Deleting File Version History."

  If the file is already checked out to another user, this selection is disabled.

  If you do not have the permissions required to create a new version or overwrite the file, this selection is disabled.

– **Use another name for the uploaded file** to display a **Name** field where you can enter a new name for the file. If you specify a name that matches another existing file, a message notifies you to enter a different name.

43.8.1.2 Uploading a File with a Content Profile

If the original version of a file is associated with a content profile in Content Server, or if you want to associate a new file with a content profile, you must first select the content profile to open the Content Check In Form, where you will upload the file *by itself*. You cannot select a profile when uploading multiple files.

Selecting a content profile enforces uniformity by requiring values for certain metadata fields that must be provided before the file can be uploaded. For example, a press release profile might include fields about who to contact, release date, and so on.

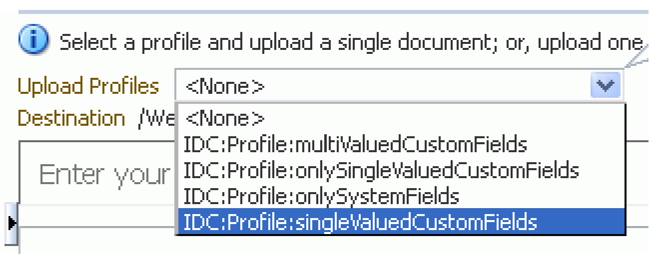
Note: To enable the **Upload Profiles** selection list, *both* of the following two requirements must be met:

- You must access the Spaces application through Oracle HTTP Server (OHS) to expose Content Server and the Spaces application under the same host and port. For information about setting up OHS as the frontend to Spaces, see "Configuring Content Server for WebCenter Portal Applications" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- Spaces must be connected to a Content Server repository, with the `webContextRoot` parameter set to a Content Server host name. For information on setting `webContextRoot`, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. To set `webContextRoot` through WLST, see "`createJCRContentServerConnection`" and "`setJCRContentServerConnection`" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

To upload a file associated with a content profile:

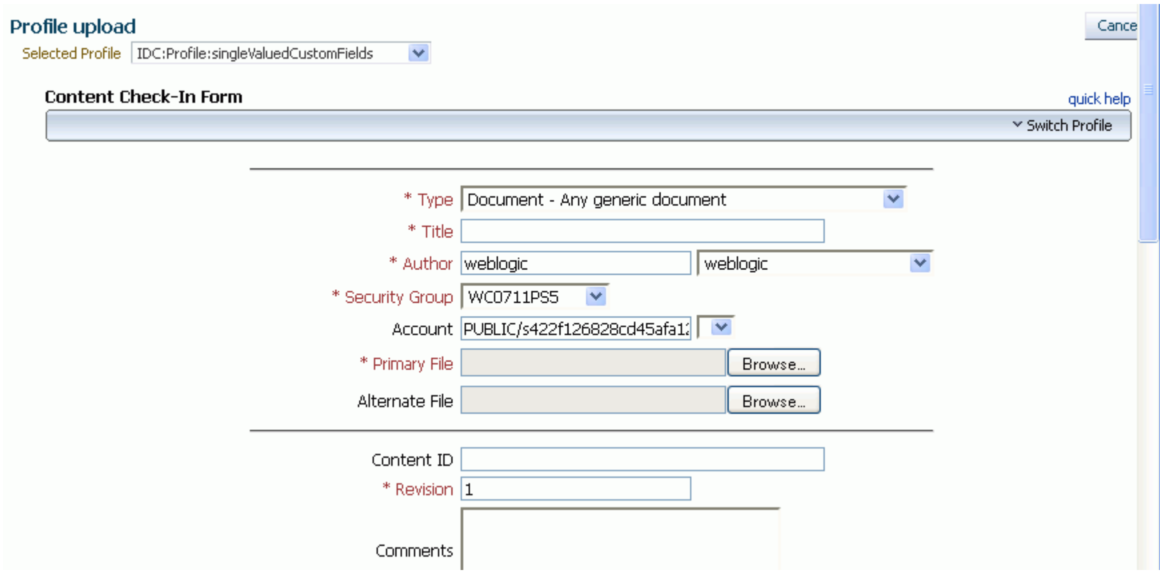
1. Select the profile from the **Upload Profiles** list (Figure 43–72)

Figure 43–72 Selecting Content Profile for a File



The Profile Upload pane displays the Content Check In Form, with metadata fields for the selected content profile (Figure 43–73).

Figure 43–73 Content Profile Metadata Fields



2. In the **Primary File** field, specify the name of the file to be uploaded.
3. Enter values for other metadata field values to associate with the file.

Note: Content Server may require certain mandatory metadata field values for a selected content profile to ensure a successful checkin. Mandatory fields are identified in the dialog by an asterisk and red text.

For information about content profile metadata field requirements for Content Server, refer to *Oracle Fusion Middleware User's Guide for Oracle Content Server*, specifically the chapter "Checking In Files". The fields described in the "Content Check-In Form" section in the appendix are mandatory for Content Server. All content profiles must include them, otherwise the checkin will fail.

In addition to the mandatory metadata field values required by Content Server for specific content profiles, every content profile must include additional metadata fields required by Spaces. For a list and descriptions of the required fields, which should be added to a content profile as hidden fields so that the end user cannot override the values populated by Spaces, see "What You Should Know About Creating Content Profiles in Content Server" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

---

4. Click **Check In**.

   The specified file is uploaded and listed in the current folder in your space.

43.8.2 Creating a Wiki Document

In addition to uploading files (see Section 43.8.1, "Uploading Files") to the connected content repository, you can create wiki documents using either of the following two methods:

- **New Wiki Document** action through Documents service task flows, as described in Section 49.4.1, "Creating a Wiki Document Using the New Wiki Document Action"
- Wiki page style, as described in Section 49.4.2, "Creating a Wiki Document Using the Wiki Page Style"

For more information about wiki documents in Spaces, see Chapter 49, "Working with Wiki Documents."

43.9 Opening a Folder

You can open a folder to display its contents in all Documents service task flows except the Recent Documents task flow, which does not display folders.

Note: Other methods to open folders when the backend content repository is Content Server are:

- Create a network place to a space, then use Windows Explorer to open folders and files, as described in Section 48.4, "Working with Microsoft Windows Explorer Integration."
- Use the task pane available through Microsoft Office shared document management functionality to open folders in a space, as described in Section 48.3.3.8, "Managing Folders"

To open a folder to display its contents and make it the top-level folder:

- On the **Documents** page or in a Documents service task flow, either:
  - Click the folder name.
  - Or, right-click the folder, and select **Open**.

43.10 Opening a File

With appropriate permissions, you can open files of any type in all Documents service task flows to preview file contents or properties in a read-only view.

The Document Explorer, Document Manager, and Folder Viewer task flows open files in-place in a Document Viewer preview pane; the Document List Viewer and Recent Documents task flows open files in a separate Document Viewer preview window.

Note: Another method to open files when the backend content repository is Content Server is:

- Create a network place to a space, then use Windows Explorer to open folders and files, as described in Section 48.4, "Working with Microsoft Windows Explorer Integration."

To open a read-only view of a file:

- On the **Documents** page or in a Documents service task flow, click the file name to open the file in a Document Viewer preview pane or window.

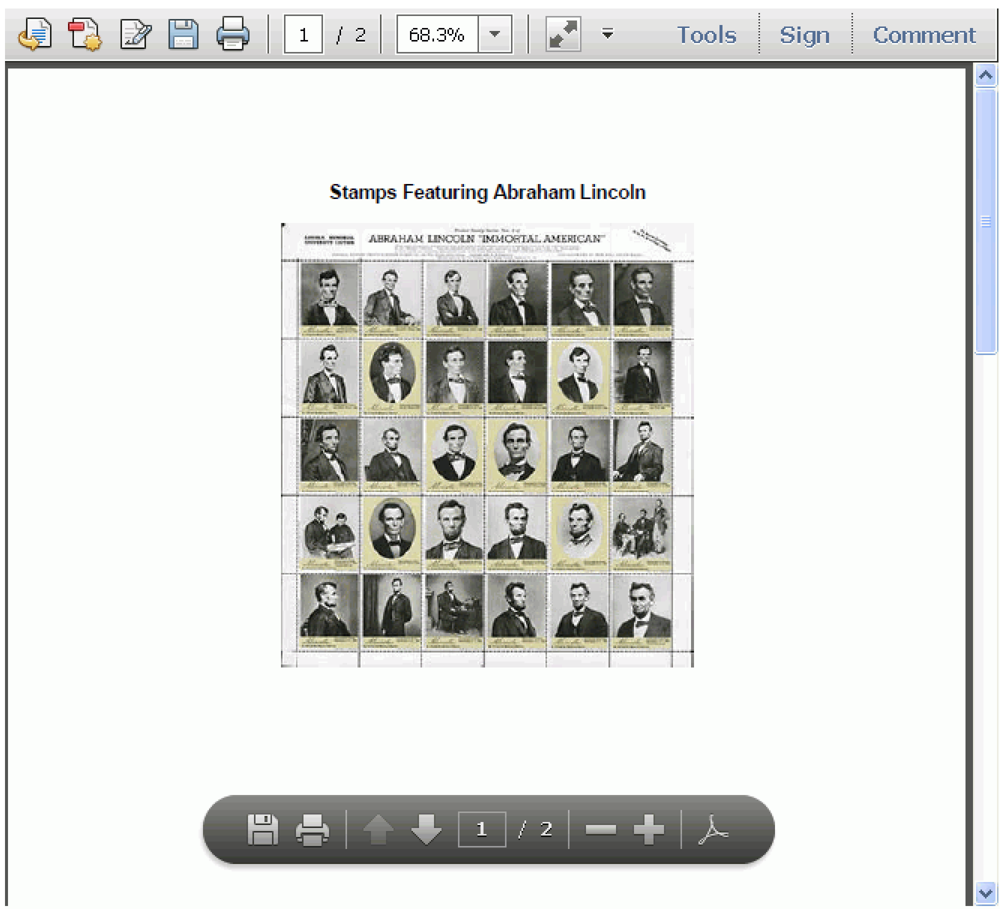
Notes:

- Some file types do not support a preview. An attempt to open such a file displays the properties of the file in the Document Viewer.
- For files of types that support a preview, the file must also support display in an inline frame to open in the Document Previewer. For example, if an HTML file includes coding that disallows display in an inline frame, it will not display in the Document Previewer, but instead overlays the current window with the HTML file content.

The appearance of the file in the preview pane or window depends on the file type:

– **For files that support PDF format**: The file displays either in an in-place PDF viewer (Figure 43–74) or in a slide viewer (Figure 43–75).

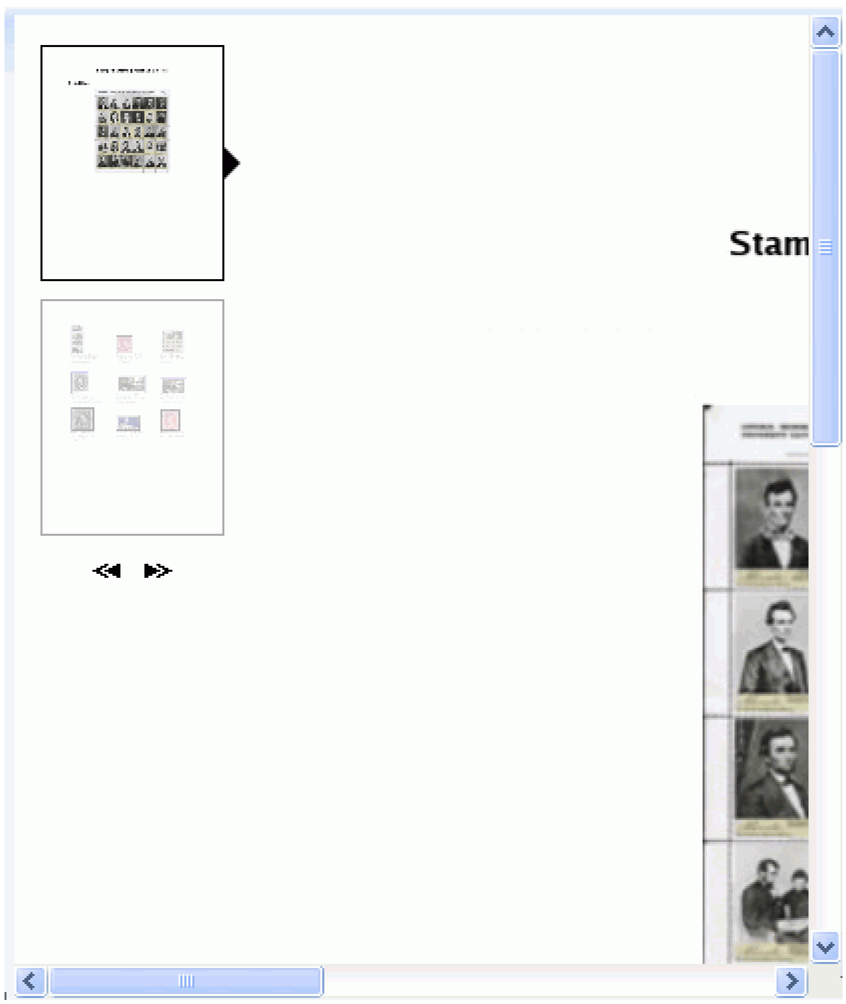
Figure 43–74 File Preview in PDF Viewer



Note: To enable the slide preview functionality, *both* of the following two requirements must be met:

- You must access the Spaces application through Oracle HTTP Server (OHS) to expose Content Server and the Spaces application under the same host and port. For information about setting up OHS as the frontend to Spaces, see "Configuring Content Server for WebCenter Portal Applications" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- Spaces must be connected to a Content Server repository, with the `webContextRoot` parameter set to a Content Server host name. For information on setting `webContextRoot`, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. To set `webContextRoot` through WLST, see "`createJCRContentServerConnection`" and "`setJCRContentServerConnection`" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

Figure 43–75 File Preview in Slide Viewer (see Note)



- **For HTML, text, image, XML files**: In the preview pane or window, click the **View** menu, and select **Open in Browser** to open the file in a separate tab in your browser.
- **For any file type for which Content Server is configured to convert to PDF**: In the preview pane or window, click the **View** menu, and select **Open as PDF** to open a PDF version of the file.

To edit files, see Section 43.12, "Editing and Updating a File".

43.11 Using the Rich Text Editor (RTE)

The Rich Text Editor (RTE) is a fully-integrated HTML text editor, which you can use to create and edit wiki documents and blog posts, and edit HTML files. Figure 43–76 shows create mode, and Figure 43–77 shows edit mode.

Figure 43–76 New Wiki Document in Rich Text Editor

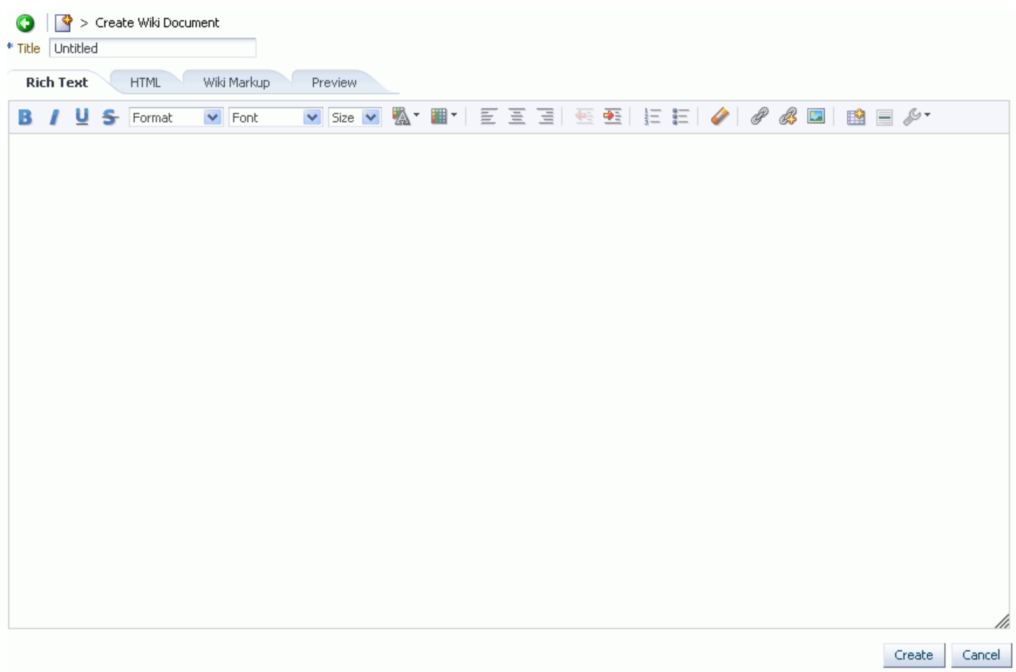
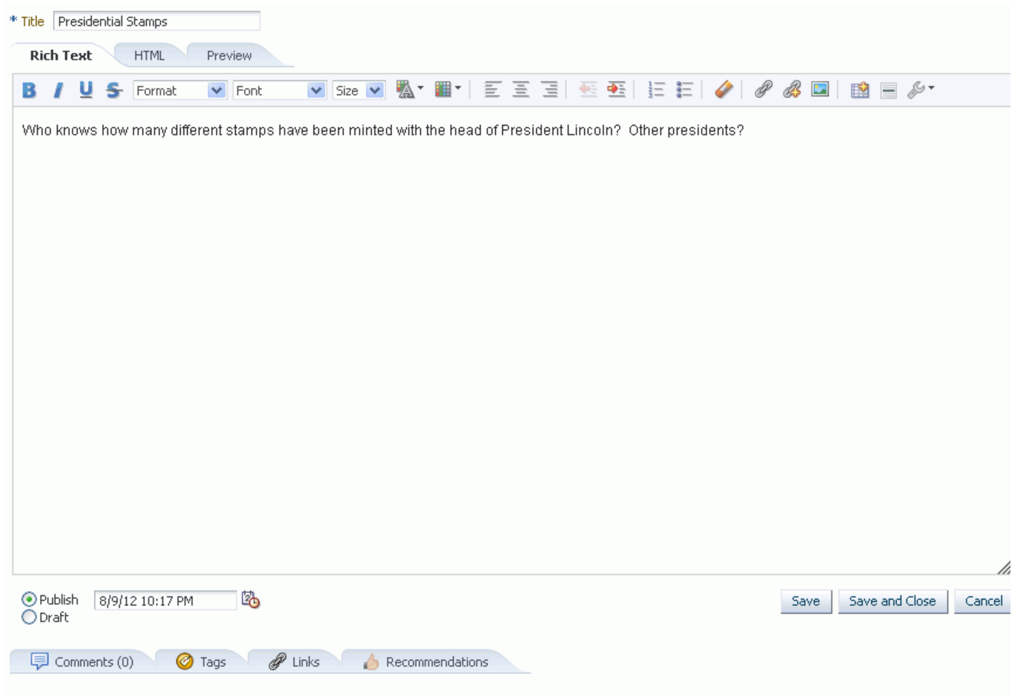


Figure 43–77 Editing Blog Post in Rich Text Editor



To use the RTE:

1. Open the RTE either by creating a new wiki document (see Section 43.8.2, "Creating a Wiki Document") or blog post (see Section 50.7.2, "Creating a Blog Post"), or editing a wiki (see Section 49.5, "Editing a Wiki Document", blog post, or HTML file (see Section 43.12.4, "Editing Files In-Place").
2. For a new wiki document or blog post, enter a display name in the **Title** field.
3. Add, revise, and preview text, formatting, styling, and links in the tabbed panes (see Section 43.11.1, "About the Rich Text Editor Tabbed Panes").

   For information about using the toolbar and features in the **Rich Text** pane, see Section 43.11.2, "About the Rich Text Editor Toolbar", Section 43.11.3, "Working with Tables in the Rich Text Editor", and Section 43.11.4, "Using the Keyboard in the Rich Text Editor."
4. (For wiki documents and HTML files only) Select the **Minor Edit?** check box if you do not want to notify space members about your changes.

   Leaving this check box deselected updates the Activity Stream and sends notifications after you save your changes.
5. In the tabbed panes along the bottom of the RTE, you can add comments, tags, links, and recommendations pertinent to the document or post. For more information, see Section 43.19, "Viewing, Entering, and Deleting Comments on a File," Section 43.20, "Working with Tags," Section 43.24, "Working with Links,", and Section 43.25, "Working with Recommendations."
6. Save your changes:
   - To create and save a new wiki document or blog post, click **Create**.
   - To save updates to an existing wiki document, blog post, or HTML file, click **Save and Close**.

43.11.1 About the Rich Text Editor Tabbed Panes

The RTE provides four tabbed panes where you can create and edit your wiki and HTML documents, and blog posts:

- **Rich Text**. Create and revise content in a WYSIWYG environment using the icons and controls in the RTE toolbar (see Section 43.11.2, "About the Rich Text Editor Toolbar").
- **HTML**. Enter HTML manually. This includes entering source code for HTML not handled by the WYSIWYG icons and controls on the **Rich Text** tab.

Notes:

- The RTE ignores the following types of tags when entered in HTML because they are irrelevant or redundant within the RTE context:
  - script tags
  - form elements, such as `input`, `select`, `textarea`, and `form`
  - `frame/frameset`
  - document tags, such as `html`, `head`, `body`, `meta`, and `title`
  - unknown tags; for example: `<foo></foo>`
- Changes to the behavior of the default CSS selectors in a wiki or blog is not supported.

- **Preview** (wiki documents and blog posts only). Shows a preview of your wiki document or post as it will appear when published.
- **Wiki Markup** (wiki documents only). Enter your own wiki markup. For the full set of wiki markup syntax, click the **Wiki Markup Help** icon (Figure 43–78) and refer to Table 43–7. Any formatting not provided by Wiki Markup uses HTML.

Figure 43–78 Wiki Markup Help Icon

Table 43–7 Wiki Markup Syntax and Examples

Element	Syntax	Example	Output
italics	`//`*string*`//`	`//Sales// team`	*Sales* team
bold	`**`*string*`**`	`**Sales** team`	**Sales** team

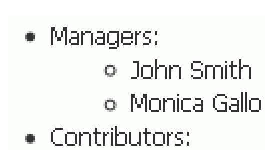
bulleted list	`*` *listItem*
	`**` *subitem*
	`**` *subitem*
	`*` *listItem*
		`* Managers:`
		`** John Smith`
		`** Monica Gallo`
		`* Contributors:`
			

Table 43–7 (Cont.) Wiki Markup Syntax and Examples

<table>
<tr><th>Element</th><th>Syntax</th><th>Example</th><th>Output</th></tr>
<tr><td>numbered list</td><td><code># listItem</code>
<code>## subitem</code>
<code>## subitem</code>
<code># listItem</code></td><td><code># Dairy</code>
<code>## Milk</code>
<code>## Cheese</code>
<code># Bread</code></td><td>1. Dairy
    1. Milk
    2. Cheese
2. Bread</td></tr>
<tr><td>web link</td><td><code>[[URL|linkName]]</code></td><td><code>[[http://www.oracle.com|Search Oracle]]</code>
<code>[[http://fmw.vm.oracle.com:8888/webcenter/spaces/Philatelists/page/presidents|Presidents]]</code></td><td><u>Search Oracle</u>
<u>Presidents</u>
Click link to view target in browser window</td></tr>
<tr><td>WebCenter link</td><td><code>[[owc://svcId/rsrcId|linkName]]</code>
For a list of valid service IDs, see Table B–19, " Service IDs".
To find the resource ID, view the item properties (right-click and select Details, or see Chapter 44, "Setting Documents Service Task Flow and Document Component Properties.")</td><td><code>[[owc://oracle.webcenter.doclib/dev-ucm#dDocName:OWCSVR01USORAC026779|Results]]</code></td><td><u>Results</u>
Click link to view resource in browser window</td></tr>
<tr><td>Anchor for link target</td><td><code><<<anchor:<i>anchorName</i>>>></code></td><td><code><<<anchor:forecast>>></code>
(inserted at section describing sales forecast to act as a target for links)</td><td>(Invisible)
In HTML: <code></code></td></tr>
<tr><td>Line break</td><td><code>\\</code></td><td>xxxx \\ xxxx</td><td>xxxx
xxxx</td></tr>
<tr><td>Horizontal line</td><td><code>----</code></td><td>xxxx
----
xxxx</td><td>xxxx
<hr>xxxx</td></tr>
<tr><td>Image
(All bowser-supported image types such as JPG, GIF, and PNG)</td><td><code>{{URL/imageFile|linkName}}</code></td><td><code>[[http://www.myco.com/Sales/chart.jpg|Quarterly Sales]]</code></td><td><u>Quarterly Sales</u>
Click link to view image in browser window</td></tr>
<tr><td>Table</td><td><code>|=head|=head|...|=head|</code>
<code>|value|value|...|value|</code>
Repeat for each row of table</td><td><code>|=ID|=Name|=Dept|</code>
<code>|1356|Bob King|Sales|</code></td><td><table><tr><th>ID</th><th>Name</th><th>Dept</th></tr><tr><td>1356</td><td>Bob King</td><td>Sales</td></tr></table></td></tr>
</table>

43.11.2 About the Rich Text Editor Toolbar

Table 43–8 describes the RTE toolbar icons and controls on the **Rich Text** tab, where you can create and revise content in a WYSIWYG environment.

To perform an operation assigned to an icon, click the icon once to either immediately perform the action or open a dialog with further configuration options.

Table 43–8 Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

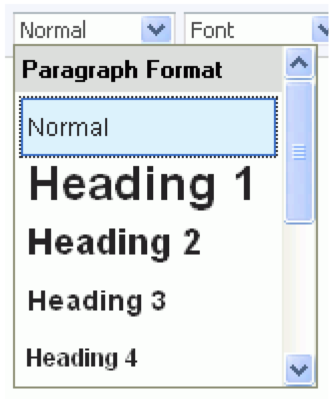
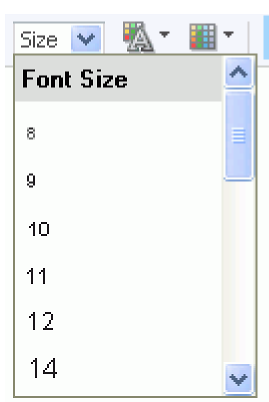
Control	Description
	**Bold**, **Italic**, **Underline**, and **Strike Through**. Select text, and click the desired font style icon; or click an icon, and enter text. Click the icon again to exit the font style.
	**Paragraph Format**. Select a format, then enter text; or highlight text, then select a format.
	**Font Name**. Select a font, then enter text; or highlight text, then select a font.
	**Font Size**. Select a size, then enter text; or highlight text, then select a size.

Table 43–8 (Cont.) Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

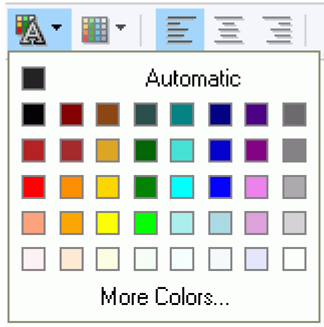
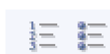
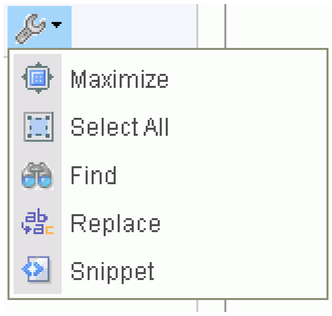
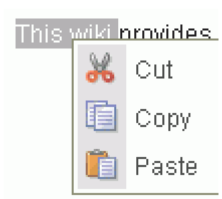
Control	Description
	**Text Color** or **Background Color**. Select text, and click the desired text or background color icon, then select a color. Or, click an icon and select a color, then enter text. **Note**: If you are using Internet Explorer 10 as your browser, the dropdown menus do not display. To display the Text Color and Background Color menus, use a different browser.
	**Left Justify**, **Center Justify**, and **Right Justify**. Select text, and click to apply the desired text alignment; or click an icon, and enter text.
	**Decrease Indent** and **Increase Indent**. Select text, and click the desired indent icon to move text left or right.
	**Numbered List** and **Bulleted List**. Start a new line, click the desired list type icon, and enter text. Or, select lines of text and click an icon. Click the icon again to remove the list formatting. Alternately, end list mode by pressing Enter twice after the last item.
	**Remove Format**. Select text, and click this icon to remove all font styling, such as font types, sizes, weights, and colors. Lists and indents are not affected.

Table 43–8 (Cont.) Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

Control	Description
	**Select Resource**. Select text to link to an existing Spaces resource, then click this icon to open the Select Resource dialog. Select a resource (for example, a document or an announcement in the current space, or a URL) to be linked from the selected text. Clicking the linked text in the document opens the selected resource in the Document Viewer preview pane. **New Resource**. Select text to link to a new Spaces resource, then click this icon to open the New Resource dialog. Select a resource to be linked from the selected text, then create the resource (for example, a discussion forum topic or note), specify the external location of the resource (for example, a URL), specify a name for the new resource (for example, a wiki document), or upload the resource from your local file system or a connected network drive (for example, a document). *Note*: If you create a new wiki document in this manner, Spaces creates a placeholder for the new wiki document in the current folder. To add content to the new wiki document, you must navigate to it and open it in the RTE. The links created using **Select Resource** and **New Resource** are created as inline links, and are not added to the **Links** tab associated with the details of the linking resource. For information about links to resources in Spaces, see Chapter 65, "Working with the Links Service." **Embed Image**. Click to open the Embed Image dialog: ■ Click **Select Image** to select an image in the current space. ■ Click **Upload Image** to upload an image from your local file system or a connected network drive.
	**Table**. Click to open the Table Properties dialog: See Section 43.11.3, "Working with Tables in the Rich Text Editor."
	**Insert Horizontal Line**. Click to insert a horizontal line at the current cursor location.

Table 43–8 (Cont.) Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

Control	Description
	**Tools**: ■ **Maximize/Minimize**. Click to expand the RTE to fill the entire screen, or reduce the RTE to display inside the Spaces application. ■ **Select All**. Select all content in the body in the text input area. ■ **Find** or **Replace**. Click to open the Find and Replace dialog, where you can search for a string, or replace a given string with specified text. ■ **Snippet**. In a blog post, select a portion of text, then click this icon to display the paragraph containing that portion as a summary of the blog post on the blog summary page (or digest page), with a **Read More** link to allow users to view the full blog. In a wiki document, this functionality is not available. **Note**: If you are using Internet Explorer 10 as your browser, the dropdown menu does not display. To display the Tools menu, use a different browser.
	**Cut**, **Copy**, or **Paste**. Select text, then right-click to displaya context menu to cut or copy selected text, or paste text in the buffer at the current cursor location. **Note**: If a browser security warning displays, you can either use keyboard commands (see Section 43.11.4, "Using the Keyboard in the Rich Text Editor") or configure your browser to grant access to the clipboard. For example, for the FireFox browser, see `http://kb.mozillazine.org/Granting_JavaScript_access_to_the_clipboard`.

43.11.3 Working with Tables in the Rich Text Editor

To create a table in the RTE, click the **Table** icon in the toolbar (Figure 43–79).

Figure 43–79 Rich Text Editor: Table Icon

The Table Properties dialog window opens (Figure 43–80), where you can set basic properties for the table, as described in Table 43–9.

Figure 43–80 Rich Text Editor: Table Properties Dialog (Basic Properties)

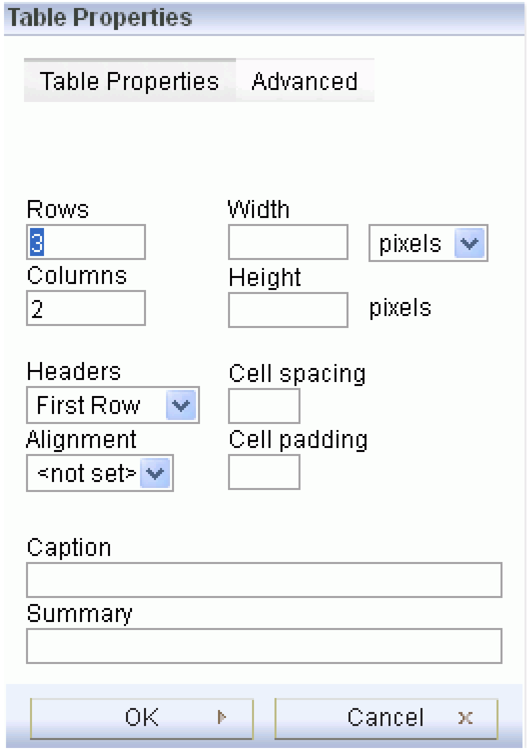


Table 43–9 Rich Text Editor: Basic Table Properties

Property	Description
Rows	(Required) Enter the number of rows in the table.
Columns	(Required) Enter the number of columns in the table.
Width	Enter the width of the table, selecting either pixels or a percent value. Giving the width as a percent value lets you set the proportion of the editing area that the table will occupy.
Height	Enter the height of the table in pixels.
Headers	Select the table element to format as headers, which applies special formatting to them. You can apply header formatting to First Row, First Column or Both.
Alignment	Select the alignment of the table on the page Left, Center, or Right.
Cell spacing	Enter he space between individual cells as well as cells and table borders, in pixels.
Cell padding	Enter the space between the cell border and its contents, in pixels.
Caption	Enter label text to be displayed above the table.
Summary	Enter a summary of the table contents that is available for assistive devices like screen readers. It is good practice to provide tables with meaningful summary text to make them more accessible to users with disabilities.

Click the **Advanced** tab to expose the advanced table properties (Figure 43–81), which you can set as described in Table 43–10.

Figure 43–81 Rich Text Editor: Table Properties Dialog (Advanced Properties)

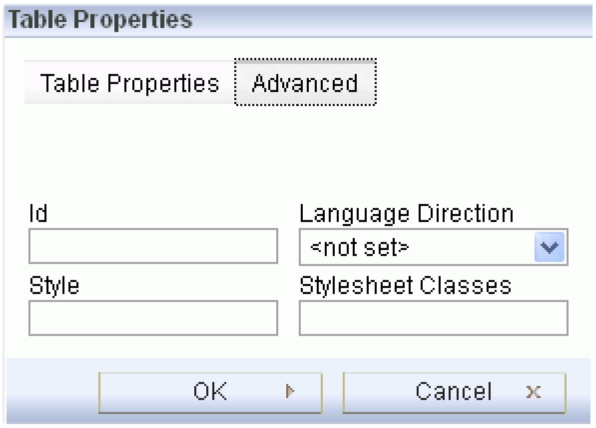


Table 43–10 Rich Text Editor: Advanced Table Properties

Property	Description
Id	Enter a unique identifier for a table element in the document (`id` attribute).
Language Direction	Select the direction of the text in the table: left to right (LTR) or right to left (RTL) (`dir` attribute).
Style	Enter the CSS style definitions (`style` attribute). Note that each value must end with a semi-colon and individual properties should be separated with spaces.
Stylesheet Classes	Enter the class of the table element (`class` attribute). If a table element is assigned more than one class, separate class names with spaces.

With a table inserted into your document, you can enter values directly in the cells. Additional editing is available through the context menu (Figure 43–82). To open the context menu, right-click the table and select actions as described in Table 43–11.

Figure 43–82 Rich Text Editor: Table Context Menu

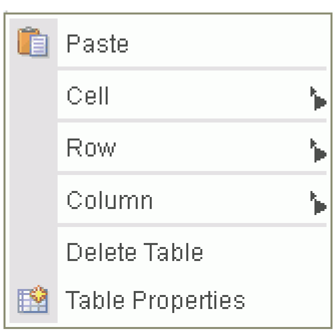


Table 43–11 Rich Text Editor: Table Context Menu Selections

Action	Description
Paste	Pastes the content on the clipboard at the current cursor location
Cell	See Section 43.11.3.1, "Editing Table Cells in the Rich Text Editor."

Table 43–11 (Cont.) Rich Text Editor: Table Context Menu Selections

Action	Description
Row	See Section 43.11.3.2, "Editing Table Rows in the Rich Text Editor."
Column	See Section 43.11.3.3, "Editing Table Columns in the Rich Text Editor."
Delete Table	Deletes the entire table and its contents.
Table Properties	Opens the Table Properties dialog, where you can modify properties as described in Table 43–9, " Rich Text Editor: Basic Table Properties" and Table 43–10, " Rich Text Editor: Advanced Table Properties", with the exception of the number of rows and columns.

43.11.3.1 Editing Table Cells in the Rich Text Editor

To insert, delete, merge, or cells, or modify cell properties, right-click a cell (*the current cell*) to display the context menu, then select **Cell** to expand the submenu of cell actions (Figure 43–83), and select actions as described in Table 43–12.

To select multiple cells, drag the mouse over the cell, then right-click to open the context menu.

Figure 43–83 Rich Text Editor: Table Cell Actions

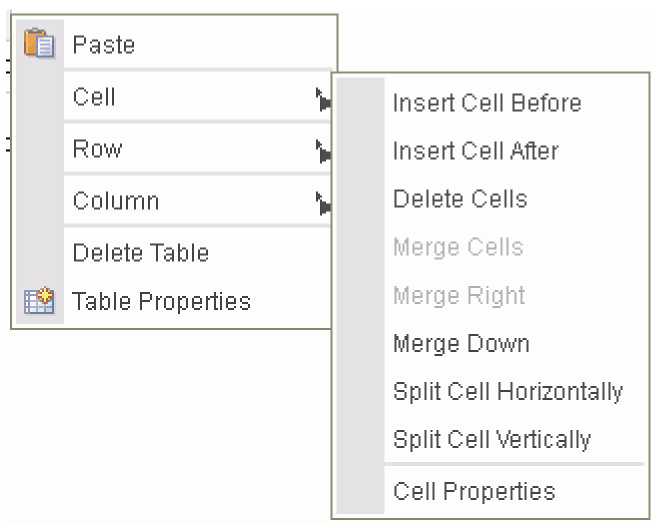


Table 43–12 Rich Text Editor: Table Cell Menu Selections

Action	Description
Insert Cell Before	Inserts a new cell before the current cell(s).
Insert Cell After	Inserts a new cell after the current cell(s).
Delete Cells	Deletes the current cell(s).
Merge Cells	Merges multiple selected cells into one. This option is available only if two or more cells are selected.
Merge Right	Merges the selected cell with a cell on its right. This option is available only if no more than one cell is selected.
Merge Down	Merges the selected cell with a cell located below it. This option is available only if no more than one cell is selected.

Table 43–12 (Cont.) Rich Text Editor: Table Cell Menu Selections

Action	Description
Split Cell Horizontally	Splits the selected cell in two, creating a new cell on its right. The content of the cell appears in the original, left cell. This option is available only if no more than one cell is selected.
Split Cell Vertically	Splits the selected cell in two, creating a new cell below it. The content of the cell appears in the original, upper cell. This option is available only if no more than one cell is selected.
Cell Properties	Opens the Cell Properties dialog, where you can configure cell size, type, color, and content alignment, as described in Section 43.11.3.1.1, "Editing Table Cell Properties in the Rich Text Editor."

43.11.3.1.1 Editing Table Cell Properties in the Rich Text Editor

Table cells can be further customized, creating a unique look and feel. From the table context menu, select **Cell**, then **Cell Properties** to open the Cell Properties dialog (Figure 43–84) where you can set cel properties for the table, as described in Table 43–13.

Figure 43–84 Rich Text Editor: Table Cell Properties Dialog

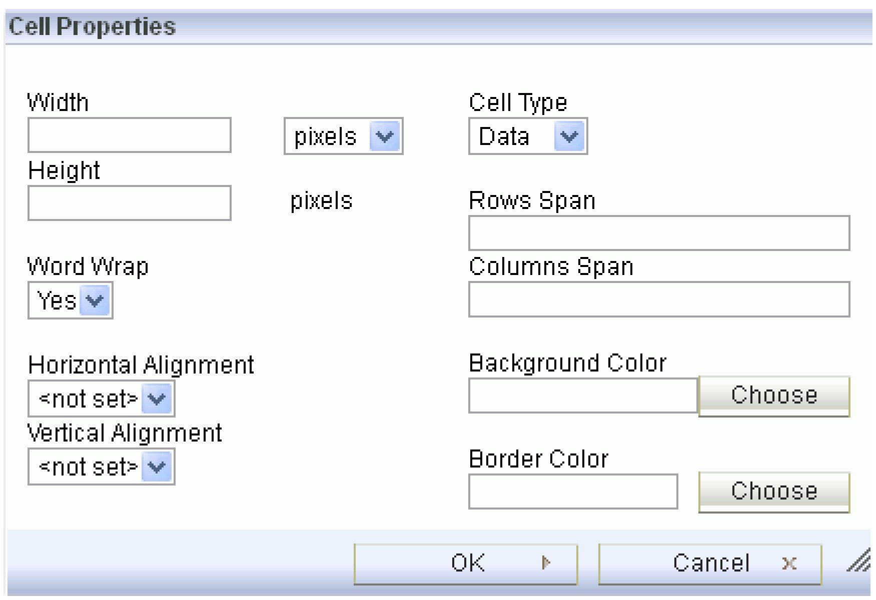


Table 43–13 Rich Text Editor: Table Cell Properties

Action	Description
Width	Enter the width of the cell, selecting either pixels or a percent value. Giving the width as a percent value lets you set the proportion of the row that the cell (and the column it is located in) will occupy.
Height	Enter the height of the cell in pixels.
Cell Type	Select the type of the table cell — either a normal data cell or a header cell with special formatting.
Word Wrap	Select whether or not to wrap content in the current cell.

Table 43–13 (Cont.) Rich Text Editor: Table Cell Properties

Action	Description
Rows Span	Enter a numeric value to specify the number of rows over which to stretch the cell downward. This value sets the `rowspan` attribute.
Columns Span	Enter a numeric value to specify the number of columns over which to stretch the cell to the right. This value sets the `colspan` attribute.
Horizontal Alignment	Select the horizontal alignment of table cell contents: Left, Center, or Right.
Vertical Alignment	Select the vertical alignment of table cell contents: Top, Middle, Bottom, or Baseline.
Background Color **Border Color**	Enter the color of the cell background and/or border using any of the following methods: ■ Enter an RGB value in `rgb(`*nn*`, `*nn*`, `*nn*`)` format, where *nn* is a numeric value on a scale from 0 to 255 representing the red, green, and blue channel. ■ Enter a hexadecimal RGB value, in `#`*nnnnnn* format, where the *nnnnnn* is the three pairs of hex color values representing the red, green, and blue channel. ■ Click **Choose** to open the Select color dialog where you can select from the color palette.

43.11.3.2 Editing Table Rows in the Rich Text Editor

To insert or delete rows in a table, right-click a row (*the current row*) to display the context menu, then select **Row** to expand the submenu of row actions (Figure 43–85), and select actions as described in Table 43–13.

To select multiple rows, drag the mouse over the rows, then right-click to open the context menu.

Figure 43–85 Rich Text Editor: Table Row Actions

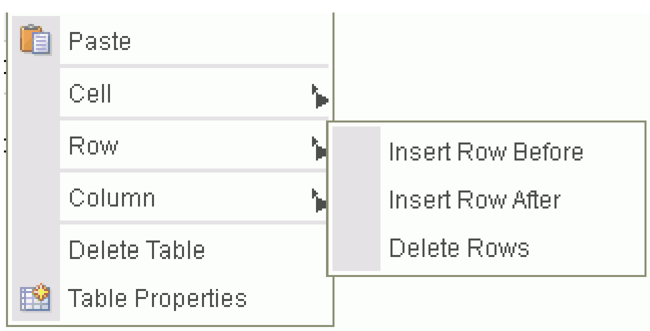


Table 43–14 Rich Text Editor: Table Row Menu Selections

Action	Description
Insert Row Before	Inserts a new row before the current row(s).
Insert Row After	Inserts a new row after the current row(s).
Delete Rows	Deletes the current row(s).

43.11.3.3 Editing Table Columns in the Rich Text Editor

To insert or delete columns in a table, right-click a column (*the current column*) to display the context menu, then select **Column** to expand the submenu of column actions (Figure 43–86), and select actions as described in Table 43–15.

To select multiple columns, drag the mouse over the columns, then right-click to open the context menu.

Figure 43–86 Rich Text Editor: Table Column Actions

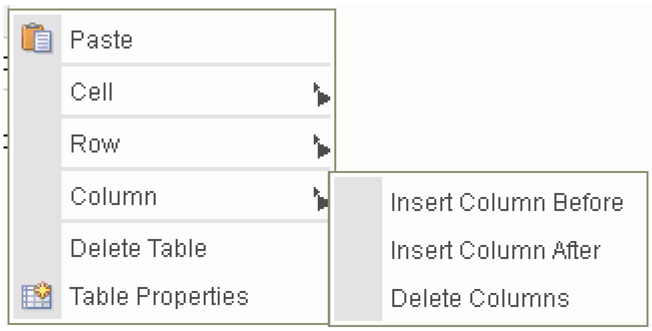


Table 43–15 Rich Text Editor: Table Column Menu Selections

Action	Description
Insert Column Before	Inserts a new column before the current column(s).
Insert Column After	Inserts a new column after the current column(s).
Delete Columns	Deletes the current column(s).

43.11.4 Using the Keyboard in the Rich Text Editor

The Rich Text Editor is compliant with several accessibility standards, including the Web Content Accessibility Guidelines (WCAG), the US Section 508 Amendment to the Rehabilitation Act of 1973, and the IBM Web Accessibility Checklist. To this end, you can use the RTE with the keyboard as well as a screen reader. The currently supported screen reader solution is JAWS.

For more information about accessibility in WebCenter Portal: Spaces, see Section 38.4, "Setting Your Accessibility Options."

Table 43–16 summarizes the keyboard keys and combinations available to you to navigate and edit text in the RTE.

Table 43–16 Rich Text Editor: Keyboard Usage

Keyboard Keys	Description
Alt+F10	Moves to the toolbar.
Tab	In the toolbar, moves to the next button group. In a dialog, moves to the next element.
Shift+Tab	In the toolbar, moves to the previous button group. In a dialog, moves to the previous element.
Left Arrow/Right Arrow	In the toolbar, moves between buttons within a button group. In a dialog, moves within a field.

Table 43–16 (Cont.) Rich Text Editor: Keyboard Usage

Keyboard Keys	Description
Enter	In the toolbar, selects the current button or menu item, or expands a drop-down list or menu. In a dialog, confirms entry at current cursor location.
Down Arrow/ Up Arrow	Moves between selections in a drop-down list.
Esc	Closes a menu without executing any command. When inside a submenu, closes the submenu and returns focus to the parent context menu. Press Esc again to close it. (In a dialog, cancels entries and closes dialog (equivalent to clicking **Cancel** or **Close**).
In the editing area:	
Shift+F10	Opens the context menu of the current element (use down arrow and up arrow to move between selections in the menu, and Enter to select an action).
Alt+F10	Moves to the tab selection in a dialog (use left and right arrow keys to move between tabs, and Enter to move to the fields on a tab).
Ctrl+A	Selects the entire content in the editing area.
Ctrl+B	Changes the formatting of the selected text to bold or remove the bold formatting of the selected text.
Ctrl+C	Copies highlighted selections to the clipboard.
Ctrl+I	Changes the formatting of the selected text to italics or remove the italics from the selected text.
Ctrl+U	Underlines the selected text or remove the underline formatting of the selected text.
Ctrl+V or **Shift+Insert**	Pastes the content on the clipboard at the current cursor location.
Ctrl+X or **Shift+Delete**	Cuts highlighted selections to the clipboard.
Ctrl+Y	Performs the redo operation.
Ctrl+Z	Performs the undo operation.

43.12 Editing and Updating a File

In a Documents service task flow or in the Document Viewer preview pane, you can check a file out, download it to your local file system for editing, edit a file in-place, or upload a new version of an existing file. The actions available to you depend on the file type:

- For all file types except wiki documents, check the file out to lock it from being updated by other users.
- For all file types, download the file to your local file system for saving or editing locally.
- For wiki and HTML documents, edit the file in-place using the Rich Text Editor (RTE).
- For all file types except wiki documents, upload a new version of the file.

The following sections provide more information:

- Section 43.12.1, "Checking a File Out"

- Section 43.12.2, "Cancelling a Checked Out Status"
- Section 43.12.3, "Downloading a File"
- Section 43.12.4, "Editing Files In-Place"
- Section 43.12.5, "Uploading a New Version of an Existing File"

43.12.1 Checking a File Out

When you want to retain exclusive use of a file—for example, when you're editing it on your local machine, or need to prevent other users from modifying it—you must check the file out. Other Spaces users can view the file, but they cannot upload a file of the same name into the same folder while the file is checked out.

Note: When you edit a file in-place (see Section 43.12.4, "Editing Files In-Place"), it is automatically checked out of the content repository. When you save it, it is automatically checked back in.

When you're ready to release the file, you can either check the file back in, or cancel file check out. Checking a file back in involves uploading the revised file (see Section 43.12.5, "Uploading a New Version of an Existing File"). Cancelling check out removes the file's checked out status without requiring a file upload (see Section 43.12.2, "Cancelling a Checked Out Status".

Note: To use the task pane available through the Microsoft Office shared document management functionality to check a Microsoft Word, Excel, or PowerPoint file out or in when the backend content repository is Content Server, see Section 48.3.3.4, "Checking a File Out" and Section 48.3.3.5, "Checking a File In"

To check a file out:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file you want to check out.

   Alternatively, you can check out an open file in the Document Viewer preview pane.

   Notes:

   - File check out is not available for wiki documents. In-place editing is the optimal way to update wiki documents, as described in Section 43.12.4, "Editing Files In-Place."
   - To check out a file in workflow, the file must be associated with a workflow that contains the step `review the current revision or create new revisions` *and* you must be an approver for the workflow. See Section 45.1.1, "Understanding Workflow Types."

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2. Depending on your view, perform one of the following actions:
   - On the **Documents** page or in a Documents service task flow, click the **File** menu, and select **Check Out**, or right-click to display the file's context menu (Figure 43–55) and select **Check Out**.

- In the Document Viewer preview pane, click the **File** menu, and select **Check Out**.

3. On the **Documents** page or in a Documents service task flow, click the **View** menu, and select **Refresh Content** to confirm that the **Checked Out** (padlock) icon appears in the file's **Checked Out** column:

   - Roll your mouse pointer over the icon to see details about the user who has checked the file out.
   - Click the icon to expose actions to upload a new version of the file, or cancel the checkout (Figure 43–87).

Figure 43–87 Checked Out Icon with Details

To cancel the checked out status of a file:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file.

   Alternatively, you can cancel the checked out status of an open file in the Document Viewer preview pane.

2. Depending on your view, perform one of the following actions:

   - On the **Documents** page or in a Documents service task flow, click the **Checked Out** (padlock) icon in the file’s row and select **Cancel Check Out** (Figure 43–87), click the **File** menu, and select **Cancel Check Out**, or right-click to display the file’s context menu (Figure 43–55) and select **Cancel Check Out**.
   - In the Document Viewer preview pane, click the **Cancel Check Out** action.

3. On the **Documents** page or in a Documents service task flow, click the **View** menu, and select **Refresh Content** to confirm that the **Checked Out** (padlock) icon no longer appears in the file's **Checked Out** column.

43.12.2 Cancelling a Checked Out Status

To cancel the checked out status of a file:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file.

   Alternatively, you can cancel the checked out status of an open file in the Document Viewer preview pane.

2. Depending on your view, perform one of the following actions:

   - On the **Documents** page or in a Documents service task flow, click the **Checked Out** (padlock) icon in the file’s row and select **Cancel Check Out** (Figure 43–88), click the **File** menu, and select **Cancel Check Out**, or right-click to display the file’s context menu (Figure 43–55) and select **Cancel Check Out**.

Figure 43–88 Checked Out Icon with Details

- In the Document Viewer preview pane, click the **Cancel Check Out** action.

3. On the **Documents** page or in a Documents service task flow, click the **View** menu, and select **Refresh Content** to confirm that the **Checked Out** (padlock) icon no longer appears in the file's **Checked Out** column.

43.12.3 Downloading a File

When you want to save a file to your local file system, you can download it from the content repository.

To download a file:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file you want to download to your local file system.

   Alternatively, you can download an open file in the Document Viewer preview pane.

2. Depending on your view and the file type, perform one of the following actions:

   - On the **Documents** page or in a Documents service task flow, click the **Download** action, or right-click to display the file's context menu (Figure 43–55) and select **Download**.
   - In the Document Viewer preview pane, click the **Download** action.
   - (For any file type for which Content Server is configured to convert to PDF) In the Document Viewer preview pane, click the **View** menu, and select **Download PDF** to save a PDF version of the open file to your local file system.

3. In the Open/Save dialog, select **Save File** to open the Save dialog, where you can navigate to the folder in which to save the file.

43.12.4 Editing Files In-Place

With appropriate permissions, end users can directly edit the following types of files in-place:

- Wiki documents
- Blog posts
- HTML files
- Microsoft Office 2003 or higher files (Word, Excel, PowerPoint)

> **Note:** If you are using Windows 7 or a 64-bit machine with Firefox 3.6, you may need to install the Java plugin available at `http://support.mozilla.com` to edit a Microsoft Office file. This plugin is included in Java 6 Update 15 and above.

In-place editing refers to editing content directly in a Spaces application at runtime, where the editor opens in the document preview pane. When you edit a file in-place, it is automatically checked out of the content repository. When you save it, it is automatically checked back in.

To edit HTML and Site Studio files that display in a Content Presenter task flow, see Section 42.10, "Creating and Editing Files In-Context in a Content Presenter Task Flow."

To edit a file in-place:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file you want to edit, but not on the file name.

   Alternatively, you can edit an open file in the Document Viewer preview pane.

2. Depending on your view and the file type, perform one of the following actions:

   - On the **Documents** page or in a Documents service task flow, click the **File** menu, and select **Edit** or **Edit with *Application***, or right-click to display the file's context menu (Figure 43–55) and select **Edit** or **Edit with *Application***.

   - In the Document Viewer preview pane, click the **Edit** (Figure 43–89) or **Edit with *Application*** (Figure 43–90) action.

Figure 43–89 Edit Action in Document Viewer for Wiki Document

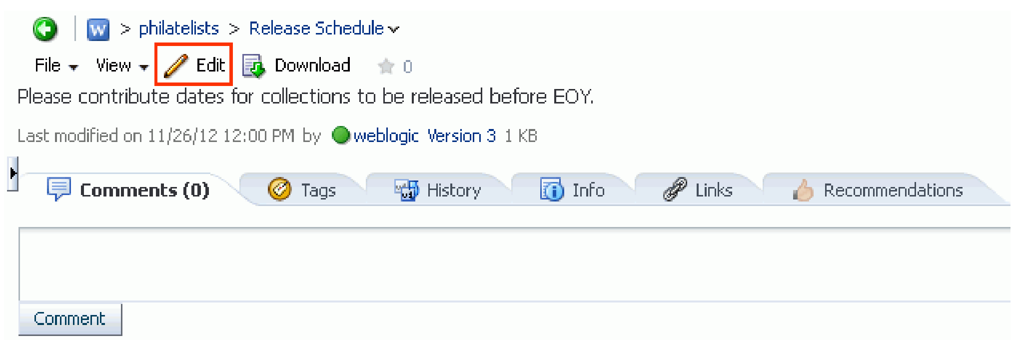
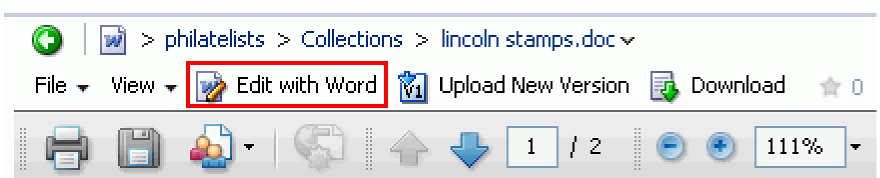


Figure 43–90 Edit Action in Document Viewer for Microsoft Word File



Notes:

- If the file is already checked out by another user, the the Document Viewer specifies the name of the user who has it checked out. See Section 43.12.4.1, "Opening a File Already Checked Out By Another User."
- To edit a file in workflow, the file must be associated with a workflow that contains the step `review the current revision or create new revisions` *and* you must be an approver for the workflow. See Section 45.1.1, "Understanding Workflow Types."

The file opens in the appropriate editor:

- Wiki documents, blog posts, and HTML files open in-place in the Rich Text Editor (RTE). For information about the RTE, see Section 43.11, "Using the Rich Text Editor (RTE)."
- Microsoft Office (Word, Excel, PowerPoint) files may first display a confirmation prompt, then an authentication dialog. Use the same credentials used to log in to Spaces to open the file in-place in its corresponding application.

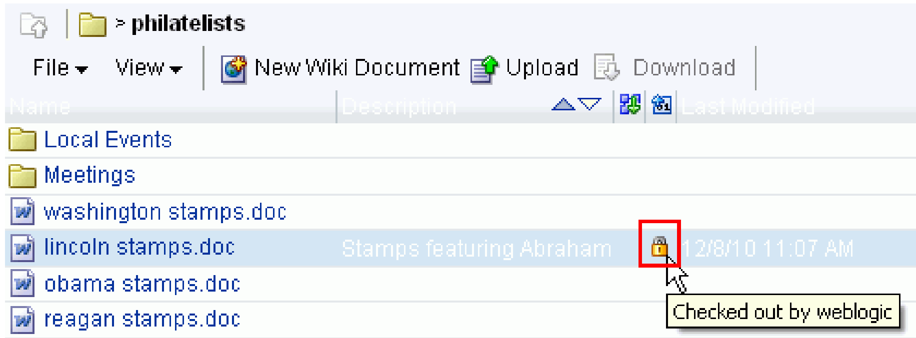
Note: The user name and password must contain only ASCII characters. A user name or password containing multi-byte characters cannot be successfully authenticated.

When the connected content repository is Content Server, you must access the Spaces application through Oracle HTTP Server (OHS) to expose Content Server and the Spaces application under the same host and port to allow for full integration of Microsoft Office with Spaces. For information about setting up OHS as the front-end to Spaces, see "Configuring Content Server for WebCenter Portal Applications" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Additionally, your Spaces administrator must modify system properties and server configuration files, and set up a virtual host for your Spaces application. These configuration requirements are described in "Managing Microsoft Office Integration" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

3. When the file opens, it is automatically checked out. In Spaces, click the **Refresh** icon to show the **Checked Out** icon for the selected file (Figure 43–91).

Figure 43–91 Checked Out Icon in Spaces



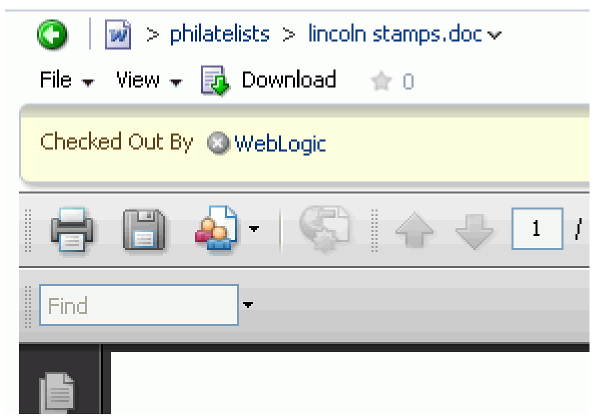
4. Make required updates, then save and close the file.

   The modified file is automatically checked back in.

43.12.4.1 Opening a File Already Checked Out By Another User

If the file that you attempt to open is already checked out by another user, the Document Viewer specifies the name of the user who has it checked out. (Figure 43–92).

Figure 43–92 Document Viewer: File Checkout Out



You can download the file to your local system to edit it, but you cannot upload the changed file to the content repository until it is checked in and made available again.

43.12.5 Uploading a New Version of an Existing File

If you have write permissions on a file, you can replace the file with a new version that you have saved on your local file system.

To upload new versions of multiple files at once, which allows you to also specify whether to create new versions of existing files or overwrite existing files, follow the steps in Section 43.8.1, "Uploading Files."

Note: Spaces does not support uploading a new wiki document or a new version of a wiki document from the file system. If you upload an HTML file, you cannot convert it to a wiki document due to differences in underlying metadata. For information about wiki documents in Spaces, see Chapter 49, "Working with Wiki Documents."

To upload a new version of a single file:

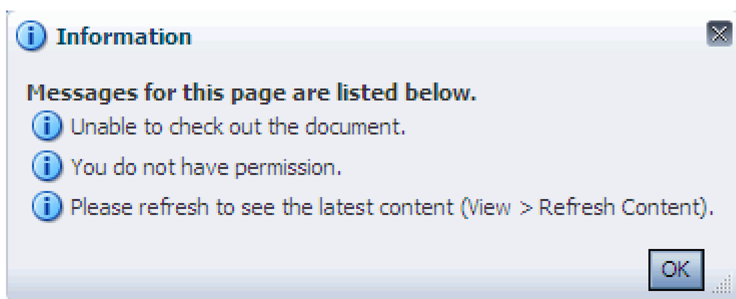
1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file you want to replace.

   Alternatively, you can upload a new version of an open file in the Document Viewer preview pane.

2. Depending on your view and permissions, perform one of the following actions:

Note: If you do not have write permission on the file, or if the file is already checked out by another user, then the **Upload New Version** action will not be available to you.

If you have write permissions on the file, and try to upload a new version at the same time it is being checked out by another user, an Information dialog notifies you that the file is not available:

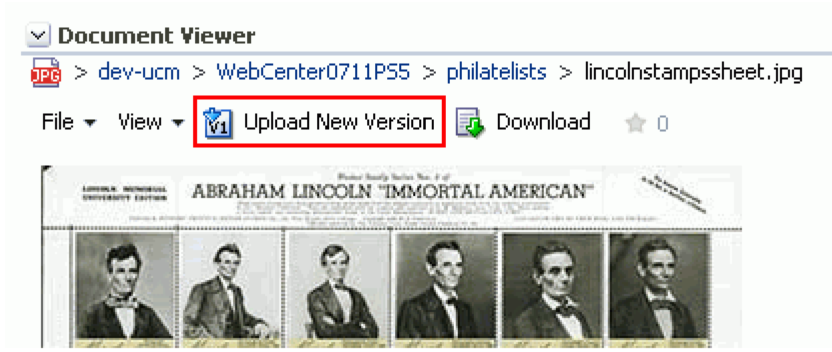


- On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click the **Checked Out** (padlock) icon in the file's row and select **Upload New Version** (Figure 43–93), click the **File** menu, and select **Upload New Version** (Figure 43–49), or right-click to display the file's context menu (Figure 43–55) and select **Upload New Version**.

Figure 43–93 Checked Out Icon: Upload New Version

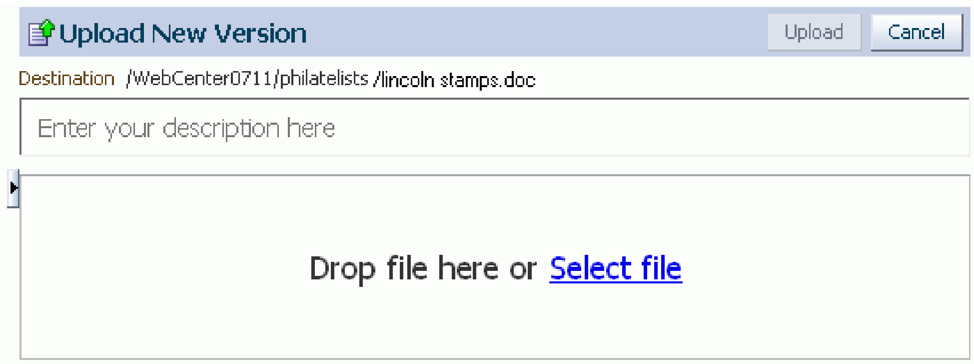
- In the Document Viewer preview pane, click the **Upload New Version** action (Figure 43–94).

Figure 43–94 Document Viewer: Upload New Version



The Upload New Version pane opens (Figure 43–95).

Figure 43–95 Upload New Version Pane



Note: if a file is associated with a content profile, it will be uploaded using that content profile. You cannot change a file's content profile by uploading a new version. See Section 43.8.1.2, "Uploading a File with a Content Profile" for information about selecting a content profile when a file is first uploaded.

---

3. Select the file(s) to upload, in either of the following ways:
   - (In FireFox, Chrome, or Safari browsers) Select the file(s) in your local file system and drag them into the Upload New Version pane.
   - Or, click **Select files** to navigate to and select the file(s) you want to upload.
4. In the Upload Document pane, optionally, provide a description of the file in the **Description** field.
5. Click **Upload**.

   A new version of the file replaces the existing file. For information about viewing versions of a file, see Section 43.21, "Viewing and Deleting File Version History."

43.13 Renaming a Folder or File

In a Documents service task flow, you can rename a folder or file as described in the following sections:

- Section 43.13.1, "Renaming a Folder or File Using a Menu"
- Section 43.13.2, "Renaming a File and Revising Its Description Through Properties"

Note: To use Windows Explorer to rename folders and files in a space when the backend content repository is Content Server, see Section 48.4.2, "Working with Files Using Windows Explorer."

43.13.1 Renaming a Folder or File Using a Menu

To rename a folder or file:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the folder or file you want to rename.
2. Click the **File** menu, and select **Rename**, or right-click in the folder or file's row to display the context menu (Figure 43–54 and Figure 43–55) and select **Rename**.

   The Rename Folder or Rename Document dialog opens (Figure 43–96).

Figure 43–96 Rename Document Dialog

3. In the **Name** field, enter a new folder or file name.

Note: The following characters are not allowed in folder and file names

```
\ / : [ ] * ' " | ?
```

Letters, numbers, spaces, and periods (.) are allowed.

---

4. Click **Rename**.

43.13.2 Renaming a File and Revising Its Description Through Properties

To rename a file or revise its description through its properties, see Section 43.22, "Viewing and Modifying Folder and File Properties."

43.14 Copying and Pasting Folders and Files

In a Documents service task flow, you can copy and paste folders and files in the following ways:

- Use menu actions as described in the steps below.

- Drag and drop into a target folder while pressing the Ctrl key. You can even drag and drop into another Documents service task flow on the same page as long as both task flows are connected to the same content repository.
- Copy a file to your local file system, as described in Section 43.12.3, "Downloading a File."

To copy one or more folders (including all of its subfolders and files) or files using menu actions:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the folder(s) or file(s) you want to copy.

   To select multiple folders or files, Ctrl-click in the rows.
2. Click the **File** menu, and select **Copy**, or right-click to display the context menu (Figure 43–54 and Figure 43–55) and select **Copy**.
3. Navigate to the folder where you want to paste the copied folder(s) or file(s).

   You can also navigate to a folder in another Documents service task flow on the same or a different page as long as both task flows are connected to the same content repository.
4. Click the **File** menu, and select **Paste**, or right-click to display the folder's context menu (Figure 43–54) and select **Paste**. After pasting, the **Paste** action becomes inactive in the current folder. You can continue to paste the copied content to other folders as needed.

   If you are copying into another Documents service task flow, you may need to refresh the target folder if the **Paste** menu action is not active (see Section 43.17, "Refreshing Folder Contents").

   The selected folder(s) and file(s) are copied to the current folder.

Note: If a folder or file is deleted at the source location before pasting, it will not be copied to the paste location.

43.15 Moving Folders and Files

In a Documents service task flow, you can move folders and files in the following ways:

- Use the menu actions as described in the steps below.
- Drag and drop into a target folder. You can even drag and drop into another Documents service task flow on the same page as long as both task flows are connected to the same content repository.

Note: To use Windows Explorer to move folders and files in a space when the backend content repository is Content Server, see Section 48.4.2, "Working with Files Using Windows Explorer."

To move one or more folders (including all of its subfolders and files) or files using menu actions:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the folder(s) or file(s) you want to move.

   To select multiple folders or files, Ctrl-click in the rows.

2. Click the **File** menu, and select **Cut**, or right-click to display the context menu (Figure 43–54 and Figure 43–55) and select **Cut**.

3. Navigate to the folder where you want to move the folder(s) or file(s).

   You can also navigate to a folder in another Documents service task flow on the same or a different page as long as both task flows are connected to the same content repository

4. Click the **File** menu, and select **Paste**, or right-click to display the folder's context menu (Figure 43–54) and select **Paste**. After pasting, the **Paste** action becomes inactive in the current folder.

   If you are moving folders or files into another Documents service task flow, you may need to refresh the target folder if the **Paste** menu action is not active (see Section 43.17, "Refreshing Folder Contents").

   The selected folder(s) and file(s) are moved to the current folder.

> **Note:** If you do not paste the cut folder(s) or file(s), they are restored to the location where they were cut. If a folder or file is deleted at the source location before pasting, it will not be moved to the paste location.

43.16 Deleting Folders and Files

When you delete a folder, all the subfolders and files the folder contains are also deleted in the content repository. When you delete a folder, this action is not reflected in the Activity Stream in the Home space.

> **Notes:**
>
> - The root folder of the task flow cannot be deleted.
> - To use Windows Explorer to move folders and files in a space when the backend content repository is Content Server, see Section 48.4.2, "Working with Files Using Windows Explorer."

To delete one or more folders or files:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the folder(s) or file(s) you want to delete.

   To select multiple folders or files, Ctrl-click in the rows.

2. Click the **File** menu, and select **Delete**, or right-click to display the context menu (Figure 43–54 and Figure 43–55) and select **Delete**.

   The Delete dialog opens (Figure 43–97).

Figure 43–97 Deleting a File

3. Click **Delete** to delete your selection from the content repository.

43.17 Refreshing Folder Contents

Refreshing the contents of the current folder retrieves all changes made in the content repository since the last retrieval.

To refresh folder contents:

- On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click the **View** menu, and select **Refresh Content**.
- In the Document List Viewer task flow, click the **Refresh** icon.

43.18 Hiding and Showing Folders

To hide or show the folders in a listing of folders and files:

- On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click the **View** menu, and select **Hide Folders**.

  When folders are hidden, a checkmark displays alongside the **Hide Folders** menu selection.

43.19 Viewing, Entering, and Deleting Comments on a File

You can associate comments with a file to provide additional information that you want to convey to other users about the file. When you enter comment on a file, this action is not reflected in the Activity Stream in the Home space.

> **Note:** Users viewing a public document are not given the ability to comment on the document.

To view, enter, or delete comments on a file:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file.

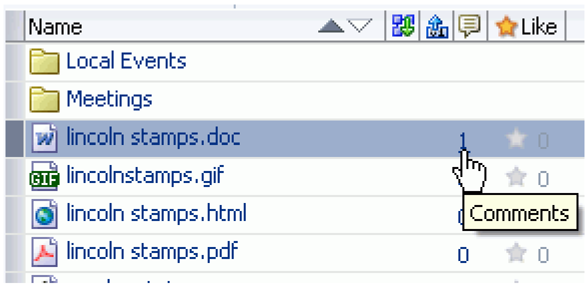
   Alternatively, you can view comments for an open file in the Document Viewer preview pane or Rich Text Editor (RTE).

2. Depending on your view, perform one of the following actions:

   - On the **Documents** page or in a Documents service task flow, open the Comments pane in any of the following ways:
     – Click the **View** menu, and select **Details**.

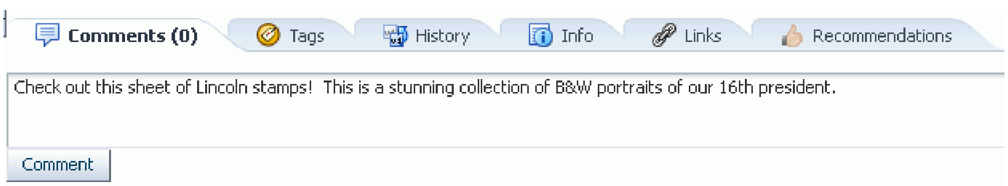
- Right-click to display the file's context menu (Figure 43–55) and select **Details**.
- Click the value in the **Comments** column (Figure 43–98) for the file. This value indicates the number of comments that have been entered for each file.

Figure 43–98 Comments Column for a File



- In the Document Viewer preview pane, scroll to the bottom of the document and click the **Comments** tab (Figure 43–99).

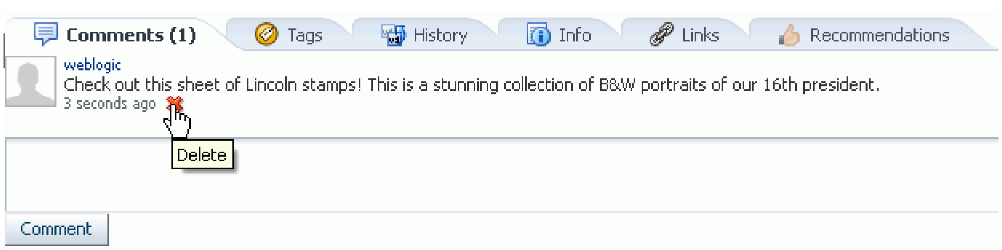
Figure 43–99 Comments Pane



- In the Rich Text Editor, scroll to the bottom of the HTML document, wiki, or blog post, and click the **Comments** tab (Figure 43–99).

3. To add a comment, enter it in the input area, then click **Comment** to display your comment above the input area. The comment display is limited to 500 characters.
4. To delete a prior comment that you have entered, click the **Delete** icon beneath the comment (Figure 43–100).

Figure 43–100 Deleting a Comment



43.20 Working with Tags

Tags specify keywords related to the content of the file. Tags are useful for making a file more widely discoverable in search results.

To work with the tags for a file:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file.

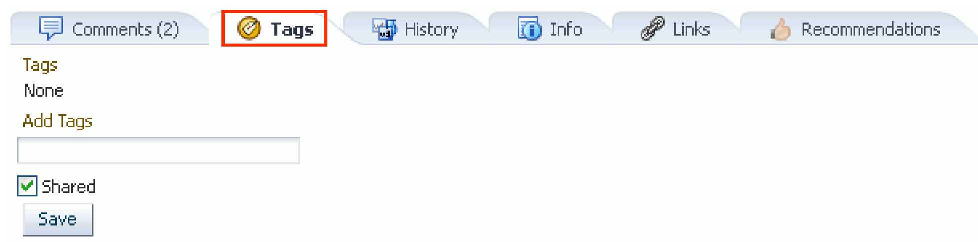
   Alternatively, you can view the tags of an open file in the Document Viewer preview pane or Rich Text Editor (RTE).

2. Depending on your view, perform one of the following actions:

   - On the **Documents** page or in a Documents service task flow, click the **View** menu, and select **Details**, or right-click to display the file's context menu (Figure 43–55) and select **Details**.
   - In the Document Viewer preview pane, scroll to the bottom of the document and click the **Tags** tab (Figure 43–101).

     S

Figure 43–101 Tags Pane



   - In the Rich Text Editor, scroll to the bottom of the HTML document, wiki, or blog post, and click the **Tags** tab (Figure 43–101).

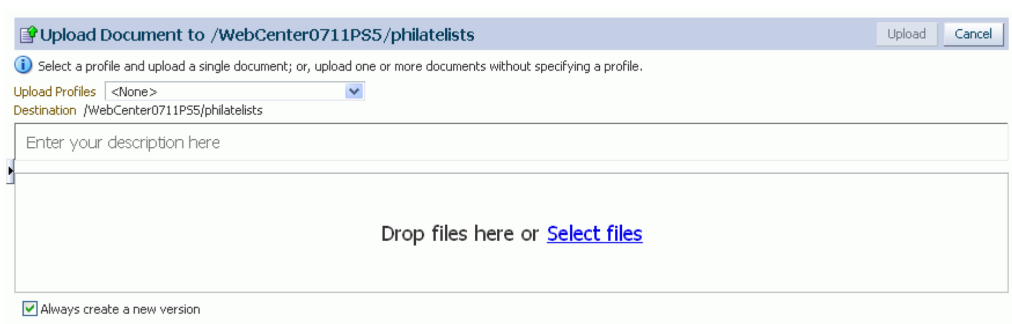
3. In the **Tags** pane, enter new tags, and edit or delete existing tags as your permissions allow, then click **Save**.

   See Also: For information about tags in Spaces, see Chapter 59, "Working with the Tags Service."

43.21 Viewing and Deleting File Version History

If you edit and save a file, or upload a file with **Always create a new version** selected in the Upload dialog (Figure 43–102), Spaces creates a new version of the file if it already exists in the current folder. When a file has multiple versions, it has a version history.

Figure 43–102 Upload Document Screen (in FireFox browser)



This section describes how to view a file's version history to track when a file was last revised, to determine which user revised it, and to delete a particular file version. For wiki documents and blog posts, you can also compare versions.

Note: To use the the task pane available through Microsoft Office shared document management functionality to work with a Microsoft Word, Excel, or PowerPoint file's version history, see Section 48.3.3.11, "Working with File Version History."

To view or delete versions of a file:

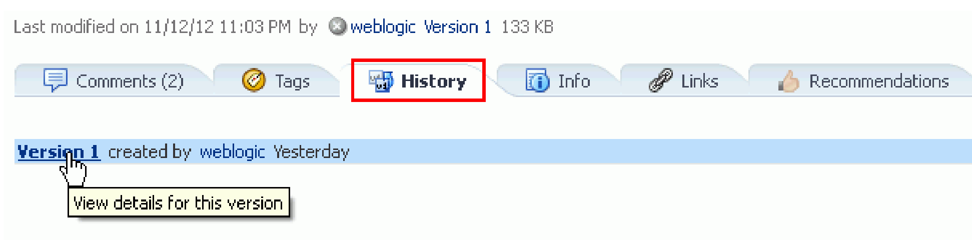
1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file.

   Alternatively, you can view comments for an open file in the Document Viewer preview pane or Rich Text Editor (RTE).

2. Depending on your view, perform one of the following actions:

   - On the **Documents** page or in a Documents service task flow, click the **View** menu, and select **Details**, or right-click to display the file's context menu (Figure 43–55) and select **Details**.
   - In the Document Viewer preview pane, scroll to the bottom of the document and click the **History** tab (Figure 43–103).

Figure 43–103 History Pane



   - In the Rich Text Editor, scroll to the bottom of the HTML document, wiki, or blog post, and click the **History** tab (Figure 43–103).

3. Select a version of the file to display a preview of that version in the preview pane.

4. To delete a particular version, select it in the History pane, then click **Delete** (Figure 43–104).

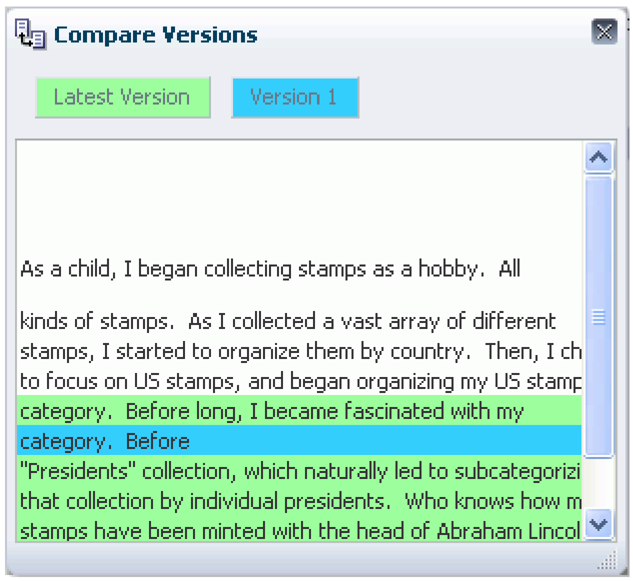
Note: The **Delete** icon displays only if you have been granted delete permissions.

Figure 43–104 Deleting a Version of a File

5. (For wiki documents and blog posts only) To compare a particular version with the current version of the file, select it in the History pane, then click **Compare** to open the Compare Versions dialog, showing the differences (Figure 43–105 and Figure 43–106).

Figure 43–105 Comparing Older Version with Current Version (Wiki or Blog)

Figure 43–106 Compare Versions Dialog (Wiki or Blog)



43.22 Viewing and Modifying Folder and File Properties

Folder and file properties provide access to informational details. You can use file properties to perform activities such as rename a file, modify a file description, or change file metadata values.

Additionally, both folder and file properties provide read-only information about location, type, and creation and modification dates, and the users who created or last modified the folder or file.

To access folder or file properties, refer to the steps in the following sections:

- Section 43.22.1, "Working with Folder Properties"
- Section 43.22.2, "Working with File Properties"

43.22.1 Working with Folder Properties

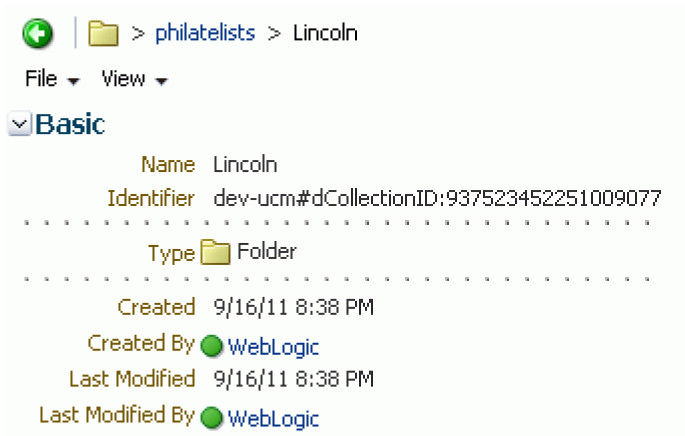
To view folder properties:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the folder.

2. Click the **View** menu, and select **Details**, or right-click to display the folder's context menu (Figure 43–54) and select **Details**.

   The Basic properties pane opens (Figure 43–107). Folder properties are not editable. To change the folder name, see Section 43.13, "Renaming a Folder or File."

Figure 43–107 Folder Properties



43.22.2 Working with File Properties

To view or modify file properties:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file.

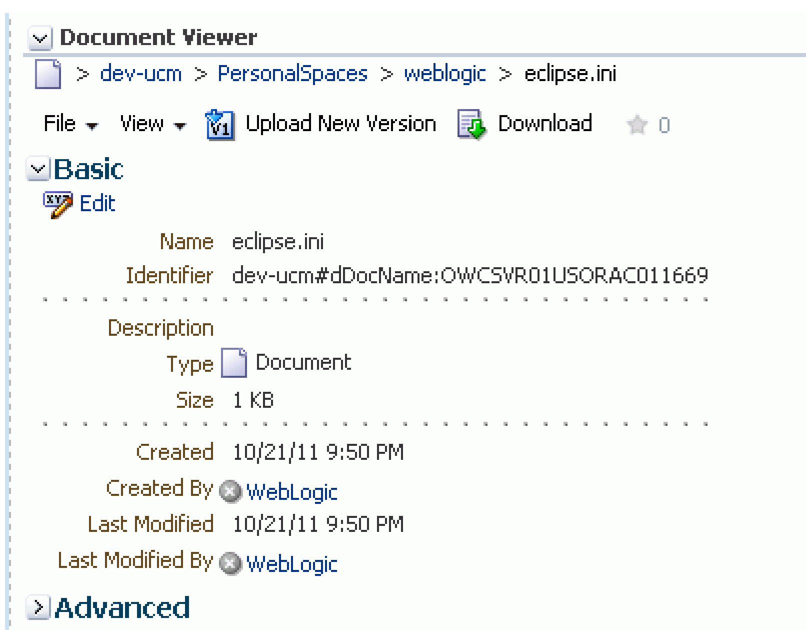
   Alternatively, you can view properties of an open file in the Document Viewer preview pane.

2. Depending on your view, perform one of the following actions:

   - On the **Documents** page or in a Documents service task flow, click the **View** menu, and select **Details**, or right-click to display the context menu (Figure 43–55) and select **Details**.
   - In the Document Viewer preview pane:
     – If the file type supports an in-place preview of the file contents, scroll to the bottom of the preview and click the **Info** tab (Figure 43–108).
     – If the file type does not support a preview (for example, `.mp3` music files, video files, or `.ini` files), the preview pane displays the file properties (Figure 43–109).

Figure 43–108 Document Viewer: File Properties in Tabbed Info Pane

Figure 43–109 Document Viewer: File Properties in Preview Pane



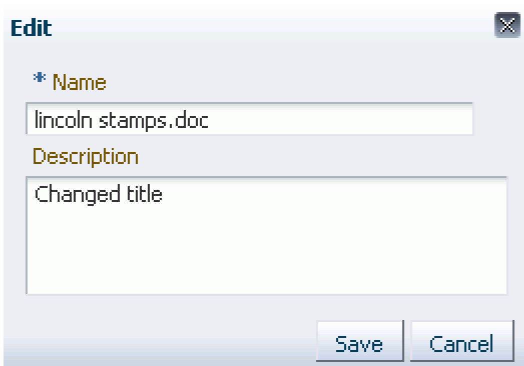
3. To modify the editable Basic properties, click **Edit** in the Basic properties area. In the Edit dialog (Figure 43–110), revise the file name and description as desired, then click **Save**.

Note: The following characters are not allowed in file names:

`\ / : [ ] * ' " | ?`

Letters, numbers, spaces, and periods (.) are allowed.

Figure 43–110 Edit Dialog for Basic Properties

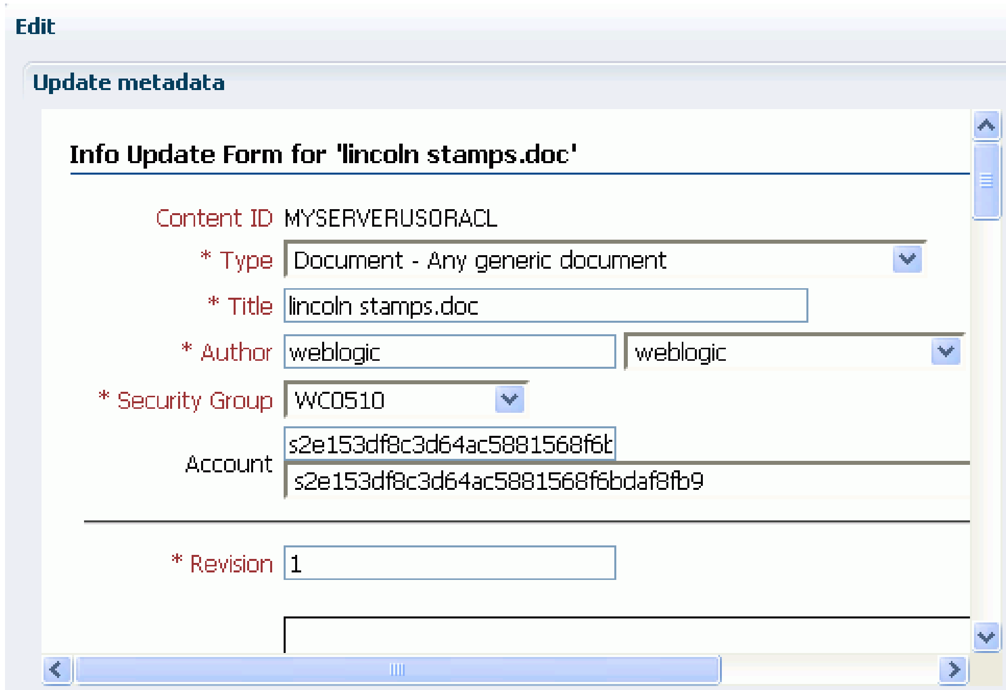


4. To modify the editable Advanced properties, click **Edit** in the Advanced properties area. In the Edit dialog (Figure 43–111), revise the property values as desired, then click **Save**.

Note: To enable **Edit** functionality on Advanced properties, *both* of the following two requirements must be met:

- You must access the Spaces application through Oracle HTTP Server (OHS) to expose Content Server and the Spaces application under the same host and port. For information about setting up OHS as the frontend to Spaces, see "Configuring Content Server for WebCenter Portal Applications" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- Spaces must be connected to a Content Server repository, with the `webContextRoot` parameter set to a Content Server host name. For information on setting `webContextRoot`, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. To set `webContextRoot` through WLST, see "`createJCRContentServerConnection`" and "`setJCRContentServerConnection`" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

Figure 43–111 Advanced Properties Edit Dialog



> **Note:** Most advanced properties are unique to the content repository (such as Content Server) where the file is stored.

43.23 Setting Security Options on a Folder or File

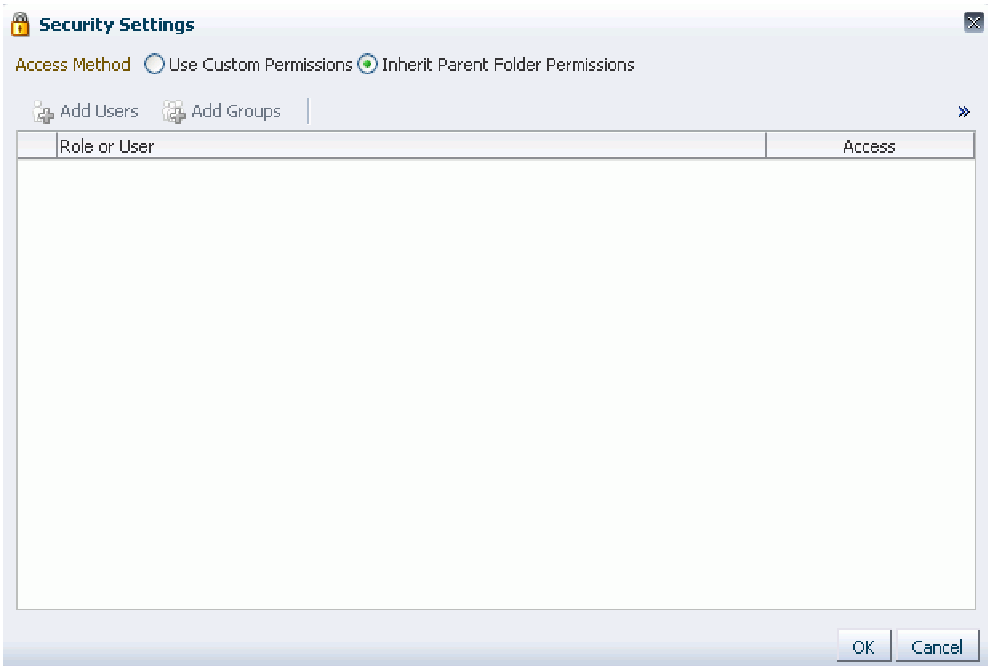
Security can set be on a folder or a file through inheritance from the parent folder, or by setting custom permissions. If set on a folder, the security is propagated to child files and folders that do not already have their own custom permissions defined. A child file or folder (at any depth) that already has custom permissions defined will retain that security definition.

You must have `Documents-Administration` permission to set security options on a folder or file. For information about roles and permissions, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

To set security options on a folder or file:

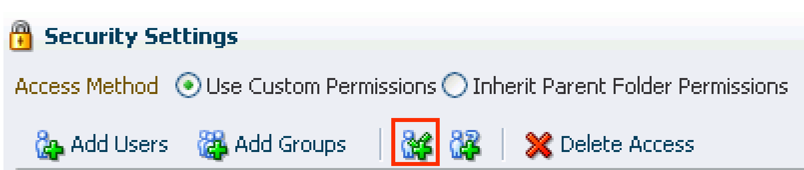
1. Verify that the Spaces administrator has completed the prerequisite steps before setting security options on folder or file, as described in "Configuring Item Level Security between Content Server 11*g* and Spaces" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
2. Open the Security Settings dialog (Figure 43–112) in any of the following ways:
   - On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the folder or file, then click the **File** menu, and select **Security**.
   - Right-click in the folder or file's row to display the context menu (Figure 43–54 and Figure 43–55) and select **Security**.
   - If you are already viewing a file in the Document Viewer preview pane, click the **File** menu, and select **Security**.

Figure 43–112 Security Settings Dialog



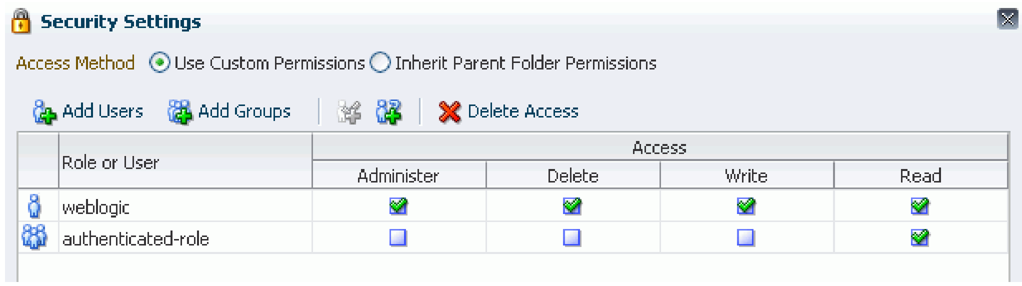
3. Select the **Access Method**:
   - To specify that the folder or file should inherit access settings from the parent folder, select **Inherit Parent Folder Permissions**, then click **OK** to save your changes and exit the dialog.
   - To set custom access on the current folder or file, select **Use Custom Permissions**, and continue with the next steps.
4. To grant access permissions to all authenticated users (that is, to users who are logged in to Spaces), click the **Add Authenticated Role for Logged in User Access** icon (Figure 43–113).

Figure 43–113 Add Authenticated Role for Logged in User Access Icon



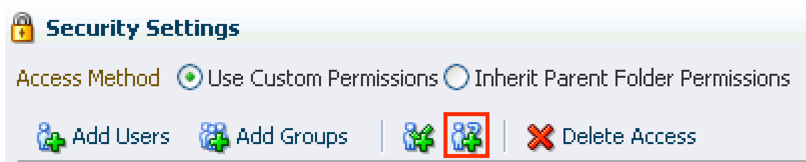
The role `authenticated-role` is added under **Role or User** with default **Read** access to the folder or file, and the option to grant **Administer**, **Delete**, and **Write** permissions (Figure 43–114).

Figure 43–114 authenticated-role Default Security Settings



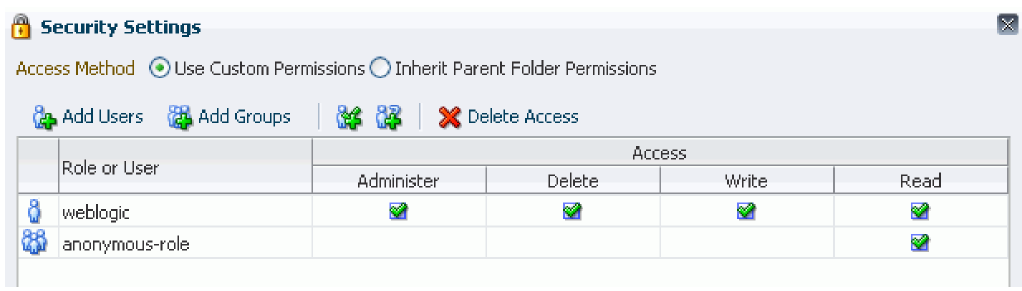
5. To grant access permissions to all public users (that is, users who have not logged in to Spaces), click the **Add Anonymous Role for Public Access** (Figure 43–115).

Figure 43–115 Add Anonymous Role for: Access Icon



The role `anonymous-role` is added under **Role or User** with default **Read** access to the file (Figure 43–116).

Figure 43–116 anonymous-role Default Security Settings



6. To grant access permissions to selected members of the space, click **Add Users** or **Add Groups** to open the corresponding Search dialog where you can select users or groups to populate the list in the Security Settings dialog. For tips on searching for a user or group in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."
7. For each user, group, or role, grant access by selecting one or more access privileges from the **Access** columns: **Administer**, **Delete**, **Write**, and **Read**.
8. Click **OK** to save your changes and close the Security Settings dialog.

43.24 Working with Links

Links provide a way to view, access, and associate related information by linking a file to a discussion, document, event, note, or URL. For example, you can create a link to associate a project plan document with a list of project issues. To create links, you must be granted the `Links-Create Links` permission.

Note: If you create a link using the **Select Resource** or **Add Resource** icons in the RTE (see Table 43–8, " Rich Text Editor Toolbar Icons and Controls on Rich Text Tab"), the resulting inline link is not added to the **Links** tab associated with the details of the linking HTML document, wiki, or blog post. If you require a link to appear on the **Links** tab, you must add it using the **Link to New** and **Link to Existing** menus on the **Links** tab, as described in the steps below, which also adds a corresponding link on the **Links** tab for the linked resource.

To work with links associated with a file:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file.

   Alternatively, you can view the links of an open file in the Document Viewer preview pane.

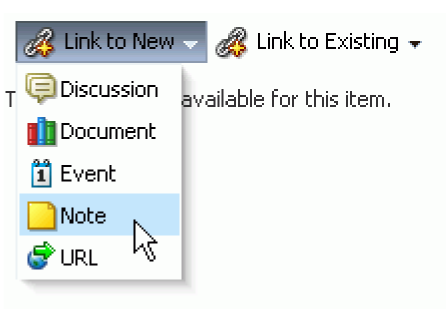
2. Depending on your view, perform one of the following actions:

   - On the **Documents** page or in a Documents service task flow, click the **View** menu, and select **Details**, or right-click to display the file's context menu (Figure 43–55) and select **Details**.
   - In the Document Viewer preview pane, scroll to the bottom of the document and click the **Links** tab (Figure 43–117).

Figure 43–117 Links Pane

3. On the **Links** tab, click **Link to New** and select the required item to create and link to discussion forum topics, events, or notes; upload and link to documents, or enter the URL of a web page to link to (Figure 43–118).

Figure 43–118 Adding a Link to a New Discussion, Document, Event, Note, or URL



4. Click **Link to Existing** and select the required item to link to an existing announcement, discussion forum topic, document, or event (Figure 43–119).

Figure 43–119 Adding a Link to an Existing Announcement, Discussion, Document, or Event

The links that you add are listed on the **Links** tab for the document, and a corresponding link to the document is listed on the **Links** tab for the linked resource.

Figure 43–120 Link to Another Document

> **See Also:** For more information about creating links in Spaces, see Chapter 65, "Working with the Links Service."

43.25 Working with Recommendations

> **Note:** The Recommendations pane displays only if the Activity Graph service is configured in your application. For more information, see "Activity Graph Service Prerequisites" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

The **Recommendations** pane provides suggestions of other documents you might want to view, based on the current document. This list uses the Similar Items task flow of the Activity Graph service. For more information, see Section 60.2.4, "Working with the Similar Items Task Flow."

To work with the recommendations for a file:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file.

   Alternatively, you can view the links of an open file in the Document Viewer preview pane.

2. Depending on your view, perform one of the following actions:

   - On the **Documents** page or in a Documents service task flow, click the **View** menu, and select **Details**, or right-click to display the file's context menu (Figure 43–55) and select **Details**.

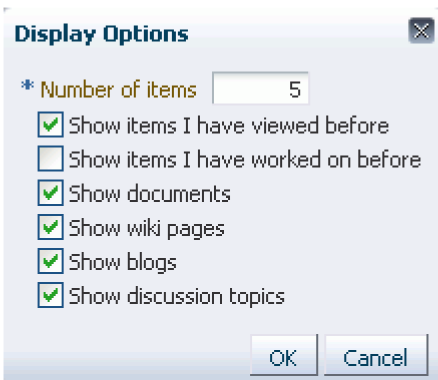
   - In the Document Viewer preview pane, scroll to the bottom of the document and click the **Recommendations** tab (Figure 43–121).

Figure 43–121 Recommendations Pane

3. Click the **Display Options** icon (Figure 43–122) to open the Display Options dialog (Figure 43–123), where you can select the items you want to show on the **Recommendations** tab.

Figure 43–122 Recommendations Display Options Icon

Figure 43–123 Display Options for Recommendations



4. In the Recommendations pane:
   – Click the **Delete** icon to delete the associated recommendation.
   – Click the link text for each recommendation to view that document.
   – Click the **Refresh** icon to display the most recent recommendations.

   See Also: For more information about working with recommendations, see Chapter 60, "Working with the Activity Graph Service."

43.26 Opening or Saving PDF Files

From the Document Viewer preview pane, you can open or save the PDF version of the currently open file to your local file system. This choice is available for any file type for which Content Server is configured to convert to PDF.

Note: To enable the conversion of wikis and blogs into PDF, your application administrator must configure the WebCenter Conversion component, as described in "Enabling the Conversion of Wikis and Blogs into PDFs" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

To open or save a file in PDF:

- In the Document Viewer preview pane, click the **View** menu, and select:
  - **Open as PDF** to open the file in a new tab in your browser in Adobe Acrobat Reader's PDF Viewer plug-in.
  - **Download PDF** to open a browser dialog where you can save the file to your local file system as a PDF file.

43.27 Sharing the URL for a Folder or File

With appropriate permissions, users can directly access folders and files by clicking the URL, or entering it in a browser. You can retrieve and share the URL to a folder or file in several ways, as described in the following sections:

- Section 43.27.1, "Retrieving the URL for a Folder or File"
- Section 43.27.2, "Mailing the URL for a Folder or File"
- Section 43.27.3, "Publishing the URL for a File to Activity Streams"

43.27.1 Retrieving the URL for a Folder or File

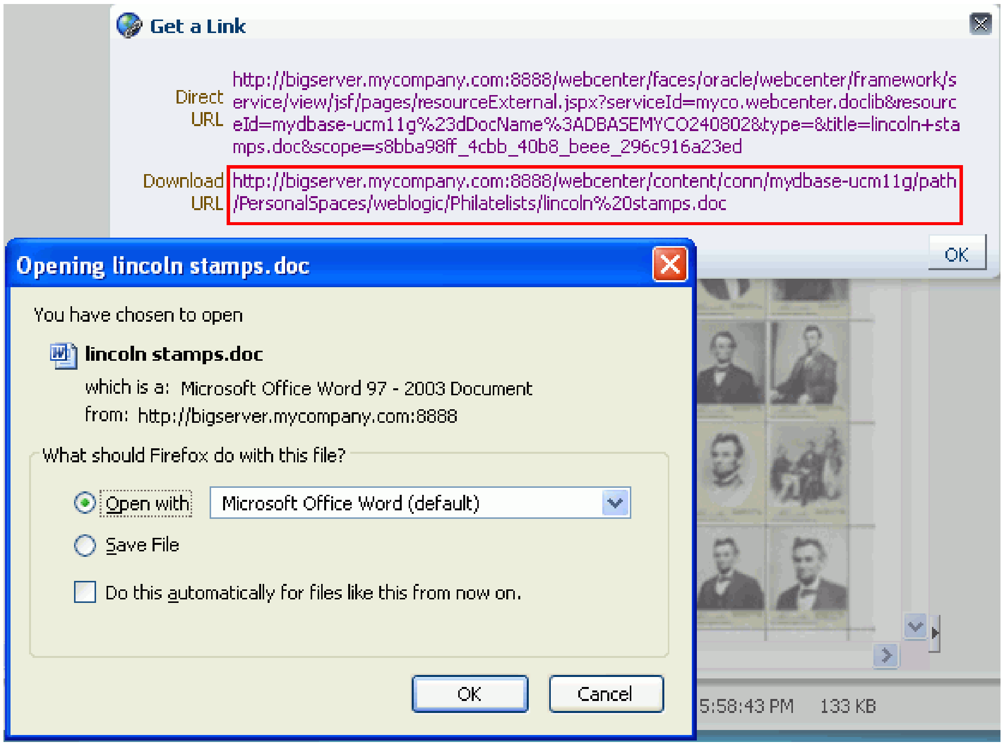
Every folder and file that resides in a connected content repository can be accessed through a direct URL, which you can provide to other users. If they have permissions to access the folder or file, they can click the URL link to open the folder or file directly in a Spaces application, open the file in its default application, or save the file to their local file system.

To retrieve the URL for a folder or file:

1. Open the Get a Link dialog in any of the following ways:
   - On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the folder or file, then click the **View** menu, and select **Get a Link**.
   - Right-click in the folder or file's row to display the context menu (Figure 43–54 and Figure 43–55) and select **Get a Link**.
   - If you are already viewing a file in the Document Viewer preview pane, click the **View** menu, and select **Get a Link**.

   The **Direct URL** provides a direct link to open the folder or file in Spaces application. For files, the **Download URL** provides a direct link to allow users to open the file in its default application, or choose to save the file to their local file system (Figure 43–124).

Figure 43–124 Clicking Download URL Value in Get a Link Dialog



2. Drag your mouse pointer over the URL to select it, then press Ctrl-c to copy it so that you can paste it wherever you need it.

43.27.2 Mailing the URL for a Folder or File

From the Document Viewer preview pane, you can send a mail message to other users with the body of the message populated with the direct URL to the currently open folder or file. If the folder or file is in a space, the direct URL to the space is also included.

Note: To use the task pane available through the Microsoft Office shared document management functionality to send a message to any user who has a mail address defined in Spaces, see Section 48.3.3.13, "Sending a Message."

To send the URL to folder or file in a mail message:

1. Open the folder or file in the Document Viewer preview pane in either of the following ways:
   - On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the folder or file, then click the **View** menu, and select **Details**.
   - Right-click in the folder or file's row to display the context menu (Figure 43–54 and Figure 43–55) and select **Details**.
2. In Document Viewer preview pane, click the **File** menu, and select **Send Mail** to open the mail message in your default mail application.
3. Modify the mail message as desired, and send it.

43.27.3 Publishing the URL for a File to Activity Streams

You can publish the URL for the currently open file to the Activity Stream on the Home page of the current space, and to the personal Activity Stream in the Home space for all users or groups who have permissions to access to the file.

Note: To share your personal files and other items with others, see Section 37.3, "Sharing Files, URLs, and Streamed Items with Other Users."

To publish a file's URL to activity streams:

1. Open the Share dialog (Figure 43–125) in any of the following ways:
   - On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the file, then click the **File** menu, and select **Share**.
   - Right-click in the file's row to display the context menu (Figure 43–54 and Figure 43–55) and select **Share**.
   - If you are already viewing a file in the Document Viewer preview pane, click the **File** menu, and select **Share**.

Figure 43–125 Share Dialog

2. Optionally, enter a comment to appear with the URL.
3. Click **Publish**.

   The URL to the file is added to the Activity Stream on the Home page of the current space, and to the personal activity streams for all users or groups who have permission to access the file, along with your comments, if any.

43.28 Subscribing to a File

To receive notifications about the activities on a file, you can subscribe to it. Whenever a user comments on, likes, updates, or deletes the file, you will be notified through your selected messaging channel.

> **See Also:** For more information, see Section 39.2, "Establishing and Managing Your Messaging Channels and Filters."

To subscribe to a file:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click the file to open it in the Document Viewer preview pane.
2. From the **File** menu, select **Subscribe**.
3. If you no longer wish to monitor the activities on a file, click the **File** menu, and select **Unsubscribe**.

43.29 Liking and Unliking a File

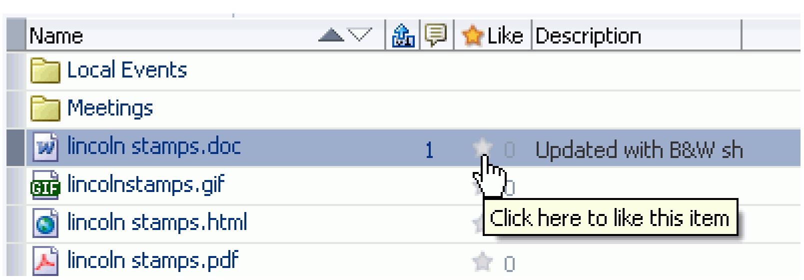
To indicate that a file is of particular interest to you, you can "like" it. Liking a file simply highlights the **Like** icon for the file to show that you have given it this preference. If a file is already liked, you can "unlike" it if you no longer wish to highlight it in any way. If a number greater than zero displays alongside the **Like** icon, you can click the number to view a list of other users who have "liked" the file.

> **See Also:** For more information, see Chapter 37, "Liking, Commenting On, and Sharing Objects."

To like or unlike a file:

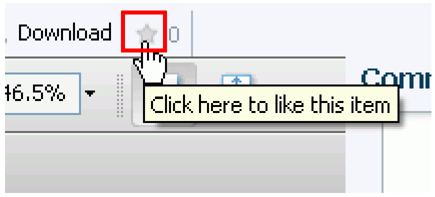
1. Click the **Like** icon for the file in either of the following locations:
   - On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click the **Like** icon in the file's row (Figure 43–126).

Figure 43–126 Like Icon in Documents Service Task Flow: Like This File



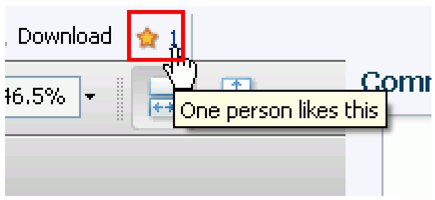
   - In the Document Viewer preview pane, click the **Like** icon in the menu bar (Figure 43–127).

Figure 43–127 Like Icon in Document Viewer: Like this File



The number alongside the **Like** icon (Figure 43–128) indicates the number of users that like the file. You can click the number to view a list of other users who have "liked" the file.

Figure 43–128 Like Icon Count



2. To "unlike" the file if you no longer wish to highlight it in any way, click the **Like** icon (Figure 43–129).

Figure 43–129 Like Icon in Document Viewer: Unlike this File

43.30 Adding a Folder or File to Your Favorites

For quick access to a folder or file (including wki documents and blog posts), you can add it to your personal favorites.

> **See Also:** For more information, see Chapter 40, "Creating and Managing Your Personal Favorites."

To add a folder file to your personal Spaces favorites:

1. Open the folder or file in the Document Viewer preview pane in either of the following ways:
   - On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click in the row of the folder or file, then click the **View** menu, and select **Details**.
   - Right-click in the folder or file's row to display the context menu (Figure 43–54 and Figure 43–55) and select **Details**.
2. In Document Viewer preview pane, click the **File** menu, and select **Add To Favorites** (Figure 43–130).

Figure 43–130 Adding a File to Personal Favorites

43.31 Searching for Documents

In addition to the WebCenter Search service, which searches a particular space or across an entire Spaces application (see Chapter 58, "Working with the Search Service"), the Documents service provides its own search engine for file searches. A Documents service search saves time and increases the relevancy of results by narrowing the scope of a search to files.

In Spaces, the Documents service search searches within a specific space root folder. In a WebCenter Portal: Framework application, the it searches through all files to which you have access.

Note: When searching for content stored in the connected Content Server repository, full-text search must be enabled in Content Server through either of the following methods:

- OracleTextSearch (preferred), as described in "Configuring OracleTextSearch for Content Server" in *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*
- `DATABASE.FULLTEXT`, as described in "Configuring the Full-Text Features in the WebCenter Content Repository" in *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*

The Oracle Secure Enterprise Search (SES) adapter does *not* need to be configured to use the Documents service search.

The Documents service search is exposed in the Document Manager, Document Explorer, and Folder Viewer task flows. It provides two levels of search: Basic and Advanced. To perform Basic and Advanced searches for files, refer to the following sections:

- Section 43.31.1, "Running a Basic Document Search"
- Section 43.31.2, "Running an Advanced Document Search"

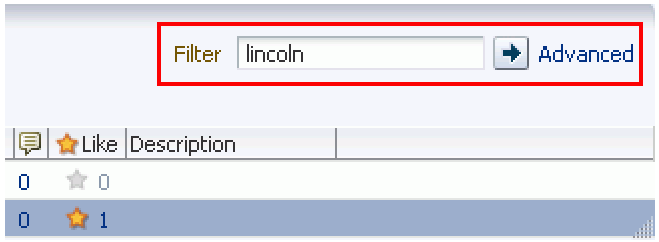
43.31.1 Running a Basic Document Search

A basic document search searches the connected content repository for the specified file name. To include more search criteria, see Section 43.31.2, "Running an Advanced Document Search."

To perform a basic document search:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, enter a full or partial file name in the **Filter** field (Figure 43–131). You can use `*` as a wild card character; for example: `*.jpg`.

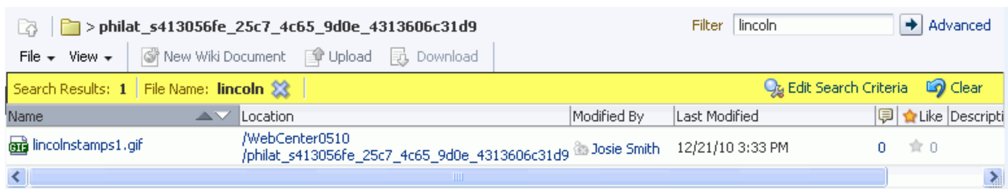
Figure 43–131 Filter Field



2. Press the Enter key, or click the **Search** icon.

   The search results pane displays files matching the search string (Figure 43–132).

Figure 43–132 Search Results Pane



   In the search results pane, the presence of the highlighted area indicates that you're looking at the results of a query, not the contents of a folder. Look in the **Location** column to determine where a file or folder is located. Alternatively, click the file name to open it from the Search Results pane.

3. In the Search Results pane:

   - Click the **Clear** action to clear the **Filter** field and return to the default folder display.
   - Click **Edit Search Criteria** action to open the Advanced Search dialog, where you can specify additional search criteria, as described in Section 43.31.2, "Running an Advanced Document Search."

43.31.2 Running an Advanced Document Search

You can specify more granular search options to search the connected content repository to generate results for a specified file name, keywords, folder, content type, dates, users, or properties that are defined for the selected content profile.

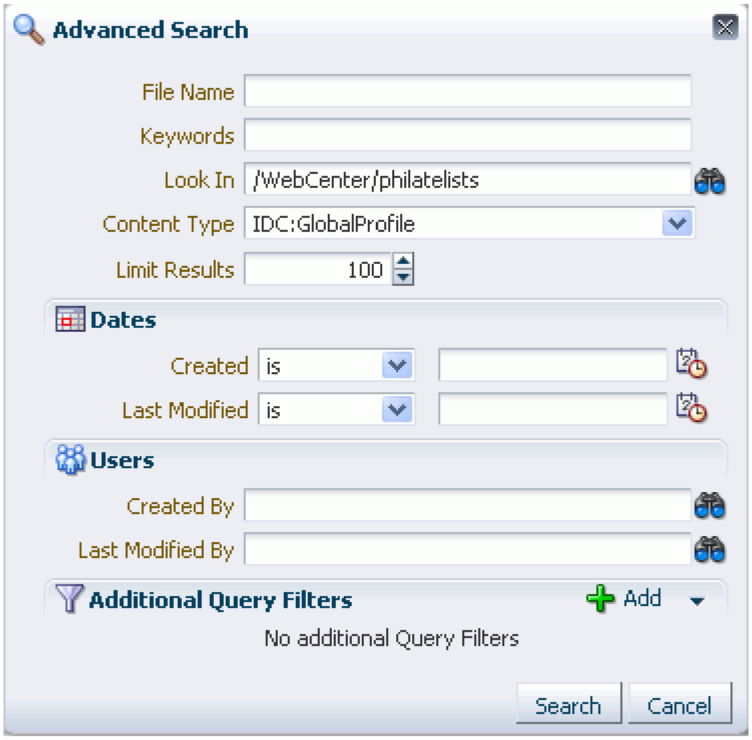
To perform an advanced document search:

1. Open the Advanced Search dialog in either of the following ways:

   - On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, click **Advanced** next to the **Filter** field.
   - Click **Edit Search Criteria** in the highlighted toolbar area of the Search Results pane (Figure 43–132).

   The **Advanced Search** dialog opens (Figure 43–133).

Figure 43–133 Advanced Search Dialog



2. Enter search terms in one or more of the fields:

   - **File Name**: Enter a full or partial file name. You can use `*` as a wild card character; for example: `*.jpg`..
   - **Keywords**: Enter any keywords related to the content of the file.
   - **Look In**: Click the **Browse** icon to open a list of content repository folders, then drill down to the desired folder.
   - **Content Type**: Select **All Content Types** to retrieve content items regardless of the content type. Or, select from the list the name of a content type profile defined in the Content Server repository. A content type profile specifies the properties that define a specific type of content (for example, a press release, or a news flash, or an image). The content type **IDC:GlobalProfile** is the name of a default content profile defined in Content Server that can be applied if no other content profiles are defined.
   - **Limit Results**: Specify the maximum number of files to be returned by the search.
   - **Dates**: In the **Created** and/or **Last Modified** fields, select a modifier to search for files matching an exact date (**is**), a following date (**is after**), a preceding date (**is before**), or a date between two other dates (**is between**).

     Selecting **is between** adds an additional date field for entering the end date (Figure 43–134). Enter a beginning date and an end date; the end date is *not* inclusive.

Figure 43–134 Dates Search Pane

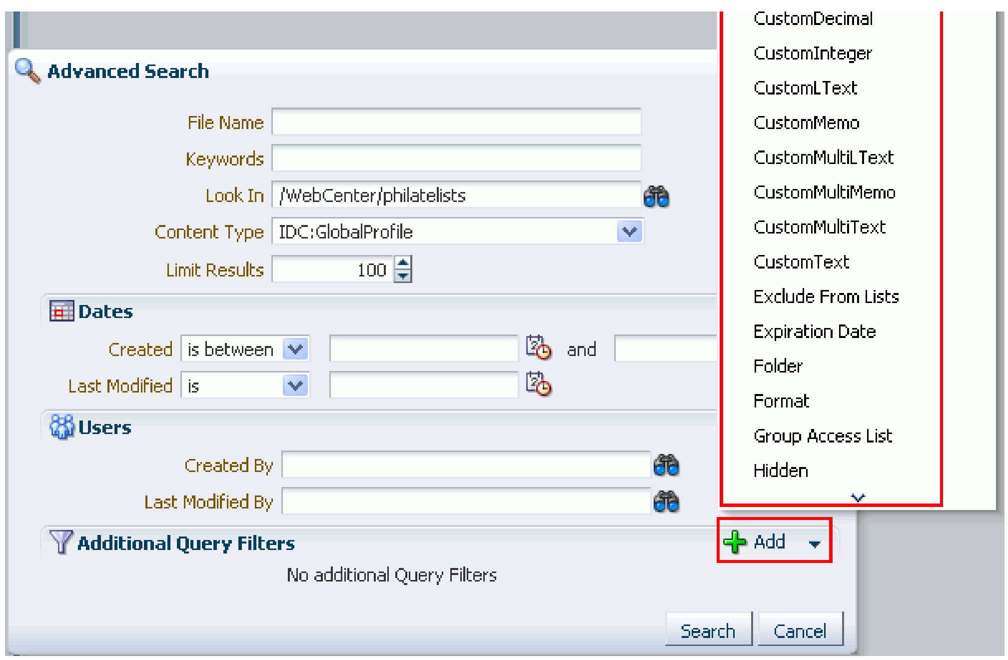
Click the **Select Date** icon to select a date in the correct format (`mm/dd/yy`), for example `11/18/11`, or enter a date manually.

- **Users**: In the **Created By** and **Last Modified By** fields, enter a user name to search for files that the user created (uploaded) or last modified. Click the **Browse** icon to open the Search Users dialog where you can select from a list of users or search for a user name. For tips on searching for a user in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."

Note: In the Spaces application, when you search in a space, the user selection list and the user search find user names for current members of the space.

- **Additional Query Filters**: Not applicable when **Content Type** is set to **All Content Types**. For a selected content type profile (prefixed **IDC**), click the **Add** icon (Figure 43–135) to list all the properties that are defined for the selected profile. Select one or more properties to refine the query to find files with specific property settings.

Figure 43–135 Additional Query Filters Search



3. Click **Search** to execute the advanced search.

   Files matching the search criteria display in the Search Results pane.

43.32 Troubleshooting Documents Service Issues

This section includes the following subsections:

- Section 43.32.1, "Document Permissions Not Working in a Space"
- Section 43.32.2, "Document Permissions Not Granted When Creating a Space"

43.32.1 Document Permissions Not Working in a Space

If a user cannot perform certain actions on documents, even though they are granted appropriate Document permissions in the space, do one of the following:

Note: You must be the space moderator or have the `Manage Membership` permission to grant permissions in the space.

- Revoke the user's membership to the space, and then add them back to the space. For details, see Section 54.3.8, "Revoking Membership to a Space" and Section 54.3.4, "Adding Members to a Space."
- Temporarily change the user's role, and then change it back to the required role. For details, see Section 54.3.6, "Approving Requests for Membership of a Space."

If multiple users cannot perform actions on documents, even though they are granted appropriate permissions in the space, try editing the role to which the affected users are assigned:

1. Identify the membership role that the affected users have and note down the current permission set. See Section 54.2.3, "Viewing and Editing Permissions of a Space Role."
2. Deselect all permissions for the role, and click **Save**.
3. Edit the role again, select all required permissions for the role, and click **Save**.

43.32.2 Document Permissions Not Granted When Creating a Space

If you see the following error when you create a space based on a template that includes the Documents service, an error occurred while attempting to grant permissions for the new space on the back-end content server:

```
Granting permissions for Documents failed
```

Ask your system administrator to review the Spaces application log (at `DOMAIN_HOME/servers/WC_Spaces/logs/WC_Spaces-diagnostic.log`) to see if any messages indicate the source of the error. If the cause of the error is not clear, try resetting Document permissions on each role in the space:

1. Edit permissions for each role in turn. See Section 54.2.3, "Viewing and Editing Permissions of a Space Role."
2. Deselect any Document permissions set for the role, and click **Save**.
3. Edit the role again, select the required permissions for the role, and click **Save**.
4. Repeat for all the roles in the space.

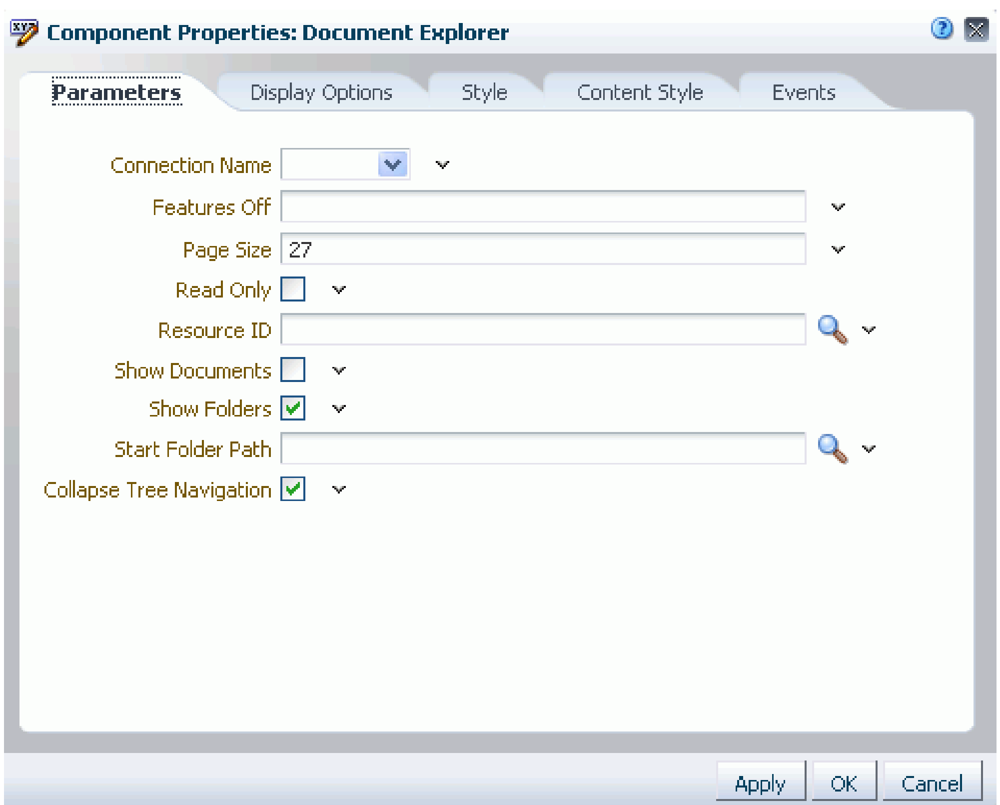
Failures, if any, are logged in the Spaces application log.

44

Setting Documents Service Task Flow and Document Component Properties

All Documents service task flows and individual document components in WebCenter Portal: Spaces have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 44–1).

Figure 44–1 Document Explorer Task Flow Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Documents service task flows and document components (links, inline frames, and images) and describe the properties on the **Parameters** tab for each Documents service task flow and document component:

- Section 44.1, "What You Should Know About Documents Service Task Flow and Document Component Properties"
- Section 44.2, "Setting Document Explorer Task Flow Properties"
- Section 44.3, "Setting Document List Viewer Task Flow Properties"
- Section 44.4, "Setting Document Manager Task Flow Properties"
- Section 44.5, "Setting Document Navigator Task Flow Properties"
- Section 44.6, "Setting Folder Viewer Task Flow Properties"
- Section 44.7, "Setting Recent Documents Task Flow Properties"
- Section 44.8, "Setting Document Viewer Task Flow Properties"
- Section 44.9, "Setting Document Mini Properties Task Flow Properties"
- Section 44.10, "Setting Document Properties Task Flow Properties"
- Section 44.11, "Setting Document Version History Task Flow Properties"
- Section 44.12, "Setting Document Link Component Properties"
- Section 44.13, "Setting Document Inline Frame Component Properties"
- Section 44.14, "Setting Document Image Component Properties"

For the steps to add a Documents service task flow or document item to a page, see Chapter 43, "Working with the Documents Service Task Flows and Document Components."

Audience

This chapter is intended for Spaces users who want to change the properties of Documents service task flows and document components (links, inline frames, and images).

44.1 What You Should Know About Documents Service Task Flow and Document Component Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. These properties are unique to the task flow type. For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6.4, "Working with Component Display Options" and Section 18.6.6, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So this tab may be omitted. For more information, see Section 18.6.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

44.2 Setting Document Explorer Task Flow Properties

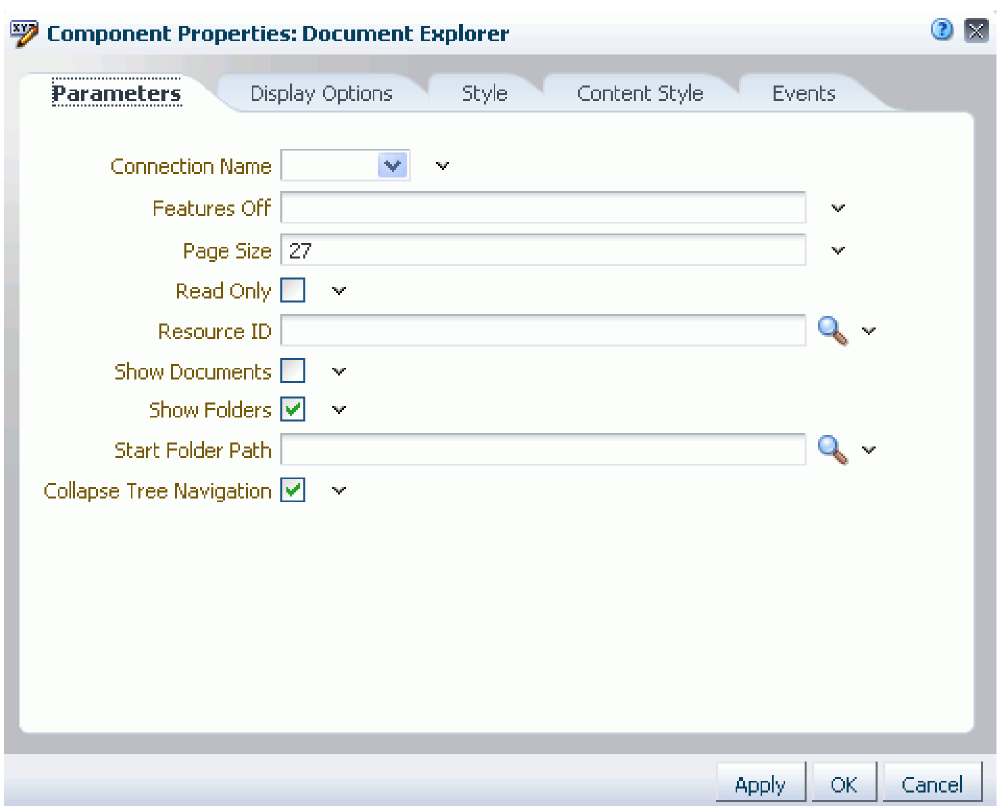
The Document Explorer task flow displays a list of folders and files in two panes: the left pane shows folders, and the right pane show the contents of the currently selected folder. It is a feature-rich Documents service task flow for viewing, managing, and collaborating on folders and files.

See Also: Section 43.1.1, "Understanding the Document Explorer Task Flow"

Properties that are unique to the Document Explorer task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 44–2).

Tip: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–2 Document Explorer Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.2.1 Document Explorer Task Flow Parameters

Table 44–1 describes the parameters that are unique to the Document Explorer task flow.

Table 44–1 Document Explorer Task Flow Parameters

Parameter	Description
`Collapse Tree Navigation`	Specifies whether to collapse the panel containing the tree navigation: ■ Selected (default): Collapse panel. ■ Deselected: Expand panel.
`Connection Name`	The name of the content repository connection. If no value is selected from the list, the default connection specified by the application developer or administrator is used. For information about configuring content repository connections, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. Default: The connection selected as default in the Create Content Repository Connection dialog box by the application developer, which can be changed by the administrator.
`Features Off`	A list of disabled features for the task flow. Use commas or spaces to separate items. Valid values are exposed in the JavaDoc: `checkin`, `checkout`, `clipboard`, `close`, `delete`, `download`, `dnd`, `editwiki`, `editoffice`, `newfolder`, `newwiki`, `rename`, `upload`, `multifile-upload`, `profile-upload`, `search`, `advancedSearch`, `workflow`, `properties`, `history`, `comments`, `likes`, `links`, `tags`, `recommendations`, `autovue`, `title`, `related-items`, `social`, `sidebars`, `ils`. Example: `${'search, advancedSearch, clipboard, dnd, rename, newfolder, upload, newwiki, checkin, checkout, editoffice, edithtml, delete, sidebars, history'}`
`Page Size`	The maximum number of rows to show in the task flow. If the listing of folders and files in the task flow is larger than the specified number of rows, the task flow displays a scroll bar. Default: `27` Typical scenarios where you may wish to alter this value are: ■ The majority of end users have bigger screens, allowing for the display of more rows. ■ You want to fit this task flow into a smaller area of a page. **Note**: If you set `Page Size` to a value that is too big for the size of the screen, the end user will experience difficulty coordinating the task flow scroll bar with the application scroll bar.
`Read Only`	Specifies whether to disable and hide all content management operations: ■ Selected: Disable content management. ■ Deselected (default): Expose content management to users.

Table 44–1 (Cont.) Document Explorer Task Flow Parameters

Parameter	Description
`Resource ID`	The currently focused resource. This value can be a folder ID or a document ID. Click the magnifier icon to open the Pick a Value dialog and navigate to the desired folder or file; select the folder or file to set the `Resource ID` value. The `Resource ID` value is checked for coherence with the `Connection Name` and `Start Folder Path` values, and influences their default values when they are not explicitly specified. For example, if `Resource ID` alone is specified, the `Connection Name` value will be inherited from it and the Start Folder Path will be either the resource itself for a folder or the parent folder for a file.
`Show Documents`	Specifies whether the navigation tree shows documents and folders in the tree (left-side) navigation page, or folders only: ■ Selected: Show documents and folders. ■ Deselected (default): Show folders and hide documents.
`Show Folders`	Specifies whether the navigation tree shows documents and folders in the table (right-side) navigation pane, or documents only: ■ Selected (default): Show folders and documents. ■ Deselected: Show documents and hide folders.
`Start Folder Path`	The name of the folder to use as the root folder in the current task flow instance. Click the magnifier icon to open a dialog where you can navigate the connected content repository and select a folder. This is a content-scoping parameter that assists with determining the source and range of content to display in the task flow instance. There is no need to set this value for task flows that display the content of the current space's default root folder. But it is useful, for example, when you want the start folder to be other than a space's default root folder and when you want to display content from another space. Example: ■ `/PersonalSpaces/monty/Public` ■ `/WebCenterB5/Proj_X/Specs` You can specify an EL expression to set this value. See Section B.4.12, "EL Expressions Relevant to the Documents Service" in Appendix B. Default: The root folder of the content repository configured with the specified connection for the current space.

44.3 Setting Document List Viewer Task Flow Properties

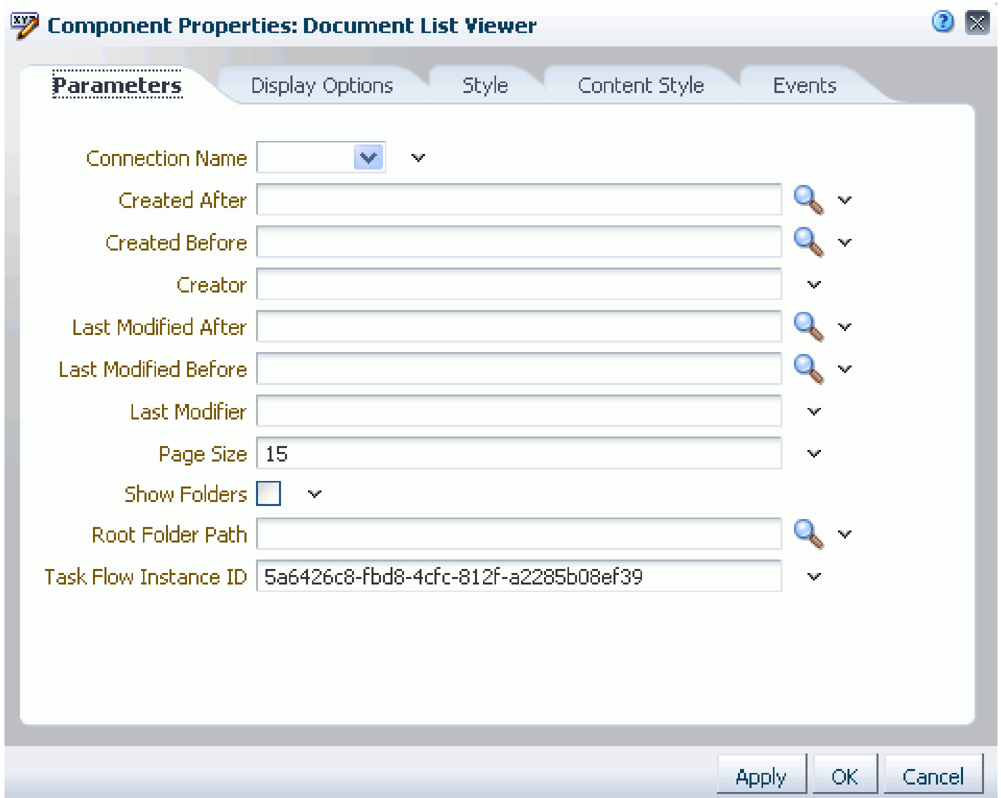
The Document List Viewer task flow displays folders and files in a single pane as a flat listing. In this task flow, users can navigate a folder hierarchy, and customize search queries. While this task flow may be useful for a specific need, its search functionality is replicated and enhanced by using the Content Presenter task flow instead.

> **See Also:** Section 43.1.2, "Understanding the Document List Viewer Task Flow"

Properties that are unique to the Document List Viewer task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 44–3).

> **Tip:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–3 Document List Viewer Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.3.1 Document List Viewer Task Flow Parameters

Table 44–2 describes the parameters that are unique to the Document List Viewer task flow.

Table 44–2 Document List Viewer Task Flow Parameters

Parameter	Description
`Connection Name`	The name of the content repository connection. If no value is selected from the list, the default connection specified by the application developer or administrator is used. For information about configuring content repository connections, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. Default: The connection selected as default in the Create Content Repository Connection dialog box by the application developer, which can be changed by the administrator.

Table 44–2 (Cont.) Document List Viewer Task Flow Parameters

Parameter	Description
`Created After`	A filtering value to limit the display of task flow content to folders and files created after a specified date and time. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format: `yyyy-mm-ddThh:mm:ss.sssTZ`[1] Example: `2010-11-17T18:24:36.000+01:00` This parameter is available for contextual wiring. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components".
`Created Before`	A filtering value to limit the display of task flow content to folders and files created before a specified date and time. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format: `yyyy-mm-ddThh:mm:ss.sssTZ`[1] Example: `2010-11-17T18:24:36.000+01:00` This parameter is available for contextual wiring. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components".
`Creator`	A filtering value to limit the display of task flow content to folders and files created by a particular user. Enter the user name as specified by the user login credentials. Only one user name may be entered. If no value is entered, then content created by any user is shown. Example: `${'monty'}` This parameter is available for contextual wiring. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components".
`Last Modified After`	A filtering value to limit the display of task flow content to folders and files last modified after a specified date and time. If no value is entered, then content modified in the last three months is shown. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format: `yyyy-mm-ddThh:mm:ss.sssTZD`[1] Example: `2010-11-17T18:24:36.000+01.00` This parameter is available for contextual wiring. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components".

Table 44–2 (Cont.) Document List Viewer Task Flow Parameters

Parameter	Description
`Last Modified Before`	A filtering value to limit the display of task flow content to folders and files modified before a specified date and time. If no value is entered, then no such filtering is applied is applied. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format: `yyyy-mm-ddThh:mm:ss.sssTZD`[1] Example: `2010-11-17T18:24:36.000+01:00` This parameter is available for contextual wiring. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components".
`Last Modifier`	A filtering value to limit the display of task flow content to folders and files last modified by a particular user. Enter the user name as specified by the user login credentials. Only one user name may be entered. If no value is entered, then all modified documents are shown. Example: `${'monty'}` This parameter is available for contextual wiring. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components".
`Page Size`	The maximum number of rows to show in the task flow. If the listing of folders and files in the task flow is larger than the specified number of rows, the task flow displays a scroll bar. Default: `15` Typical scenarios where you may wish to alter this value are: ■ The majority of end users have bigger screens, allowing for the display of more rows. ■ You want to fit this task flow into a smaller area of a page. **Note**: If you set `Page Size` to a value that is too big for the size of the screen, the end user will experience difficulty coordinating the task flow scroll bar with the application scroll bar.
`Root Folder Path`	The name of the folder to use as the root folder in the current task flow instance. Click the magnifier icon to open a dialog where you can navigate the connected content repository and select a folder. This is a content-scoping parameter that assists with determining the source and range of content to display in the task flow instance. There is no need to set this value for task flows that display the content of the current space's default root folder. But it is useful, for example, when you want the start folder to be other than a space's default root folder and when you want to display content from another space. Example: ■ `/PersonalSpaces/monty/Public` ■ `/WebCenterB5/Proj_X/Specs` You can specify an EL expression to set this value. See Section B.4.12, "EL Expressions Relevant to the Documents Service" in Appendix B. Default: The root folder of the content repository configured with the specified connection for the current space.

Table 44–2 (Cont.) Document List Viewer Task Flow Parameters

Parameter	Description
`Show Folders`	Specifies whether the navigation tree shows documents and folders, or documents only: ■ Selected (default): Show folders and documents. ■ Deselected: Show documents and hide folders.
`Task Flow Instance ID`	The unique identifier for this task flow instance, used internally to maintain the association of the task flow instance with its customization and personalization settings and to manage saved queries. Do not edit this value.

[1] "TZ" is the time zone indicator. If the time being described is in UTC (Coordinated Universal Time), then the time zone indicator is "Z". If the time is from any other time zone, then TZ describes the offset from UTC of the time zone. For example, if the time is in California in December (Pacific Standard Time, PST), then the TZ indicator would be "-08:00".

44.4 Setting Document Manager Task Flow Properties

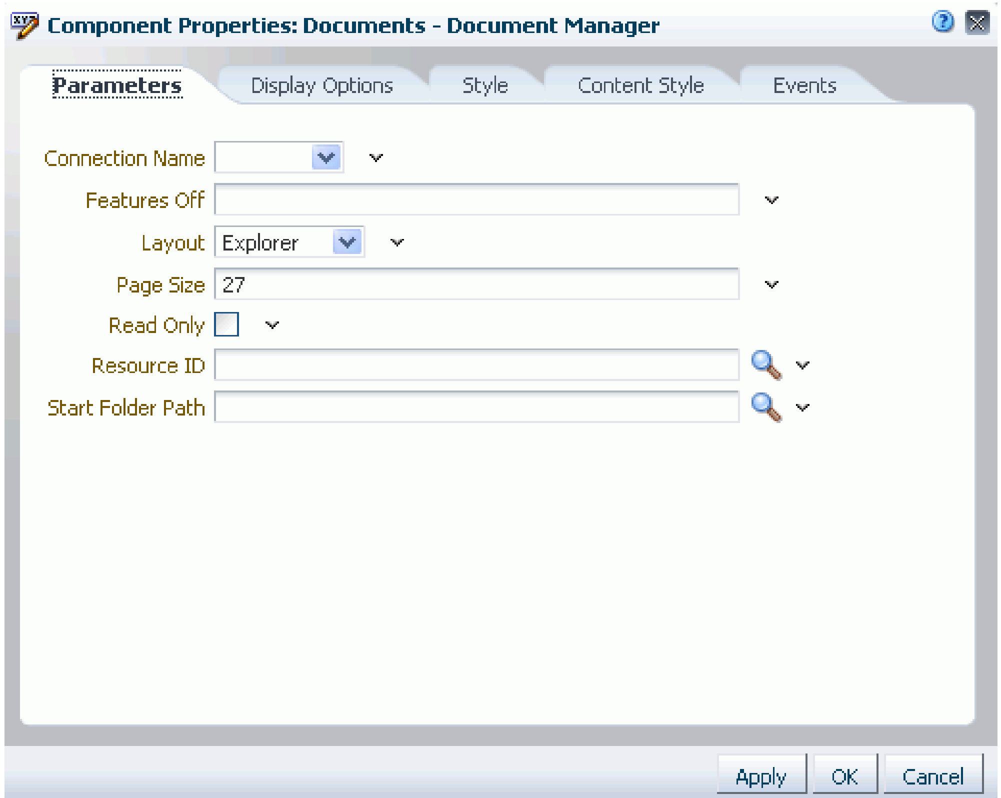
The Document Manager task flow displays folders and files as specified by its `layout` parameter: it may display folders and files in two panes (`Explorer` layout), or a single pane showing only the content of the current folder (`Table` layout), or a single pane showing the folder hierarchy starting from the root folder (`Tree-Table` layout). The Document Manager task flow provides comprehensive document management functionality, such as copying, moving, pasting, and deleting folders and files.

> **See Also:** Section 43.1.3, "Understanding the Document Manager Task Flow"

Properties that are unique to the Document Manager task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 44–4).

> **Tip:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–4 Document Manager Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.4.1 Document Manager Task Flow Parameters

Table 44–3 describes the parameters that are unique to the Document Manager task flow.

Table 44–3 Document Manager Task Flow Parameters

Parameter	Description
`Connection Name`	The name of the content repository connection. If no value is selected from the list, the default connection specified by the application developer or administrator is used. For information about configuring content repository connections, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. Default: The connection selected as default in the Create Content Repository Connection dialog box by the application developer, which can be changed by the administrator.

Table 44–3 (Cont.) Document Manager Task Flow Parameters

Parameter	Description
`Features Off`	A list of disabled features for the task flow. Use commas or spaces to separate items. Valid values are exposed in the JavaDoc: `checkin`, `checkout`, `clipboard`, `close`, `delete`, `download`, `dnd`, `editwiki`, `editoffice`, `newfolder`, `newwiki`, `rename`, `upload`, `multifile-upload`, `profile-upload`, `search`, `advancedSearch`, `workflow`, `properties`, `history`, `comments`, `likes`, `links`, `tags`, `recommendations`, `autovue`, `title`, `related-items`, `social`, `sidebars`, `ils`. Example: `${'search, advancedSearch, clipboard, dnd, rename, newfolder, upload, newwiki, checkin, checkout, editoffice, edithtml, delete, sidebars, history'}`
`Layout`	A target layout for the task flow. Choose from: ■ `Explorer` (default): Displays folders and files in two panes; the left pane shows folders, and the right pane show the contents of the currently selected folder. This layout looks identical to the Document Explorer task flow, without the properties `Show Documents`, `Show Folders`, and `Collapse Tree Navigation`. See Figure 43–14, "Document Manager Task Flow: Explorer Layout". ■ `Table`: Displays only the contents of the current folder in a single pane, with the capability to click a folder to drill down, refreshing the pane with the folder contents. See Figure 43–15, "Document Manager Task Flow: Table Layout". ■ `Tree Table`: Displays the folder hierarchy in a single pane, beginning with the root folder, with the capability to expand and collapse folders. Figure 43–16, "Document Manager Task Flow: Tree Table Layout"
`Page Size`	The maximum number of rows to show in the task flow. If the listing of folders and files in the task flow is larger than the specified number of rows, the task flow displays a scroll bar. Default: `27` Typical scenarios where you may wish to alter this value are: ■ The majority of end users have bigger screens, allowing for the display of more rows. ■ You want to fit this task flow into a smaller area of a page. **Note**: If you set `Page Size` to a value that is too big for the size of the screen, the end user will experience difficulty coordinating the task flow scroll bar with the application scroll bar.
`Read Only`	Specifies whether to disable and hide all content management operations: ■ Selected: Disable content management. ■ Deselected (default): Expose content management to users.
`Resource ID`	The currently focused resource. This value can be a folder ID or a document ID. Click the magnifier icon to open the Pick a Value dialog and navigate to the desired folder or file; select the folder or file to set the `Resource ID` value. The `Resource ID` value is checked for coherence with the `Connection Name` and `Start Folder Path` values, and influences their default values when they are not explicitly specified. For example, if `Resource ID` alone is specified, the `Connection Name` value will be inherited from it and the Start Folder Path will be either the resource itself for a folder or the parent folder for a file.

Table 44–3 (Cont.) Document Manager Task Flow Parameters

Parameter	Description
`Start Folder Path`	The name of the folder to use as the root folder in the current task flow instance. Click the magnifier icon to open a dialog where you can navigate the connected content repository and select a folder. This is a content-scoping parameter that assists with determining the source and range of content to display in the task flow instance. There is no need to set this value for task flows that display the content of the current space's default root folder. But it is useful, for example, when you want the start folder to be other than a space's default root folder and when you want to display content from another space. Example: ■ `/PersonalSpaces/monty/Public` ■ `/WebCenterB5/Proj_X/Specs` You can specify an EL expression to set this value. See Section B.4.12, "EL Expressions Relevant to the Documents Service" in Appendix B. Default: The root folder of the content repository configured with the specified connection for the current space.

44.5 Setting Document Navigator Task Flow Properties

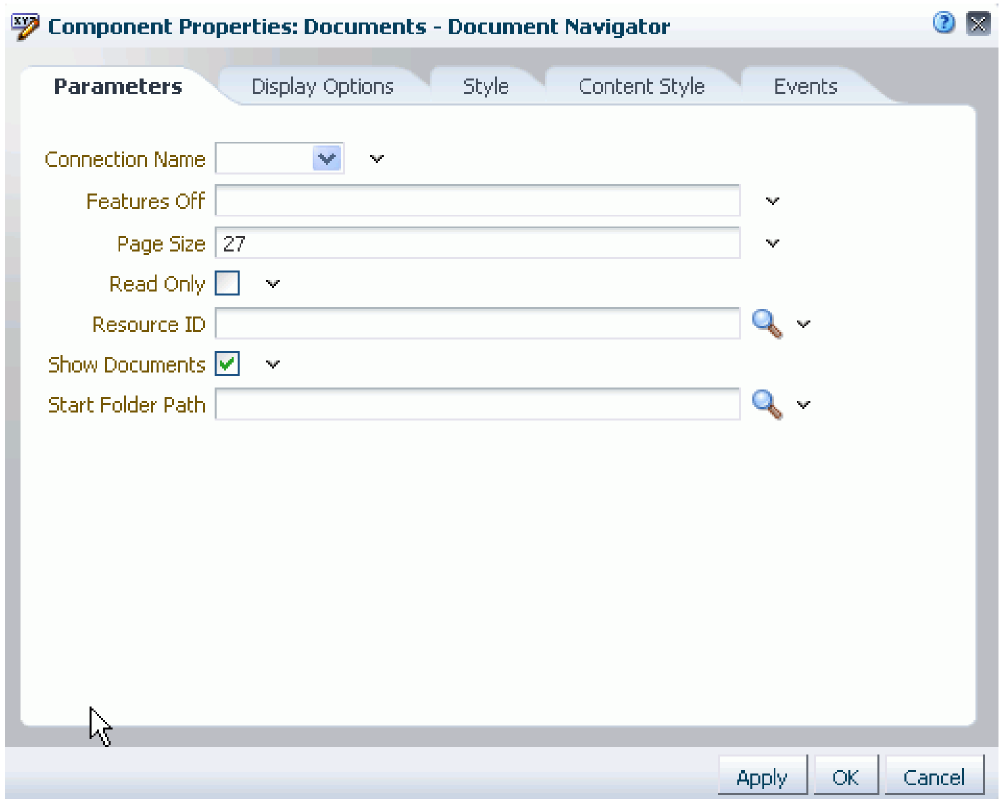
The Document Navigator task flow displays folders and files in a single pane, with the capability to expand and collapse folders to view folder hierarchy within the current folder. There are no menu options available to the end user for this task flow. This task flow is intended for use as a component of another Documents service task flow (such as the Document Explorer task flow). Clicking folders and files in this task flow standalone performs no action.

> **See Also:** Section 43.1.4, "Understanding the Document Navigator Task Flow"

Properties that are unique to the Document Navigator task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 44–5).

> **Tip:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–5 Document Navigator Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.5.1 Document Navigator Task Flow Parameters

Table 44–4 describes the parameters that are unique to the Document Navigator task flow.

Table 44–4 Document Navigator Task Flow Parameters

Parameter	Description
`Connection Name`	The name of the content repository connection. If no value is selected from the list, the default connection specified by the application developer or administrator is used. For information about configuring content repository connections, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. Default: The connection selected as default in the Create Content Repository Connection dialog box by the application developer, which can be changed by the administrator.

Table 44–4 (Cont.) Document Navigator Task Flow Parameters

Parameter	Description
`Features Off`	A list of disabled features for the task flow. Use commas or spaces to separate items. Valid values are exposed in the JavaDoc: `checkin`, `checkout`, `clipboard`, `close`, `delete`, `download`, `dnd`, `editwiki`, `editoffice`, `newfolder`, `newwiki`, `rename`, `upload`, `multifile-upload`, `profile-upload`, `search`, `advancedSearch`, `workflow`, `properties`, `history`, `comments`, `likes`, `links`, `tags`, `recommendations`, `autovue`, `title`, `related-items`, `social`, `sidebars`, `ils`. Example: `${'search, advancedSearch, clipboard, dnd, rename, newfolder, upload, newwiki, checkin, checkout, editoffice, edithtml, delete, sidebars, history'}`
`Page Size`	The maximum number of rows to show in the task flow. If the listing of folders and files in the task flow is larger than the specified number of rows, the task flow displays a scroll bar. Default: `27` Typical scenarios where you may wish to alter this value are: ■ The majority of end users have bigger screens, allowing for the display of more rows. ■ You want to fit this task flow into a smaller area of a page. **Note**: If you set `Page Size` to a value that is too big for the size of the screen, the end user will experience difficulty coordinating the task flow scroll bar with the application scroll bar.
`Read Only`	Specifies whether to disable and hide all content management operations: ■ Selected: Disable content management. ■ Deselected (default): Expose content management to users.
`Resource ID`	The currently focused resource. This value can be a folder ID or a document ID. Click the magnifier icon to open the Pick a Value dialog and navigate to the desired folder or file; select the folder or file to set the `Resource ID` value. The `Resource ID` value is checked for coherence with the `Connection Name` and `Start Folder Path` values, and influences their default values when they are not explicitly specified. For example, if `Resource ID` alone is specified, the `Connection Name` value will be inherited from it and the Start Folder Path will be either the resource itself for a folder or the parent folder for a file.
`Show Documents`	Specifies whether the navigation tree shows documents and folders, or folders only: ■ Selected (default): Show documents and folders. ■ Deselected: Show folders and hide documents.

Table 44–4 (Cont.) Document Navigator Task Flow Parameters

Parameter	Description
`Start Folder Path`	The name of the folder to use as the root folder in the current task flow instance. Click the magnifier icon to open a dialog where you can navigate the connected content repository and select a folder. This is a content-scoping parameter that assists with determining the source and range of content to display in the task flow instance. There is no need to set this value for task flows that display the content of the current space’s default root folder. But it is useful, for example, when you want the start folder to be other than a space's default root folder and when you want to display content from another space. Example: ■ `/PersonalSpaces/monty/Public` ■ `/WebCenterB5/Proj_X/Specs` You can specify an EL expression to set this value. See Section B.4.12, "EL Expressions Relevant to the Documents Service" in Appendix B. Default: The root folder of the content repository configured with the specified connection for the current space.

44.6 Setting Folder Viewer Task Flow Properties

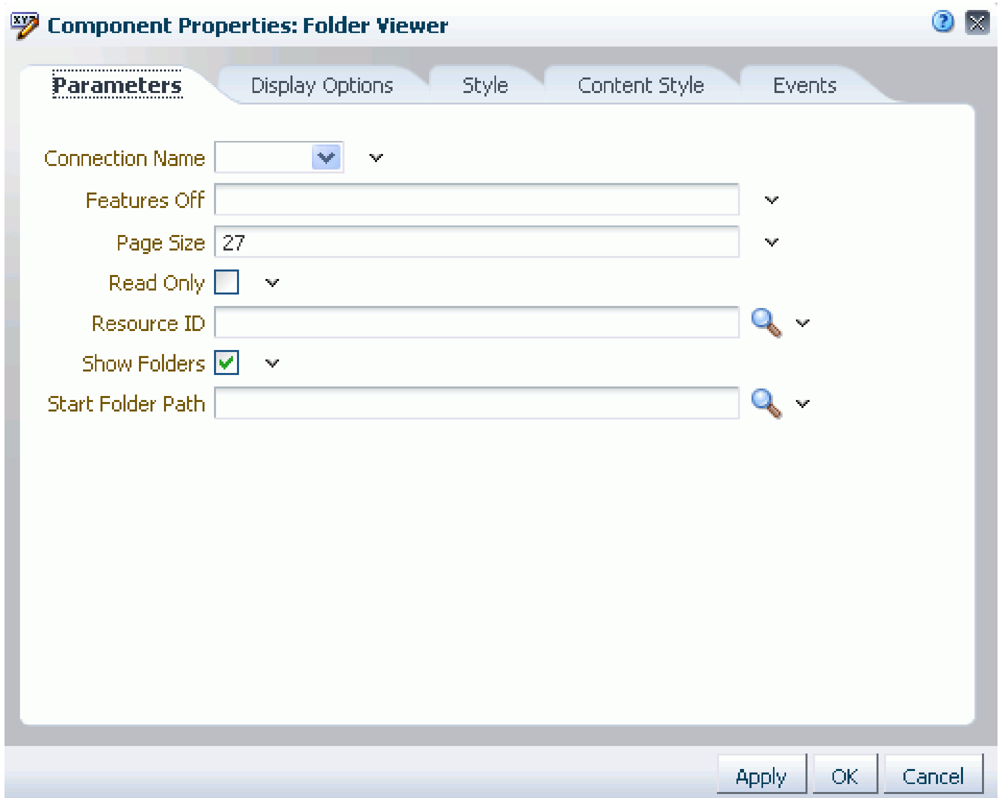
The Folder Viewer task flow displays a listing of the contents of a folder in a single pane as a flat listing.

> **See Also:** Section 43.1.5, "Understanding the Folder Viewer Task Flow"

Properties that are unique to the Folder Viewer task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 44–6).

> **Tip:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–6 Folder Viewer Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.6.1 Folder Viewer Task Flow Parameters

Table 44–5 describes the parameters that are unique to the Folder Viewer task flow.

Table 44–5 Folder Viewer Task Flow Parameters

Parameter	Description
`Connection Name`	The name of the content repository connection. If no value is selected from the list, the default connection specified by the application developer or administrator is used. For information about configuring content repository connections, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. Default: The connection selected as default in the Create Content Repository Connection dialog box by the application developer, which can be changed by the administrator.

Table 44–5 (Cont.) Folder Viewer Task Flow Parameters

Parameter	Description
`Features Off`	A list of disabled features for the task flow. Use commas or spaces to separate items. Valid values are exposed in the JavaDoc: `checkin`, `checkout`, `clipboard`, `close`, `delete`, `download`, `dnd`, `editwiki`, `editoffice`, `newfolder`, `newwiki`, `rename`, `upload`, `multifile-upload`, `profile-upload`, `search`, `advancedSearch`, `workflow`, `properties`, `history`, `comments`, `likes`, `links`, `tags`, `recommendations`, `autovue`, `title`, `related-items`, `social`, `sidebars`, `ils`. Example: `${'search, advancedSearch, clipboard, dnd, rename, newfolder, upload, newwiki, checkin, checkout, editoffice, edithtml, delete, sidebars, history'}`
`Page Size`	The maximum number of rows to show in the task flow. If the listing of folders and files in the task flow is larger than the specified number of rows, the task flow displays a scroll bar. Default: `27` Typical scenarios where you may wish to alter this value are: ■ The majority of end users have bigger screens, allowing for the display of more rows. ■ You want to fit this task flow into a smaller area of a page. **Note**: If you set `Page Size` to a value that is too big for the size of the screen, the end user will experience difficulty coordinating the task flow scroll bar with the application scroll bar.
`Read Only`	Specifies whether to disable and hide all content management operations: ■ Selected: Disable content management. ■ Deselected (default): Expose content management to users.
`Resource ID`	The currently focused resource to display in the task flow. This value can be a folder ID or a document ID. Click the magnifier icon to open the Pick a Value dialog and navigate to the desired folder or file; select the folder or file to set the `Resource ID` value. The `Resource ID` value is checked for coherence with the `Connection Name` and `Start Folder Path` values, and influences their default values when they are not explicitly specified. For example, if `Resource ID` alone is specified, the `Connection Name` value will be inherited from it and the Start Folder Path will be either the resource itself for a folder or the parent folder for a file.
`Show Folders`	Specifies whether the navigation tree shows documents and folders, or documents only: ■ Selected (default): Show folders and documents. ■ Deselected: Show documents and hide folders.

Table 44–5 (Cont.) Folder Viewer Task Flow Parameters

Parameter	Description
`Start Folder Path`	The name of the folder to use as the root folder in the current task flow instance. Click the magnifier icon to open a dialog where you can navigate the connected content repository and select a folder. This is a content-scoping parameter that assists with determining the source and range of content to display in the task flow instance. There is no need to set this value for task flows that display the content of the current space's default root folder. But it is useful, for example, when you want the start folder to be other than a space's default root folder and when you want to display content from another space. Example: ■ `/PersonalSpaces/monty/Public` ■ `/WebCenterB5/Proj_X/Specs` You can specify an EL expression to set this value. See Section B.4.12, "EL Expressions Relevant to the Documents Service" in Appendix B. Default: The root folder of the content repository configured with the specified connection for the current space.

44.7 Setting Recent Documents Task Flow Properties

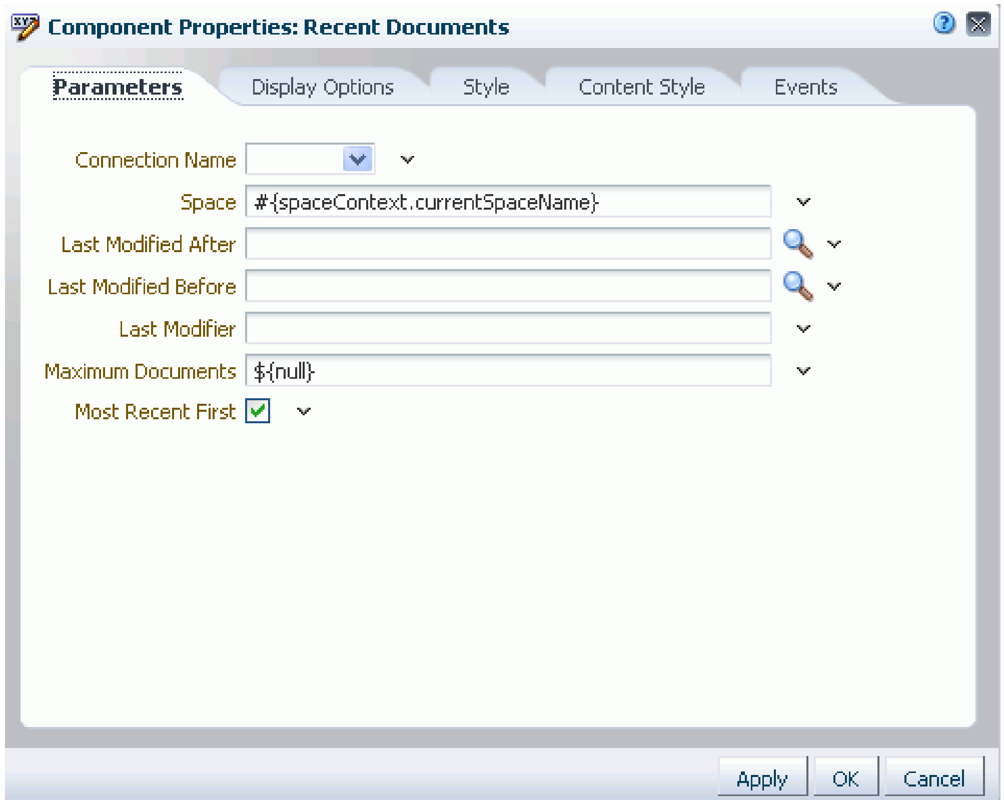
The Recent Documents task flow displays a listing of the most recently created or modified files by the current user, when the connected content repository is Content Server.

> **See Also:** Section 43.1.6, "Understanding the Recent Documents Task Flow"

Properties that are unique to the Recent Documents task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 44–7).

> **Tip:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–7 Recent Documents Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.7.1 Recent Documents Task Flow Parameters

Table 44–6 describes the parameters that are unique to the Recent Documents task flow.

Table 44–6 Recent Documents Task Flow Parameters

Parameter	Description
`Connection Name`	The name of the content repository connection. If no value is entered, the default connection specified by the application developer or administrator is used. For information about configuring content repository connections, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. Default: The connection selected as default in the Create Content Repository Connection dialog box by the application developer, which can be changed by the administrator.

Table 44–6 (Cont.) Recent Documents Task Flow Parameters

Parameter	Description
`Space`	(Used in Spaces only) The name of a space that is the source of the recently created or modified documents listed in the task flow. Valid values are: ■ no value or `${null}` (default): Displays documents for the entire connected content repository. ■ Display name or ID of a specific space: Displays documents in that space. ■ `${'all'}`: Displays documents from any space, excluding non-space documents.
`Last Modified After`	A filtering value to limit the display of task flow content to folders and files last modified after a specified date and time. If no value is entered, then content modified in the last three months is shown. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format: `yyyy-mm-ddThh:mm:ss.sssTZD`[1] Example: `2010-11-17T18:24:36.000+01.00` This parameter is available for contextual wiring. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components".
`Last Modified Before`	A filtering value to limit the display of task flow content to folders and files modified before a specified date and time. If no value is entered, then no such filtering is applied is applied. Click the magnifier icon to open a dialog where you can select the date from a calendar. The value uses the ISO 8601 format: `yyyy-mm-ddThh:mm:ss.sssTZD`[1] Example: `2010-11-17T18:24:36.000+01:00` This parameter is available for contextual wiring. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components".
`Last Modifier`	A filtering value to limit the display of task flow content to folders and files last modified by a particular user. Enter the user name as specified by the user login credentials. Only one user name may be entered. If no value is entered, then all modified documents are shown. Example: `${'monty'}` This parameter is available for contextual wiring. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components".
`Maximum Documents`	The maximum number of files to show.If no value or 0 is entered, then up to 10 of the most recently accessed documents are shown. Example: `${10}` Note that there is no single quote surrounding the value. Default: `${null}`

Table 44–6 (Cont.) Recent Documents Task Flow Parameters

Parameter	Description
`Most Recent First`	Specifies the sort order of files in the task flow: ▪ `${true}` (default): Most recent documents listed first. ▪ `${false}`: Oldest documents listed first.

[1] "TZ" is the time zone indicator. If the time being described is in UTC (Coordinated Universal Time), then the time zone indicator is "Z". If the time is from any other time zone, then TZ describes the offset from UTC of the time zone. For example, if the time is in California in December (Pacific Standard Time, PST), then the TZ indicator would be "-08:00".

44.8 Setting Document Viewer Task Flow Properties

The Document Viewer task flow displays a preview of an individual file in the default template for its file type.

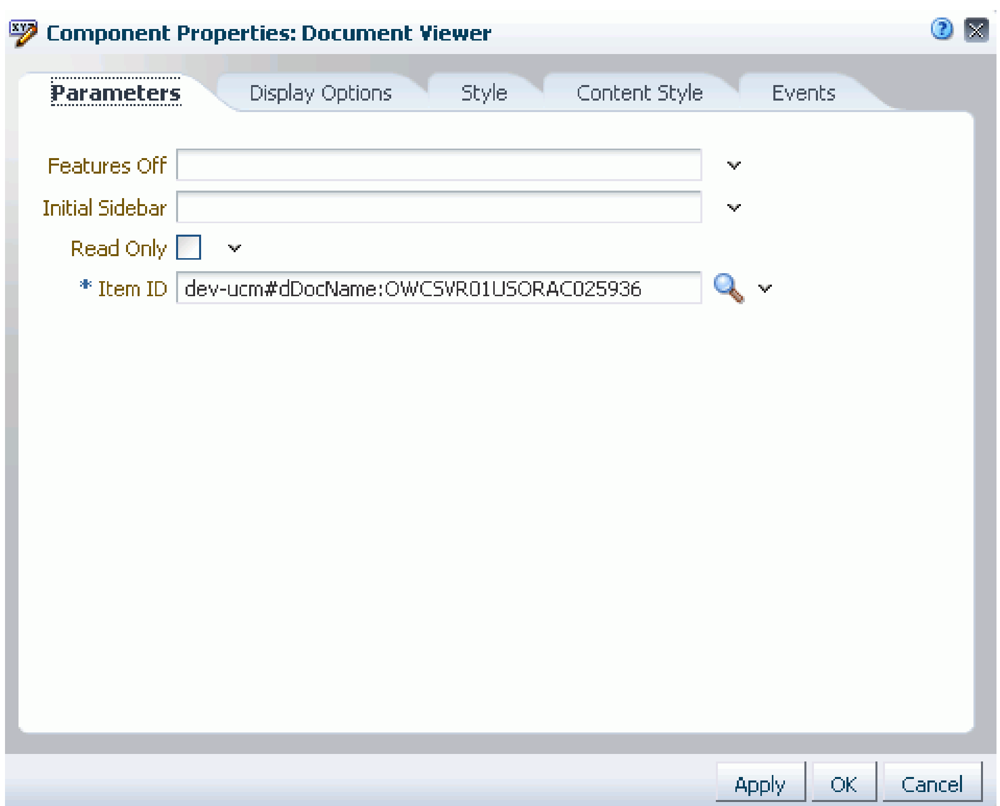
See Also:

- Section 43.1.7, "Understanding the Document Viewer Task Flow"
- Section 43.3, "Adding a Selected Folder or File to a Page"

Properties that are unique to the Document Viewer task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 44–8).

Tip: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–8 Document Viewer Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.8.1 Document Viewer Task Flow Parameters

Table 44–7 describes the parameters that are unique to the Document Viewer task flow.

Table 44–7 Document Viewer Task Flow Parameters

Parameter	Description
`Features Off`	A list of disabled features for the task flow. Use commas or spaces to separate items. Valid values are exposed in the JavaDoc: `checkin`, `checkout`, `clipboard`, `close`, `delete`, `download`, `dnd`, `editwiki`, `editoffice`, `newfolder`, `newwiki`, `rename`, `upload`, `multifile-upload`, `profile-upload`, `search`, `advancedSearch`, `workflow`, `properties`, `history`, `comments`, `likes`, `links`, `tags`, `recommendations`, `autovue`, `title`, `related-items`, `social`, `sidebars`, `ils`. Example: `${'search, advancedSearch, clipboard, dnd, rename, newfolder, upload, newwiki, checkin, checkout, editoffice, edithtml, delete, sidebars, history'}`
`Initial Sidebar`	Specifies the tabbed pane to have initial focus in the Document Viewer. Valid values are: ▪ `${'comments'} (default)`. Displays the **Comments** pane (see "Section 43.19, "Viewing, Entering, and Deleting Comments on a File"). ▪ `${'tags'}`. Displays the **Tags** pane (see Section 43.20, "Working with Tags"). ▪ `${'history'} (default)`. Displays the **History** pane (see Section 43.21, "Viewing and Deleting File Version History"). ▪ `${'docInfo'}`. Displays the **Info** pane (see Section 43.22, "Viewing and Modifying Folder and File Properties"). ▪ `${'links'}`. Displays the **Links** pane (see Section 43.24, "Working with Links"). ▪ `${'recommendations'}`. Displays the **Recommendations** pane (see Section 43.25, "Working with Recommendations") ▪ `${'autovue'}`. When Oracle AutoVue is installed, displays the **AutoVue** pane showing the AutoVue markup for the current document in a table of hyperlinked markup names (see Section 47.3, "Collaborating on Documents Using Oracle AutoVue"). **Note**: Values are case-sensitive.
`Item ID`	The ID of the document to display in the Document Viewer.
`Read Only`	Specifies whether to disable and hide all content management operations: ▪ Selected: Disable content management. ▪ Deselected (default): Expose content management to users.

44.9 Setting Document Mini Properties Task Flow Properties

The Document Mini Properties task flow displays the basic properties of a selected file in a read-only view. This choice is available for all file types.

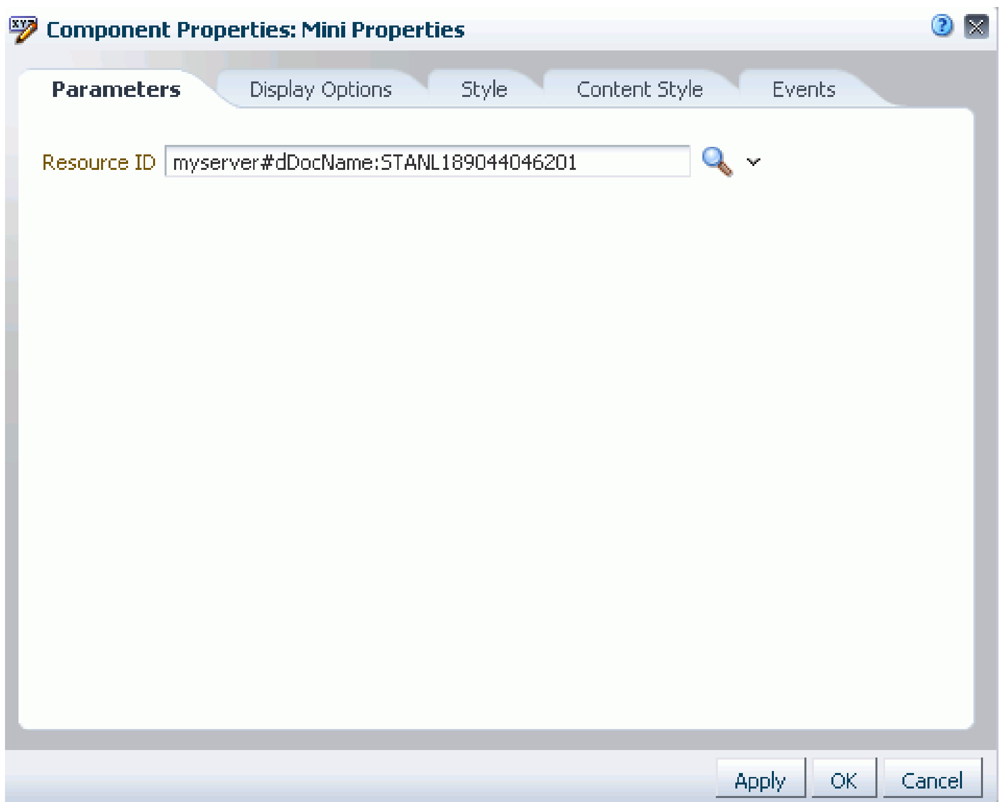
See Also:

- Section 43.1.8, "Understanding the Document Mini Properties Task Flow"
- Section 43.3, "Adding a Selected Folder or File to a Page"
- Section 43.22.2, "Working with File Properties"

Properties that are unique to the Document Mini Properties task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 44–9).

> **Tip:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–9 Document Mini Properties Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.9.1 Document Mini Properties Task Flow Parameters

Table 44–8 describes the parameters that are unique to the Document Mini Properties task flow.

Table 44–8 Document Mini Properties Task Flow Parameters

Parameter	Description
`Resource ID`	The ID of the current document for which to display basic properties.

44.10 Setting Document Properties Task Flow Properties

The Document Properties task flow displays both Basic and Advanced properties of a selected file, along with an **Edit** button to modify property values. This choice is available for all file types.

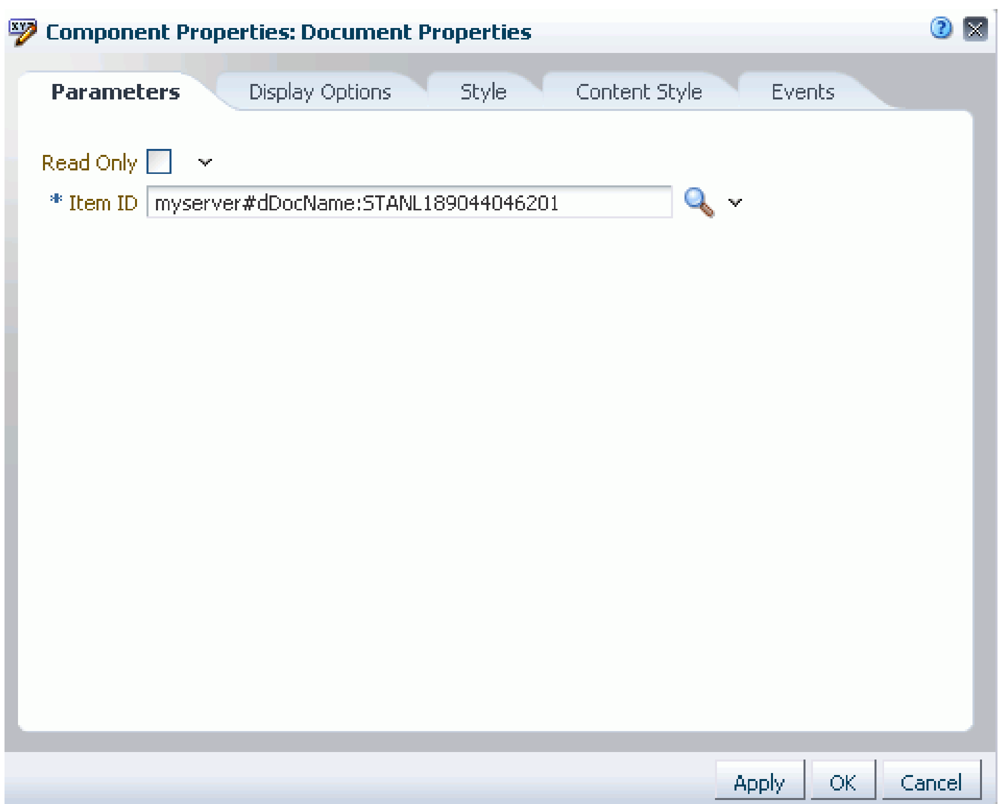
See Also:

- Section 43.1.9, "Understanding the Document Properties Task Flow"
- Section 43.3, "Adding a Selected Folder or File to a Page"
- Section 43.22.2, "Working with File Properties"

Properties that are unique to the Document Properties task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 44–10).

Tip: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–10 Document Properties Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.10.1 Document Properties Task Flow Parameters

Table 44–9 describes the parameters that are unique to the Document Properties task flow.

Table 44–9 Document Properties Task Flow Parameters

Parameter	Description
`Item ID`	The ID of the document for which to display properties.
`Read Only`	Specifies whether or not to allow end user to edit document properties: ■ Selected: Do not display **Edit** button in Basic and Advanced properties panes, thus disabling the ability for the end user to edit document properties. ■ Deselected (default): Display **Edit** button in Basic and Advanced properties panes, allowing end users to edit document properties.

44.11 Setting Document Version History Task Flow Properties

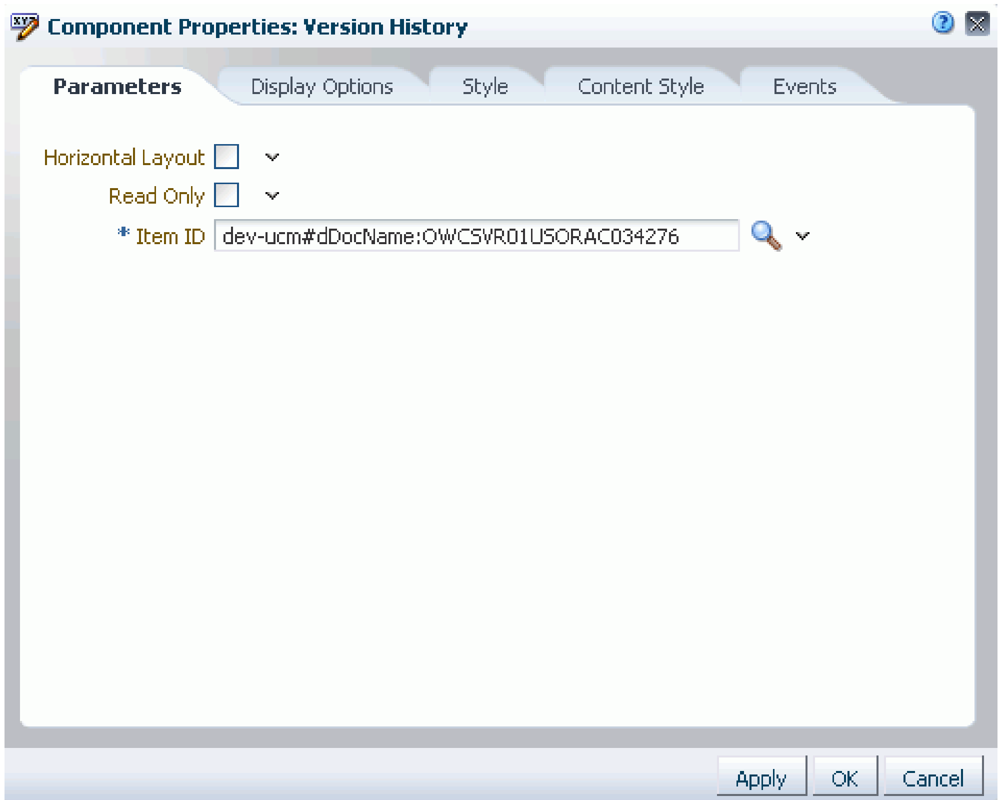
The Document Version History task flow displays a list of versions of a selected file in a read-only view. This choice is available for all file types.

See Also:

- Section 43.1.10, "Understanding the Document Version History Task Flow"
- Section 43.3, "Adding a Selected Folder or File to a Page"
- Section 43.21, "Viewing and Deleting File Version History"

Properties that are unique to the Document Version History task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 44–11).

Figure 44–11 Version History Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.11.1 Document Version History Task Flow Parameters

Table 44–10 describes the parameters that are unique to the Document Version History task flow.

Table 44–10 Document Version History Task Flow Parameters

Parameter	Description
`Horizontal Layout`	Specifies the layout orientation for the version history information: ■ Deselected (default): Vertical orientation (see Figure 43–33, "Version History Task Flow for File: vertical layout (Horizontal Layout property deselected (default))"). ■ Selected: Horizontal orientation (see Figure 43–34, "Version History Task Flow for File: Horizontal Layout property selected").
`Item ID`	The ID of the document for which to display version history.
`Read Only`	Specifies whether to disable and hide all content management operations: ■ Selected: Disable content management. ■ Deselected (default): Expose content management to users.

44.12 Setting Document Link Component Properties

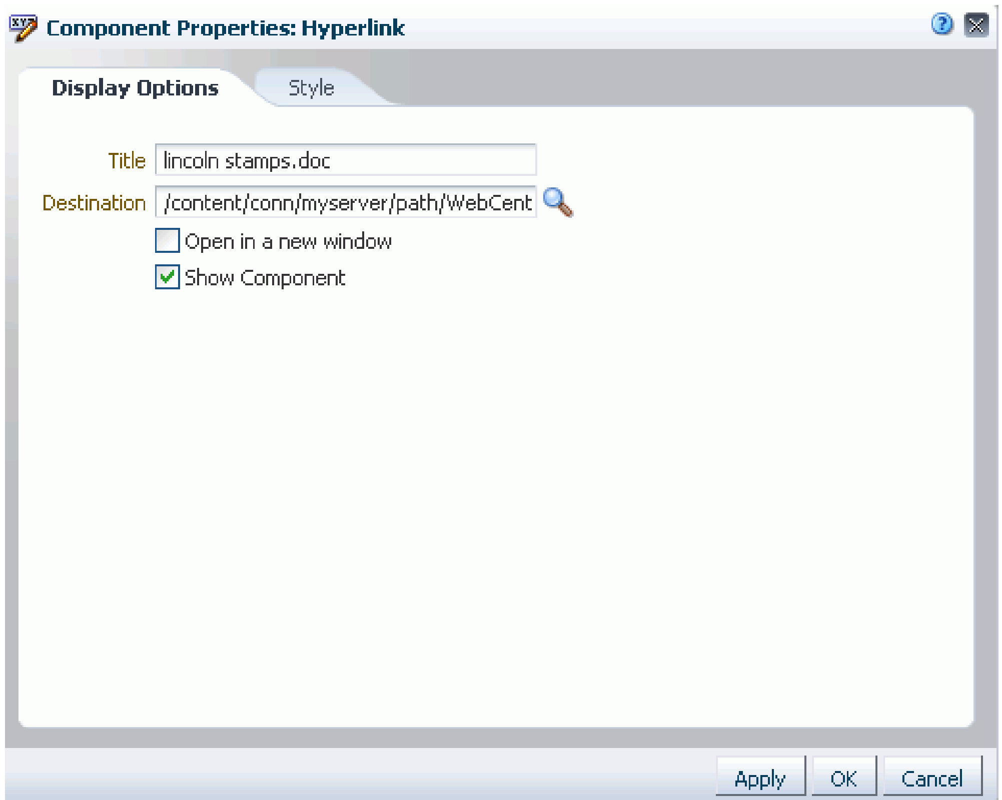
The Link component displays the file name of a selected file as a link on the page.

> **See Also:** Section 43.3, "Adding a Selected Folder or File to a Page"

Properties that are unique to the Link component are shown on the **Display Options** tab of the Component Properties dialog (Figure 44–12).

> **Tip:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–12 Link Component Properties



For information about the properties on the **Style** tab, which is common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.12.1 Document Link Component Display Options

Table 44–11 describes the properties that are unique to the link component.

Table 44–11 Link Component Properties: Display Options

Property	Description
`Title`	The display name of the selected file. Default: file name.

Table 44–11 (Cont.) Link Component Properties: Display Options

Property	Description
`Destination`	Path to the file relative to the application root. Example: `/resources/images/cologo.gif`
`Open in a new window`	Specifies where the file opens: ■ Selected: Open file in new browser tab or window. ■ Deselected (default): Open file in current browser window. This option is relevant only to files that open in a browser. Some files, such as Microsoft Word files, open in their native applications.
`Show Component`	Specifies whether to show or hide the link component on the page: ■ Selected (default): Show the link component. ■ Deselected: Hide the link component. Once you hide a component in this way, any child components are also hidden. You can show the component again through Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

44.13 Setting Document Inline Frame Component Properties

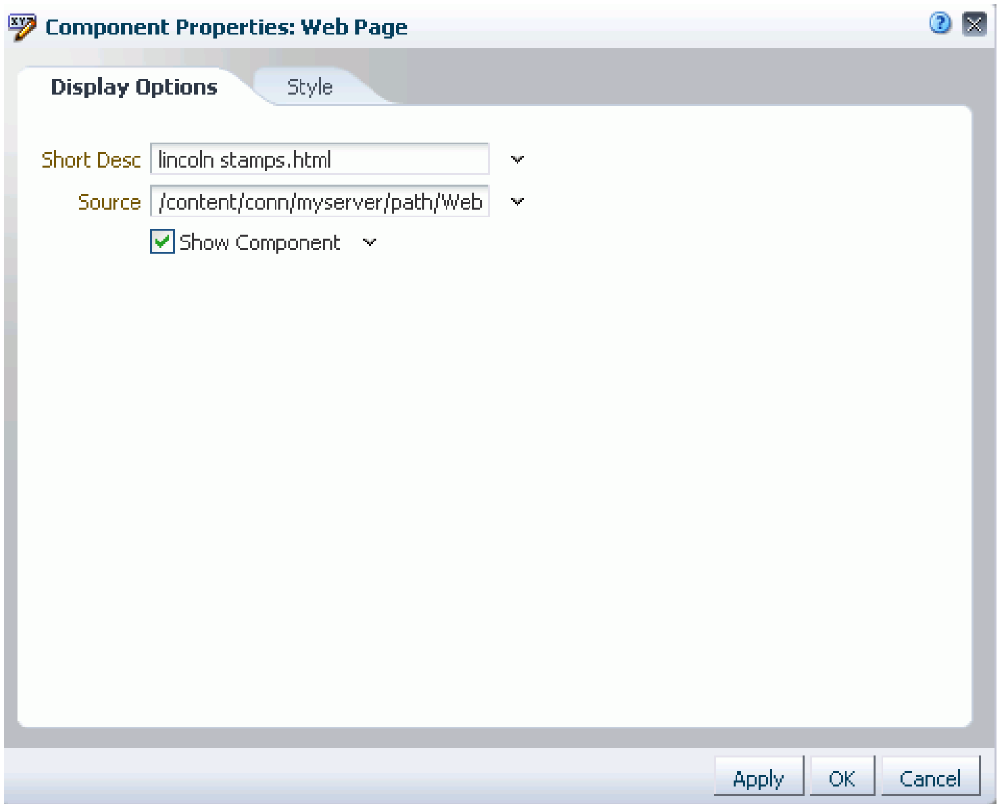
The Inline Frame component displays a preview of the file content of a selected file. This choice is available for HTML and TXT types.

> **See Also:** Section 43.3, "Adding a Selected Folder or File to a Page"

Properties that are unique to the inline frame component are shown on the **Display Options** tab of the Component Properties dialog (Figure 44–13).

> **Tip:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–13 Inline Frame Component Properties



For information about the properties on the **Style** tab, which is common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.13.1 Document Inline Frame Component Display Options

Table 44–12 describes the properties that are unique to the inline frame component.

Table 44–12 Inline Frame (iframe) Component Properties: Display Options

Property	Description
`Short Desc`	The `ALT` text to display when the mouse pointer hovers over the component. The default is the name of the document.
`Source`	The path to the file relative to the Spaces application root. Example: `/resources/images/cologo.gif`
`Show Component`	Specifies whether to show or hide the inline frame component on the page: ■ Selected (default): Show the inline frame component. ■ Deselected: Hide the inline frame component. Once you hide a component in this way, any child components are also hidden. You can show the component again through Composer Source view. Right-click the hidden component, and select **Show Component** from the resulting context menu.

44.14 Setting Document Image Component Properties

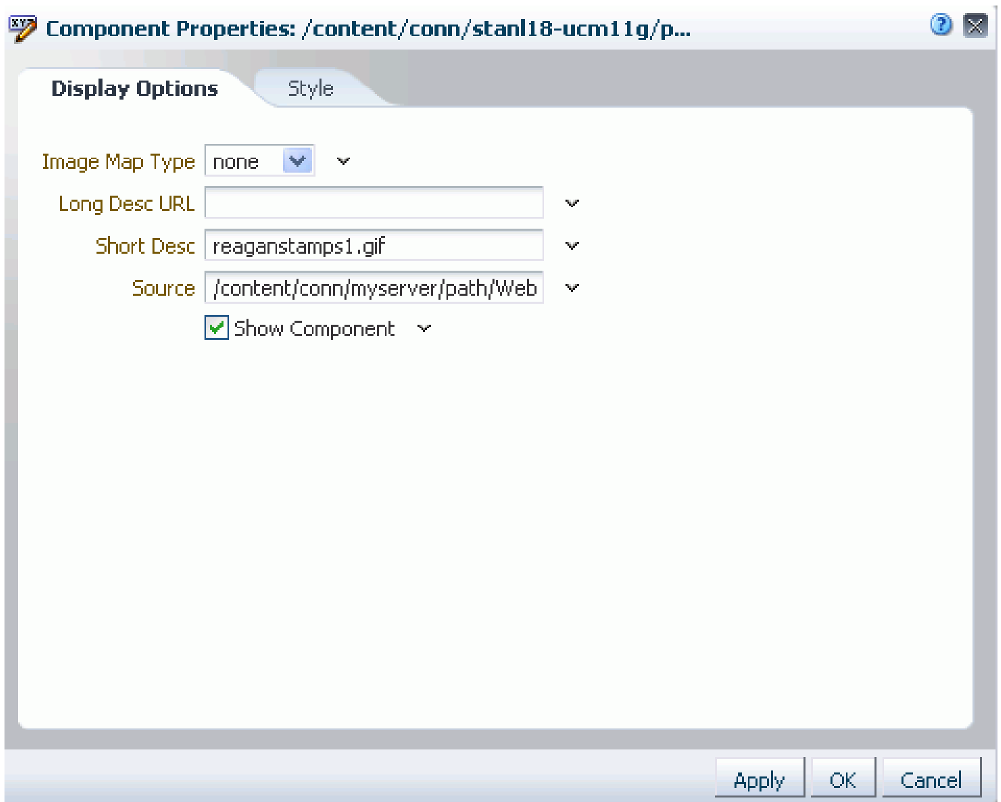
The Image component displays a selected file as an image on a page. This choice is available only for image file types (such as JPG, PNG, and GIF).

See Also: Section 43.3, "Adding a Selected Folder or File to a Page"

Properties that are unique to the image component are shown on the **Display Options** tab of the Component Properties dialog (Figure 44–14).

Tip: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 44–14 Image Component Properties



For information about the properties on the **Style** tab, which is common to all Spaces components, see Section 18.6, "Modifying Page Components."

44.14.1 Document Image Component Display Options

Table 44–13 describes the properties that are unique to the image component.

Table 44–13 Image Component Properties: Display Options

Property	Description
`Image Map Type`	The map type when the selected file is an image map. Choose from: ■ `none` ■ `server`

Table 44–13 (Cont.) Image Component Properties: Display Options

Property	Description
`Long Desc URL`	A URL to a file that contains a detailed description of the image. Example: `http://www.abc.com/image_desc.htm`
`Short Desc`	The summary `ALT` text to display when users hover their mouse pointers over the image component. The default is `Display Spaces Information`. The default is the rendered value of the Expression Language (EL) expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ABOUT_DESC}`.
`Source`	The path to the image file relative to the Spaces application root. Example: `/resources/images/cologo.gif`
`Show Component`	Specifies whether to show or hide the image component on the page: ■ Selected (default): Show the image component. ■ Deselected: Hide the image component. Once you hide a component in this way, any child components are also hidden. You can show the component again through Composer Source view. Right-click the hidden component, and select **Show Component** from the context menu.

45 Working with Workflow-Enabled Content

WebCenter Portal: Spaces includes the following types of workflows:

- Internally-defined workflows, available through the Worklist service, are discussed in Chapter 72, "Working with the Worklist Service." For example, space moderators receive a workflow notification in their worklists for space subscription requests, or when a new file is checked in or uploaded to the space. The *Oracle Fusion Middleware Installation Guide for Oracle WebCenter* describes how to install and configure internally-defined workflows for Spaces.
- Externally-defined workflows enabled in a Workflow server that comes with Oracle SOA Suite, also available through the Worklist service discussed in Chapter 72, "Working with the Worklist Service." The definition of these workflows is an administrative or development task in Oracle SOA Suite.
- Workflows defined on space folders that reside in Content Server. When a folder is assigned a workflow, any file (including wiki documents and blog posts) checked in or uploaded to that folder must be approved or rejected by one or more assigned approvers. Documents service task flows, Content Presenter, and the Oracle Workflow Queue portlet from the Universal Content Management Portlet Suite provide access to the workflow-enabled content. This chapter discusses this type of workflow.

> **See Also:** For more information about working with workflows in the Content Server user interface, see the "Working with Workflows" chapter in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.

The following sections describe how to work with workflows on content in a space:

- Section 45.1, "What You Should Know About Content Workflows"
- Section 45.2, "Assigning a Workflow to a Folder in a Space"
- Section 45.3, "Viewing Files in Workflow"
- Section 45.4, "Viewing Workflow Status and File Information"
- Section 45.5, "Changing or Deleting a Workflow"
- Section 45.6, "Participating in a Workflow"

Audience

This chapter is intended for Spaces users who want to assign and manage workflows on folders in a space when the connected content repository is Content Server.

You must have `Administration-Manage Configuration` permission in a space to define workflow settings. For information about roles and permissions, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

45.1 What You Should Know About Content Workflows

Workflows on content in Spaces are available only when the connected content repository is Content Server and your Spaces administrator has completed the prerequisite configuration.

See Also: For more information, see:

- "Content Server Prerequisites" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*
- "How to Create a Content Repository Connection Based on the Content Server Adapter" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*

A workflow provides for review and approval of a file before it is released to the system. The workflow notifies approvers through mail messages when they have a file to review and approve.

In Spaces, you can define workflows by assigning a workflow to a folder in a Documents service task flow. Out-of-the-box, Spaces includes three workflow types that you can assign to space folders (see Section 45.1.1, "Understanding Workflow Types"). These seeded workflows are available only to a folder in a space. They are not available to your personal folders in the Home space.

Once you assign a workflow to a folder in a space, Spaces automatically assigns the workflow to every file subsequently checked in or uploaded to the folder. Documents service task flows, the Content Presenter task flow, and the Oracle Workflow Queue portlet from the Universal Content Management Portlet Suite provide access to the workflow-enabled content.

In all Documents service task flows, any user with privileges to view the contents of a folder that is assigned a workflow can view the files while they are in a workflow, showing the pending changes. Content Presenter allows you to view both the published version of a content item (not showing the pending changes), and the pending changed version while it is in workflow. REST APIs, on the other hand, show only the published version of a file, and do not show the pending changes in unreleased versions of files that are in workflow.

Only workflow approvers can perform actions on a file in workflow (such as upload new version, edit, rename, delete, copy/cut/paste). Non-approvers can view the file, but cannot perform any actions on the file.

The following sections provide conceptual information about workflow on files in Spaces:

- Section 45.1.1, "Understanding Workflow Types"
- Section 45.1.2, "Understanding Workflow Steps"
- Section 45.1.3, "Understanding Workflow Process"

45.1.1 Understanding Workflow Types

Spaces provides three built-in workflows for content in a space. These are single-step workflows that allow one or more approvers to approve, reject, or edit a file in workflow:

- **`AllApprover`**: A single-step workflow that requires all assigned approvers to approve the document to release it from workflow. Approvers of this workflow type are not able to edit the file while it is in worfklow.
- **`AllReviewer`**: A single-step workflow that requires all assigned approvers to approve the document to release it from workflow. Approvers of this workflow type may optionally edit the file.

> **Note:** If an assigned approver in an `AllReviewer` workflow uploads a new version of the document or edits the document, it is automatically approved by that approver.

- **`SingleApprover`**: A single-step workflow that requires only one assigned approver to approve the document to release it from workflow. Approvers of this workflow type are not able to edit the file while it is in workflow.

> **Note:** The seeded workflows are available only to a folder in a space. They are not available to your personal folders in the Home space.

For more information about configuring Content Server to enable the built-in workflows, see "What You Should Know About the WebCenterConfigure Component" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

45.1.2 Understanding Workflow Steps

The three workflows provided with Spaces (`AllApprover`, `AllReviewer`, and `SingleApprover`) each contain a workflow contribution step and an approval step. Typically, different users will participate in each of the steps.

Table 45–1 Workflow Steps

Step Type	Description
`contribution`	This is the initial step of a workflow. In this step, the user who participates as the contributor is the Spaces user who submits the document or edits an existing document in a folder that has workflow enabled on it.
`ApprovalStep`	In this step, approvers can approve or reject the file. Editing is allowed by an approver during this step only if the workflow contains the step `review the current revision or create new revisions` (in the seeded workflows, this applies only to the `AllReviewer` worfklow).

45.1.3 Understanding Workflow Process

The workflow process is as follows:

1. A document enters the workflow approval step by exiting the initial `contribution` step as a result of a new document upload or editing an existing document that was previously uploaded into a workflow-enabled folder. See Section 45.1.2, "Understanding Workflow Steps."

2. If any approver rejects a revision, it goes back to the most recent `contribution` step for editing.
3. When approvers approve a revision in the workflow, the content item is released to the system.

45.2 Assigning a Workflow to a Folder in a Space

With appropriate permissions (the Spaces administrator, or space members with `Administration-Manage Configuration` permissions), you can assign a workflow to a folder in a space when the connected content repository is Content Server. Once you assign a workflow to a space folder, Spaces automatically assigns the workflow to every file subsequently checked in or uploaded to the folder.

Out-of-the-box, Spaces includes three workflow types that you can assign to space folders (see Section 45.1.1, "Understanding Workflow Types"). These seeded workflows are available only to a folder in a space. They are not available to your personal folders in the Home space.

If you create a subfolder in a parent folder that is assigned a workflow, the subfolder automatically inherits the workflow assignment of the parent folder.

To assign a workflow to a folder:

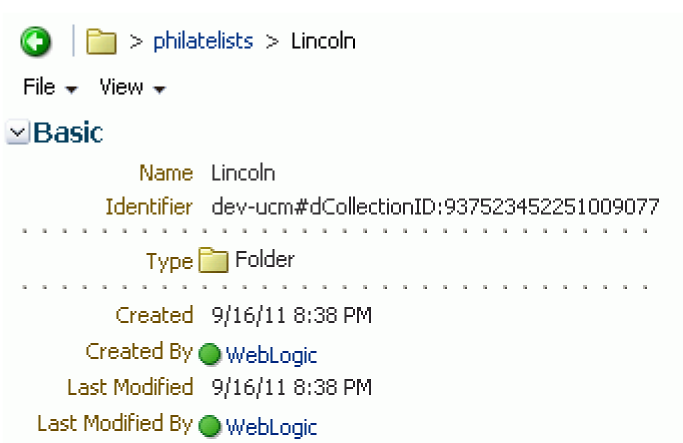
1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, create a new folder (see Section 43.7, "Creating a Folder"), or click in the row of an existing folder.

   > **Note:** The **Documents** page is exposed in a space only with Content Server 11*g*. If the connected content repository is Content Server 10*g*, you can create a page in a space and add Documents service task flows to the page (see Section 43.4, "Adding a Documents Service Task Flow to a Page").

2. Click the **View** menu, and select **Details**, or right-click to display the folder's context menu, and select **Details**.

   The Basic properties pane for the folder opens (Figure 45–1).

Figure 45–1 Folder Properties

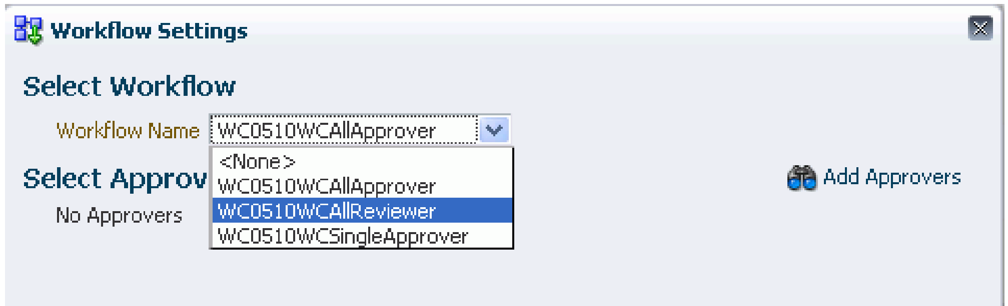


3. From the **File** menu, select **Workflow Settings**.

4. In the Workflow Settings dialog, select from the **Workflow Name** list (Figure 45–2) to apply a workflow to the folder.

> **Note:** The selections in the **Workflow Name** list are preceded with the Spaces installation name used during the installation procedure.

Figure 45–2 Workflow Settings Dialog



For information about the out-of-the-box workflows, see Section 45.1.1, "Understanding Workflow Types." Additional workflows may be listed if they have been defined in Content Server and added by the system administrator. For more information about defining workflows, see the "Working with Workflows" chapter in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.

5. After selecting a workflow name, click **Add Approvers** (Figure 45–3).

> **Note:** Spaces does not support group names as approvers.

Figure 45–3 Workflow Settings Dialog

6. In the Select User dialog, search for and select one or more users to whom to assign the workflow.

Notes:

- For tips on searching for a user in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."
- To select multiple users in the Select User dialog, your search result must include all users that you want to select, then you can use Ctrl-Click to selectively create the list of approvers. To list all users in one search result, use a generic search string. If you enter a second search string and select users in that search result, your existing list of approvers in the Select User dialog is replaced.
- If you encounter any issues with selecting user names from the identity store, contact your Spaces administrator to consult the instructions in "Configuring the Identity Store" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

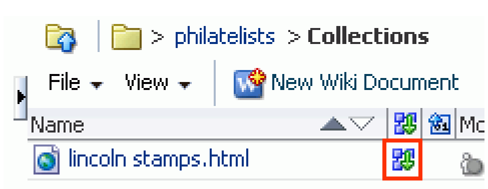
7. Click **OK**.
8. In the Workflow Settings dialog, optionally click **Add Approvers** again to add more approvers, then click **OK** to save the workflow.

Every assigned approver receives a mail message to notify them that they are assigned to the workflow as document approvers. The format and contents of the mail message are controlled by how the system administrator installed and configured the Content Server (see "Managing the Mail Service" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal).*

With a workflow established on a folder in a space, Spaces automatically enters every file that is subsequently checked in or uploaded to the folder into workflow. If you want to assign the workflow to a file that was already in the folder prior to the workflow being defined, you can save the file to your local file system, delete the file from the space, then reupload the file into the folder so that the file can inherit the workflow properties of the folder. See Section 43.8.1, "Uploading Files."

A workflow icon alongside a file in a Documents service task flow indicates that the file is assigned to a workflow (Figure 45–4). For more information, see Section 45.3, "Viewing Files in Workflow." Note that the only way to determine if a *folder* has a workflow defined on it is to view its workflow settings, as described in the steps above.

Figure 45–4 Workflow Icon



45.3 Viewing Files in Workflow

You can view files in workflow and view workflow details in a Documents service task flow, Content Presenter task flow, or in an Oracle Workflow Queue portlet:

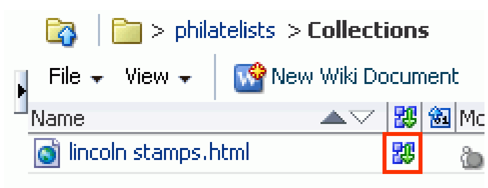
Note: Only workflow approvers can perform actions on a file in workflow (such as upload new version, edit, rename, delete, copy/cut/paste). Non-approvers can view the file, but cannot perform any actions on the file.

- Section 45.3.1, "Viewing Workflow Files in a Documents Service Task Flow"
- Section 45.3.2, "Viewing Workflow Files in a Content Presenter Task Flow"
- Section 45.3.3, "Viewing Workflow Files in a Workflow Queue"

45.3.1 Viewing Workflow Files in a Documents Service Task Flow

On the **Documents** page or in a Documents service task flow in a space, a workflow icon alongside a file in a Documents service task flow indicates that the file is assigned to a workflow (Figure 45–5).

Figure 45–5 File in Workflow Showing Workflow Icon



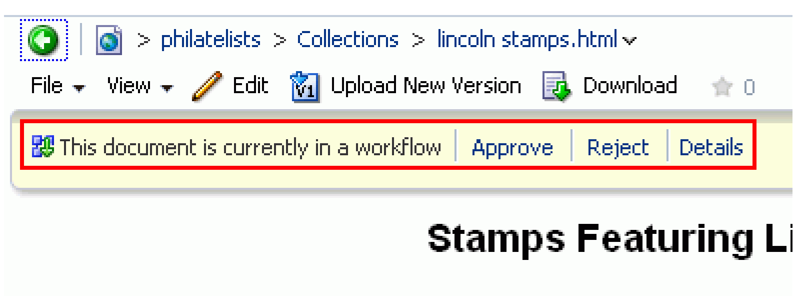
Note: The **Documents** page is exposed in a space only with Content Server 11*g*. If the connected content repository is Content Server 10*g*, you can create a page in a space and add Documents service task flows to the page (see Section 43.4, "Adding a Documents Service Task Flow to a Page").

To view a file that is in workflow:

1. Click the file name to open the file in the Document Viewer preview pane.

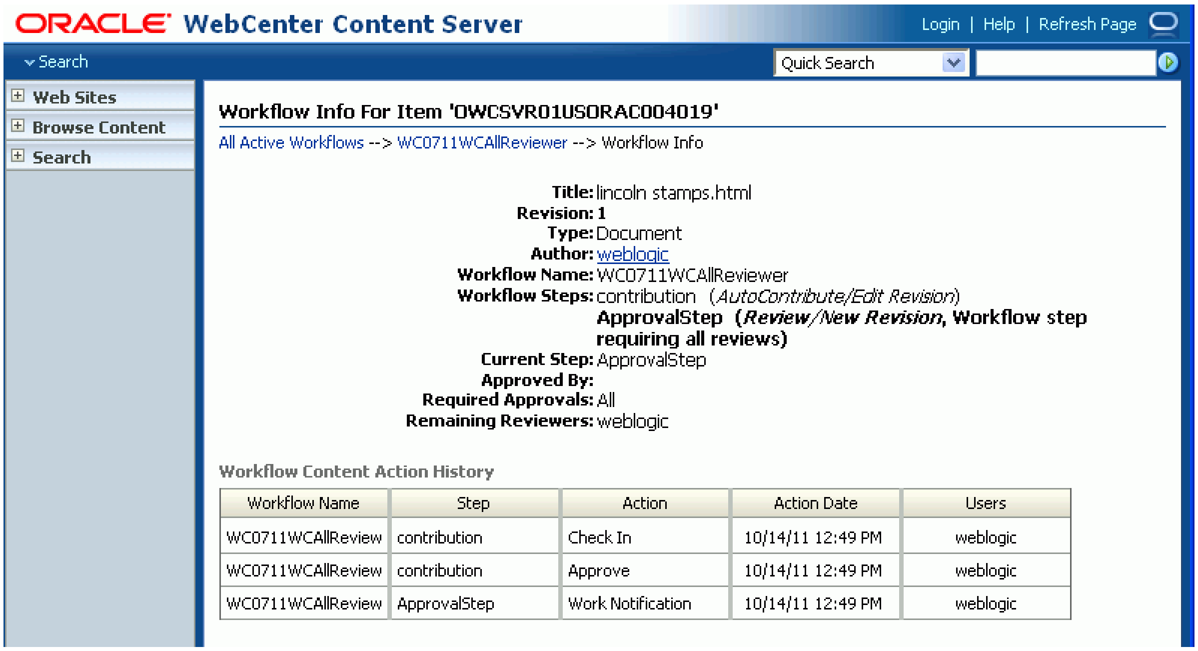
   The Document Viewer preview pane displays a notification that the file is in workflow. If you are assigned as an approver of the workflow, you will see controls that allow you to approve, reject, or view details of the file (Figure 45–6). The preview of the file shows the pending changes.

Figure 45–6 Document Viewer Preview Pane Showing File in Workflow



2. To view further details about the workflow, if you are an approver, click **Details** to display the workflow information in Content Server (Figure 45–7).

Figure 45–7 Workflow Information in Content Server



Note: To enable the availability of the workflow **Details** link in the Document Viewer preview pane, *both* of the following two requirements must be met:

- You must access the Spaces application through Oracle HTTP Server (OHS) to expose Content Server and the Spaces application under the same host and port. For information about setting up OHS as the front-end to Spaces, see "Configuring Content Server for WebCenter Portal Applications" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- Spaces must be connected to a Content Server repository, with the `webContextRoot` parameter set to a Content Server host name. For information on setting `webContextRoot`, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. To set `webContextRoot` through WLST, see "`createJCRContentServerConnection`" and "`setJCRContentServerConnection`" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

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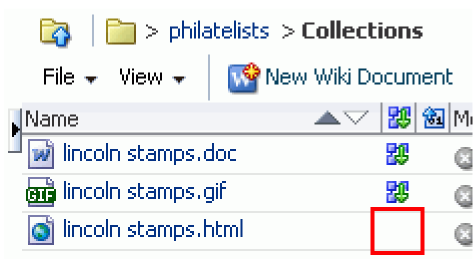
3. If you are an approver or reviewer for the file, click **Approve** or **Reject** to indicate the result of your review of the file. These links are active only when the file is pending approval. If you reject the file, enter the justification for your rejection. For other ways to approve or reject a file, see Section 45.6.1, "Approving or Rejecting a File in Workflow."

Note: If the file is configured in Content Server to require an esignature, you will not be able to approve it in WebCenter Portal: Spaces. To provide an esignature with approval, you must approve using Content Server. For more information, see the "Working with Workflows" chapter in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.

Note: To edit a file in workflow, the file must be associated with a workflow that contains the step `review the current revision or create new revisions` *and* you must be an approver for the workflow. The seeded workflow that meets these requirements is `AllReviewer`.

When a file in workflow is approved, it is released from workflow, and the workflow icon no longer displays for the file (Figure 45–8). If you edit the file and make further changes, it will return to workflow.

Figure 45–8 File Released From Workflow Showing No Workflow Icon



When a file in workflow is rejected, it remains in workflow, returning to the `contribution` step. It must be updated by the file owner for the **Approve** and **Reject** controls to display.

45.3.2 Viewing Workflow Files in a Content Presenter Task Flow

You can view content items displayed in Content Presenter while they are in a workflow, including Site Studio contributor data files displayed in a Site Studio region template. As long as the content item has at some point had Released status in Content Server, you can display the content item in Content Presenter. Then, if a revision of the content item is pending in workflow, Content Presenter allows approvers for the content item to toggle between the published version and the version in workflow in page edit mode or in-context edit (contributor) mode, and also provides links to approve or reject the item in workflow, and view additional details about the item.

To view a file in workflow in Content Presenter:

1. Add a Content Presenter task flow to a page (see Section 42.2, "Adding a Content Presenter Task Flow to a Page"), selecting the file that is in workflow.
2. To view the current workflow state of the file in Content Presenter, view the page in edit mode (Figure 45–9), or view the file in in-context edit (contributor) mode (Figure 45–10).

   Content Presenter displays workflow controls to show that the file is in workflow. The initial view of the file shows the published version of the file.

See Also: To view the page in edit mode, or view the file in in-context edit (contributor) mode, respectively, see:

- Section 18.1, "Entering and Exiting Composer"
- Section 42.10, "Creating and Editing Files In-Context in a Content Presenter Task Flow"

Figure 45–9 Page Edit Mode: Workflow Controls in Content Presenter

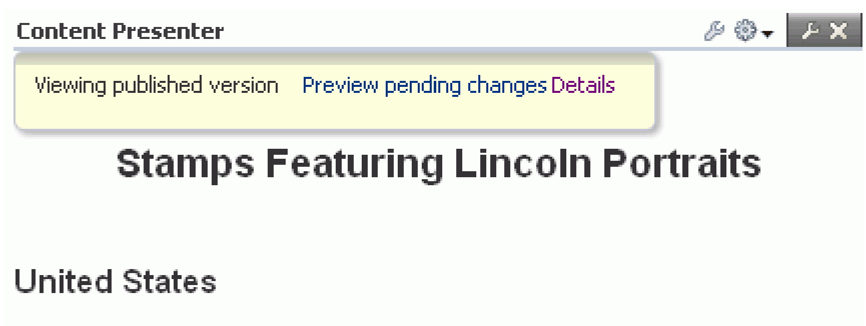
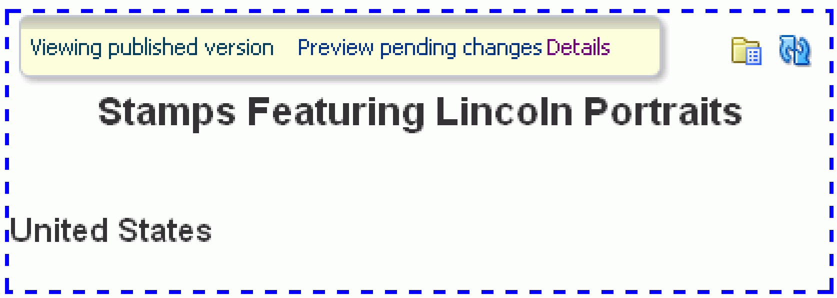


Figure 45–10 In-Context Edit (Contributor) Mode: Workflow Controls in Content Presenter



3. To view further details about the workflow, click **Details** to display the workflow information in Content Server (including workflow name, steps performed, action performed, date of action, and who performed the action).

Note: To enable the availability of the workflow **Details** link in the Document Viewer preview pane, *both* of the following two requirements must be met:

- You must access the Spaces application through Oracle HTTP Server (OHS) to expose Content Server and the Spaces application under the same host and port. For information about setting up OHS as the front-end to Spaces, see "Configuring Content Server for WebCenter Portal Applications" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- Spaces must be connected to a Content Server repository, with the `webContextRoot` parameter set to a Content Server host name. For information on setting `webContextRoot`, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. To set `webContextRoot` through WLST, see "`createJCRContentServerConnection`" and "`setJCRContentServerConnection`" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

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4. If you are a workflow approver, click **Preview pending changes** to preview the changes to the file, then **Approve** or **Reject** the changes in either page edit mode (Figure 45–11), or in-context edit (contributor) mode (Figure 45–12). These links are active only when the file is pending approval. If you reject the file, enter the justification for your rejection. For other ways to approve or reject a file, see Section 45.6.1, "Approving or Rejecting a File in Workflow."

Note: If the file is configured in Content Server to require an esignature, you will not be able to approve it in WebCenter Portal: Spaces. To provide an esignature with approval, you must approve using Content Server. For more information, see the "Working with Workflows" chapter in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.

Figure 45–11 Page Edit Mode: Preview File in Workflow to Approve or Reject in Content Presenter

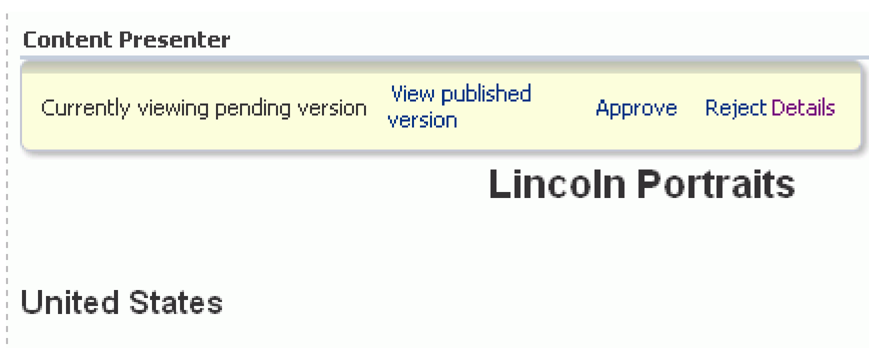
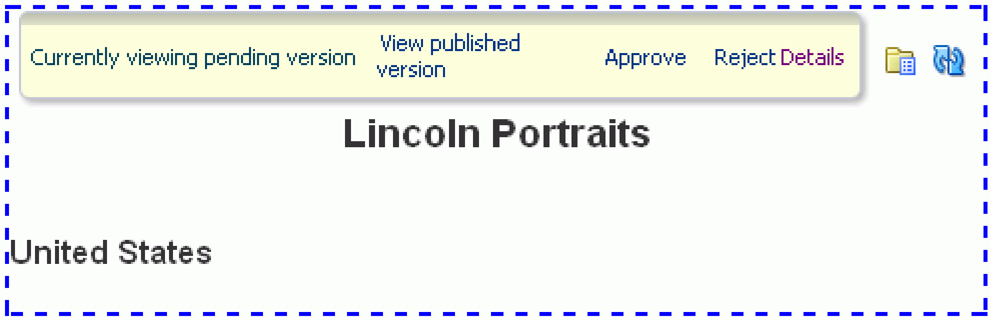


Figure 45–12 In-Context Edit (Contributor) Mode: Preview File in Workflow to Approve or Reject in Content Presenter



When a file in workflow is approved, it is released from workflow, and the workflow controls no longer display in Content Presenter. If you edit the file and make further changes, it will return to workflow and the workflow controls will display again.

When a file in workflow is rejected, it remains in workflow, returning to the `contribution` step. It must be updated by the file owner for the **Approve** and **Reject** controls to display.

45.3.3 Viewing Workflow Files in a Workflow Queue

If you have Content Portlet Suite installed, you can add the Oracle Workflow Queue portlet to a page to list the files in workflow, along with details about each workflow. For information about how to deploy Content Portlet Suite, see *Oracle Fusion Middleware Deployment Guide for Content Portlet Suite*.

To add the Oracle Workflow Queue portlet to a page:

1. Create a new page in a space or go to the page where you want to add the portlet, and open the page in edit mode.

   See Also: For more information, see Section 17.2, "Creating a Page" and Section 18.1, "Entering and Exiting Composer."

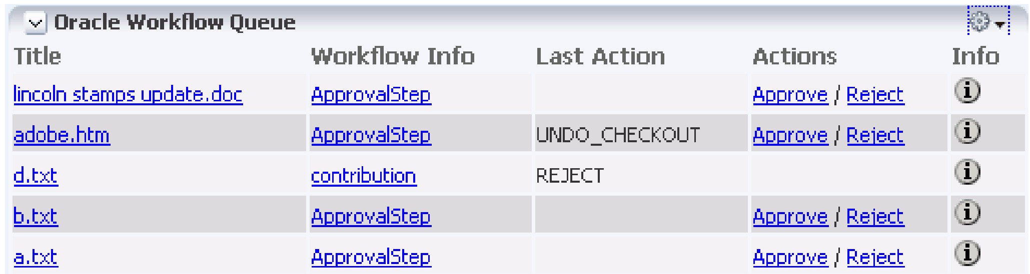
2. Click **Add Content** to open the Resource Catalog.
3. Locate the Oracle Workflow Queue portlet in the Resource Catalog.

   Tip: The presence or location of the Oracle Workflow Queue portlet depends on how the Resource Catalog is configured. For example, in the default Resource Catalog, click **Portlets**, then **<Host> Portlets** to locate the **Oracle Workflow Queue** portlet.

4. Click **Add** next to the Oracle Workflow Queue portlet to add it to the page, then **Close** the Resource Catalog.

   On the page, the Oracle Workflow Queue portlet (Figure 45–13) displays a list of all the files in workflow assigned to you to approve or reject.

Figure 45–13 Oracle Workflow Queue Portlet



In the Oracle Workflow Queue portlet, you can perform the following actions if you have appropriate permissions:

- In the **Title** column, click a file name to open it in its native application.
- In the **Workflow Info** column, click a link to display the Workflow Step Information pane, which provides steps required to complete the workflow, the current step, the number of approvals required, and the remaining reviewers. For more information, see Section 45.4.1, "Viewing Detailed Workflow Status."
- In the **Actions** column, click **Approve** or **Reject** to indicate the result of your review of the file. These links are active only when the file is pending approval. If you reject the file, enter the justification for your rejection. For other ways to approve or reject a file, see Section 45.6.1, "Approving or Rejecting a File in Workflow."

> **Note:** If the file is configured in Content Server to require an esignature, you will not be able to approve it in WebCenter Portal: Spaces. To provide an esignature with approval, you must approve using Content Server. For more information, see the "Working with Workflows" chapter in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.

- In the **Info** column, click the **Content Information** icon to display the Content Info pane, which provides access to actions you can perform, file metadata information, and revision history. For more information, see Section 45.4.2, "Viewing Content Information and Actions."

45.4 Viewing Workflow Status and File Information

As an approver or owner of a file in workflow, you may want to get more information about the current state of the workflow, details about the file itself, or perform file management actions to update or share the file to advance its approval:

- Section 45.4.1, "Viewing Detailed Workflow Status"
- Section 45.4.2, "Viewing Content Information and Actions"

45.4.1 Viewing Detailed Workflow Status

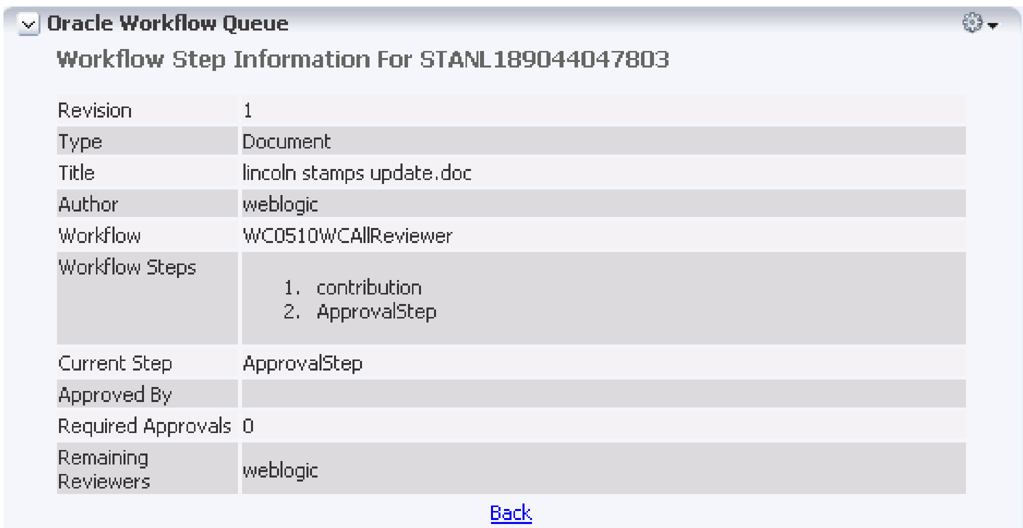
To view the details of the workflow status of a file:

1. Go to the Oracle Workflow Queue portlet that lists the file.

To add an Oracle Workflow Queue portlet to a page, see Section 45.3.3, "Viewing Workflow Files in a Workflow Queue."

2. In the **Workflow Info** column, click the workflow step link to display the Workflow Step Information pane (Figure 45–14), which includes the steps required to complete the workflow, the current step, the number of approvals required, and the remaining reviewers. For information about workflow steps, see Section 45.1.2, "Understanding Workflow Steps."

Figure 45–14 Workflow Step Information



3. Click **Back** to return to the Oracle Workflow Queue portlet.

45.4.2 Viewing Content Information and Actions

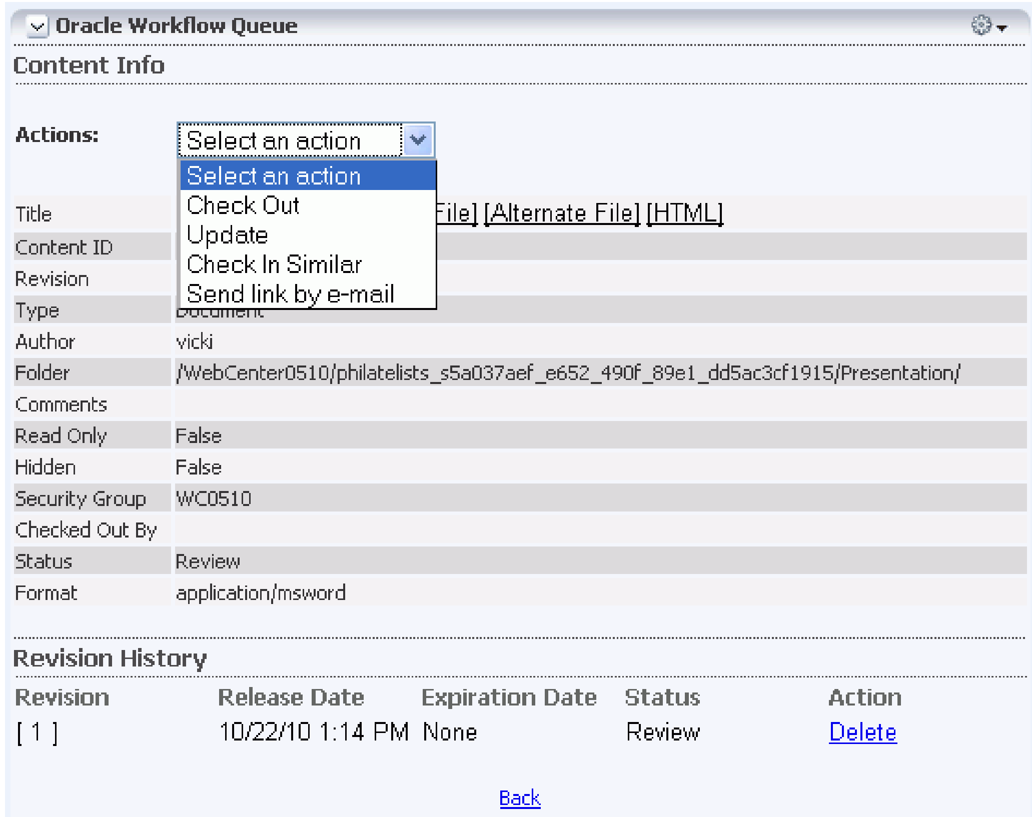
To display a Content Info pane that provides details about a file in workflow and perform file management actions to update or share the file to advance its approval:

1. Go to the Oracle Workflow Queue portlet that lists the file.

   To add an Oracle Workflow Queue portlet to a page, see Section 45.3.3, "Viewing Workflow Files in a Workflow Queue."

2. In the **Info** column, click the **Content Information** icon to display the Content Info pane (Figure 45–15), which provides access to actions you can perform, file metadata information, and revision history. For more information, see "Content Information Page" in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.

Figure 45–15 Content Info Pane



3. Optionally, from the **Actions** list, select any of the following actions:

   - **Check Out** to check the file out so that you can lock it from changes by other contributors while you are making updates.
   - **Update** to display the Info Update Form, where you can update editable metadata of the file without creating a new revision of the file. Only the Spaces administrator, space members with `Administration-Manage Configuration` permissions, or file owners can edit the file properties. For more information, see "Info Update Form" in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.
   - **Check in Similar** to display the Content Check In Form, where you can update editable metadata of the file and check the file in to Content Server. Only the Spaces administrator, space members with `Administration-Manage Configuration` permissions, or file owners can edit the metadata properties. For more information, see "Content Check-In Form" in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.
   - **Send link by e-mail** to open your e-mail application with a new message that contains a link to the URL of the web-viewable file, which you can mail to other users with requests for input or review to further the approval of the file.

4. Click **Back** to return to the Oracle Workflow Queue portlet.

45.5 Changing or Deleting a Workflow

With appropriate permissions (the Spaces administrator, or space members with `Administration-Manage Configuration` permissions), you can change or delete the workflow assigned to a folder in a Documents service task flow when the connected content repository is Content Server.

To change or delete the workflow assigned to a folder:

1. On the **Documents** page or in a Documents service task flow in a space, click in the row of the folder.

> **Note:** The **Documents** page is exposed in a space only with Content Server 11*g*. If the connected content repository is Content Server 10*g*, you can create a page in a space and add Documents service task flows to the page (see Section 43.4, "Adding a Documents Service Task Flow to a Page").

2. Follow the steps in Section 45.2, "Assigning a Workflow to a Folder in a Space":
   - To change the workflow, select a different workflow from the **Workflow Name** list, and optionally add or delete approvers.
   - To delete the workflow, select **<None>** from the **Workflow Name** list.

> **Note:** If you change or delete the workflow assigned to a folder, the files that were previously in that folder remain assigned to the prior workflow. Only files that are subsequently checked in or uploaded to the folder inherit the new workflow settings.

45.6 Participating in a Workflow

The workflow process is as follows:

- A document enters the workflow approval step by exiting the initial `contribution` step as a result of a new document upload or the editing of an existing document that was previously uploaded into a workflow-enabled folder.
- If any reviewer rejects a revision, it goes back to the `contribution` step for editing.
- When a revision is approved at the last step in the workflow, the content item is released to the system.

The following sections describe how to work with a file through the workflow process:

- Section 45.6.1, "Approving or Rejecting a File in Workflow"
- Section 45.6.2, "Working with a Rejected Revision"

45.6.1 Approving or Rejecting a File in Workflow

As an assigned approver for a workflow, you will need to review and either approve or reject a file to which you are assigned. A file is released from workflow when it is approved in accordance with its workflow type (see Section 45.1.1, "Understanding Workflow Types").

To approve or reject a file in workflow:

1. View the files for which you are an assigned approver in either of the following ways:

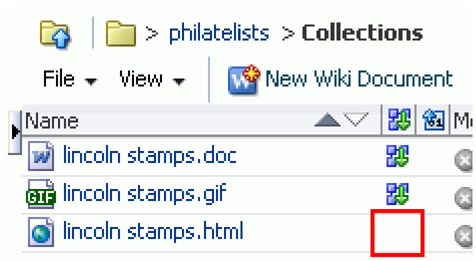
- In the Document Viewer preview pane, as described in Section 45.3.1, "Viewing Workflow Files in a Documents Service Task Flow."
- In a Content Presenter task flow, as described in Section 45.3.2, "Viewing Workflow Files in a Content Presenter Task Flow."
- In an Oracle Workflow Queue portlet, as described in Section 45.3.3, "Viewing Workflow Files in a Workflow Queue."

2. Click **Approve** or **Reject** to indicate the result of your review of the file. These links are active only when the file is pending approval. If you reject the file, enter the justification for your rejection.

> **Note:** If the file is configured in Content Server to require an esignature, you will not be able to approve it in WebCenter Portal: Spaces. To provide an esignature with approval, you must approve using Content Server. For more information, see the "Working with Workflows" chapter in *Oracle Fusion Middleware User's Guide for Oracle Content Server*.

When a file in workflow is approved, it is released from workflow, and the workflow icon no longer displays for the file (Figure 45–16). If you edit the file and make further changes, it will return to workflow.

Figure 45–16 File Released From Workflow Showing No Workflow Icon



When a file in workflow is rejected, it remains in workflow, but must be updated by the file owner for the **Approve** and **Reject** controls to display.

45.6.2 Working with a Rejected Revision

If a file in workflow is rejected, it remains in workflow and returns to the original submitter in the `contribution` workflow step. The contributor can then revise the file and save it. After saving, the file automatically moves back into the workflow approval step again to be approved or rejected by assigned approvers.

46

Creating and Managing Content at Runtime

End users of a WebCenter Portal: Spaces application can create and manage content at runtime in a variety of ways:

- The **Documents** page and Documents service task flows offer capabilities to create, open, edit, delete, copy, rename, move, share, search, view, and manage information about folders and files in any connected content repository, including wikis and blogs. For more information about the Documents service task flows, see Section 43.1, "What You Should Know About the Documents Service Task Flows."
- In a Content Presenter task flow, end users can edit wiki documents, HTML files, or Site Studio files in-context, and create new Site Studio files in the connected Content Server content repository. For more information about the Content Presenter task flow, see Section 42.1, "What You Should Know About the Content Presenter Task Flow."

This chapter offers pointers to the information that will assist you in creating and managing content at runtime using the content task flows.

To create and manage content at runtime using the **Documents** page or one of the *Documents service task flows*, refer to the steps in the following sections:

- Section 43.6, "Personalizing Your View of Documents"
- Section 43.7, "Creating a Folder"
- Section 43.8, "Creating a File"
- Section 43.9, "Opening a Folder"
- Section 43.10, "Opening a File"
- Section 43.11, "Using the Rich Text Editor (RTE)"
- Section 43.12, "Editing and Updating a File"
- Section 43.13, "Renaming a Folder or File"
- Section 43.14, "Copying and Pasting Folders and Files"
- Section 43.15, "Moving Folders and Files"
- Section 43.16, "Deleting Folders and Files"
- Section 43.17, "Refreshing Folder Contents"
- Section 43.18, "Hiding and Showing Folders"
- Section 43.19, "Viewing, Entering, and Deleting Comments on a File"
- Section 43.20, "Working with Tags"

- Section 43.21, "Viewing and Deleting File Version History"
- Section 43.22, "Viewing and Modifying Folder and File Properties"
- Section 43.23, "Setting Security Options on a Folder or File"
- Section 43.24, "Working with Links"
- Section 43.25, "Working with Recommendations"
- Section 43.26, "Opening or Saving PDF Files"
- Section 43.27, "Sharing the URL for a Folder or File"
- Section 43.23, "Setting Security Options on a Folder or File"
- Section 43.28, "Subscribing to a File"
- Section 43.29, "Liking and Unliking a File"
- Section 43.30, "Adding a Folder or File to Your Favorites"
- Section 43.31, "Searching for Documents"

To create and manage content at runtime using *Content Presenter*, refer to the steps in the following sections:

- Section 42.9, "Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog"
- Section 42.10.1, "Editing Wiki Documents or HTML Files In-Context"
- Section 42.10.2, "Editing Site Studio Files In-Context"
- Section 42.10.3, "Creating New Site Studio Content In-Context"

47

Collaborating on Documents

Almost every enterprise spends a lot of time collaborating on documents. This includes joint authoring, sharing, reviewing, approving, editing, and so on. WebCenter Portal: Spaces provides several ways to collaborate on documents, both during the development of a document, or when a document is available to all users of a Spaces application:

- Section 47.1, "Collaborating on Documents Using the Documents Service"
- Section 47.2, "Collaborating on Documents through Workflows"
- Section 47.3, "Collaborating on Documents Using Oracle AutoVue"

Note: The Documents service is exposed on the **Documents** page and administration settings in a space only with Content Server 11*g*. If the connected content repository is Content Server 10*g*, the **Documents** page is not shown in a space, and the Documents service is not available in the space administration settings (**Services** and **Roles**). To use the Documents service functionality in 10*g*, you can create a page in a space and add Documents service task flows to the page.

Audience

This chapter is intended for Spaces users interested in sharing and collaborating on documents in a Spaces application.

47.1 Collaborating on Documents Using the Documents Service

The Documents service provides features for accessing, adding, and managing folders and files; configuring and viewing file and folder properties; and searching file and folder content in the connected content repositories.

Within the context of managing documents, the Documents service provides features for collaborating on documents. These features include:

- Viewing a document in-place. See Section 43.10, "Opening a File."
- Tagging a document. See Section 43.20, "Working with Tags."
- Linking to supporting documents. See Section 43.24, "Working with Links."
- Viewing recommendations for similar documents. See Section 43.25, "Working with Recommendations."

- Commenting on a document. See Section 43.19, "Viewing, Entering, and Deleting Comments on a File."
- Sharing the link to a document. See Section 43.27, "Sharing the URL for a Folder or File."
- Subscribing to a document. See Section 43.28, "Subscribing to a File."
- Liking a document. See Section 43.29, "Liking and Unliking a File."
- Adding a document to your list of favorites. See Section 43.30, "Adding a Folder or File to Your Favorites."
- Adding wiki documents to a Spaces application, allowing multiple users to collaborate to create content that is relevant, useful, and up-to-date. See Chapter 49, "Working with Wiki Documents."
- Adding blogs to record experiences and opinions, and allowing multiple users to contribute through blog posts. See Chapter 50, "Working with Blogs."

47.2 Collaborating on Documents through Workflows

While a document is being developed, it must typically be reviewed and approved by a number of people. To assist in managing this process, Spaces provides a built-in workflow capability to move a document through required approvals by assigned approvers. This capability is available when the connected content repository is Content Server.

For information about assigning, viewing, updating, and participating in document workflows, see Chapter 45, "Working with Workflow-Enabled Content."

47.3 Collaborating on Documents Using Oracle AutoVue

In addition to the wide range of functionality offered by Spaces to manage and collaborate on documents through workflows, wiki documents, and spaces, you also have the option to use Oracle AutoVue.

Note: To enable Oracle AutoVue functionality, the following requirements must be met:

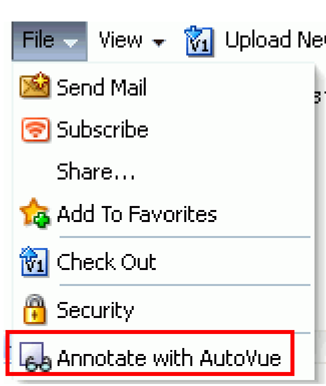
- You must access the Spaces application through Oracle HTTP Server (OHS) to expose Content Server and the Spaces application under the same host and port. For information about setting up OHS as the front-end to Spaces, see "Configuring Content Server for WebCenter Portal Applications" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- The AutoVue VueLink Integration servlet must be mapped through the same OHS front-end that is configured for Content Server and WebCenter Portal. For more information, see "Enabling the iFraming UI in WebCenter Portal" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- SSO should be set up between Content Server and the Spaces application to allow for single sign-off, and avoid unexpected reuse of Content Server sessions. See "Configuring Single Sign-on" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- Spaces must be connected to a Content Server repository, with the `webContextRoot` parameter set to a Content Server host name. For information on setting `webContextRoot`, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. To set `webContextRoot` through WLST, see "`createJCRContentServerConnection`" and "`setJCRContentServerConnection`" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

Oracle AutoVue, packaged separately from Spaces, integrates easily with a Content Server back-end repository to provide document review and collaboration features. AutoVue supports a wide range of file types, including Word, Excel, PDF, as well as 2D and 3D CAD file types. For more information about Oracle AutoVue, see the library of documents at
`http://www.oracle.com/us/products/applications/`.

To use Oracle AutoVue to review and collaborate on a file:

1. Open the file in the Document Viewer preview pane, click the **File** menu, and select **Annotate with AutoVue** (Figure 47–1).

Figure 47–1 Document Viewer File Menu



The AutoVue file viewer in Content Server opens.

Note: if SSO is not set up, you will need to log into Content Server to see the AutoVue viewer.

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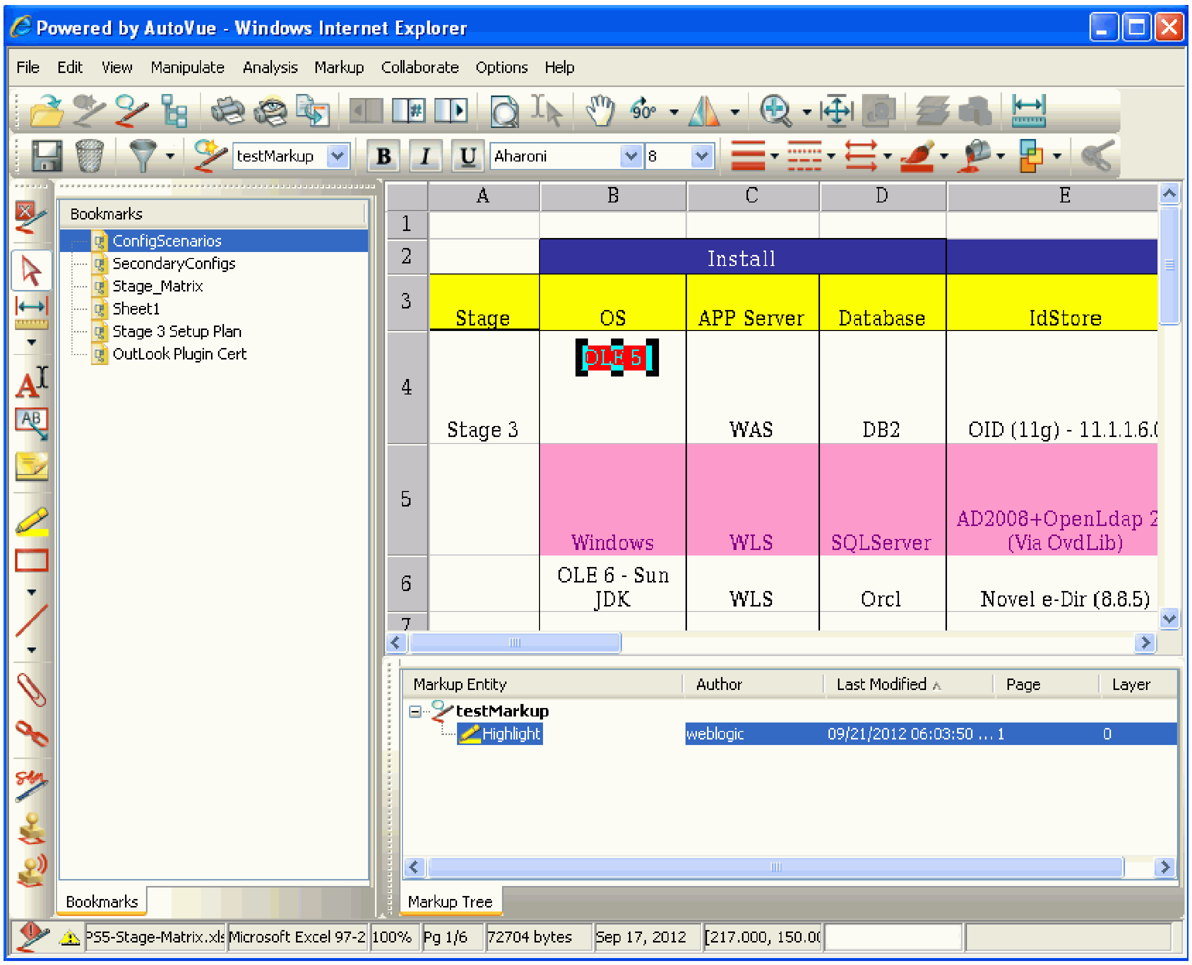
2. In the AutoVue file viewer (Figure 47–2), enter comments and individualized mark-up, and save your changes.

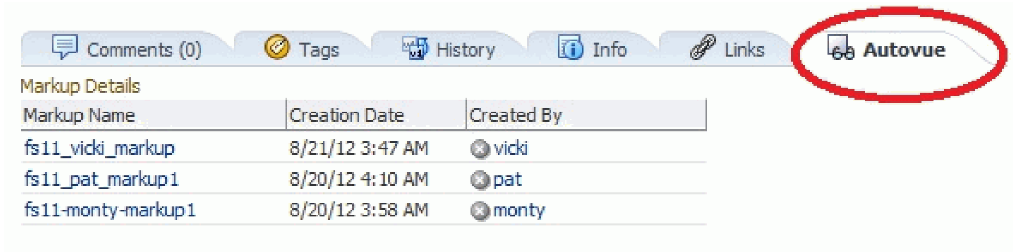
Figure 47–2 AutoView File Viewer in Content Server



3. To view the file containing the AutoVue markup in Spaces, click the **AutoVue** tab at the bottom of the Document Viewer preview pane (Figure 47–3), then click the name of the AutoVue version of the file.

Note: There may be multiple marked-up versions of the file listed in the **AutoVue** pane. Click the version you require.

Figure 47–3 Document Viewer: AutoVue Pane



48

Working with Microsoft Office and Explorer Integration

WebCenter Portal: Spaces integrates with Microsoft Office and Windows Explorer to provide you with flexibility in managing files in a space when the content repository is Content Server. Microsoft Office shared document management functionality offers alternate ways to perform tasks that can also be performed within Spaces.

> **Note:** The Documents service is exposed on the **Documents** page and administration settings in a space only with Content Server 11*g*. If the connected content repository is Content Server 10*g*, the **Documents** page is not shown in a space, and the Documents service is not available in the space administration settings (**Services** and **Roles**). To use the Documents service functionality in 10*g*, you can create a page in a space and add Documents service task flows to the page.

The differences in Microsoft Office 2003, 2007, and 2010 mean that each version may support a particular feature in a different way, and one or more versions may not support some of the tasks described in this chapter. Each section in this chapter provides information about which Microsoft Office version supports the task described, and how that support is implemented, where there are differences. Additionally, Table 48–1 provides a quick reference summary of the Microsoft Office functionality supported by WebCenter Portal: Spaces in the different versions of Microsoft Office.

This chapter includes the following sections:

- Section 48.1, "What You Should Know About Microsoft Office and Explorer Integration"
- Section 48.2, "Configuring Microsoft Office Integration with Spaces"
- Section 48.3, "Working with Microsoft Word, PowerPoint, and Excel Integration"
- Section 48.4, "Working with Microsoft Windows Explorer Integration"

Audience

This chapter is intended for Spaces users interested in using Microsoft Office applications and Windows Explorer to manage information in a space.

48.1 What You Should Know About Microsoft Office and Explorer Integration

The following sections provide an overview of the functionality provided by integration with Microsoft Office and Windows Explorer:

- Section 48.1.1, "Understanding Microsoft Office Word, PowerPoint, and Excel Integration"
- Section 48.1.2, "Understanding Microsoft Windows Explorer Integration"

48.1.1 Understanding Microsoft Office Word, PowerPoint, and Excel Integration

Using the Microsoft Office shared document management functionality, you can work with Word, PowerPoint, or Excel files in any space, including the Home space. This functionality is available in Microsoft Office 2003 and later, when the backend content repository is Content Server.

Note: The differences in Microsoft Office 2003, 2007, and 2010 mean that each version may support a particular feature in a different way, and one or more versions may not support some of the tasks described in this chapter. Each section provides information about which version supports the task described, and how that support is implemented, where there are differences.

Table 48–1 provides a quick reference summary of the Microsoft Office functionality supported by WebCenter Portal: Spaces in the different versions of Microsoft Office.

Note: The following browsers are supported for all versions of Microsoft Office:

- Internet Explorer 7+
- Firefox 3.6+
- Safari 4+
- Google Chrome 12+

Table 48–1 Microsoft Office Version Support Summary

Task	2003	2007	2010
Creating a Space from a Microsoft Office Document	⛔	✅	⛔
Opening a Microsoft Word, Excel, or PowerPoint file from Spaces: ■ Opening and Editing a File 2003: By default, opens task pane (Figure 48–5) 2007: By default, does not open task pane 2010: Does not include task pane ■ Opening a File Already Checked Out By Another User	✅	✅	✅

Table 48–1 (Cont.) Microsoft Office Version Support Summary

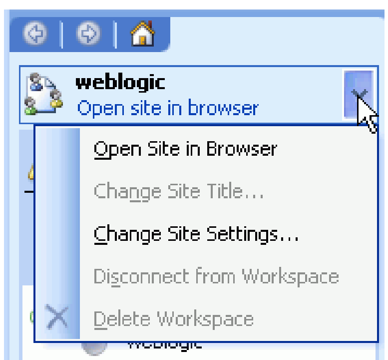
Task	2003	2007	2010
Closing a File ▪ Closing a File After Checking It In ▪ Closing a File Before Checking It In 2003: From the **File** menu, select **Close** 2007: Click the Office Button (Figure 48–41) in the top left corner of the Microsoft Office application, then select **Close** ▪ Closing an Unchanged File ▪ Closing an Updated File	✅	✅	✅
Working with the Microsoft Office Task Pane (2003 and 2007 only)	✅	✅	⛔
Displaying and Hiding the Microsoft Office Task Pane: ▪ Displaying or Hiding the Task Pane Manually 2003: From **Tools** menu, select **Shared Workspace** (Figure 48–5) 2007: Click Office button: from **Server** menu, select **Document Management Information** (Figure 48–10) ▪ Displaying or Hiding the Task Pane By Default 2003: From **Tools** menu, select **Options** 2007: In Microsoft Office task pane, click **Options**	✅	✅	N/A
Microsoft Office Task Pane: Top section 	✅	✅	N/A
User or space name. See Table 48–2.	✅	✅	N/A
Open Site in Browser. See Table 48–2.	✅	✅	N/A
Change Site Title	⛔	⛔	N/A
Change Site Settings. See Table 48–2.	✅	✅	N/A
Disconnect from Workspace	⛔	⛔	N/A
Delete Workspace	⛔	⛔	N/A

Table 48–1 (Cont.) Microsoft Office Version Support Summary

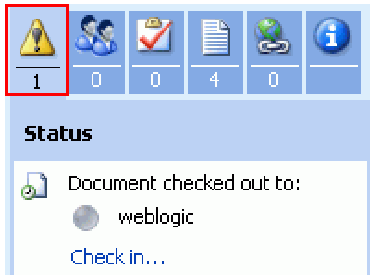
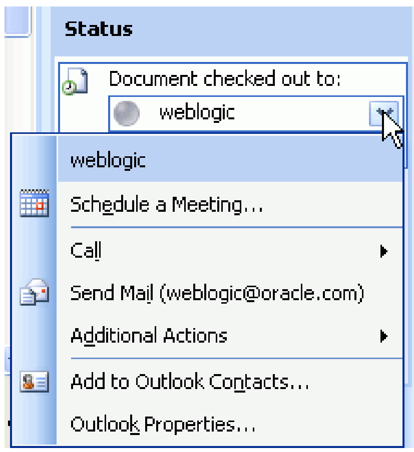
Task	2003	2007	2010
Microsoft Office Task Pane: Status section  	✔	✔	N/A
User who checked out the file	✔	✔	N/A
Check in ■ Checking a File In ■ Checking the Currently Open File Out Again After Checking It In ■ Checking a File Out	✔	✔	N/A
Schedule a Meeting. See Table 48–2.	✔	✔	N/A
Call	⛔	⛔	N/A
Send Mail ■ Sending a Message to the Current User ■ Sending a Message to Your Connections ■ Sending a Message to Members of a Space	✔	✔	N/A
Additional Actions	⛔	⛔	N/A
Add to Outlook Contacts. See Table 48–2.	✔	✔	N/A
Outlook Properties. See Table 48–2.	✔	✔	N/A

Table 48–1 (Cont.) Microsoft Office Version Support Summary

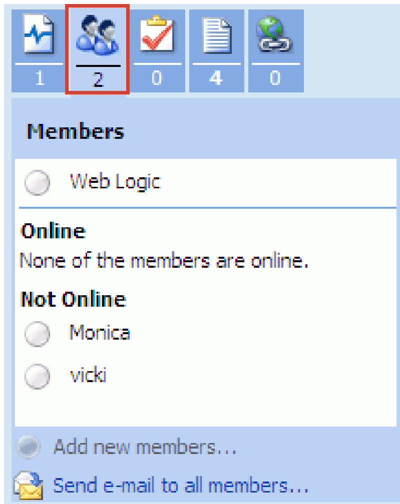
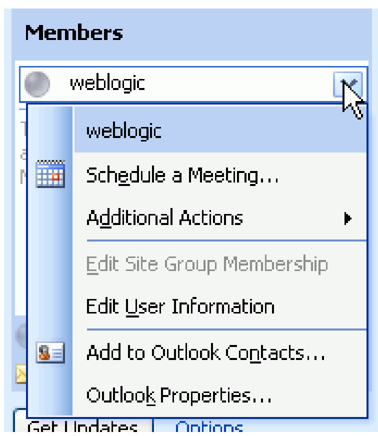
Task	2003	2007	2010
Microsoft Office Task Pane: Members section  	✔	✔	N/A
User who checked out the file	✔	✔	N/A
Listing of current people connections	✔	✔	N/A
Add new members (not supported for Home space) ▪ Adding Members to a Space	✔	✔	N/A
Send e-mail to all members ▪ Sending a Message	✔	✔	N/A
Schedule a Meeting	⛔	⛔	N/A
Additional Actions	⛔	⛔	N/A
Edit Site Group Membership	⛔	⛔	N/A
Edit User Information	⛔	⛔	N/A
Add to Outlook Contacts	⛔	⛔	N/A
Outlook Properties	⛔	⛔	N/A

Table 48–1 (Cont.) Microsoft Office Version Support Summary

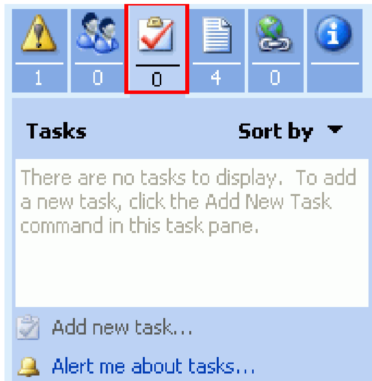
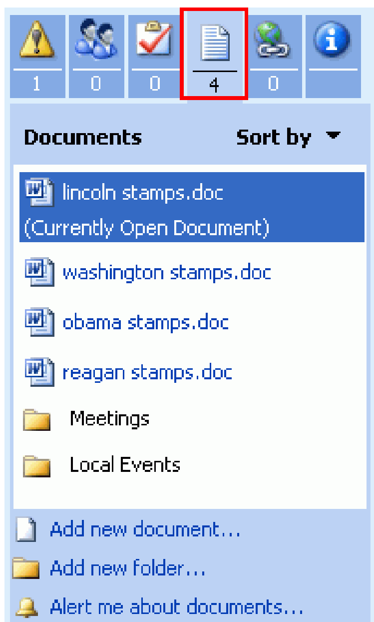
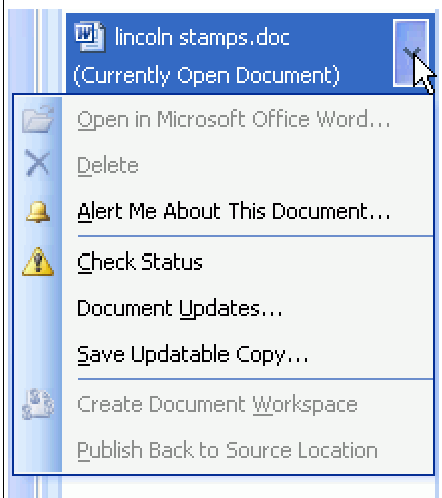
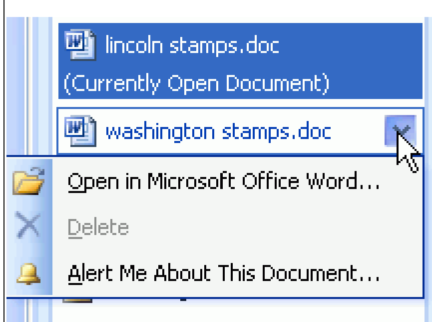
Task	2003	2007	2010
Microsoft Office Task Pane: Tasks section 			N/A
Microsoft Office Task Pane: Documents section 			N/A

Table 48–1 (Cont.) Microsoft Office Version Support Summary

Task	2003	2007	2010
Managing the Currently Open File			



Task	2003	2007	2010
Open in Microsoft Office *Xxxxx*	⊖	⊖	N/A
Delete	⊖	⊖	N/A
Alert Me About This Document	⊖	⊖	N/A
Check Status. See Table 48–2.	✓	✓	N/A
Document Updates	⊖	⊖	N/A
Save Updatable Copy	⊖	⊖	N/A
Create Document Workspace	⊖	⊖	N/A
Publish Back to Source Location	⊖	⊖	N/A
Managing Other Files in the Current Space			



Task	2003	2007	2010
Open in Microsoft Office *Xxxxx*	✓	✓	N/A
Delete	⊖	⊖	N/A
Alert Me About This Document	⊖	⊖	N/A

Table 48–1 (Cont.) Microsoft Office Version Support Summary

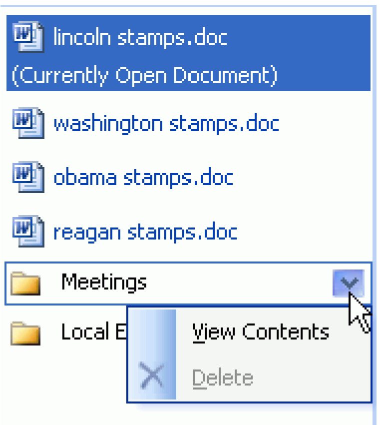
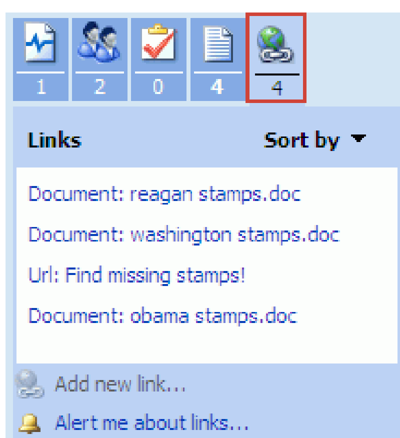
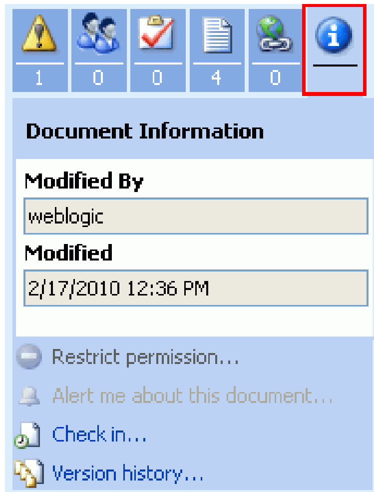
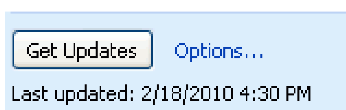
Task	2003	2007	2010
Managing Folders: 			
View Contents.	✅	✅	N/A
Delete	⛔	⛔	N/A
Other action in the Documents section:			
Add new document ▪ Saving a File As a New File in a Space ▪ Adding a New File Using the Task Pane	✅	✅	N/A
Add new folder ▪ Adding a New Folder	✅	✅	N/A
Alert me about documents	⛔	⛔	N/A
Microsoft Office Task Pane: Links section 	✅	✅	N/A
Documents and URL links defined in Spaces to the current file ▪ Viewing Link Targets	✅	✅	N/A
Add new link	⛔	⛔	N/A
Alert me about links	⛔	⛔	N/A

Table 48–1 (Cont.) Microsoft Office Version Support Summary

Task	2003	2007	2010
Microsoft Office Task Pane: Document Information section 	✔	⛔	N/A
Document Information ▪ Viewing Document Information	✔	⛔	N/A
Restrict permission	⛔	⛔	N/A
Alert me about this document	⛔	⛔	N/A
Check out or Check in ▪ Checking a File Out ▪ Checking a File In	✔	⛔	N/A
Version history ▪ Working with File Version History	✔	⛔	N/A
Microsoft Office Task Pane: Bottom section 	✔	✔	N/A
Get Updates. See Table 48–2.	✔	✔	N/A
Options. See Table 48–2.	✔	✔	N/A
Date and time that the file was last modified.	✔	✔	N/A

48.1.2 Understanding Microsoft Windows Explorer Integration

In Windows Explorer, you can manage the folders and files in a space when the backend content repository is Content Server. To use this functionality, you create a network place in Windows Explorer for the space documents. See Section 48.4, "Working with Microsoft Windows Explorer Integration."

48.2 Configuring Microsoft Office Integration with Spaces

To allow for full integration of Microsoft Office with Spaces, your system administrator must complete the steps detailed in "Managing Microsoft Office Integration" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

48.3 Working with Microsoft Word, PowerPoint, and Excel Integration

Spaces integrates with the Microsoft Office shared document management functionality for working with Microsoft Word, Excel, or PowerPoint files. This functionality is available in Microsoft Office 2003 and later, when the backend content repository is Content Server. For more information, see Section 48.1.1, "Understanding Microsoft Office Word, PowerPoint, and Excel Integration."

Many of the tasks you can perform using the Microsoft Office shared document management functionality can also be performed in Spaces, and described in Chapter 43, "Working with the Documents Service Task Flows and Document Components."

This section provides steps to perform the following tasks using Microsoft Office shared document management:

- Section 48.3.1, "Creating a Space from a Microsoft Office Document"
- Section 48.3.2, "Opening and Editing a File"
- Section 48.3.3, "Working with the Microsoft Office Task Pane"
  - Section 48.3.3.1, "Displaying and Hiding the Microsoft Office Task Pane"
  - Section 48.3.3.2, "Adding a File"
  - Section 48.3.3.3, "Adding a New Folder"
  - Section 48.3.3.4, "Checking a File Out"
  - Section 48.3.3.5, "Checking a File In"
  - Section 48.3.3.6, "Managing the Currently Open File"
  - Section 48.3.3.7, "Managing Other Files in the Current Space"
  - Section 48.3.3.8, "Managing Folders"
  - Section 48.3.3.9, "Viewing Link Targets"
  - Section 48.3.3.10, "Viewing Document Information"
  - Section 48.3.3.11, "Working with File Version History"
  - Section 48.3.3.12, "Adding Members to a Space"
  - Section 48.3.3.13, "Sending a Message"
- Section 48.3.4, "Closing a File"

Note: Spaces does not implement administrative features of the Microsoft Office shared document management functionality, such as creating a workspace using the task pane, deleting a workspace, or changing a workspace title.

48.3.1 Creating a Space from a Microsoft Office Document

Note: This feature is available only in Microsoft Office 2007. It is not available in Microsoft Office 2003 or 2010.

With Microsoft Office 2007, you can create a space from a Microsoft Office document, as long as your permissions on the document are the same as your permissions in Spaces.

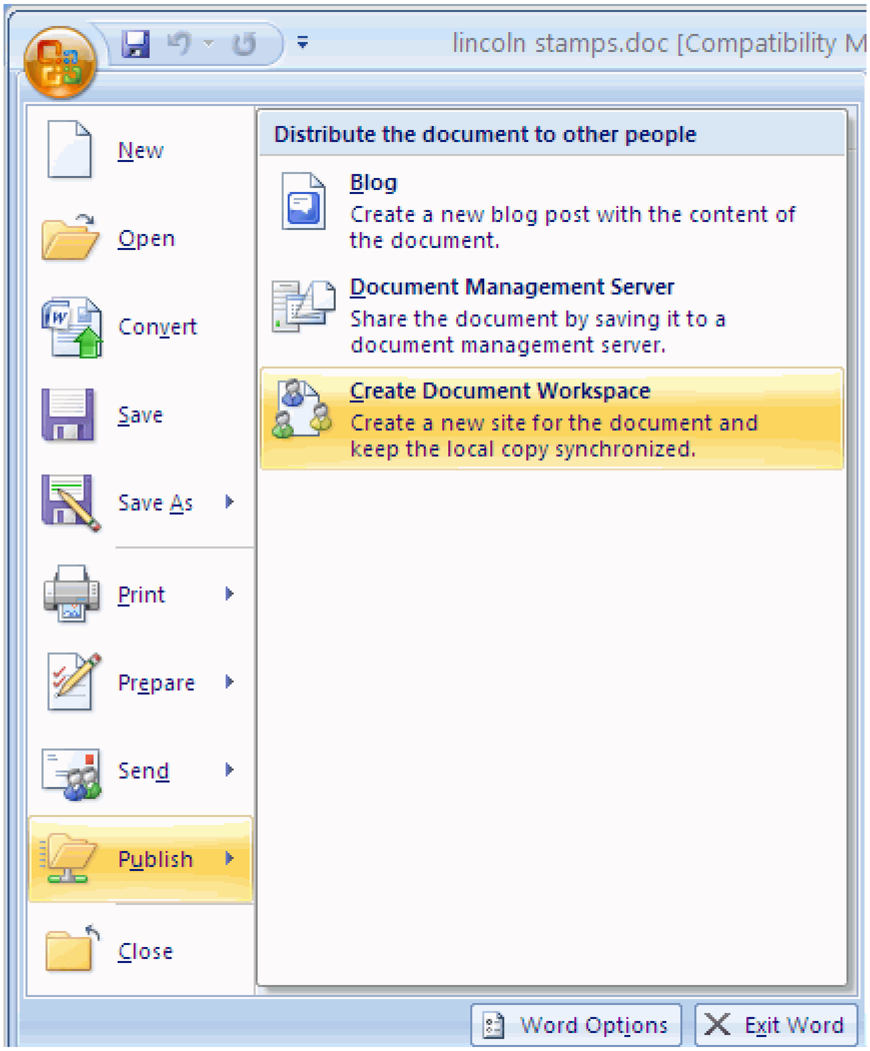
To create a space from a Microsoft Office document:

1. If you are using Internet Explorer as a browser, add Spaces to your list of trusted sites in the browser settings.
2. In the Microsoft Office document, click the Office Button (Figure 48–1) in the top left corner of the Microsoft Office application.

Figure 48–1 Office Button in Microsoft Office

3. From the **Publish** menu, select **Create Document Workspace** (Figure 48–2).

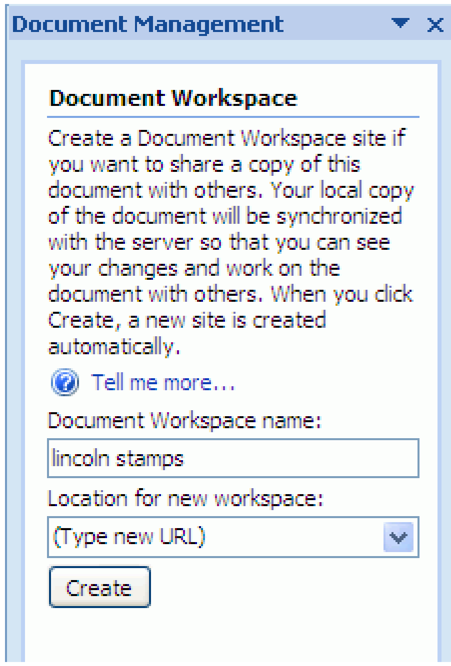
Figure 48–2 Creating a Space from an Office Document



4. The Microsoft Office application displays the **Document Management** task pane, displaying the file name as the default workspace name.

Note: If the pane does not display, see Section 48.3.3.1, "Displaying and Hiding the Microsoft Office Task Pane."

Figure 48–3 Document Management Task Pane: Document Workspace



5. In the **Document Workspace name** field, type a name for the space if you want to change the default name.
6. In the **Location for new workspace** field, type the Explorer URL for the Spaces instance. For example:

```
http://myserver.example.com:8888/wcsdocs/conn/myserver-ucm11g/spaces
/WebCenter/
```

   You can find this URL in the About Space dialog for an existing space, as described in Section 51.6, "Viewing Information About a Space."
7. Click **Create**.
8. At the prompt, enter your Spaces login credentials.

Spaces creates the new space.

In Microsoft Office, the **Status** section of the Microsoft Office task pane (see Table 48–2) displays one of the following status messages:

```
This document is up to date.  If you have unsaved changes, you must save the
document before you can update the workspace copy.

A copy of this document is stored in a Document Workspace.  Changes made to your
document have not been udpated in the workspace copy.
```

If you update the document in Microsoft Office, you can simply click the **Update Workspace Copy** link to synchronize the document with the version in the space (on the server).

48.3.2 Opening and Editing a File

When you open a Microsoft Office file from Spaces (using any browser), the file is automatically checked out of the Content Server repository. When you refresh the page in Spaces, the **Status** column for the file shows a **Checked Out** icon.

To make your changes available to other users, you can save and close it in Microsoft Office, or explicitly check the file in using Microsoft Office.

Note: (For all browsers, with the exception of Internet Explorer: If you are using Windows 7 or a 64-bit machine, you must install the Java plugin available at `http://support.mozilla.com` to edit a Microsoft Office file. This plugin is included in Java 6 Update 15 and above.

To open a Microsoft Word, Excel, or PowerPoint file from Spaces in-place in its Microsoft Office application:

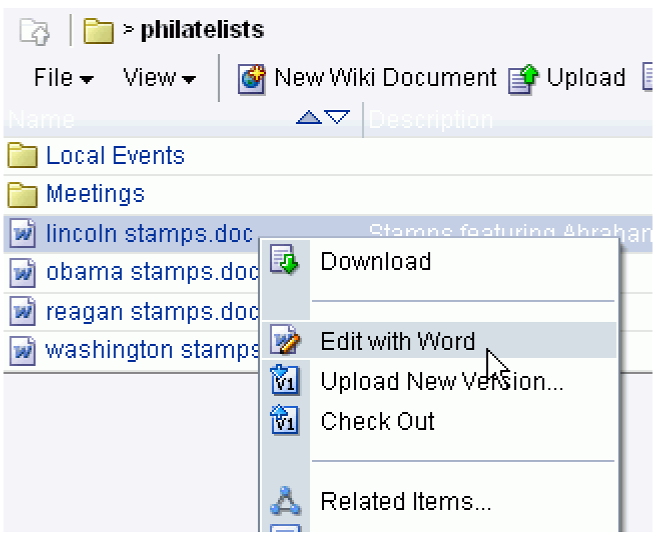
1. On the **Documents** page, or in a Documents service task flow on a page, click in the row of the file you want to edit, but not on the file name.

   Alternatively, you can edit an open file in the Document Viewer preview pane.

2. Depending on your view and the file type, perform one of the following actions:

   - On the **Documents** page or in a Documents service task flow, from the **File** menu or the context (right-click) menu, select the **Edit** action that opens the file in-place in its Microsoft Office application. For example, for Microsoft Word files, select **Edit with Word** (Figure 48–4)

Figure 48–4 Open a File in Microsoft Word



   - In the Document Viewer preview pane, click the **Edit** action.

Note: If the file is already checked out by another user, the File in Use dialog opens. See Section 48.3.2.1, "Opening a File Already Checked Out By Another User."

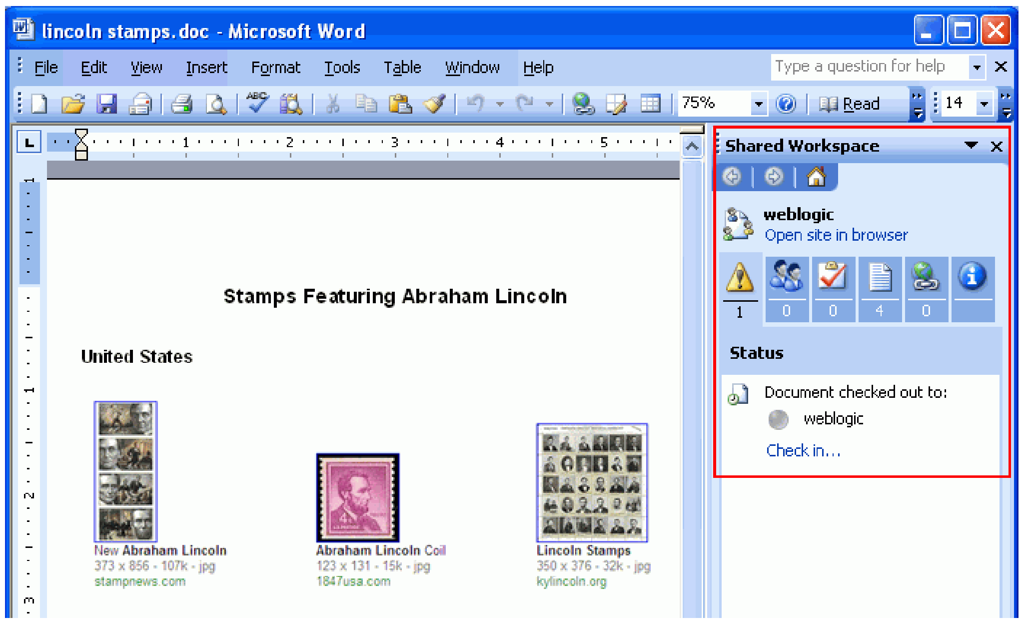
---

3. If prompted, enter the same credentials used to log in to Spaces to open the file in-place in its corresponding application.

Note: The user name and password must contain only ASCII characters. A user name or password containing multi-byte characters cannot be successfully authenticated.

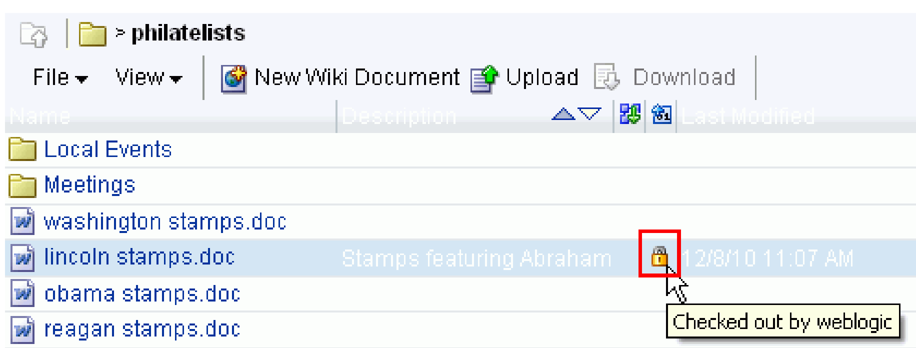
- *In Microsoft Office 2003*. The Microsoft Office application displays a **Shared Workspace** task pane by default (Figure 48–5).
- *In Microsoft Office 2007*. The Microsoft Office application displays no task pane by default. To display the **Document Management** task pane, see Section 48.3.3.1, "Displaying and Hiding the Microsoft Office Task Pane."

Figure 48–5 Microsoft Office 2003 Shared Workspace Task Pane



4. When the file opens, it is automatically checked out of the Content Server repository, indicated by the **Checked Out** icon (Figure 48–6).

Figure 48–6 Checked Out Icon in Spaces



5. Make required updates, then save and close the file.

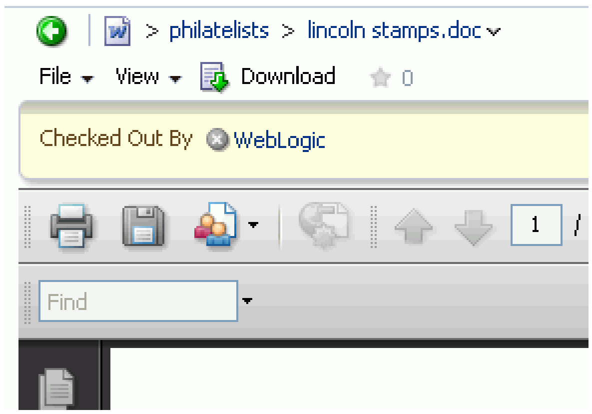
   The modified file is automatically checked back in.

You can use the Microsoft Office task pane to open other files in the space directly from Microsoft Office, instead of from Spaces. See Section 48.3.3.7, "Managing Other Files in the Current Space."

48.3.2.1 Opening a File Already Checked Out By Another User

If the file that you attempt to open is already checked out by another user, the File In Use dialog opens (Figure 48–7).

Figure 48–7 File in Use Dialog



In the File In Use dialog, select the desired option:

- **Open a Read Only copy** to open the file in its default application to view it.
- **Create a local copy and merge your changes later** is not supported.
- **Receive notification when the original copy is available** to open a read-only copy of the file until it is available for editing. When the file is available, the File Now Available dialog (Figure 48–8) notifies you; in the dialog, click **Read-Write** to change the read-only state to editable.

Figure 48–8 File Now Available Dialog

48.3.3 Working with the Microsoft Office Task Pane

Note: The Microsoft Office task pane is available only in Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

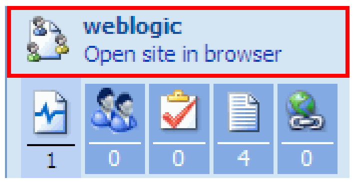
The Microsoft Office task pane provides information pertaining to the currently open file and access to tasks for all folders and files in the current space, as described in Table 48–2.

Table 48–2 Microsoft Office Task Pane for Files in a Space

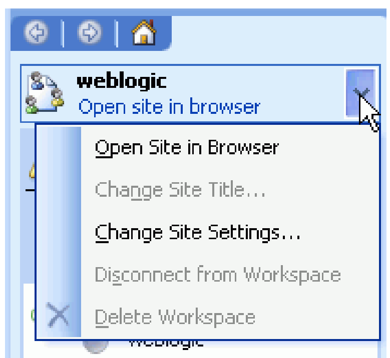
<table>
<tr><th>Task Pane Area</th><th>Description</th></tr>
<tr><td>

Top section in Microsoft Office 2003:

Top section in Microsoft Office 2007:



Dropdown menu:



</td><td>

For a file in the Home space:

- Shows the user name.
- **Open site in browser**. Click to display the Spaces Home page.

For a file in a space:

- Shows the space name.
- **Open site in browser**. Click to display the space Home page.

Additionally, the top section provides a dropdown menu of actions available for the user or space:

- **Open Site in Browser**. See above.
- **Change Site Title**. Not supported.
- **Change Site Settings**. For the Home space, displays the Spaces Home page; for a space, displays the Settings tab of the space.
- **Disconnect from Workspace**. Not supported.
- **Delete Workspace**. Not supported.

</td></tr>
</table>

Table 48–2 (Cont.) Microsoft Office Task Pane for Files in a Space

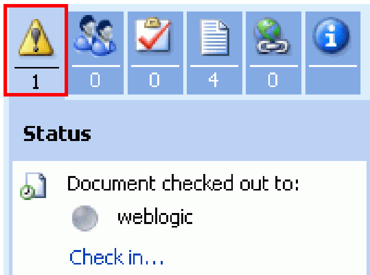
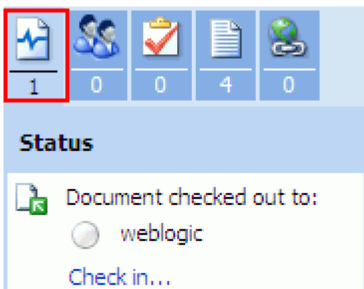
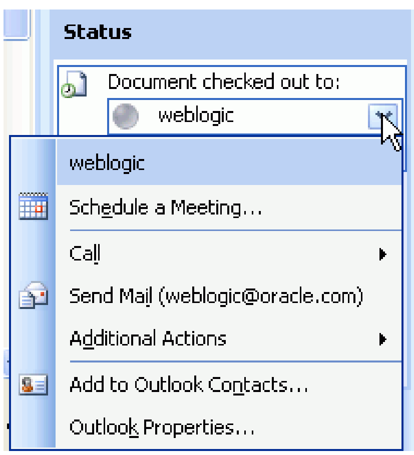
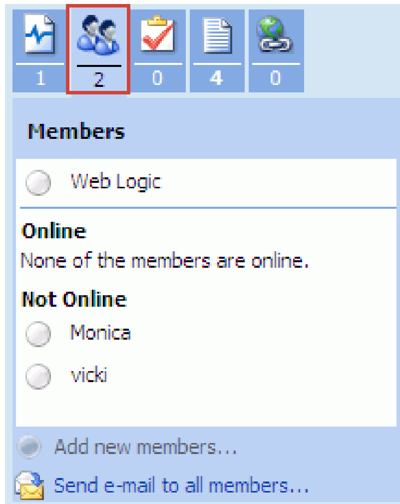
Task Pane Area	Description
Status section in Microsoft Office 2003: 	Displays information only if the file is checked out. Shows the following information: ■ The user who checked out the file. ■ **Check in** link. See Section 48.3.3.5, "Checking a File In." After checking a file in, you can subsequently check the file out again. See Section 48.3.3.4, "Checking a File Out."
Status section in Microsoft Office 2007: 	Additionally, the **Status** section provides a dropdown menu of actions available for the user: ■ **Schedule a Meeting**. Opens the Microsoft Outlook calendar scheduler. ■ **Call**. Not supported. ■ **Send Mail**. Opens a Microsoft Outlook message with the **To** field populated with the mail address that is specified for the user in Spaces. See Section 48.3.3.13, "Sending a Message." This selection has the same effect as clicking the user name in the **Members** section. ■ **Additional Actions**. Not supported.
Dropdown menu: 	■ **Add to Outlook Contacts**. Opens the Microsoft Outlook Contacts page populated with contact information for the user. ■ **Outlook Properties**. Opens the Microsoft Outlook E-mail Properties dialog.

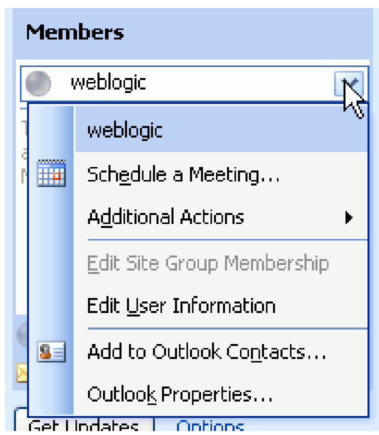
Table 48–2 (Cont.) Microsoft Office Task Pane for Files in a Space

<table>
<tr><th>Task Pane Area</th><th>Description</th></tr>
<tr><td>

Members section:



Dropdown menu:



</td><td>

For a file in the Home space:

- Lists the current people connections.
- **Add new members**. Not supported for Home space.
- **Send e-mail to all members**. See Section 48.3.3.13, "Sending a Message."

For a file in a space:

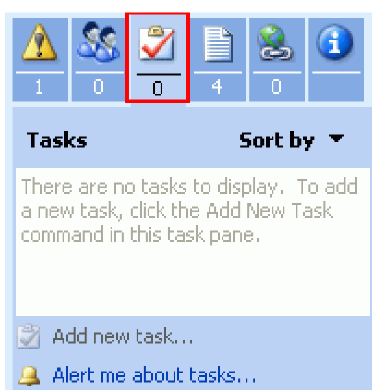
- Lists the user editing the file, followed by the user and group names of all space members, up to the limit of 99 members. The distinction between **Online** and **Not Online** users is not supported; all space members show in the list as **Not Online**.
- **Add new members**. See Section 48.3.3.12, "Adding Members to a Space."
- **Send e-mail to all members**. See Section 48.3.3.13, "Sending a Message."

Additionally, the **Members** section provides a dropdown menu of actions available for the listed member(s). The actions in this menu are not supported.

To send a message to any member, simply click the member's user name to open a Microsoft Outlook window with the **To** field populated with the mail address that is specified for the member in Spaces.

</td></tr>
<tr><td>

Tasks section:



</td><td>

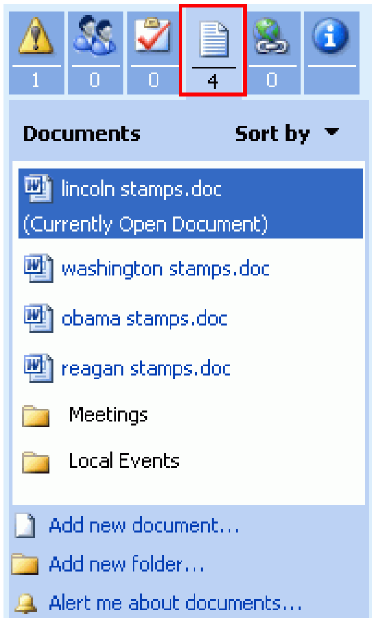
Not supported.

</td></tr>
</table>

Table 48–2 (Cont.) Microsoft Office Task Pane for Files in a Space

<table>
<tr><th>Task Pane Area</th><th>Description</th></tr>
<tr><td>

Documents section:



</td><td>

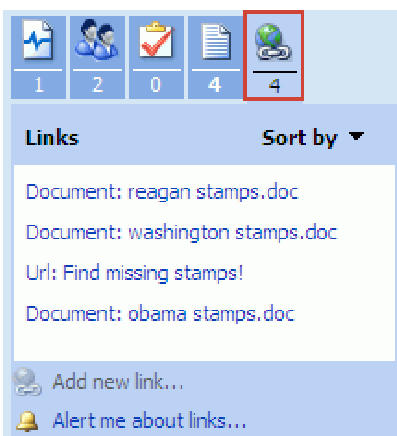
Provides access to other files in the current space directly from Microsoft Office.

- **Sort by**. Select from the menu to sort the list of documents by **Creation Date**, **Modified Date**, **File Name**, **File Type**, **Ascending**, or **Descending**.
- Shows all folders and files in the folder where the open file resides. See Section 48.3.3.7, "Managing Other Files in the Current Space."

  Note: Navigating upward in the folder hierarchy from the current document is not supported; you can drill down and then back up to the current level.
- Provides a menu of actions available on the currently open file. See Section 48.3.3.6, "Managing the Currently Open File."
- Provides a menu of actions available on other documents in the list. See Section 48.3.3.7, "Managing Other Files in the Current Space."
- Provides a menu of actions for each folder listed. See Section 48.3.3.8, "Managing Folders."
- **Add new document**. See Section 48.3.3.2, "Adding a File."
- **Add new folder**. See Section 48.3.3.3, "Adding a New Folder."
- **Alert me about documents**. Not supported. Opens the Home page in Spaces.

</td></tr>
<tr><td>

Links section:



</td><td>

Shows all document and URL links defined in Spaces to the currently open file.

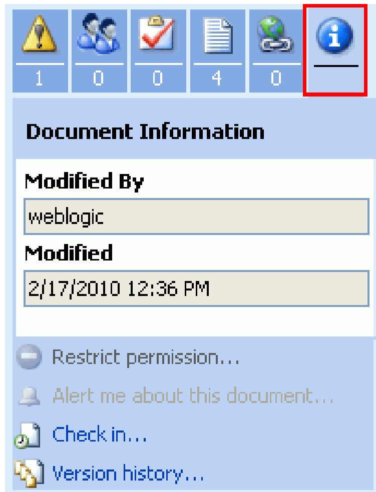
- **Sort by**. Select from the menu to sort the list of links by **Creation Date**, **Modified Date**, **URL**, **Ascending**, or **Descending**.
- Lists all links for the currently open file. See Section 48.3.3.9, "Viewing Link Targets." Click a link to navigate to the linked object.
- **Add new link**. Not supported
- **Alert me about links**. Not supported

</td></tr>
</table>

Table 48–2 (Cont.) Microsoft Office Task Pane for Files in a Space

<table>
<tr><th>Task Pane Area</th><th>Description</th></tr>
<tr><td>

Document Information section (*Microsoft Office 2003 only*):



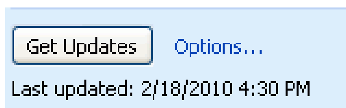
</td><td>

Provides information about the currently open document:

- **Document Information**. See Section 48.3.3.10, "Viewing Document Information."
- **Restrict permission**. Not supported.
- **Alert me about this document**. Not supported. Opens the Home page in Spaces.
- **Check out** or **Check in**. See Section 48.3.3.4, "Checking a File Out" and Section 48.3.3.5, "Checking a File In."
- **Version history**. See Section 48.3.3.11, "Working with File Version History."

</td></tr>
<tr><td>

Bottom section:



</td><td>

Includes:

- **Get Updates**. Refreshes the files and associated information from the Spaces server.
- **Options**. Opens the Service Options dialog. Refer to the Microsoft Office online help for more information.
- Shows the date and time that the file was last modified.

</td></tr>
</table>

The following sections describe the tasks you can perform using the Microsoft Office task pane:

- Section 48.3.3.1, "Displaying and Hiding the Microsoft Office Task Pane"
- Section 48.3.3.2, "Adding a File"
- Section 48.3.3.3, "Adding a New Folder"
- Section 48.3.3.4, "Checking a File Out"
- Section 48.3.3.5, "Checking a File In"
- Section 48.3.3.6, "Managing the Currently Open File"
- Section 48.3.3.7, "Managing Other Files in the Current Space"
- Section 48.3.3.8, "Managing Folders"
- Section 48.3.3.9, "Viewing Link Targets"
- Section 48.3.3.10, "Viewing Document Information"
- Section 48.3.3.11, "Working with File Version History"
- Section 48.3.3.12, "Adding Members to a Space"
- Section 48.3.3.13, "Sending a Message"

48.3.3.1 Displaying and Hiding the Microsoft Office Task Pane

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Note: The Microsoft Office task pane is available only in Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

In Microsoft Office 2003, the task pane displays by default when you open a file, whereas in Microsoft Office 2007, the task pane does not display by default.

You can manage the display of the Microsoft Office task pane as described in the following sections:

- Section 48.3.3.1.1, "Displaying or Hiding the Task Pane Manually"
- Section 48.3.3.1.2, "Displaying or Hiding the Task Pane By Default"

48.3.3.1.1 Displaying or Hiding the Task Pane Manually To display or hide the Microsoft Office task pane manually:

In Microsoft Office 2003:

- From the **Tools** menu, select **Shared Workspace** to toggle between displaying and hiding the task pane.

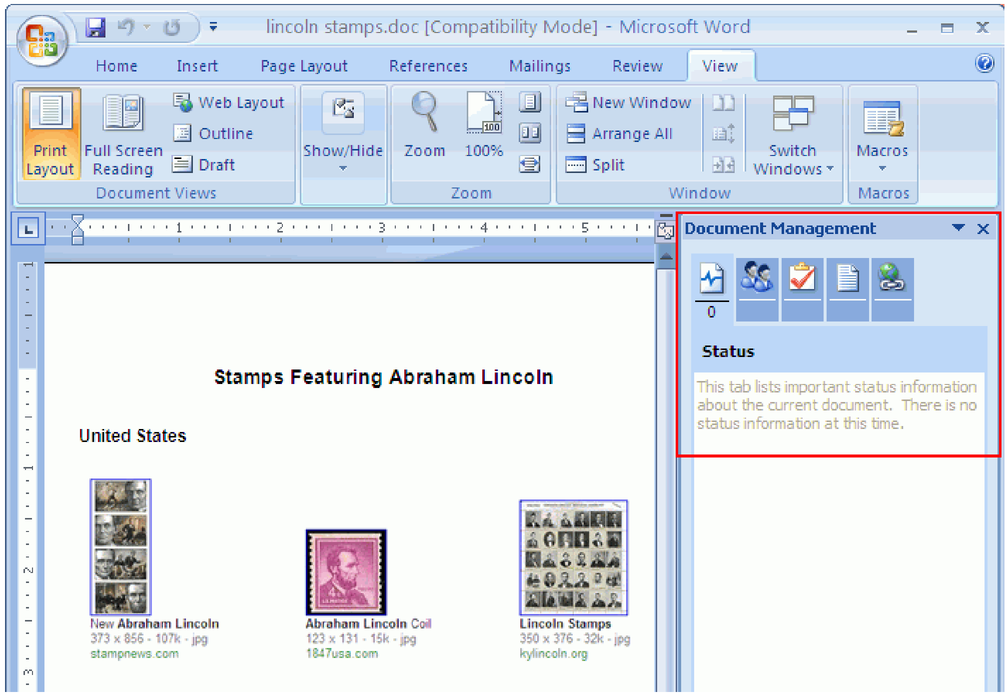
In Microsoft Office 2007:

1. Click the Office Button (Figure 48–9) in the top left corner of the Microsoft Office application.

Figure 48–9 Office Button in Microsoft Office

2. From the **Server** menu, select **Document Management Information** to toggle between displaying and hiding the **Document Management** task pane (Figure 48–10).

Figure 48–10 Microsoft Office 2007 Document Management Task Pane



48.3.3.1.2 Displaying or Hiding the Task Pane By Default To display or hide the Microsoft Office task pane automatically by default every time you open a Microsoft Word, Excel, or PowerPoint file:

In Microsoft Office 2003:

1. From the **Tools** menu, select **Options**.
2. In the Options dialog, on the **General** tab, click **Service Options**.
3. In the **Shared Workspace** category, select or deselect the check box **The document is part of a workspace or SharePoint site** to respectively display or hide the task pane by default.

In Microsoft Office 2007:

1. At the bottom of the Microsoft Office task pane, click **Options** (Figure 48–11).

Figure 48–11 Options Link in Task Pane (Microsoft Office 2007)

2. In the Service Options dialog, select or deselect the check box **The document is part of a workspace or SharePoint site** to respectively display or hide the task pane by default.

48.3.3.2 Adding a File

Using the Microsoft Office shared document management functionality, you can add a new file to the Content Server repository, exposing the file in a space, as described in the following sections:

- Section 48.3.3.2.1, "Saving a File As a New File in a Space" (Microsoft Word, Excel, or PowerPoint file only)
- Section 48.3.3.2.2, "Adding a New File Using the Task Pane" (files of any type)

Note: Other methods to add a file to the connected content repository are:

- Create a network place to a space, then use Windows Explorer to add files of any type when the backend content repository is Content Server, as described in Section 48.4, "Working with Microsoft Windows Explorer Integration."
- In Spaces, copy and paste, upload, or create a file using the Rich Text Editor (RTE), as described in Section 43.14, "Copying and Pasting Folders and Files," Section 43.8.1, "Uploading Files," and Section 43.12, "Editing and Updating a File."

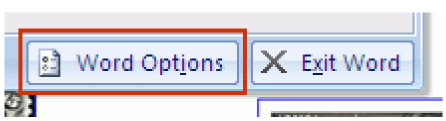
48.3.3.2.1 Saving a File As a New File in a Space To save a local Microsoft Word, Excel, or PowerPoint file to a space:

Note: This feature is supported in Microsoft Office 2003 and 2007 only.

---

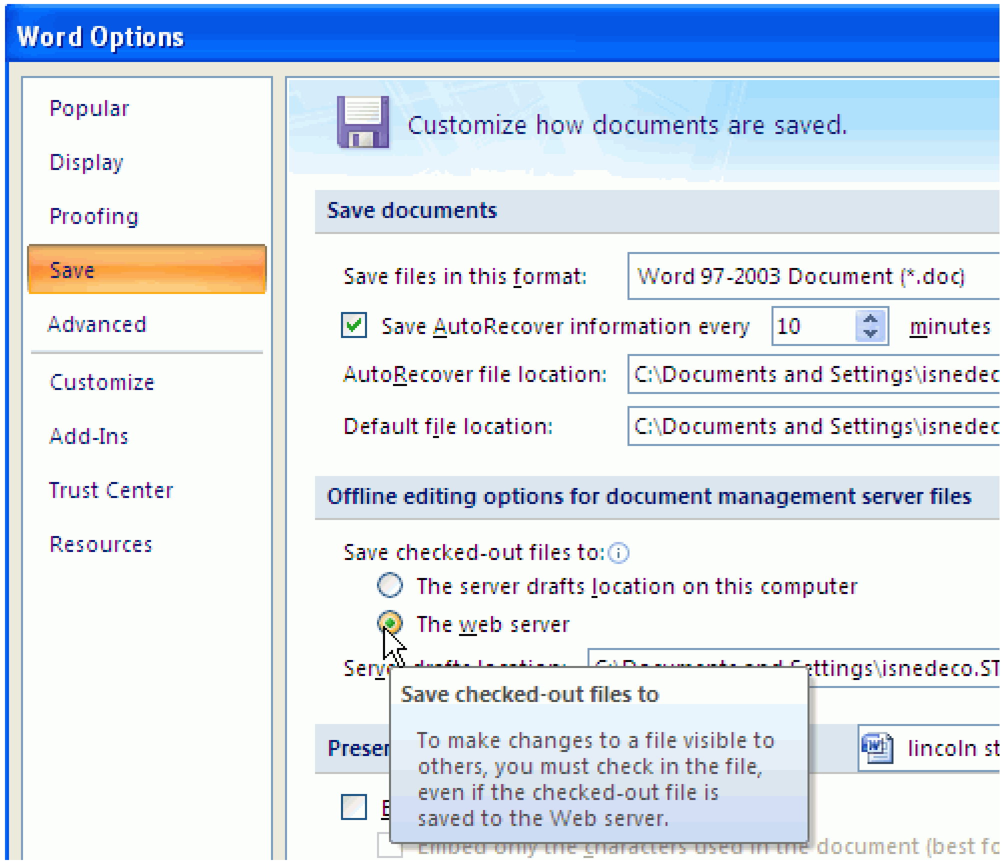
1. Add the space as a new network place in Windows Explorer, as described in Section 48.4, "Working with Microsoft Windows Explorer Integration."
2. Open the file in its Microsoft Office application.
3. (*In Microsoft Office 2007 only*) Set save options for shared documents:
   a. Click the Office Button in the top left corner of the Microsoft Office application, then click **Word Options** (Figure 48–12) at the bottom of the menu.

Figure 48–12 Office Button Menu: Word Options



   b. In the Word Options dialog, select **Save** in the left pane (Figure 48–13).
   c. Under **Offline editing options for document management server files**, select **The web server** (Figure 48–13).

Figure 48–13 Word Options Dialog



4. Publish the file to the space:

   In Microsoft Office 2003. From the **File** menu, select **Save As**.

   In Microsoft Office 2007. Click the Office Button, then select either:

   - **Publish**, then **Document Management Server**.
   - Or, **Save As**, then ***Application*** **Document**.

5. In the Save As dialog, select the space network place, then click **Save**. For more information about space network place URLs, see Section 48.4.1, "Adding a Space as a Network Place."

6. Enter login credentials for Spaces, then click **OK**.

7. In Spaces, on the **Documents** page of the space, click the **Refresh** icon to confirm that the file was added.

   Note: To make the file visible to others, you must check the file in. See Section 48.3.3.5, "Checking a File In."

   ---

8. To display the Microsoft Office task pane in the open file, see Section 48.3.3.1, "Displaying and Hiding the Microsoft Office Task Pane."

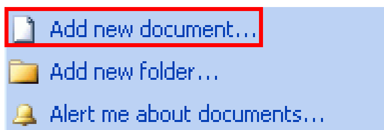
48.3.3.2.2 Adding a New File Using the Task Pane To add a new file to a space using the Microsoft Office task pane:

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

---

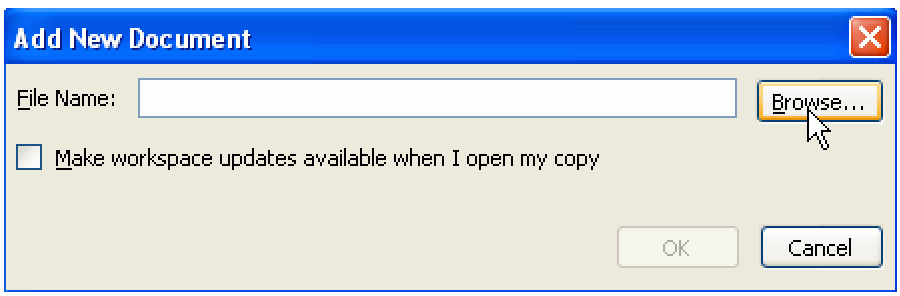
1. Open a Microsoft Word, Excel, or PowerPoint file to use the Microsoft Office shared document management functionality (see Section 48.3.2, "Opening and Editing a File").
2. At the bottom of the **Documents** section of the task pane, click **Add new document** (Figure 48–14).

Figure 48–14 Task Pane Documents Section: Adding a New File



The Add New Document dialog opens (Figure 48–15).

Figure 48–15 Add New Document Dialog



3. Browse to the file that you want to add to the current space.

Note: Spaces supports files up to 2GB in size.

The check box **Make workspace updates available when I open my copy** is not supported.

4. Click **OK**.

The new file displays at the top of the document list in the **Documents** section of the Microsoft Office task pane. When you refresh the **Documents** page of the space in Spaces, the file appears in the document list in alphabetical order.

48.3.3.3 Adding a New Folder

Using the Microsoft Office shared document management functionality, you can add a new folder to the Content Server repository, exposing the folder in a space.

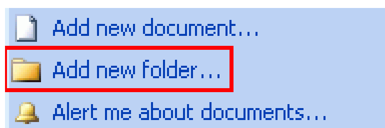
Note: Other methods to add a new folder to a space are:

- Create a network place to a space, then use Windows Explorer to add a folder, as described in Section 48.4, "Working with Microsoft Windows Explorer Integration."
- Use the Spaces application to add a folder to any connected content repository, as described in Section 43.7, "Creating a Folder."

To add a new folder to a space using the Microsoft Office task pane:

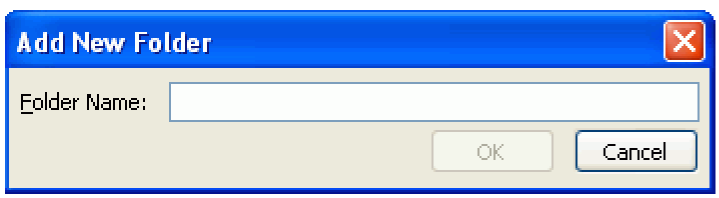
1. Open a Microsoft Word, Excel, or PowerPoint file in the space to use the Microsoft Office shared document management functionality (see Section 48.3.2, "Opening and Editing a File").
2. At the bottom of the **Documents** section of the task pane, click **Add new folder** (Figure 48–16).

Figure 48–16 Task Pane Documents Section: Adding a New Folder



The Add New Folder dialog opens (Figure 48–17).

Figure 48–17 Add New Folder Dialog



3. Enter a name for the new folder, then click **OK**.

Note: The rules for folder names follow the Windows Explorer standards.

The new folder displays at the top of the document list in the **Documents** section of the Microsoft Office task pane. When you refresh the **Documents** page of the space in Spaces, the folder appears in the folder list in alphabetical order.

48.3.3.4 Checking a File Out

Note: To check any file out using the Spaces application, see Section 43.12.1, "Checking a File Out."

When you open a Microsoft Office file in a space using the Microsoft Office shared document management functionality, the file is automatically checked out from the

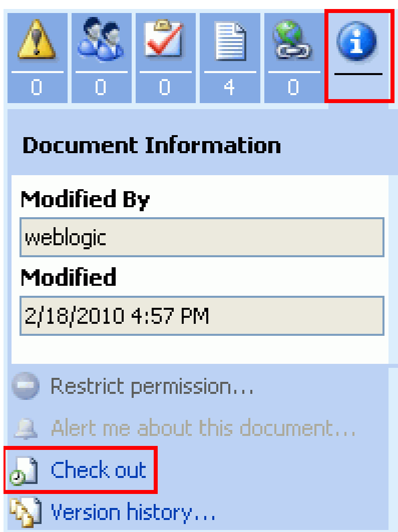
Content Server repository. If you have been granted the appropriate permissions, you can open and check a file out in two environments:

- **From Spaces**. Open a file in-place (see Section 48.3.2, "Opening and Editing a File") to automatically check out the file.
- (Microsoft Office 2003 and 2007) **From the Microsoft Office task pane**. In the **Documents** section of the task pane, click a file name to automatically check out the file and open it in its default Microsoft Office application.

48.3.3.4.1 Checking the Currently Open File Out Again After Checking It In After you check a file in (see Section 48.3.3.5, "Checking a File In"), the file remains displayed in Microsoft Office until you close it (see Section 48.3.4, "Closing a File"). If you want to check in further changes to the file, it must be checked out again:

- ***In Microsoft Office 2003***. In the **Document Information** section of the Microsoft Office task pane, you can optionally click **Check out** to check the file out again (Figure 48–18). However, even if you do not explicitly check out the file, you can continue to edit the file, then save it, and the **Status** and **Document Information** sections of the task pane automatically provide a **Check in** link to check the changed file back in to the repository.

Figure 48–18 Checking Out a Checked In File

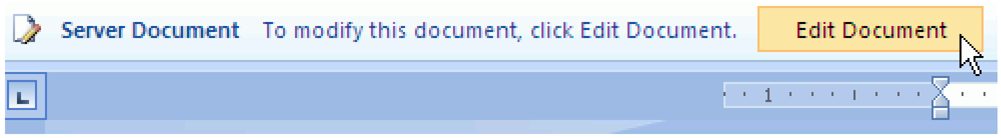


- ***In Microsoft Office 2007 and 2010***. When you check a file in, the Check In dialog (Figure 48–22) provides a check box labeled **Keep the document checked out after checking in this version**:
  - Select the check box to keep the file checked out after checking in the current version. This allows you to refresh the version of the file available to other users, yet still retain the checked out status to make further changes.
  - Deselect the check box to check the file in and cancel the checked out status.

  If you deselect the check box, you can optionally check the file out again:
  - Click **Edit Document** in the area below the toolbar (Figure 48–19).

    After you check a file in, Microsoft Office 2007 locks editing that file until you click **Edit Document**.

Figure 48–19 Checking Out and Editing the Current Document



48.3.3.5 Checking a File In

When you open a file using the Microsoft Office shared document management functionality, you can check it back in to the repository, whether or not you have made changes to it.

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

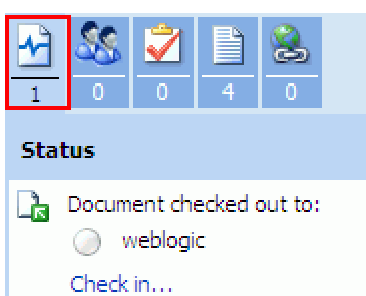
In Microsoft Office 2010, you can find file checkin and checkout information on the **Info** tab (from the **File** menu, select **Info**). When you open a Microsoft Office 2010 file from Spaces (using any browser), the file is automatically checked out of the Content Server repository, changes are (temporarily) applied when saved, and the file is automatically checked in when the file is closed, with a default checkin comment.

Note: Intermittently saving the file saves it on the server, but changes are not visible to others until you check the file in. To update the file stored in the Content Server repository, you must explicitly check it in as described in this section. If you close the Microsoft Office application and do not check the file in when prompted, your changes are lost.

To check a file in:

1. In the **Status** section of the Microsoft Office task pane, click **Check in** (Figure 48–20).

Figure 48–20 Status Section in MS Office 7: Checking In a File

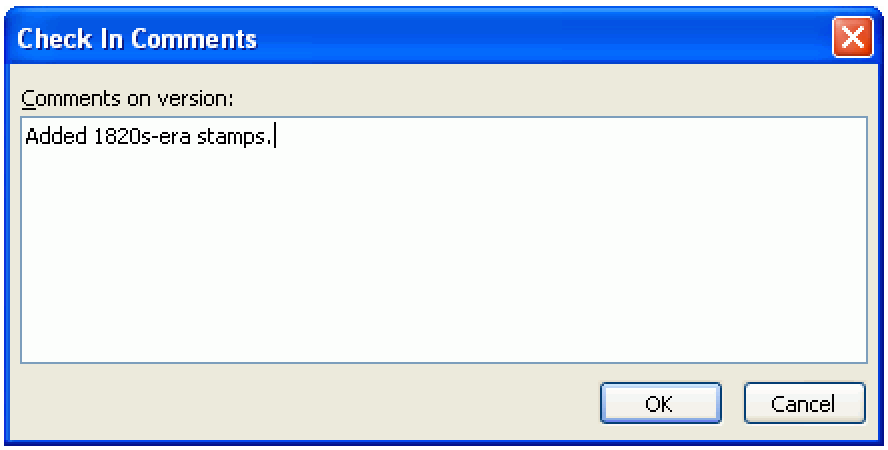


Notes:

- If the **Check in** link does not display, click the icon for any other section, then return to the Status section to refresh the pane.
- In Microsoft Office 2003, you can also find **Check in** in the **Document Information** section of the task pane.

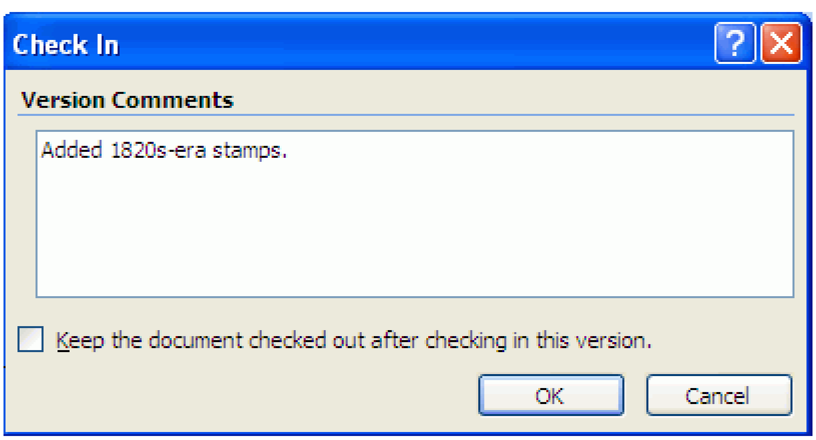
2. *In Microsoft Office 2003*. In the Check In Comments dialog (Figure 48–21), optionally enter comments about the changes made to the file since it was last checked out.

Figure 48–21 Check In Comments Dialog (Microsoft Office 2003)



In Microsoft Office 2007. In the Check In dialog (Figure 48–22), optionally enter comments about the changes made to the file since it was last checked out, and select the state in which to leave the file:

Figure 48–22 Check In Dialog (Microsoft Office 2007)



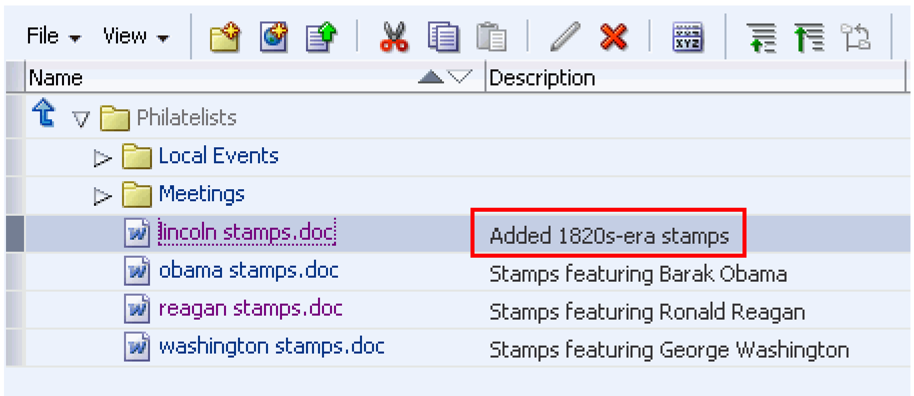
– Select the check box to keep the file checked out after checking in the current version. This allows you to refresh the version of the file available to other users, yet still retain the checked out status to make further changes.

– Deselect the check box to check the file in and cancel the checked out status. To check the file out again, see Section 48.3.3.4.1, "Checking the Currently Open File Out Again After Checking It In."

3. Click **OK**.

   If the file was modified since its prior version, it is automatically saved and checked in to Spaces as a new version. If check in comments were entered in the Check In dialog, a new file revision is created with the new comments, which display as the file description in Spaces (Figure 48–23).

Figure 48–23 Documents Listing in Spaces after Check In



4. After checking a file in, the file remains displayed in Microsoft Office until you close it (see Section 48.3.4, "Closing a File"). If you wish to make further changes to the file, see Section 48.3.3.4.1, "Checking the Currently Open File Out Again After Checking It In."

5. When you have finished making changes and checking in the file, close the Microsoft Office application (see Section 48.3.4, "Closing a File").

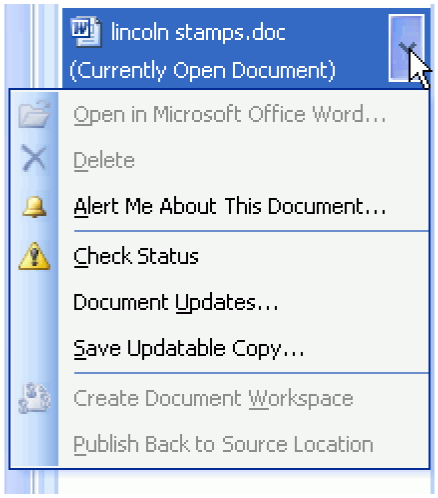
48.3.3.6 Managing the Currently Open File

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

To manage the currently open file using the Microsoft Office task pane:

1. In the **Documents** section of the task pane, click the dropdown menu icon to the right of the file name (Figure 48–24).

Figure 48–24 Task Pane Documents Section: Current File Menu



2. Select an available action, as described in Table 48–3:

Table 48–3 Dropdown Menu Actions for Currently Open File

Menu Action	Description
Open in Microsoft Office *Application*	Not applicable.
Delete	Not supported. To delete a file in a space, you must use the Spaces application (see Section 43.16, "Deleting Folders and Files") or Windows Explorer (see Section 48.4, "Working with Microsoft Windows Explorer Integration").
Alert Me About This Document	Not supported. Opens the home page of the space in Spaces.
Check Status	Displays the **Status** section of the task pane.
Document Updates	Not supported.
Save Updatable Copy	Not supported.
Create Document Workspace	Not supported.
Publish Back to Source Location	Not supported.

48.3.3.7 Managing Other Files in the Current Space

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

To manage a file other than the currently open file in the current space using the Microsoft Office task pane:

1. In the **Documents** section of the task pane, navigate to the file.

Note: Navigating upward in the folder hierarchy from the current document is not supported; you can drill down and then back up to the current level.

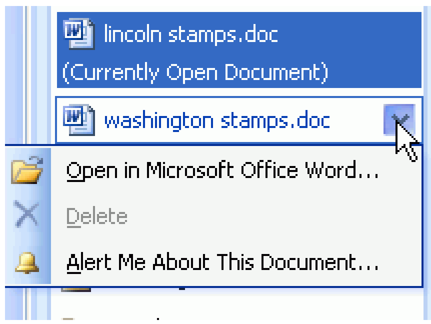
2. To open the file, click its name.

   Depending on the file type, the file opens as described in Section 48.3.2, "Opening and Editing a File" for Microsoft Word, Excel, and PowerPoint files, or Section 43.10, "Opening a File" for other file types (such as HTML files or images).

   > **Note:** If you have OpenOffice installed, an error may occur when attempting to open a file from the task pane. To resolve the error, uninstall OpenOffice.

3. To perform other actions, click the dropdown menu icon to the right of a file name (Figure 48–25):

Figure 48–25 Task Pane Documents Section: Other Files Menu



4. Select an available action, as described in Table 48–4:

Table 48–4 Dropdown Menu Actions for Other Files

Menu Action	Description
Open in Microsoft Office *`Application`*	Attempts to check out the file: if checked out by another user, it opens read-only; if not checked out, the file opens in its Microsoft Office application for editing. For more information, see Section 48.3.2, "Opening and Editing a File."
Delete	Not supported. To delete a file in a space, you must use the Spaces application (see Section 43.16, "Deleting Folders and Files") or Windows Explorer (see Section 48.4, "Working with Microsoft Windows Explorer Integration").
Alert Me About This Document	Not supported. Opens the home page of the space in Spaces.

48.3.3.8 Managing Folders

> **Note:** This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

To manage a folder under the current folder using the Microsoft Office task pane:

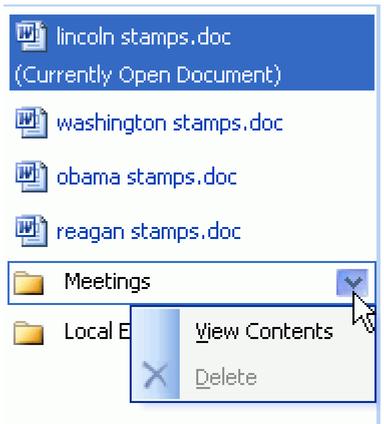
1. In the **Documents** section of the task pane, navigate to the folder.

Note: Navigating upward in the folder hierarchy from the current document is not supported; you can drill down and then back up to the current level.

---

2. To open the folder, click its name.
3. To perform other actions, click the dropdown menu icon to the right of the folder name (Figure 48–26):

Figure 48–26 Task Pane Documents Section: Folder Menu



4. Select an available action, as described in Table 48–5:

Table 48–5 Dropdown Menu Actions for a Folder

Menu Action	Description
View Contents	Refreshes the list of files with the contents of the folder only (same effect as clicking the folder name). Click the folder name to refresh to the original list.
Delete	Not supported. To delete a folder in a space, you must use the Spaces application (see Section 43.16, "Deleting Folders and Files") or Windows Explorer (see Section 48.4, "Working with Microsoft Windows Explorer Integration").

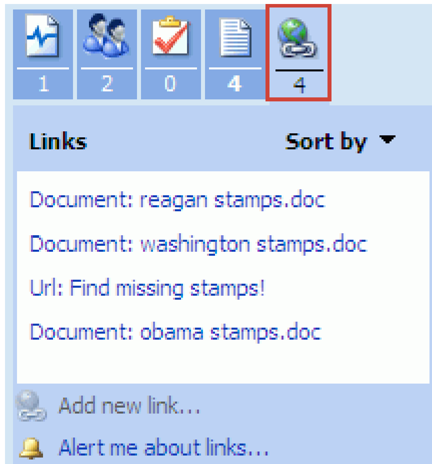
48.3.3.9 Viewing Link Targets

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

The **Links** section of the Microsoft Office task pane lists the links defined in Spaces that are associated with the currently open file (Figure 48–27). Files can have links to related documents, discussions, announcements, events, and notes; the **Links** section in the task pane shows the links to associated documents and notes.

Links are prefixed with the name of the service with which they are associated. For example, a link to another document is prefixed **Document**, a link to a note is prefixed **URL**.

Figure 48–27 Task Pane Links Section



To display the target of a link, simply click the link:

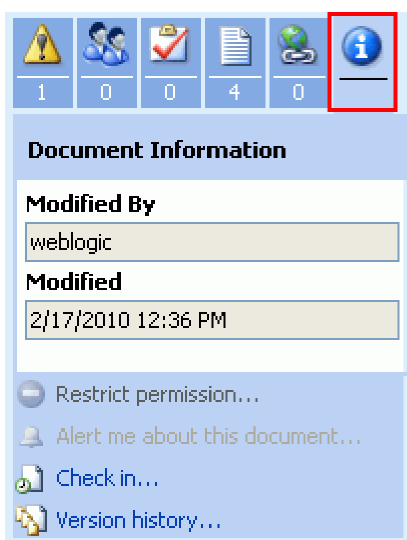
- Document links open in the same way as files in the **Document** section, namely Microsoft Word, Excel, and PowerPoint files open in Microsoft Office with a task pane, and other file types open in their default viewer or a browser.
- URL links open a browser window displaying the link target.

48.3.3.10 Viewing Document Information

Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

In Microsoft Office 2003: The **Document Information** section of the Microsoft Office task pane shows the user who last modified the file and the modified date (Figure 48–28).

Figure 48–28 Task Pane Document Information Section (Microsoft Office 2003 Only)



In Microsoft Office 2007. Information about the user who last modified the file and the modified date is shown in the Version History. See Section 48.3.3.11, "Working with File Version History."

48.3.3.11 Working with File Version History

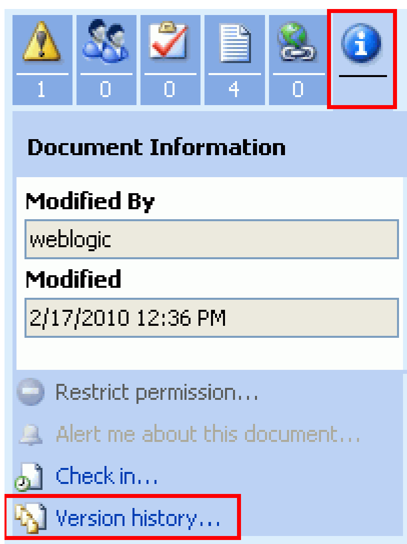
Whenever you check in a file or upload a file into a folder that already contains a file of the same name, Spaces creates a new version of the file. When a file has multiple versions, it has a version history.

Note: To use the Spaces application to work with the version history of a file in any connected content repository, see Section 43.21, "Viewing and Deleting File Version History."

In Microsoft Office 2003: To view the version history of the currently open file using the Microsoft Office task pane:

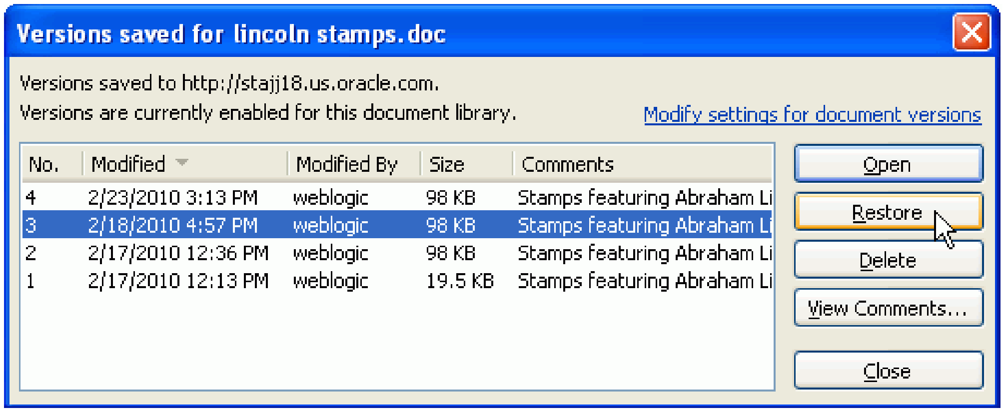
1. In the **Document Information** section of the task pane, click **Version history** (Figure 48–29).

Figure 48–29 Task Pane Document Information Section: Version History



The version history dialog for the file opens (Figure 48–30):

Figure 48–30 Version History for Currently Open File in Microsoft Office 2003



In the version history dialog, select a file version, then select the desired action:

- **Open** to open the selected file version read-only.
- **Restore** is not supported.
- **Delete** to delete the selected file version (inactive for the most recent version).
- **View Comments** to display the comments entered for the selected file version (most useful when the comments are especially long).

2. To open the **Documents** page in the current space, click **Modify settings for document versions**.

In Microsoft Office 2007: To view the version history of the currently open file:

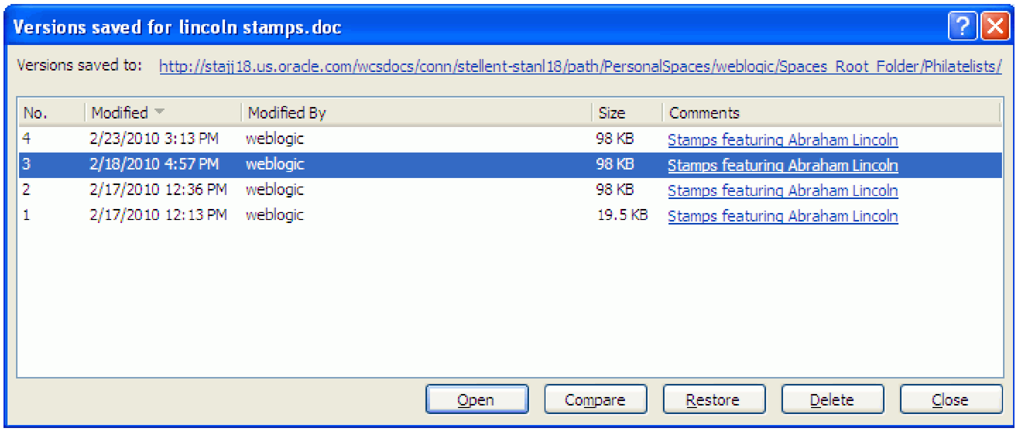
1. Click the Office Button (Figure 48–31) in the top left corner of the Microsoft Office application.

Figure 48–31 Office Button in Microsoft Office

2. From the **Server** menu, select **View Version History**.

   The version history dialog for the file opens (Figure 48–32):

Figure 48–32 Version History for Currently Open File in Microsoft Office 2007



3. In the version history dialog, select a file version, then select the desired action:
   - **Open** to open the selected file version read-only.
   - **Compare** to compare the selected file version with the currently open file.
   - **Restore** is not supported.
   - **Delete** to delete the selected file version (inactive for the most recent version).
4. To view the check in comments for a file version, click the link under **Comments**.
5. To open the **Documents** page in the space, click the link next to **Versions saved to**.

In Microsoft Office 2010: To view the version history of the currently open file:

- From the **File** menu, select **Info**.

  The **Info** tab shows version history information on the Info tab in the **Versions** section. Refer to the Microsoft Office online help for more information.

48.3.3.12 Adding Members to a Space

Note: To add members to a space using the Spaces application, see Section 54.3, "Managing Members and Assigning Roles."

If you are granted the `Moderator` role or `Manage All` permissions in a space, you can add new members to a space using the Microsoft Office task pane. The currently open file must be a space document.

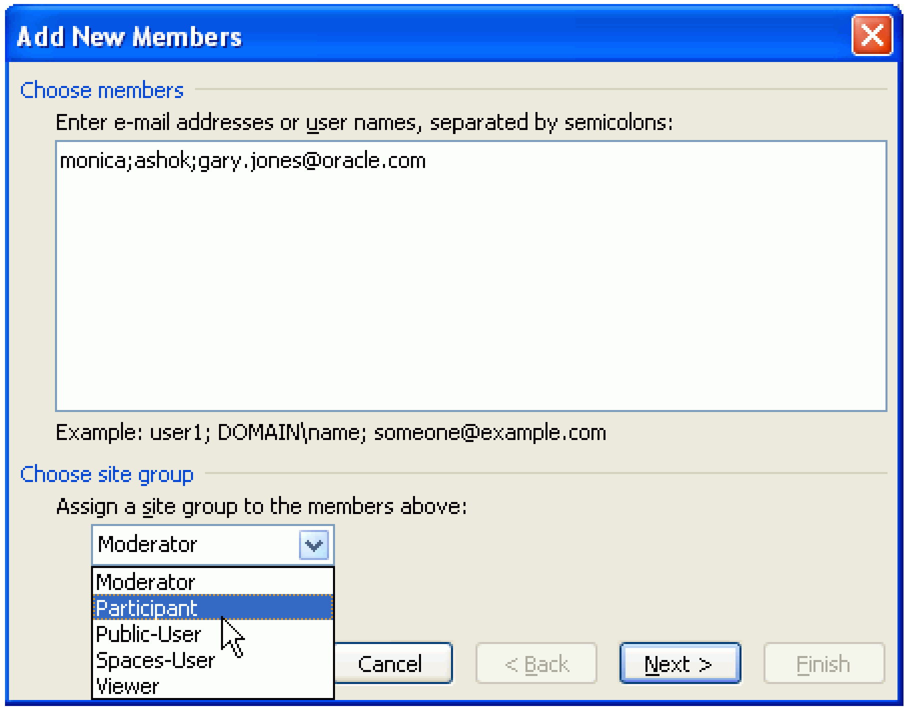
Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

To add members to a space when the currently open file is a space document:

1. In the **Members** section of the task pane, click **Add new members**.

   The Add New Members dialog opens (Figure 48–33).

Figure 48–33 Add New Members Dialog



2. Enter the login names or mail addresses of the users you want to add to the space, separated by semicolons.

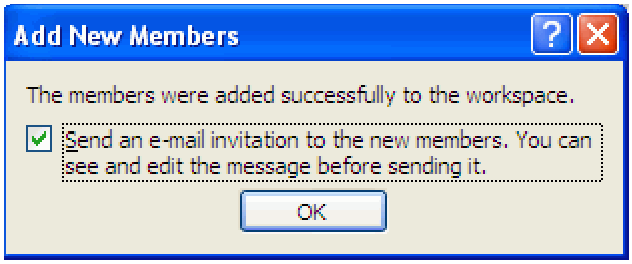
> **Note:** Users who are already members of the space cannot be added again. The user names that you enter must have an associated mail address defined in Spaces.

3. From the site group dropdown list, select the role to be given to the listed users. The listed roles are those defined for the current space. The permissions granted to each role are defined by the Spaces administrator or space moderator. For more information about space roles, see Section 54.2, "Managing Roles and Permissions for a Space."

> **Note:** To define different roles to different users, limit the list of users to those who should be assigned the same role, finish this assignment, then click **Add new members** again to assign a different role to one or more different users.

4. Click **Next**.
5. Confirm or modify the member information, then click **Finish**.
6. In the Add New Members dialog (Figure 48–34), select or deselect the check box to send an invitation to the new members to join the space, then click **OK**.

Figure 48–34 Add New Members Dialog



48.3.3.13 Sending a Message

From the Microsoft Office task pane, you can send a message to any user who has a mail address defined in Spaces:

- Section 48.3.3.13.1, "Sending a Message to the Current User"
- Section 48.3.3.13.2, "Sending a Message to Your Connections"
- Section 48.3.3.13.3, "Sending a Message to Members of a Space"

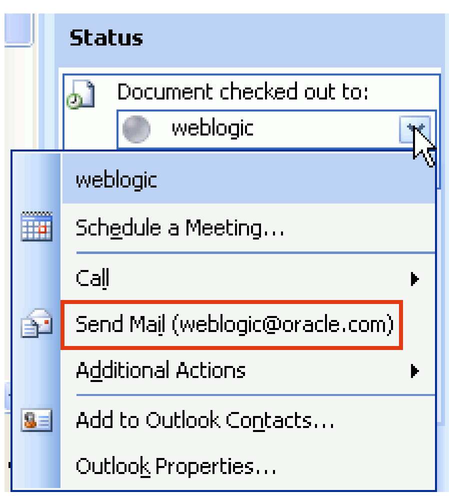
Note: This feature is available with Microsoft Office 2003 and 2007. Microsoft Office 2010 does not include a task pane.

Note: To send messages using the Spaces application, see Section 51.5, "Sending Mail to Space Members or Moderators", Section 67.1, "What You Should Know About the Send Mail Feature", and Section 67.4.6, "Composing and Sending Mail Messages."

48.3.3.13.1 Sending a Message to the Current User To send a message to the user who has the currently open document checked out:

- In the **Status** section of the Microsoft Office task pane, click the dropdown menu icon next to the user name, and select **Send Mail** (Figure 48–35).

Figure 48–35 Send a Message to the Current Document User

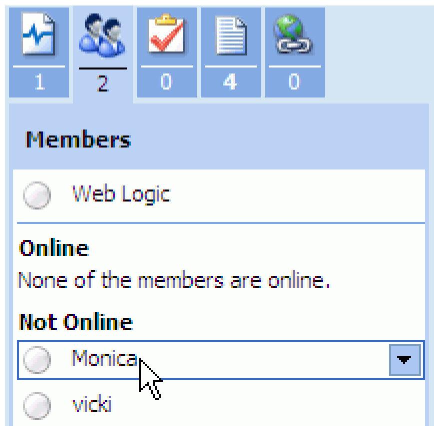


A Microsoft Outlook message composition window opens with the **To** field populated with the mail address that is specified for the user in Spaces.

48.3.3.13.2 Sending a Message to Your Connections To send a message to your connections when you are working with a document in the Home space:

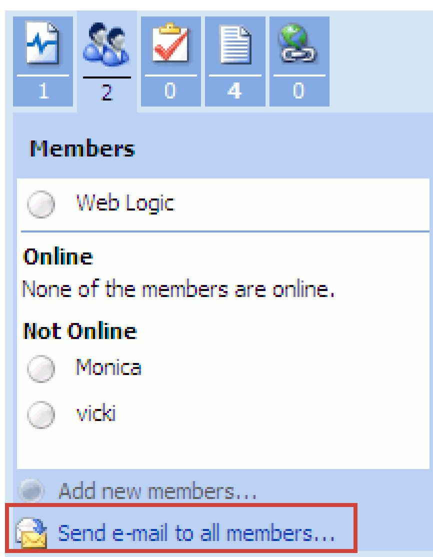
1. In the **Members** section of the Microsoft Office task pane:
   - To send a message to an individual who is one of your connections, click the user name in the **Members** list (Figure 48–36):

Figure 48–36 Send a Message to a Connection



   - To send a message to all of your connections, click **Send e-mail to all members** (Figure 48–37).

Figure 48–37 Send a Message to All Connections



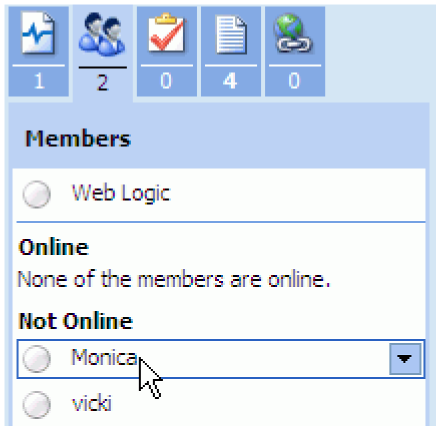
   A Microsoft Outlook message composition window opens, where the Home space name is the subject, and the **To** field is populated with the mail address(es) specified for the people connection(s) in Spaces.

2. Modify the addresses and content of the message as desired, then click **Send**.

48.3.3.13.3 Sending a Message to Members of a Space To send a message to the members of a space when you are working with a document in a space:

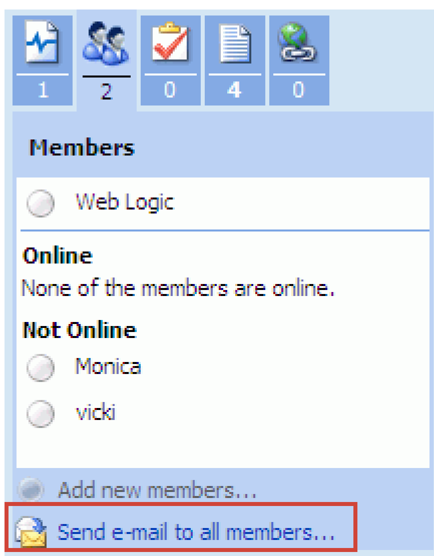
1. In the **Members** section of the Microsoft Office task pane:
   - To send a message to an individual who is a member of the space, click the user name in the **Members** list (Figure 48–38):

Figure 48–38 Send a Message to an Individual Space Member



   - To send a message to all members of the space, click **Send e-mail to all members**.

Figure 48–39 Send a Message to All Space Members



   A Microsoft Outlook message composition window opens, where the space name is the subject, and **To** field is populated with the mail address(es) specified for the space member(s) in Spaces

2. Modify the addresses and content of the message as desired, then click **Send**.

48.3.4 Closing a File

You can close a file opened in a Microsoft Office application with or without checking it in, as described in the following sections:

- Section 48.3.4.1, "Closing a File After Checking It In"
- Section 48.3.4.2, "Closing a File Before Checking It In"

48.3.4.1 Closing a File After Checking It In

After checking a file in, the file remains open in the Microsoft Office application until you close it.

To close a file after you have checked it in (see Section 48.3.3.5, "Checking a File In"):

- From the **File** menu, select **Close**.

48.3.4.2 Closing a File Before Checking It In

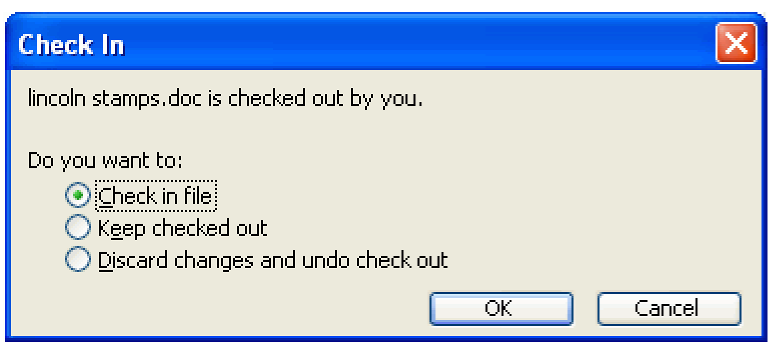
If you attempt to close a file or the Microsoft Office application before you have checked the file in, the Check In dialog provides the opportunity to check it in or cancel the check out and discard changes to the file. The selections in the Check In dialog are dependent on whether or not the file has been modified since the last time it was checked in.

48.3.4.2.1 Closing an Unchanged File

In Microsoft Office 2003: To close a file that *has not* been modified since the last time it was checked in:

1. From the **File** menu, select **Close**.
2. In the Check In dialog (Figure 48–40), select one of the following actions:

Figure 48–40 Check In Dialog for File with No Changes (Microsoft Office 2003)



   - **Check in file** to check the file in with no changes. In the Check In Comments dialog (Figure 48–21), optionally enter new comments, then click **OK**.
   - **Keep checked out** to close the file, but keep it in a checked out and locked to changes by other users. To later cancel the checked out status, see Section 43.12.1, "Checking a File Out."
   - **Discard changes and undo check out** to cancel the checked out status.

3. Click **OK**.

In Microsoft Office 2007: To close a file that *has not* been modified since the last time it was checked in:

- Click the Office Button (Figure 48–41) in the top left corner of the Microsoft Office application, then select **Close**.

Figure 48–41 Office Button in Microsoft Office

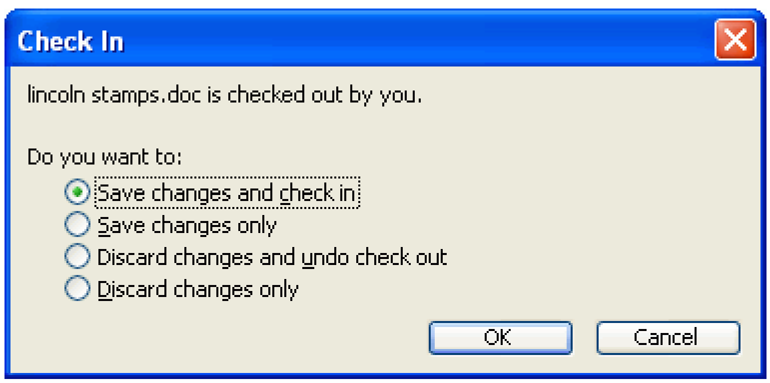
If a file is unchanged, Microsoft Office 2007 does not prompt you to first check the file back in again. If saving to a local draft folder instead of the Content Server repository, the file remains in a checked out status and locked to changes by other users, and you will need to explicitly cancel the checked out status (see Section 43.12.2, "Cancelling a Checked Out Status"). If saving to the Content Server repository, the checked out status is canceled upon closing the file.

48.3.4.2.2 Closing an Updated File

In Microsoft Office 2003: To close a file that *has* been modified since the last time it was checked in:

1. From the **File** menu, select **Close**.
2. In the Check In dialog (Figure 48–42), select one of the following actions:

Figure 48–42 Check In Dialog for File with Changes (Microsoft Office 003)

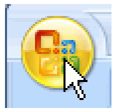


   - **Save changes and check in** to save the changes since the last check in and check the file in.
   - **Save changes only** to save changes since the last check in, but keep the file checked out and locked to changes by other users. To later cancel the checked out status, see Section 43.12.1, "Checking a File Out."
   - **Discard changes and undo check out** to retain the prior saved version of the file and cancel the checked out status.
   - **Discard changes only** to retain the prior saved version of the file and keep the file checked out.
3. Click **OK**.

In Microsoft Office 2007: To close a file that *has* been modified since the last time it was checked in:

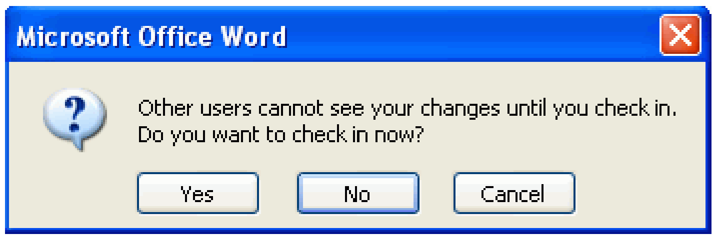
1. Click the Office Button (Figure 48–43) in the top left corner of the Microsoft Office application, then select **Close**.

Figure 48–43 Office Button in Microsoft Office



2. If you have not already saved the changes, respond to the confirmation prompt to save or discard your changes.
3. In the confirmation dialog (Figure 48–44), respond to the prompt:

Figure 48–44 Close File Confirmation Prompt (Microsoft Office 2007)



- **Yes** to display the Check In dialog where you can enter version comments and select whether or not you want the file to remain checkout out (see Section 48.3.3.5, "Checking a File In"). If you choose to keep the file checked out and locked to changes by other users, see Section 43.12.1, "Checking a File Out" to later cancel the checked out status.
- **No** to skip the checkin, with one of the following results:
  – If saving to a local draft folder, keep the file checked out and locked to changes by other users. To later cancel the checked out status, see Section 43.12.2, "Cancelling a Checked Out Status."
  – If saving to the Content Server repository, cancel the checked out status of the file.

48.4 Working with Microsoft Windows Explorer Integration

Spaces integrates with Microsoft Windows Explorer to manage the folders and files in the Home space or a group space when the backend content repository is Content Server.

In Spaces, the most useful feature of Windows Explorer integration is the ability to add multiple files at once to a space, rather than uploading up to 10 files at a time (see Section 43.8.1, "Uploading Files"). It is important to be aware that Windows Explorer is not designed as a content repository, so if you try to open, delete, or rename a file that is checked out by another user, an error message displays to notify you that the operation failed, but the error message will not be specific as to the cause of the failure.

To expose the folders and files in a space in Windows Explorer, you create a new Windows network place to work with the files, as described in the following sections:

- Section 48.4.1, "Adding a Space as a Network Place"
- Section 48.4.2, "Working with Files Using Windows Explorer"

48.4.1 Adding a Space as a Network Place

To expose the folders and files in a space using Windows Explorer, you can add the space as a Windows network place.

To add a space as a Windows network place:

1. Open the Add Network Place/Location wizard:

   - In Microsoft Windows XP, open My Network Places and click **Add Network Place**.
   - In Microsoft Windows 7, right-click My Computer, and select **Add a Network Location**.

   Refer to the Microsoft Windows online help for more information

2. In the Add Network Place/Location wizard, enter the network address using the following format:

   - (In Windows XP only) To access all spaces in your Spaces application through Windows Explorer:

     `http://`*`hostname`*`:`*`port`*`/wcsdocs/conn/`*`repository_server`*`/spaces/`

     For example:

     `http://`**`myserver:8888`**`/wcsdocs/conn/`**`myserver-ucm`**`/spaces/`

   - To access the Home space through Windows Explorer:

     `http://`*`hostname`*`:`*`port`*`/wcsdocs/conn/`*`repository_server`*`/spaces/PersonalSpaces/`*`username`*

     For example:

     `http://`**`myserver:8888`**`/wcsdocs/conn/`**`myserver-ucm`**`/spaces/PersonalSpaces/`**`wcsadmin`**

   - To access a specific space through Windows Explorer, open the About Space dialog, and copy the **Explorer URL**. See Section 51.6, "Viewing Information About a Space."

     `http://`*`hostname`*`:`*`port`*`/wcsdocs/conn/`*`repository_server`*`/spaces/`*`instance`*`/`*`spacename`*

     For example:

     `http://`**`myserver:8888`**`/wcsdocs/conn/`**`myserver-ucm`**`/spaces/WebCenter/`**`philatelists`**

     Tip: The host name and port is shown in the browser URL for your Spaces application.

     To find the name of the repository server, view the information for any space in the Spaces application, and note the name of the content repository specified by the **Explorer URL**. See Section 51.6, "Viewing Information About a Space."

3. At the prompt, enter your Spaces login credentials.

4. Optionally enter a name for the space network place, then click **Finish**.

   Windows Explorer displays a drive for all spaces or the folders and files of a space, depending on the URL you entered.

48.4.2 Working with Files Using Windows Explorer

Once you have created a Windows network place to a space (see Section 48.4.1, "Adding a Space as a Network Place"), you can manage the folders and files using Windows Explorer.

Note: If you change the internal name of a space (see Section 53.14.2, "Changing a Space URL"), the original network place to that individual space is no longer accessible. You will need to add the space as a Windows network place again using the new space internal name. Changing the internal name of a space has no effect if you create a network place to the parent URL for all spaces (`http://`*`hostname`*`:`*`port`*`/wcsdocs/conn/`*`repository_server`*`/spaces/`).

In Windows Explorer, navigate to the network place for the space to perform any of the following actions:

- Copy and paste folders and files from your local file system.
- Create folders and files.
- Delete folders and files if not checked out by another user.
- Open Microsoft Word, Excel, and PowerPoint files using the Microsoft Office shared document functionality. See Section 48.3, "Working with Microsoft Word, PowerPoint, and Excel Integration."
- Open other file types in their default applications.

When you open a file, an attempt is made to check the file out. If it is checked out by another user, or you do not have permissions to update the file, it will open read-only. A file remains checked out until you check it back in (see Section 48.3.3.5, "Checking a File In").

The changes you make in Windows Explorer are reflected in Spaces, and vice versa.

Note: To use the Spaces application to manage folders and files in a space in any connected content repository, see Chapter 43, "Working with the Documents Service Task Flows and Document Components."

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49 Working with Wiki Documents

WebCenter Portal: Spaces enables you to create wiki documents, which multiple users can use to create and edit content that is relevant, useful, and up-to-date.

This chapter describes how to create and manage wiki documents. It includes the following sections:

Note: The tasks described in this chapter are available only if Content Server 11*g* is configured as the content repository.

Audience

This chapter is intended for Spaces users interested in creating and managing wiki documents. To perform the tasks described in this chapter, users need to be assigned a role that includes the `Edit Pages` and `Create and Edit Documents` (which includes delete permissions on wiki documents that you create).

To delete wiki documents that are not your own, you must have `Delete Documents` permission. To configure workflows or access control settings, you must have `Document Administration` permission. For information about roles and permissions, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

49.1 Prerequisites for Enabling Wiki Functionality

To support wiki functionality, the Documents service relies on Content Server, the content repository that stores the wiki documents. For wiki functionality to be available in Spaces, the following prerequisites must be met:

- Content Server 11*g* must be configured as the default content repository for Spaces. The wiki functionality is not available with Content Server 10*g*. For information about installing and configuring Content Server 11*g*, see the

"Managing Content Repositories" chapter in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

- A connection to Content Server 11*g* must be established, as described in "Configuring Content Repository Connections" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*
- The Documents service must be enabled for the space in which you plan to create wiki documents. For information, see Section 53.10.1, "Enabling and Disabling Services Available to a Space."

49.2 What You Should Know About Wiki Documents

Wiki documents epitomize the concepts of community and collaboration by allowing all authorized community members to contribute their information to a body of knowledge. Wiki documents are web pages that offer in-place editing using HTML or a simple mark-up language called wiki mark-up. Users with sufficient permissions on a wiki document can add, revise, or delete content. Wikipedia (`http://www.wikipedia.com`) is a widely-known example of the use of wiki documents. Users from all over the world collaborate to create and edit Wikipedia pages, resulting in a rich, dynamic knowledge base for everyone's benefit.

In Spaces, you can create a wiki document using either of the following two methods:

- **New Wiki Document** action, available on the **Documents** page and Documents service task flows.
- Wiki page style, to create a dedicated wiki page with a default wiki document that offers a simplified user interface and a dedicated wiki experience.

  Anyone with appropriate permissions on the wiki page can create additional wiki documents using the **New Wiki Document** action. These wiki documents are siblings of the default wiki document, and are all stored in the dedicated folder that is automatically created for the wiki page.

Wiki documents created using either of the two methods offer the same in-place editing features through the Rich Text Editor (RTE).

The method you choose for creating wiki documents really depends on your preferences. If you want to expose a wiki document as a separate page in your Spaces application, and want users to feel that there is a dedicated area for wikis, use the Wiki page style method. If you do not require these features, and just want to create a wiki document (among other types of documents) in your space's document hierarchy, use the **New Wiki Document** action.

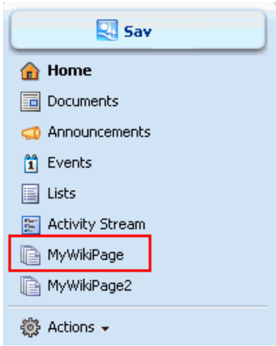
Table 49–1 summarizes the differences between the two methods of creating wiki documents:

Table 49–1 Distinguishing Features Between Methods of Creating Wikis

<table>
<tr><th>Feature</th><th>New Wiki Document Action (Section 49.4.1, "Creating a Wiki Document Using the New Wiki Document Action")</th><th>Wiki Page Style (Section 49.4.2, "Creating a Wiki Document Using the Wiki Page Style")</th></tr>
<tr><td>Exposure</td><td>In the default side navigation page template, does not display wiki documents as a separate page in the space navigation area.

A wiki document is exposed as a file in the folder where it was created on the Documents page of the space, just like any other file.</td><td>Exposes wiki documents within a dedicated page in the navigation area of a space (the location depends on the page template used). The screenshot shows an example of navigation to a wiki page in a space using the default side navigation page template.

A wiki page is exposed as a folder on the Documents page of the space, just like any other page.


</td></tr>
<tr><td>Document storage</td><td>Does not create a separate folder to store a wiki document, and the navigation is not constrained.

The screenshot shows <code>Savs Wiki</code> as the wiki document created in the document hierarchy.</td><td>Automatically creates a new folder (with the same name as the wiki page) under the root folder in the document hierarchy, and creates a default wiki document in the folder, with the same name as the page name. This method restricts navigation to start at this folder.

The screenshot shows the folder named <code>MyWikiPage</code>. It contains a default wiki document named <code>MyWikiPage</code>. The folder and the wiki document were automatically created when the Wiki page style method was used for creating a page named <code>MyWikiPage</code>.

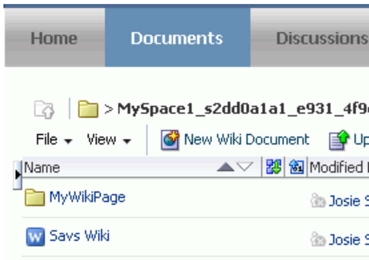

</td></tr>
</table>

Table 49–1 (Cont.) Distinguishing Features Between Methods of Creating Wikis

Feature	New Wiki Document Action (Section 49.4.1, "Creating a Wiki Document Using the New Wiki Document Action")	Wiki Page Style (Section 49.4.2, "Creating a Wiki Document Using the Wiki Page Style")
Permissions inherited by a wiki document	Inherits permissions from the folder in which it is created.	In a space, the newly created wiki page inherits space permissions (where `Moderator` and `Participant` roles have Create, Edit, and Delete permissions, and `Viewer` role has only View permission). In the Home space, a newly created wiki page inherits the same permissions as a public folder; the owner is granted the Administer, Read, Write, and Delete permissions, and public users are granted only the Read access.
Permissions required to create wiki documents See also Section 49.3, "Permissions Required for Working with Wiki Documents"	`Create and Edit Documents` permission.	To create a page based on the Wiki page style and then be able to create wiki documents within the page, users require: ■ `Create Pages` or `Create, Edit, Delete Pages` permission for the Page service. ■ `Create and Edit Documents` permission for the Documents service.

Note: The root folder where Content Server stores a space is `/spaces/`*`space_name`*; a Home space is stored in `/spaces/`*`user_name`*.

49.3 Permissions Required for Working with Wiki Documents

The following sections discuss the permissions required to create and manage wiki documents:

- Section 49.3.1, "Permissions for Using the New Wiki Document Action"
- Section 49.3.2, "Permissions for Working with Wiki Pages"

49.3.1 Permissions for Using the New Wiki Document Action

To create a wiki document using the **New Wiki Document** action and edit the document, you must be granted the `Create and Edit Documents` permission (Figure 49–1). To delete wiki documents, you require the `Delete Documents` permission. These permissions are available to the `Moderator` and `Participant` roles by default.

Figure 49–1 Documents Service Permissions for Working with Wiki Documents

▽ Documents	
☑ Administration Capabilites	Configure Workflows and access control settings. Move content between group spaces.
☑ Delete Documents	Delete any folders and files in the Space.
☑ Create and Edit Documents	Create new folders. Create and upload new files. If individual folder and file permissions allow, user can delete folders or files.
☑ View Documents	Browse files and folders.

space

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49.3.2 Permissions for Working with Wiki Pages

Note: By default the `authenticated-role` is granted `View` permission on wiki pages. This means that all authenticated users logged into Spaces can view a wiki page in the Home space, or any space to which they have access. Additional permissions on the page are determined by the security set on the page, as described in Section 26.1, "Setting Access on a Page Through Page Properties."

To create and edit wiki documents using the Wiki page style, you must be granted Page service permissions in addition to the Documents service permissions:

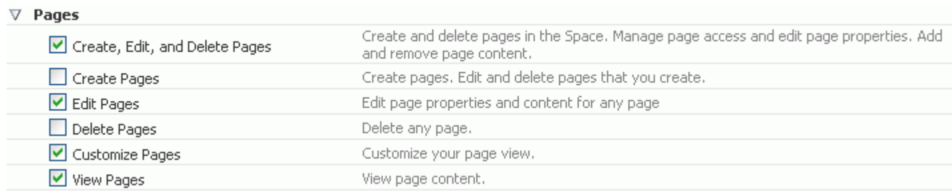
- Standard permission model: If this permission model is used, creating and editing wiki documents requires:
  - `Create and Edit Documents` permission for the Documents service (Figure 49–1).
  - `Edit Page Access, Structure, and Content` permission for Basic Services (Figure 49–2).

Figure 49–2 Basic Services Permission for Working with Wiki Documents

▽ Basic Services	
☑ Edit Page Access, Structure, and Content	Create, edit and delete pages in the Space. Manage page access and edit page properties. Add and remove task flows and portlets. Create, edit, and delete lists, events, links, and notes.
☑ Edit Page Access and Structure	Manage page access and edit properties of pages in the Space. Add and remove task flows and portlets.
☑ Customize Pages and Edit Content	Customize your view of pages in the Space. Add and remove list content, events, links, and notes.
☑ View Pages and Content	View pages, lists, events, links, and notes.

- Advanced permission model: If this permission model is used, creating and editing wiki documents requires:
  - `Create and Edit Documents` permission for the Documents service (Figure 49–1).
  - `Create Pages` or `Create, Edit, and Delete Pages` permission for the Pages service (Figure 49–3).

Figure 49–3 Page Service Permissions for Working with Wiki Documents



space

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49.4 Creating a Wiki Document

The following sections describe how to create a wiki document in a Spaces application:

- Section 49.4.1, "Creating a Wiki Document Using the New Wiki Document Action"
- Section 49.4.2, "Creating a Wiki Document Using the Wiki Page Style"
- Section 49.4.3, "Creating a Wiki Document Within a Wiki Page"

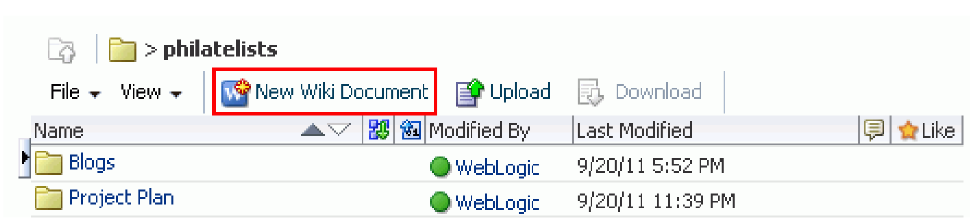
49.4.1 Creating a Wiki Document Using the New Wiki Document Action

To understand the differences between the two methods of creating a wiki document, see Section 49.2, "What You Should Know About Wiki Documents."

To create a wiki document using the **New Wiki Document** action on the **Documents** page or in a Documents service task flow:

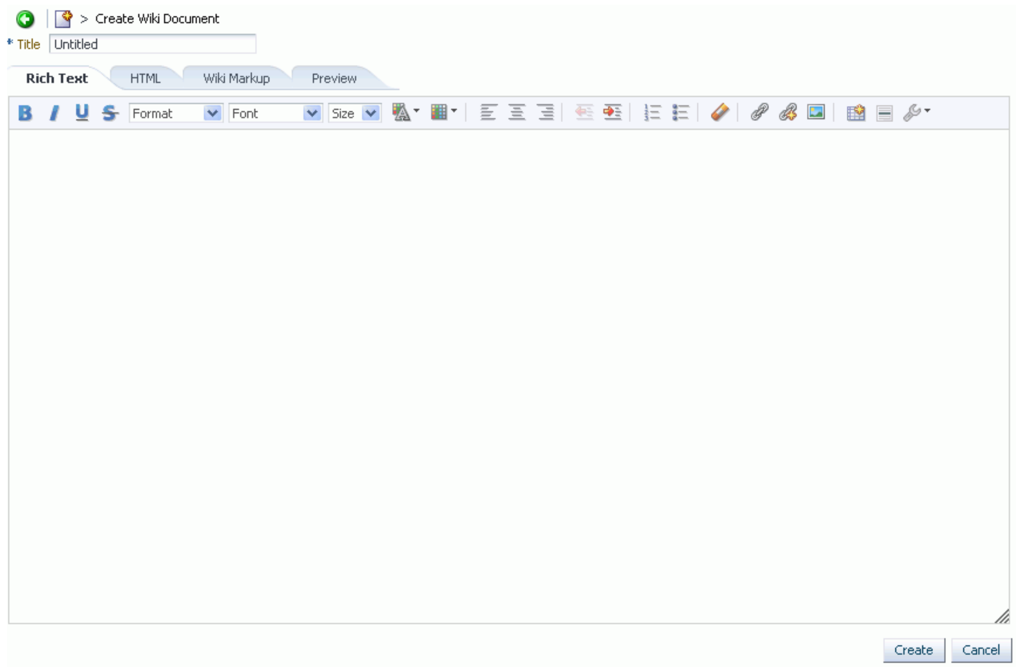
1. Navigate to the **Documents** page or the page that contains a Document Explorer, Document Viewer, Document Manager, or Folder Viewer task flow. Browse to the folder where you want to create a wiki document.
2. Click **New Wiki Document** (Figure 49–4).

Figure 49–4 Creating a New Wiki Document



The Rich Text Editor (RTE) opens (Figure 49–5), displaying a blank wiki document.

Figure 49–5 Rich Text Editor Displaying New Wiki Document



3. In the **Title** field, enter a display name for the wiki document.

Note: When naming wiki documents, the following characters are not allowed:

```
\ / : [ ] * ' " | ?
```

Letters, numbers, spaces, and periods (.) are allowed.

---

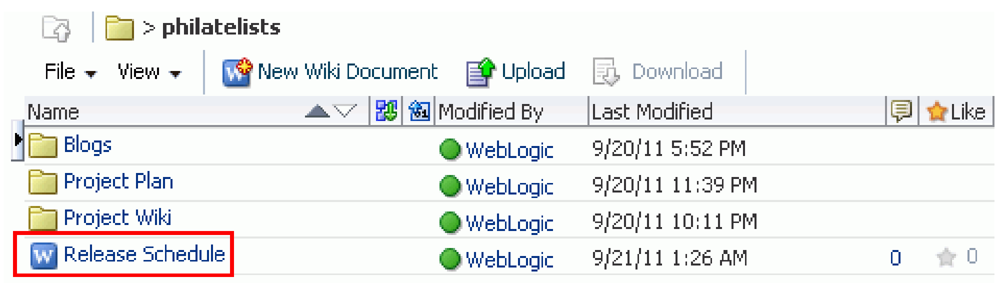
4. Add and preview the text, formatting, styling, and links in the **Rich Text**, **HTML**, **Wiki Markup**, and/or **Preview** tabbed panes. For information about working with the RTE, see Section 43.11, "Using the Rich Text Editor (RTE)."
5. Click **Create** to save your changes and exit the editor.

   The new wiki document displays in the Document Viewer, ready to be edited by other space members (Figure 49–12).

Figure 49–6 Wiki Document Created Using New Wiki Document Action

On the **Documents** page in the space, the new wiki document (`Release Schedule`) is saved as a document in the current folder, as shown in Figure 49–13.

Figure 49–7 Wiki Document Created Using New Wiki Document Action



49.4.2 Creating a Wiki Document Using the Wiki Page Style

To understand the differences between the two methods of creating a wiki document, see Section 49.2, "What You Should Know About Wiki Documents."

To create a wiki document using the Wiki page style:

1. Navigate to the space in which you want to create a wiki document and open the Create dialog.
2. In the **Page Name** field, enter a display name for the dedicated wiki page.

   The name that you enter here is also shown as the name of dedicated folder that is created, and the name of the first, default wiki document created within the folder.

Note: While there are restrictions on naming wiki documents, there are no naming restrictions for page names. However, while any of the following characters can be used to name the wiki page, the page title will include the character(s) but the associated wiki document will replace the illegal character with "_".

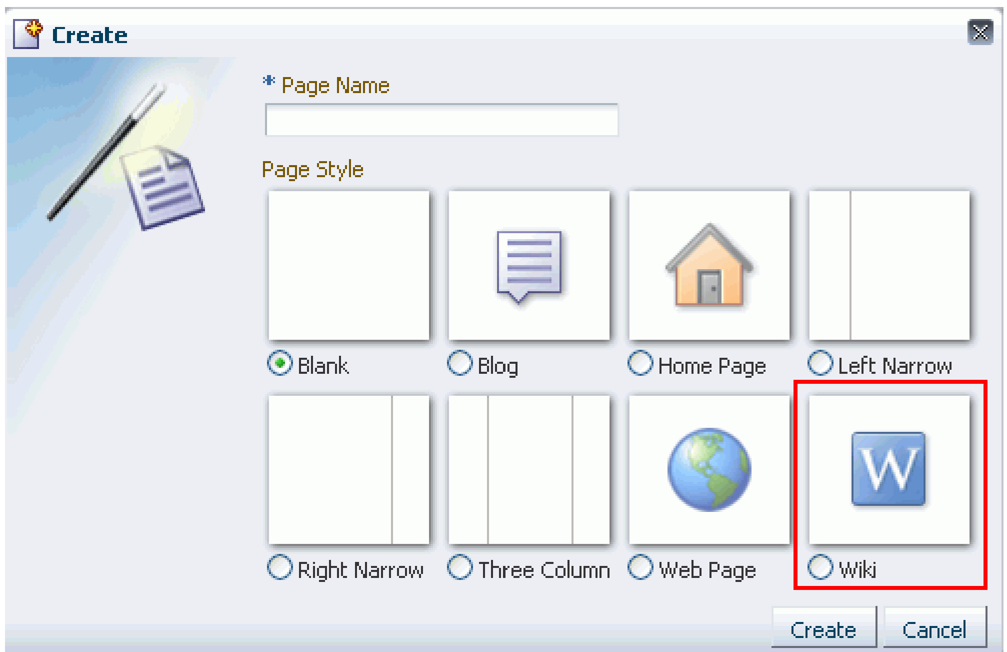
`\ / : [ ] * ' " | ?`

For example, if you create a wiki page named "`What's In a Name?`", the page will have this title, but the associated wiki document will be named "`What_s In a Name_`".

---

3. From the **Page Style** options, select **Wiki** (Figure 49–8).

Figure 49–8 Creating a Wiki Document Using the Wiki Page Style



Note: The Wiki page style becomes available in the Create dialog in a space only if Spaces is integrated with Content Server 11*g*, and the Documents service is enabled for the space.

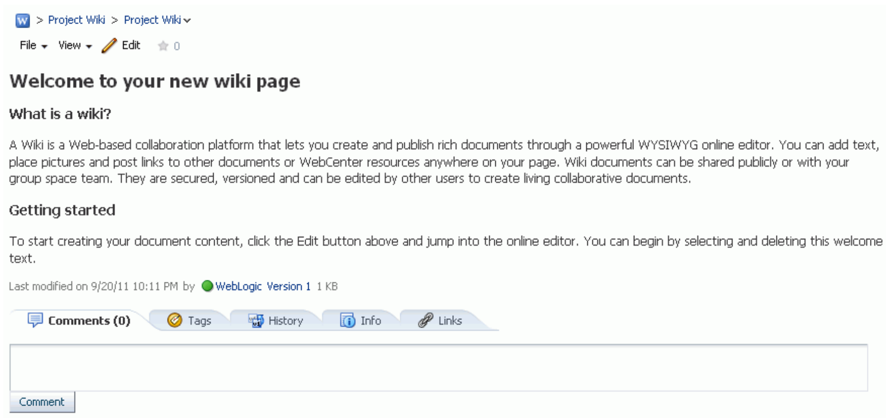
For information about setting up a connection to Content Server, see "Registering Content Repositories" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. For information about enabling the Documents service, see Section 53.10.1, "Enabling and Disabling Services Available to a Space."

---

4. Click **Create**.

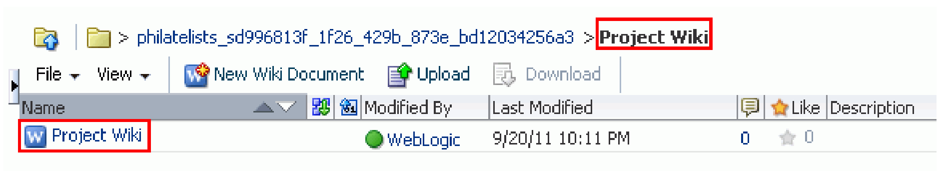
   The newly created wiki displays as a separate page, containing a default wiki document with default text (Figure 49–9). The breadcrumbs at the top display the path where the wiki document is created in the document hierarchy. In the wiki document, you can replace the default text with the desired content. For information, see Section 49.5, "Editing a Wiki Document."

Figure 49–9 Default Wiki Document Created Using the Wiki Page Style



On the **Documents** page, you can find the newly created wiki document stored in a separate folder for the wiki page under the root folder, as shown in Figure 49–10. Both the folder and the default wiki document share the same name.

Figure 49–10 Default Wiki Document for a Wiki Page in the Document Hierarchy



49.4.3 Creating a Wiki Document Within a Wiki Page

A page based on the Wiki page style contains a default wiki document. Anyone with appropriate permissions on the wiki page can create additional wiki documents using the **New Wiki Document** action. These wiki documents are siblings of the default wiki document, and are all stored in the dedicated folder that is automatically created for the wiki page.

You can create an additional wiki document within a wiki page in either of the following ways:

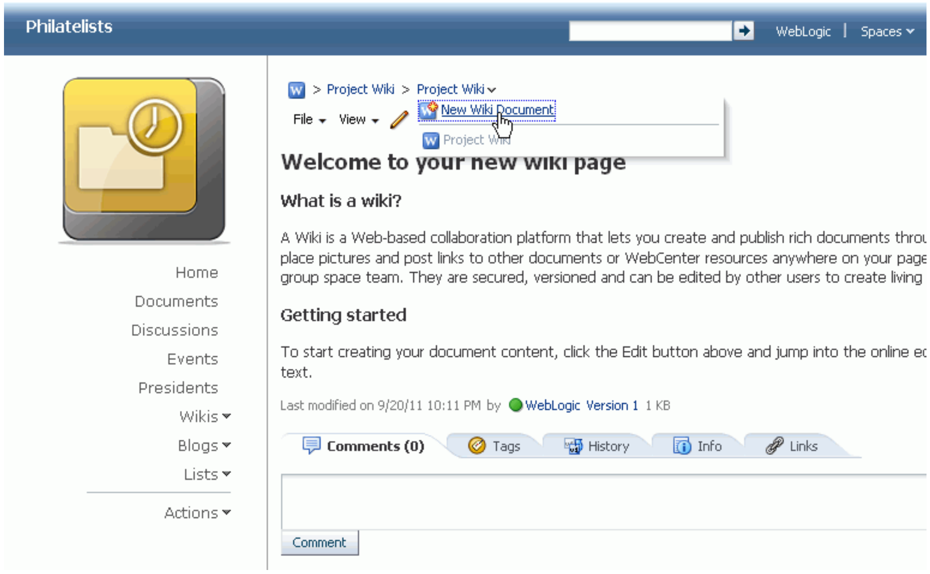
- Navigate to the folder for the page, and create a new wiki document as described in Section 49.4.1, "Creating a Wiki Document Using the New Wiki Document Action."
- Navigate to the wiki page and select the **New Wiki Document** action, as described in the following steps:

  1. In the wiki page, select the **New Wiki Document** action.

     The way you select this action depends on the page template used in your space.

     Figure 49–11 shows a wiki page open in a space that uses a side navigation page template. Clicking the page name in the breadcrumbs or the dropdown arrow next to the page name displays a menu that contains the **New Wiki Document** action.

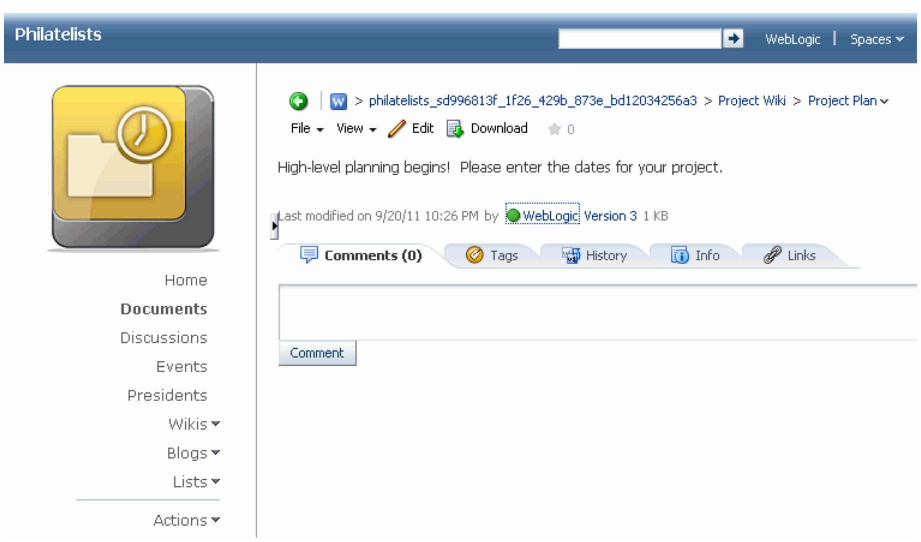
Figure 49–11 The New Wiki Document Option Available for a Wiki Page



2. In the Rich Text Editor (RTE), in the **Title** field, enter a name for the new wiki document (for example, `Project Plan`).
3. Add, revise, and preview text, formatting, styling, and links in the **Rich Text**, **HTML**, **Wiki Markup**, and/or **Preview** tabbed panes. For information about working with the RTE, see Section 43.11, "Using the Rich Text Editor (RTE)."
4. Click **Create** to save your changes and exit the editor.

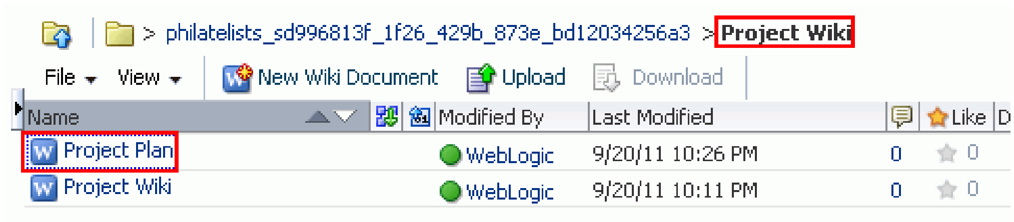
   The new wiki document displays in the Document Viewer, ready to be edited by other space members (Figure 49–12).

Figure 49–12 New Wiki Document Associated with a Wiki Page



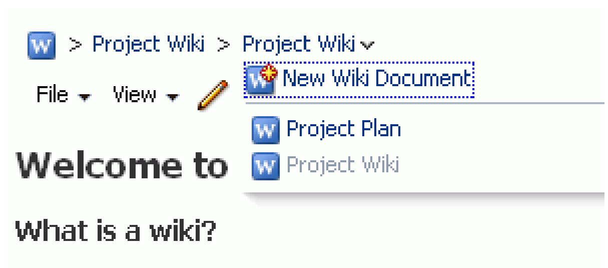
On the **Documents** page in the space, the new wiki document (`Project Plan`) is saved as a document under its parent wiki folder (`ProjectWiki`), along with the wiki document created as the default wiki page document (`ProjectWiki`), as shown in Figure 49–13.

Figure 49–13 Wiki Document Created Within a Wiki Page



In the wiki page, the dropdown arrow next to the page name in the breadcrumbs displays a menu that includes the wiki documents created within the page (in this example, `Project Plan`) (Figure 49–14).

Figure 49–14 List of Wiki Documents Associated with Wiki Page



49.5 Editing a Wiki Document

You use the Rich Text Editor (RTE) to add or revise the content of your wiki documents.

Note: The Rich Text Editor (RTE) can edit wiki documents up to 1MB in size. For wiki documents larger than 1MB, the **Edit** action is not active.

When you open a wiki document for editing, Spaces automatically checks the file out. If another user is already editing a wiki document when you try to open it, the Documents service displays a message that the wiki document has already been checked out. On the **Documents** page or in a Documents service task flow, a lock icon displays alongside a wiki document that is checked out. When you hover the mouse cursor over the lock icon, the name of the user who has checked out the wiki document displays.

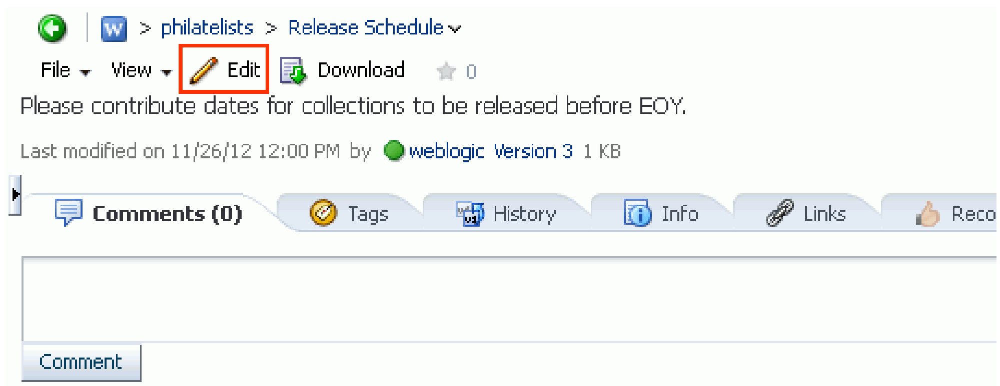
Whenever you save changes to a wiki document, Spaces automatically checks the file in and creates a new version of the wiki document. This means that the last saved version of a wiki document appears as the current version.

To edit a wiki document:

1. Open your wiki document in edit mode in any of the following ways, depending on your view:

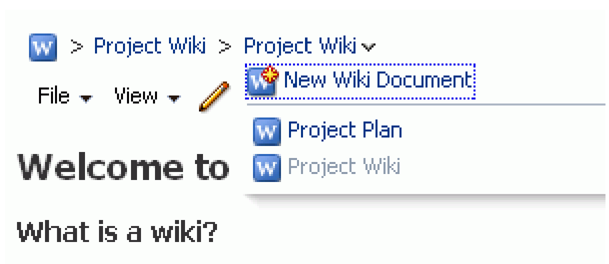
   - On the **Documents** page or in a Documents service task flow, click in the row of the wiki document you want to edit. From the **File** menu, select **Edit**, or right-click the file and select **Edit** from the context menu to open the wiki document in the RTE.
   - In the Document Viewer preview pane, click the **Edit** action (Figure 49–15).

Figure 49–15 Wiki Document in Document Viewer Preview Pane



   - In a wiki page, click the **Edit** action to edit the default wiki document.
   - In a wiki page, click the dropdown arrow next to the page name in the breadcrumbs to select and open a wiki document created within the page.(Figure 49–16), then click the **Edit** action.

Figure 49–16 List of Wiki Documents Associated with Wiki Page



2. In the RTE, add, revise, and preview text, formatting, styling, and links in the **Rich Text**, **HTML**, **Wiki Markup**, and/or **Preview** tabbed panes. For information about working with the RTE, see Section 43.11, "Using the Rich Text Editor (RTE)."
3. Select the **Minor Edit?** check box if you do not want to notify space members about your changes.

   Leaving this check box deselected updates the Activity Stream and sends notifications after you save your changes.
4. Click **Save** to save your changes and continue editing, or click **Save and Close** to save your changes and exit the editor.

49.6 Exposing an Existing Wiki Document

This section includes the following sections:

- Section 49.6.1, "Exposing an Existing Wiki Document as a Wiki Page"
- Section 49.6.2, "Exposing an Existing Wiki Document Using Content Presenter"

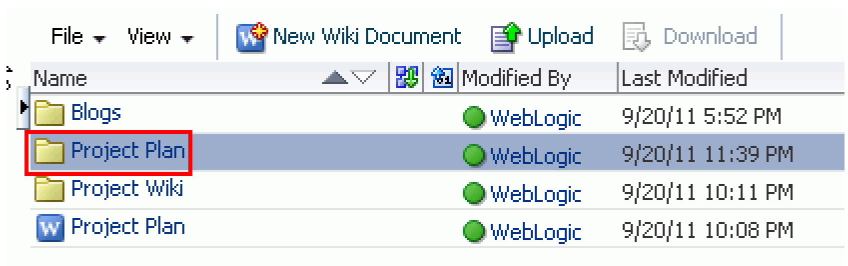
49.6.1 Exposing an Existing Wiki Document as a Wiki Page

When you create a wiki page using the Wiki page style, it is listed in the document hierarchy, and is exposed as a separate page in the navigation area in your space. However, when you create a wiki document using the **New Wiki Document** action, the wiki document is listed in only in the document hierarchy. For easy access to such a wiki document, you can publish it to appear as a page in the navigation area.

To publish an existing wiki document as a page in the navigation area:

1. On the **Documents** page, create a folder with the same name as the existing wiki document at the root level of the space (see Section 43.7, "Creating a Folder"). For example, if the existing wiki document is named `Project Plan`, create a folder named `Project Plan` (Figure 49–17).

Figure 49–17 Folder Created at the Space Root Level



2. Move the existing wiki document to the newly created folder (see Section 43.15, "Moving Folders and Files").

> **Note:** The wiki document must have been originally created using the **New Wiki Document** action, as described in Section 49.4.1, "Creating a Wiki Document Using the New Wiki Document Action."

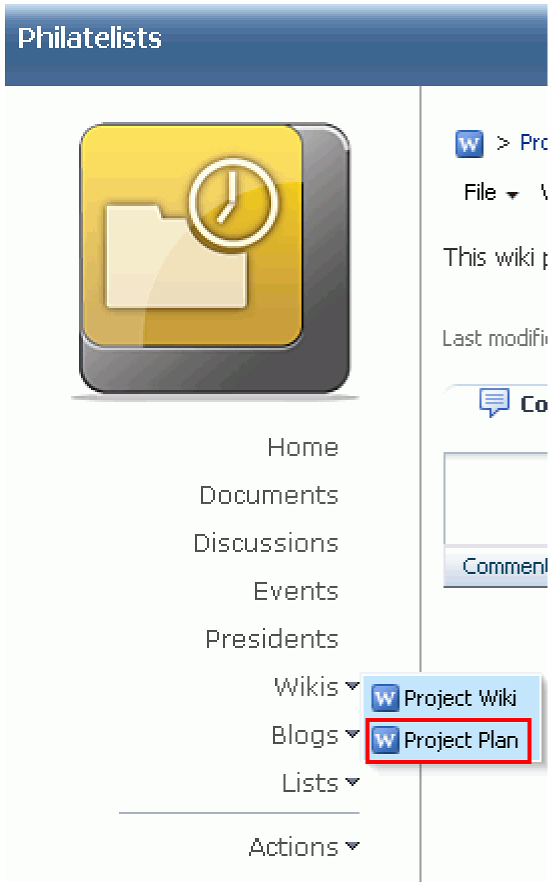
3. Open the Create dialog to create a new page in the space.
4. In the **Page Name** field, enter the display name of the existing wiki document that you want to expose; for example, `Project Plan`.

> **Note:** When naming wiki documents, the following characters are not allowed:
>
> `\ / : [ ] * ' " | ?`
>
> Letters, numbers, spaces, and periods (.) are allowed.

5. From the **Page Style** options, select **Wiki**.
6. Click **Create**.

The wiki document is now exposed as a separate page in the navigation area. The location depends on the page template used in your space. Figure 49–18 shows the `Project Plan` wiki document exposed as a page in the navigation area in a space, under **Wikis**.

Figure 49–18 A Wiki Document Exposed as a Page



49.6.2 Exposing an Existing Wiki Document Using Content Presenter

The Content Presenter task flow allows you to select a wiki document, and render its content in a specific template on a page. For information, see Section 42, "Publishing Content Using Content Presenter."

49.7 Managing Wiki Documents

Table 49–2 lists the tasks that you can perform to manage wiki documents, with links to the steps that describe how to perform each task for any kind of file.

Table 49–2 Managing Wiki Documents

Task	Description	For more information, see...
Opening a wiki document for viewing	You can open a wiki document on the **Documents** page or in a Documents service task flow. If your wiki document is exposed through a wiki page, you can open the wiki page, then access the wiki document from the wiki page's dropdown menu, as shown in Figure 49–14.	Section 43.10, "Opening a File"
Downloading a wiki document	You can download a wiki document from the content repository to your local file system. You can access the **Download** action from the **Documents** page, Documents service task flows, or the Document Viewer preview pane. **Note**: Spaces does not support uploading a new wiki document or a new version of a wiki document from the file system. If you upload an HTML file, you cannot convert it to a wiki document due to differences in underlying metadata.	Section 43.12.3, "Downloading a File"
Renaming a wiki document	You can rename a wiki document as desired.	Section 43.13, "Renaming a Folder or File" Section 43.22.2, "Working with File Properties"
Deleting a wiki document	You can delete a wiki document if it is no longer required.	Section 43.16, "Deleting Folders and Files"
Viewing, adding, and deleting comments on a wiki document	You can associate comments with a wiki document to provide additional information that you may want to convey to other users about it. **Note**: A user with view-only permissions can add comments to a wiki document in the **Comments** pane. The comment display is limited to 500 characters.	Section 43.19, "Viewing, Entering, and Deleting Comments on a File"
Viewing and adding tags to a wiki document	You can add tags to a wiki document to specify keywords related to the content of the post to make it more widely discoverable in search results.	Section 43.20, "Working with Tags"

Table 49–2 (Cont.) Managing Wiki Documents

Task	Description	For more information, see...
Viewing and deleting versions of a wiki document	Every time you save a wiki document, Spaces saves a new version of the post and maintains the version history. You can view and delete the various versions. However, you cannot restore an older version of a wiki document.	Section 43.21, "Viewing and Deleting File Version History"
Viewing and modifying properties of a wiki document	You can view the basic and advanced properties associated with a wiki document. However, you can modify only the name and description of a wiki document.	Section 43.22.2, "Working with File Properties"
Viewing and adding links to a wiki document	Using the **Select Resource** and **New Resource** icons in the RTE, you can add links from a wiki document to existing resources, or create and link to new resources. Note that these inline links are not added to the **Links** tab associated with the details of the wiki document.	Table 43–8, " Rich Text Editor Toolbar Icons and Controls on Rich Text Tab" (**Select Resource** and **New Resource** icons)
Opening or saving wiki documents as PDF files	You can open or save the PDF version of the currently open wiki document. This choice is available if Content Server is configured to convert wiki documents to PDF format, and your application administrator must configure the WebCenter Conversion component, as described in "Enabling the Conversion of Wikis and Blogs into PDFs" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.	Section 43.26, "Opening or Saving PDF Files"
Sharing the URL of a wiki document	You can directly access a wiki document using its URL. You can share the link by publishing it to the Activity Stream or sending the link in a mail message.	Section 43.27, "Sharing the URL for a Folder or File"
Setting up the security for a wiki document	You can secure a wiki document by setting custom access permissions or choosing to inherit the permissions of the parent folder. The option to set security for wiki documents is available if item level security has been enabled on Content Server.	Section 43.23, "Setting Security Options on a Folder or File"

Table 49–2 (Cont.) Managing Wiki Documents

Task	Description	For more information, see...
Subscribing to a wiki document	You can subscribe to a wiki document to receive notifications for activities such as comments, likes, updates, or deletions. You are notified through your selected messaging channel.	Section 43.28, "Subscribing to a File"
Liking or unliking a wiki document	To indicate that a wiki document is of particular interest to you, you can "like" it. If a wiki document is already liked, you can "unlike" it if you no longer wish to highlight your preference.	Section 43.29, "Liking and Unliking a File"

50 Working with Blogs

You can create and manage personal blogs in your WebCenter Portal: Spaces application to record experiences and opinions, and group related blog posts contributed by multiple users.

This chapter describes how to create and manage blogs. It includes the following sections:

Note: The tasks described in this chapter are available only if Content Server 11*g* is configured as the content repository.

Audience

This chapter is intended for Spaces users interested in adding, editing, and managing blogs.

To perform the tasks described in this chapter, users need to be assigned a role that includes the `Edit Pages` and `Create and Edit Documents` (which includes delete permissions on blogs that you create). To delete blogs that are not your own, you must have `Delete Documents` permission. To configure workflows or access control settings, you must have `Document Administration` permission. For information about roles and permissions, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

50.1 Prerequisites for Enabling Blog Functionality

To support blog functionality, the Documents service relies on Content Server, the content repository that stores the blogs. For blog functionality to be available in Spaces, the following prerequisites must be met:

- Content Server 11*g* must be configured as the default content repository for Spaces. The blog functionality is not available with Content Server 10*g*. For information about installing and configuring Content Server 11*g*, see the

"Managing Content Repositories" chapter in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

- A connection to Content Server 11*g* must be established, as described in "Configuring Content Repository Connections" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*
- The Documents service must be enabled for the space in which you plan to create a blog. For information, see Section 53.10.1, "Enabling and Disabling Services Available to a Space."

50.2 What You Should Know About Blogs

Blogs are typically personal records of an individual user's experience and opinions. The word *blog* is a contraction of the term *Web log*. It was coined to describe the online diaries spawned in the late 1990s.

Blogs provide a useful tool for discussing and/or evangelizing any type of idea, strategy, or point of view. Blogs may be projected out to a select group of people or to a wider audience. Typically, each blog contains various blog posts, with the most recently added blog post displayed at the top. Blogs invite readers to comment on the overall concepts

In Spaces, you can create blogs to group related blogs posts. For example, you can group posts by the same author or related topics.

In Spaces, you can create a blog using either of the following two methods:

- Blog task flows, to expose a customized blog view on a page along with other page components.
- Blog page style, to create a dedicated blog page.

The following sections discuss the blog functionality and the requirements for creating and managing blogs in a Spaces application:

- Section 50.2.1, "Understanding the Blog Task Flows"
- Section 50.2.2, "Understanding the Blog Page Style"

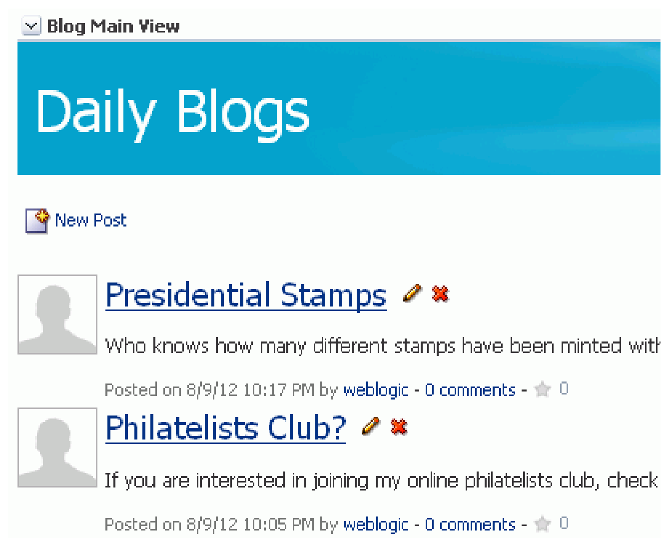
50.2.1 Understanding the Blog Task Flows

If you want to include a blog on a page, along with other page components, you can use the blog task flows to add one or more elements of a blog to a page in a Spaces application. Table 50–1 lists and describes the blog task flows:

Table 50–1 Blog Task Flows

Blog Task Flow	Description	Example as Exposed on a Page
Archives	Displays a composite list of blogs based on dates.	

Table 50–1 (Cont.) Blog Task Flows

Blog Task Flow	Description	Example as Exposed on a Page
Banner	Displays a banner for the blog.	
Blog Main View	Displays a blog or blog post with a default design.	
Blog Viewer	Displays a blog or blog post.	
Blog Recent Posts	Displays a list of most recent blog posts.	

To work with blog task flows, see:

- Section 50.3.1, "Permissions for Working with Blog Task Flows"
- Section 50.4.1, "Creating a Blog Using Blog Task Flows"

50.2.2 Understanding the Blog Page Style

Out-of-the-box, the Spaces application includes several page styles for selection when creating a new page. One of these page styles is the Blog page style, which enables you to create a dedicated blog page (Figure 50–1).

Figure 50–1 A Blog Page

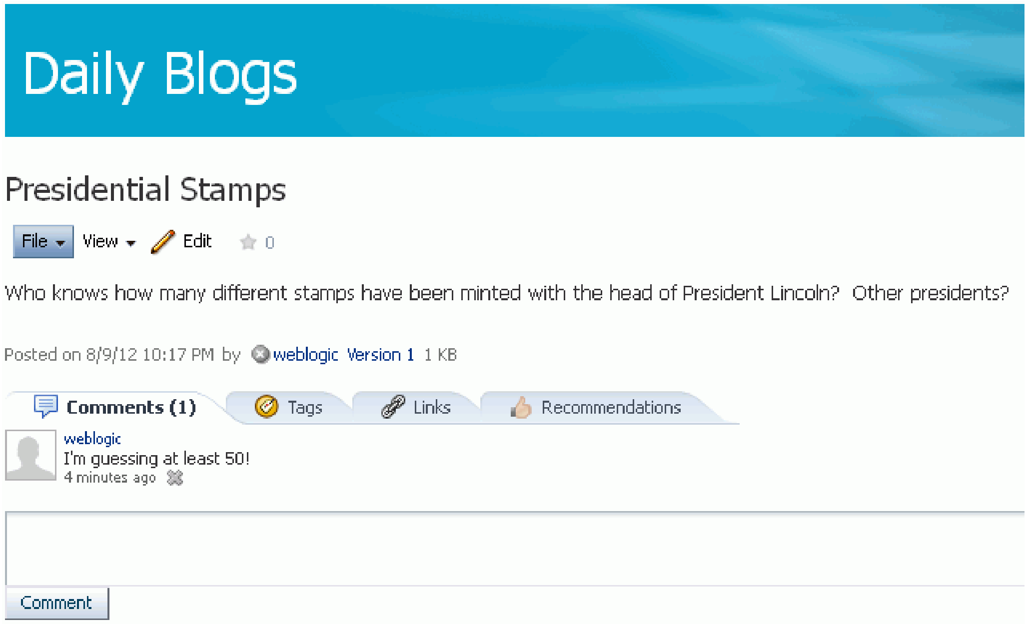
On a blog page, the **Archives** section on the right provides to blog posts by year and by month. Clicking a month displays all blog posts created during that month.

A blog page displays various details for each blog post. These include the blog post title, the blog post content, date of creation or modification, name of the user who created or last modified the post, and the number of comments on the blog post.

Authorized users can click the **Edit Post** (pencil) icon to edit a post (see Section 50.7.4, "Editing a Blog Post"), the **Delete Post** icon to delete a post (see Section 50.7.5, "Deleting a Blog Post"), and also add comments, tags, and on the corresponding tabs at the bottom of the post. An authenticated (logged in to Spaces) user with view-only permissions can add comments to a blog post by clicking the **comments** link below the post. Public users can not comment on blog posts.

Clicking a blog post title opens the blog post to occupy the entire the blog page (Figure 50–2), providing controls to manage the blog post. For more information, see Section 50.7, "Working with Blog Posts."

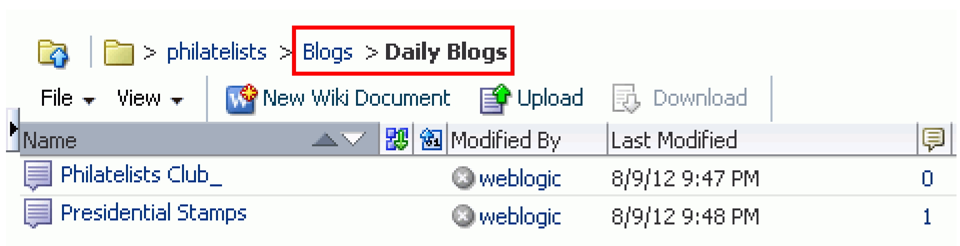
Figure 50–2 A Blog Post



In a space or the Home space, blog pages are stored in a separate folder named `Blogs` under the root folder of the space in the document hierarchy. When you create a new blog page, an empty folder is created for that blog under the `Blogs` folder. All blog posts that you create in that blog are stored in the blog's folder.

Figure 50–3 illustrates the directory structure for the example `Daily Blogs`, which contains two blog posts. The breadcrumb at the top shows that the blog posts are created in the `Daily Blogs` folder in the space.

Figure 50–3 Directory Structure of a Blog



To work with blog pages, see:

- Section 50.3.2, "Permissions for Working with a Blog Page"
- Section 50.4.2, "Creating a Blog Using the Blog Page Style"

50.3 Permissions Required for Working with Blogs

The following sections discuss the permissions required to create and manage blogs:

- Section 50.3.1, "Permissions for Working with Blog Task Flows"
- Section 50.3.2, "Permissions for Working with a Blog Page"
- Section 50.3.3, "Permissions for Working with Blog Posts"

50.3.1 Permissions for Working with Blog Task Flows

To create and manage blogs using blog task flows, you must be granted the `Create and Edit Documents` permission (Figure 50–4). To delete blogs, you require the `Delete Documents` permission. These permissions are available to the `Moderator` and `Participant` roles by default.

Figure 50–4 Documents Service Permissions for Working with Blogs

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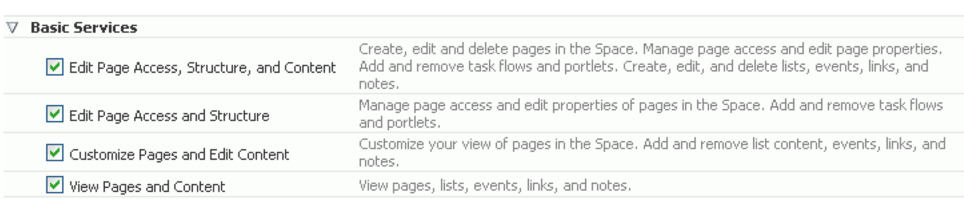
50.3.2 Permissions for Working with a Blog Page

Note: By default the `authenticated-role` is granted `View` permission on blog pages. This means that all authenticated users logged into Spaces can view a blog page in the Home space, or any space to which they have access. Additional permissions on the page are determined by the security set on the page, as described in Section 26.1, "Setting Access on a Page Through Page Properties."

To create and manage a blog using the Blog page style, you must be granted Page service permissions in addition to the Documents service permissions.

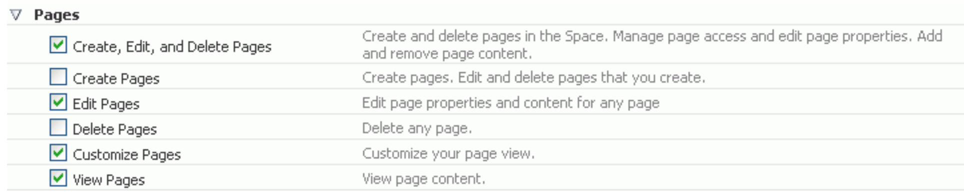
- Standard Permission Model: If this permission model is used, creating and managing blogs requires:
  - `Create and Edit Documents` permission for the Documents service (Figure 50–4).
  - `Edit Page Access, Structure, and Content` permission for Basic Services (Figure 50–5).

Figure 50–5 Basic Services Permission for Working with Blogs



- Advanced Permission Model: If this permission model is used, creating and managing blogs requires:
  - `Create and Edit Documents` permission for the Documents service (Figure 50–4).
  - `Create Pages` or `Create, Edit, and Delete Pages` permission for the Page service (Figure 50–6).

Figure 50–6 Page Service Permissions for Working with Blogs



space

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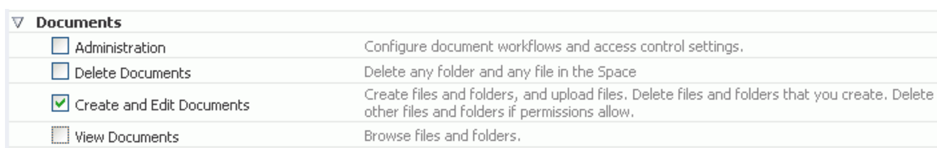
50.3.3 Permissions for Working with Blog Posts

By default, all users can create blog posts in the Home space. To create blog posts in other spaces, users must be granted the `Create and Edit Documents` permission (Figure 50–7).

All users with `View Documents` permission can post comments on blog posts.

Figure 50–7 Documents Service Permissions for Creating Blog Posts in a Space



space

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50.4 Creating a Blog

The following sections describe how to create a blog in a Spaces application:

- Section 50.4.1, "Creating a Blog Using Blog Task Flows"
- Section 50.4.2, "Creating a Blog Using the Blog Page Style"

50.4.1 Creating a Blog Using Blog Task Flows

To understand the differences between the two methods of creating a blog, see Section 50.2, "What You Should Know About Blogs."

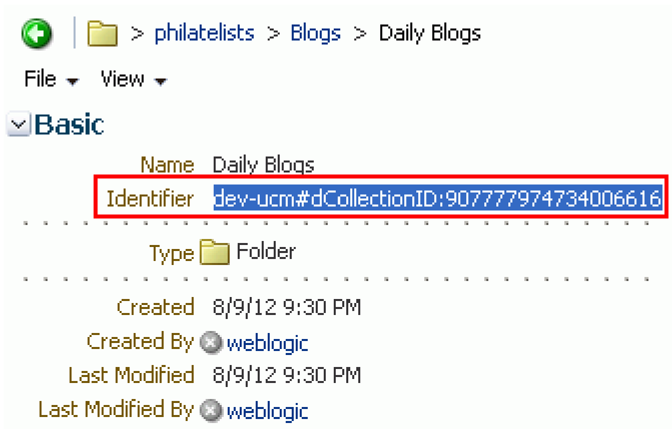
Instead of creating a dedicated blog page, you may want one or more blogs to appear along with various other components on a page. You can do this by creating a folder for a blog, and then exposing it on a page using a combination of blog task flows. For descriptions of the blog task flows provided by Spaces, see Section 50.2.1, "Understanding the Blog Task Flows"

To add a blog task flow to a page:

1. On the **Documents** page or in a Documents service task flow, create a folder under the **Blogs** folder (see Section 43.7, "Creating a Folder").
2. Right-click the newly created folder, and select **Details** to display the folder properties.
3. From the **Identifier** field, copy the value (Figure 50–8).

This value is the resource ID that uniquely identifies the folder. You will copy this resource ID to the blog task flow properties to expose the folder as a blog.

Figure 50–8 Resource ID of a Folder



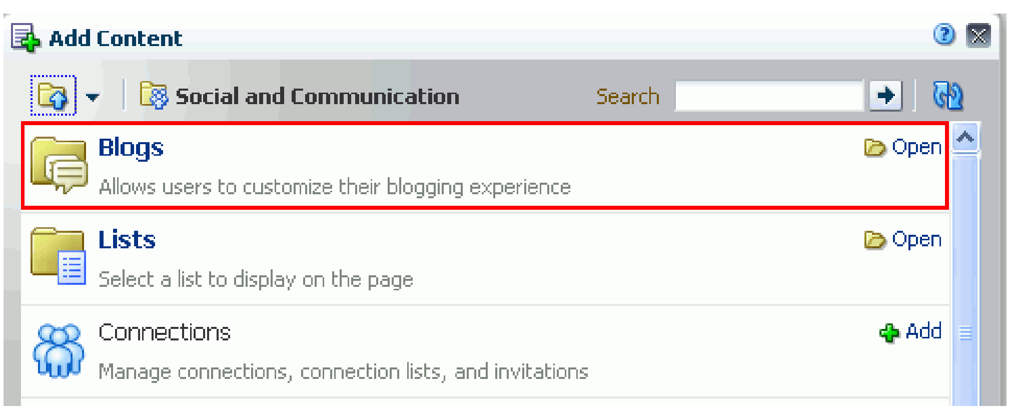
4. Open the page in edit mode.

   See Also: For more information, see Section 18.1, "Entering and Exiting Composer."

5. Click **Add Content** in the target region to open the Resource Catalog.
6. Navigate to the section of the Resource Catalog that provides access to the blog task flows.

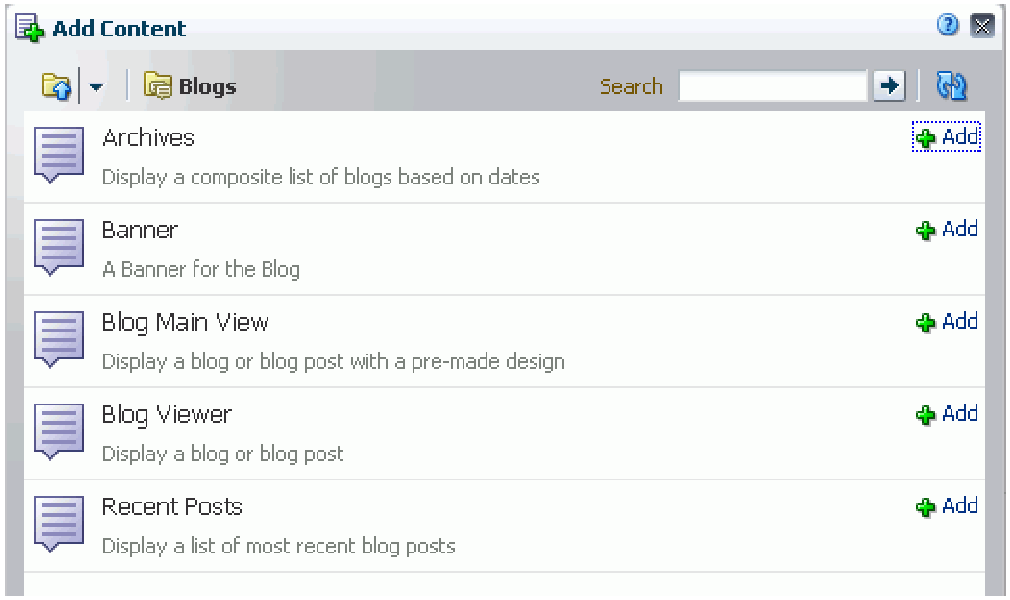
   Tip: The presence or location of this section depends on how the Resource Catalog is configured. For example, in the default Resource Catalog, click **Social and Communication**, then click **Open** next to **Blogs**.

Figure 50–9 Blogs Folder in Default Resource Catalog



7. Click **Add** next to the blog task flow that you want to add to your page (Figure 50–10). For descriptions of the blog task flows provided by Spaces, see Section 50.2.1, "Understanding the Blog Task Flows."

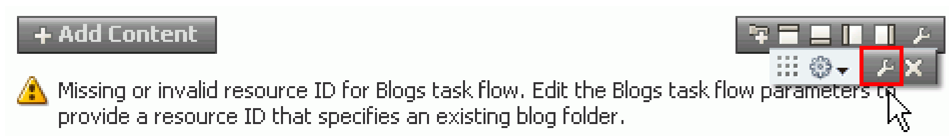
Figure 50–10 Adding a Blog Task Flow



8. Click **Close** to close the Resource Catalog.

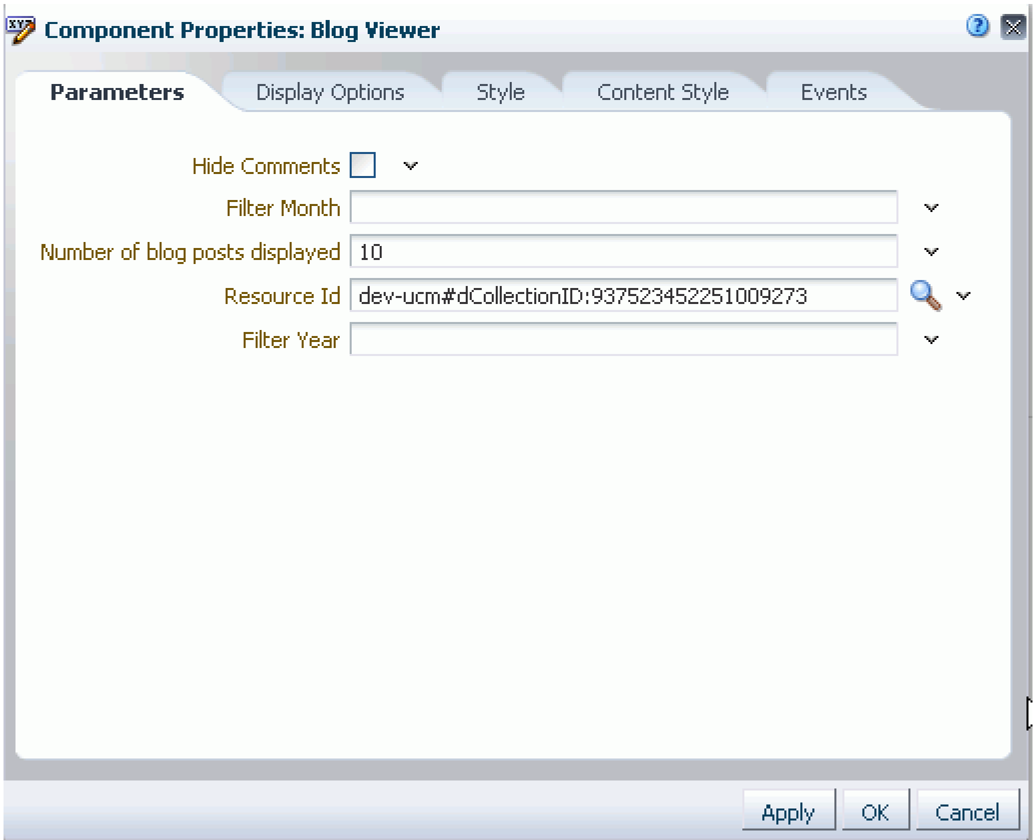
   The selected blog task flow is added to the page, displaying a message that the resource ID is missing or invalid (Figure 50–11).

Figure 50–11 Blog Task Flow Added to a Page



9. Click the **Edit** icon, highlighted in Figure 50–11.
10. In the Component Properties dialog, on the **Parameters** tab, paste the resource ID that you copied in step 3 into the **Resource Id** field (Figure 50–12).

Figure 50–12 Component Properties Dialog of a Blog Viewer Task Flow



For information about the other blog properties that you can set in the Component Properties dialog, see Section 50.6, "Setting Blog Properties."

11. Click **OK**.

    The new blog task flow is added to the page (Figure 50–13).

Figure 50–13 A New Blog Viewer Task Flow

After adding a blog task flow, you can perform blog actions provided by the task flow, such as adding blog posts, as described in Section 50.7.2, "Creating a Blog Post."

50.4.2 Creating a Blog Using the Blog Page Style

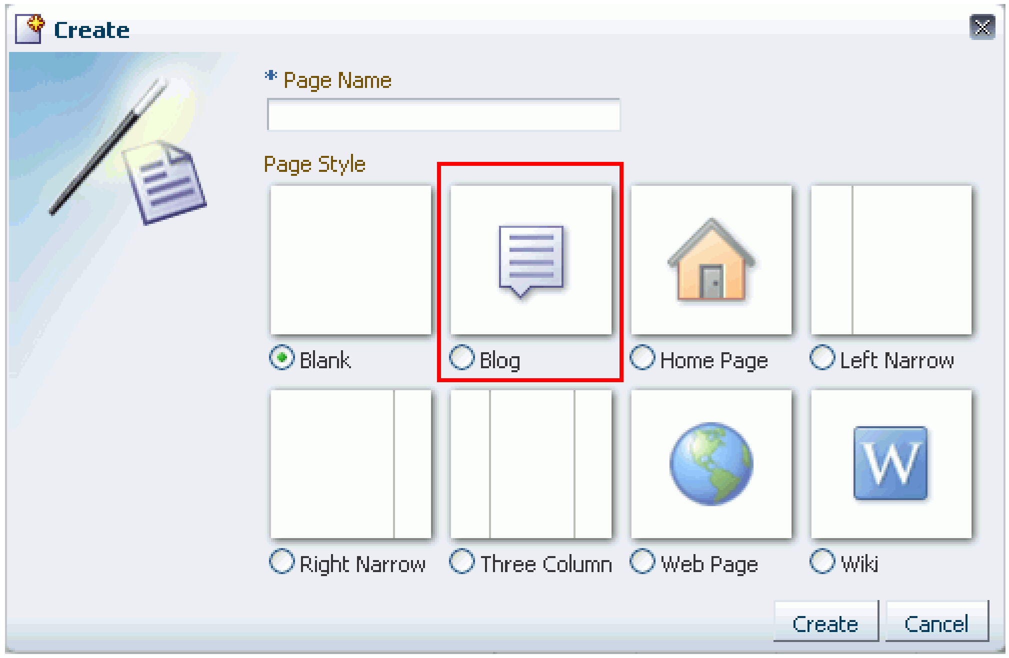
To understand the differences between the two methods of creating a blog, see Section 50.2, "What You Should Know About Blogs."

To create a dedicated blog page using the Blog page style:

1. Navigate to the space in which you want to create a blog and open the Create Page dialog.
2. In the **Page Name** field, enter a display name for the dedicated blog page.

3. From the **Page Style** options, select **Blog** (Figure 50–14).

Figure 50–14 The Blog Page Style



Note: The Blog page style becomes available in the Create dialog in a space only if Spaces is integrated with Content Server 11*g*, and the Documents service is enabled for the space.

For information about setting up a connection to Content Server, see "Registering Content Repositories" section in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. For information about enabling the Documents service, see Section 53.10.1, "Enabling and Disabling Services Available to a Space."

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4. Click **Create**.

   The newly created blog page displays as a separate page (Figure 50–15). The location of the page depends on the page template used in your space.

Figure 50–15 A Blog Created Using the Blog Page Style

To add blog posts to your newly created blog, see Section 50.7.2, "Creating a Blog Post."

50.5 Subscribing to a Blog

Users can subscribe to be notified whenever a blog entry is posted or commented upon in a space. Owning a blog does not automatically subscribe a blog owner to it. A blog owner must also explicitly subscribe to receive blog notifications. For information about how to subscribe to a blog, see Section 39.3.2, "Setting Space-Level Subscriptions." Whenever there is a change, you are notified through your selected messaging channel. For information about messaging channels, see Section 39.2, "Establishing and Managing Your Messaging Channels and Filters."

There is no subscription available for blogs in the Home space. However, you can subscribe to be notified of changes to specific blog posts. For information about subscribing to a specific blog post, see Section 50–7, " Managing Blog Posts."

50.6 Setting Blog Properties

The blog task flows and the Blog page style have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer.

The following sections provide information about properties of the blog task flows and Blog page style and describe the properties on the **Parameters** tab for each blog task flow and the Blog page style:

- Section 50.6.1, "What You Should Know About Blog Properties"
- Section 50.6.2, "Setting Blog Archives Task Flow Properties"
- Section 50.6.3, "Setting Blog Banner Task Flow Properties"
- Section 50.6.4, "Setting Blog Main View Task Flow Properties"
- Section 50.6.5, "Setting Blog Viewer Task Flow Properties"
- Section 50.6.6, "Setting Recent Posts Task Flow Properties"

50.6.1 What You Should Know About Blog Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. These properties are unique to the task flow type. For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6.4, "Working with Component Display Options" and Section 18.6.6, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. This tab is available for a Blog page style, but not for blog task flows. For more information, see Section 18.6.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

50.6.2 Setting Blog Archives Task Flow Properties

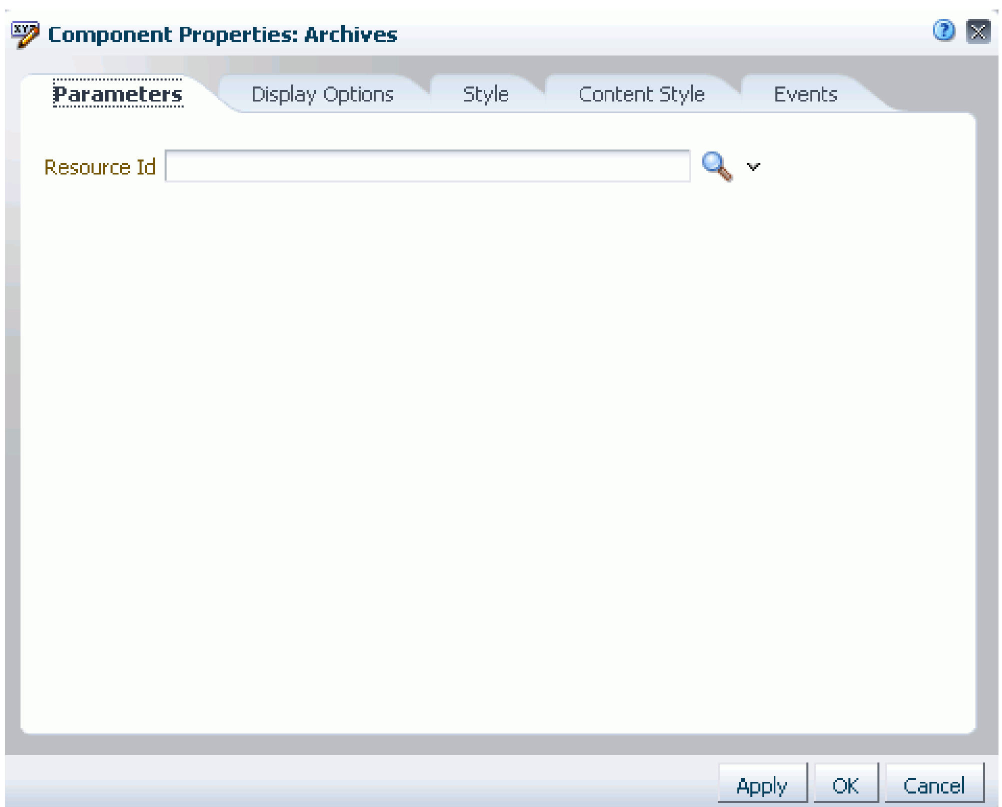
The blog Archives task flow displays a composite list of blogs based on dates.

See Also: Section 50.2.1, "Understanding the Blog Task Flows"

Properties that are unique to the Archives task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 50–16).

Tip: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 50–16 Blog Archives Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

50.6.2.1 Blog Archives Task Flow Parameters

Table 50–2 describes the parameters that are unique to the blog Archives task flow.

Table 50–2 Blog Archives Task Flow Parameters

Parameter	Description
`Resource Id`	The resource ID of the blog folder (see Figure 50–8), which can be specified in the following formats: ■ *`connection_name/path_to_folder`* Where, *`connection_name`* is the name of the Content Server connection, and *`path_to_folder`* is the path to the folder on Content Server that you want to expose as a blog. ■ *`connection_name`*`#dCollectionID:`*`dCollectionId`* Where, *`connection_name`* is the name of the Content Server connection, and *`dCollectionId`* is the collection ID of the folder on Content Server that you want to expose as a blog.

50.6.3 Setting Blog Banner Task Flow Properties

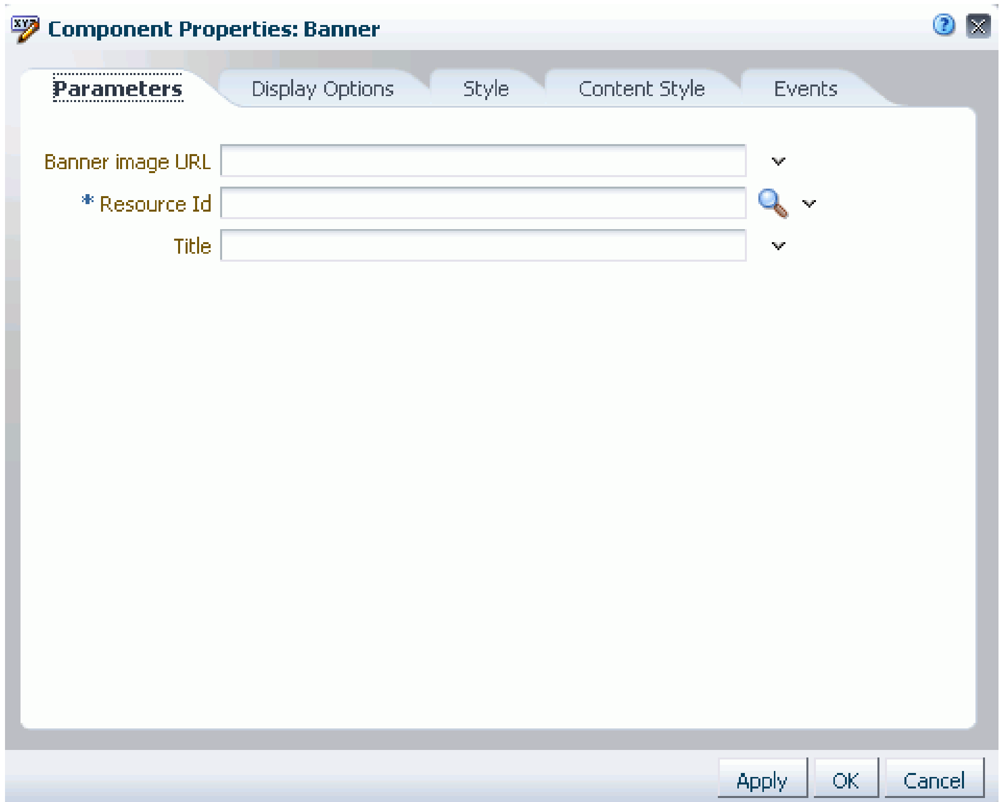
The blog Banner task flow displays a banner for the blog.

> **See Also:** Section 50.2.1, "Understanding the Blog Task Flows"

Properties that are unique to the blog Banner task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 50–17).

> **Tip:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 50–17 Blog Banner Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

50.6.3.1 Blog Banner Task Flow Parameters

Table 50–3 describes the parameters that are unique to the blog Banner task flow.

Table 50–3 Blog Banner Task Flow Parameters

Parameter	Description
`Banner image URL`	(Optional) The background image to be used in the blog banner. When not specified, the background image will default to an image provided by the current skin.
`Resource Id`	The resource ID of the blog folder (see Figure 50–8), which can be specified in the following formats: ■ *`connection_name/path_to_folder`* Where, *`connection_name`* is the name of the Content Server connection, and *`path_to_folder`* is the path to the folder on Content Server that you want to expose as a blog. ■ *`connection_name`*`#dCollectionID:`*`dCollectionId`* Where, *`connection_name`* is the name of the Content Server connection, and *`dCollectionId`* is the collection ID of the folder on Content Server that you want to expose as a blog.
`Title`	(Optional) The title to be used for the blog banner. Default: The blog folder name.

50.6.4 Setting Blog Main View Task Flow Properties

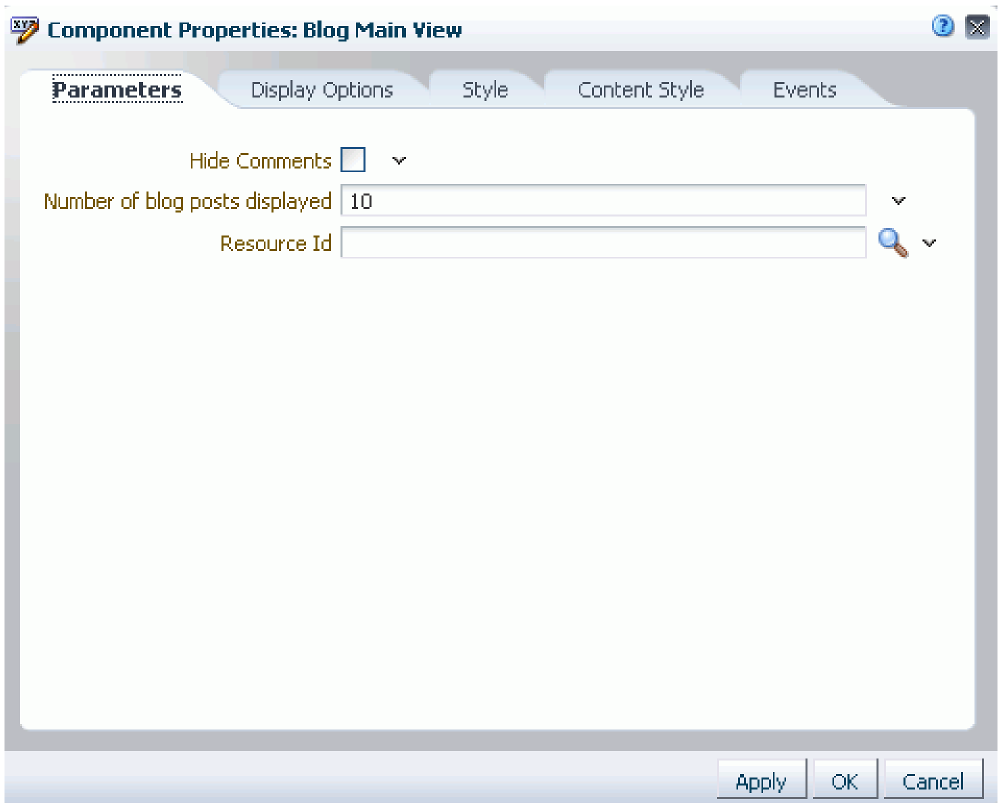
The Blog Main View task flow displays a blog or blog post with a default design.

> **See Also:** Section 50.2.1, "Understanding the Blog Task Flows"

Properties that are unique to the Blog Main View task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 50–18).

> **Tip:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 50–18 Blog Main View Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

50.6.4.1 Blog Main View Task Flow Parameters

Table 50–4 describes the parameters that are unique to the Blog Main View task flow.

Table 50–4 Blog Main View Task Flow Parameters

Parameter	Description
`Hide Comments`	Specifies whether the Comments feature is exposed: ■ Selected: Hide the Comments link and pane. ■ Deselected (default): Show the Comments link and pane.

Table 50–4 (Cont.) Blog Main View Task Flow Parameters

Parameter	Description
`Number of blog posts displayed`	The number of blog posts displayed in the Blog Main View before the Next and Previous icons are enabled. Default: `10`
`Resource Id`	The target blog resource to display. This can be either a folder ID (see Figure 50–8), in which case the blog listing for this folder will display, or a document ID, in which case the blog post will display. A folder can be specified in the following formats: ■ *`connection_name/path_to_folder`* Where, *`connection_name`* is the name of the Content Server connection, and *`path_to_folder`* is the path to the folder on Content Server that you want to expose as a blog. ■ *`connection_name`*`#dCollectionID:`*`dCollectionId`* Where, *`connection_name`* is the name of the Content Server connection, and *`dCollectionId`* is the collection ID of the folder on Content Server that you want to expose as a blog. **Note**: To allow users to add new blog posts (by clicking **New Post** in the task flow), the specified folder must have a security group assigned in Content Server.

50.6.5 Setting Blog Viewer Task Flow Properties

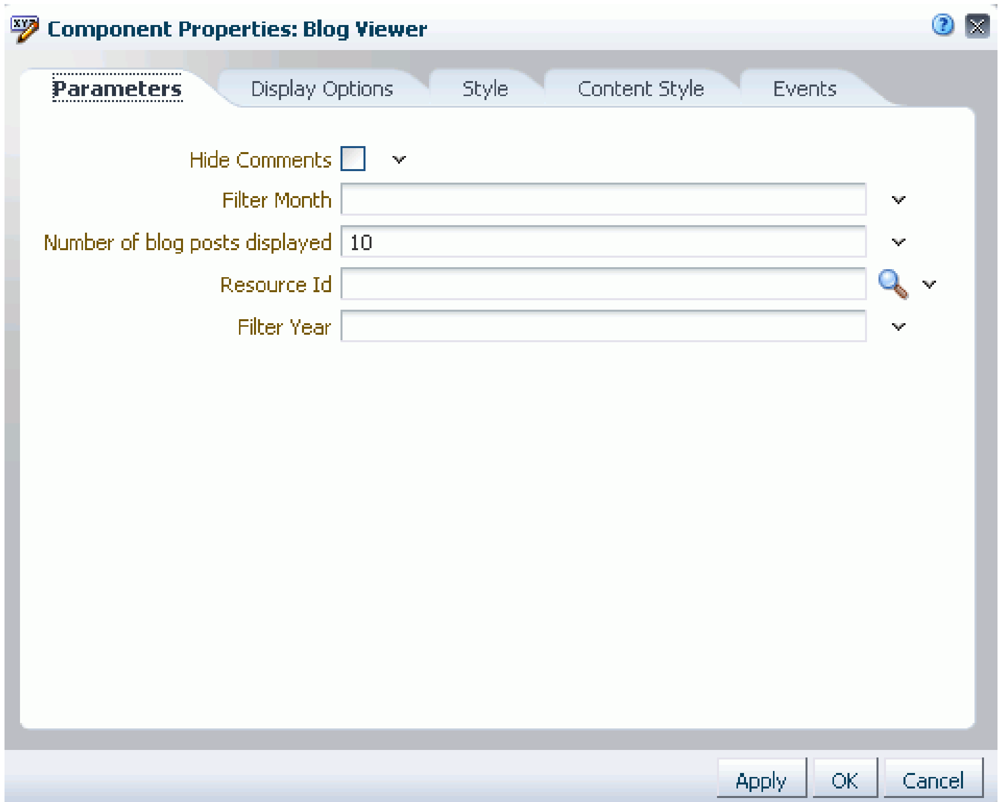
The Blog Viewer task flow displays a blog or blog post.

> **See Also:** Section 50.2.1, "Understanding the Blog Task Flows"

Properties that are unique to the Blog Viewer task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 50–19).

> **Tip:** For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 50–19 Blog Viewer Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

50.6.5.1 Blog Viewer Task Flow Parameters

Table 50–5 describes the parameters that are unique to the Blog Viewer task flow.

Table 50–5 Blog Viewer Task Flow Parameters

Parameter	Description
`Hide Comments`	Specifies whether the Comments feature is exposed: ▪ Selected: Hide the Comments link and pane. ▪ Deselected (default): Show the Comments link and pane.
`Filter Month`	A number from 1 to 12 specifying the target month used to filter blog entries. For this parameter to take effect, the `Filter Year` parameter must also be specified. Example: `10` (October)
`Number of blog posts displayed`	The number of blog posts displayed in the Blog Digest Viewer before the Next and Previous icons are enabled. Default: `10`

Table 50–5 (Cont.) Blog Viewer Task Flow Parameters

Parameter	Description
`Resource Id`	The target blog resource to display. This can be either a folder ID (see Figure 50–8), in which case the blog listing for this folder will display, or a document ID, in which case the blog post will display. A folder can be specified in the following formats: ■ *`connection_name/path_to_folder`* Where, *`connection_name`* is the name of the Content Server connection, and *`path_to_folder`* is the path to the folder on Content Server that you want to expose as a blog. ■ *`connection_name`*`#dCollectionID:`*`dCollectionId`* Where, *`connection_name`* is the name of the Content Server connection, and *`dCollectionId`* is the collection ID of the folder on Content Server that you want to expose as a blog. **Note**: To allow users to add new blog posts (by clicking **New Post** in the task flow), the specified folder must have a security group assigned in Content Server.
`Filter Year`	A four-digit number specifying the target year used to filter blog entries. Example: `2012`

50.6.6 Setting Recent Posts Task Flow Properties

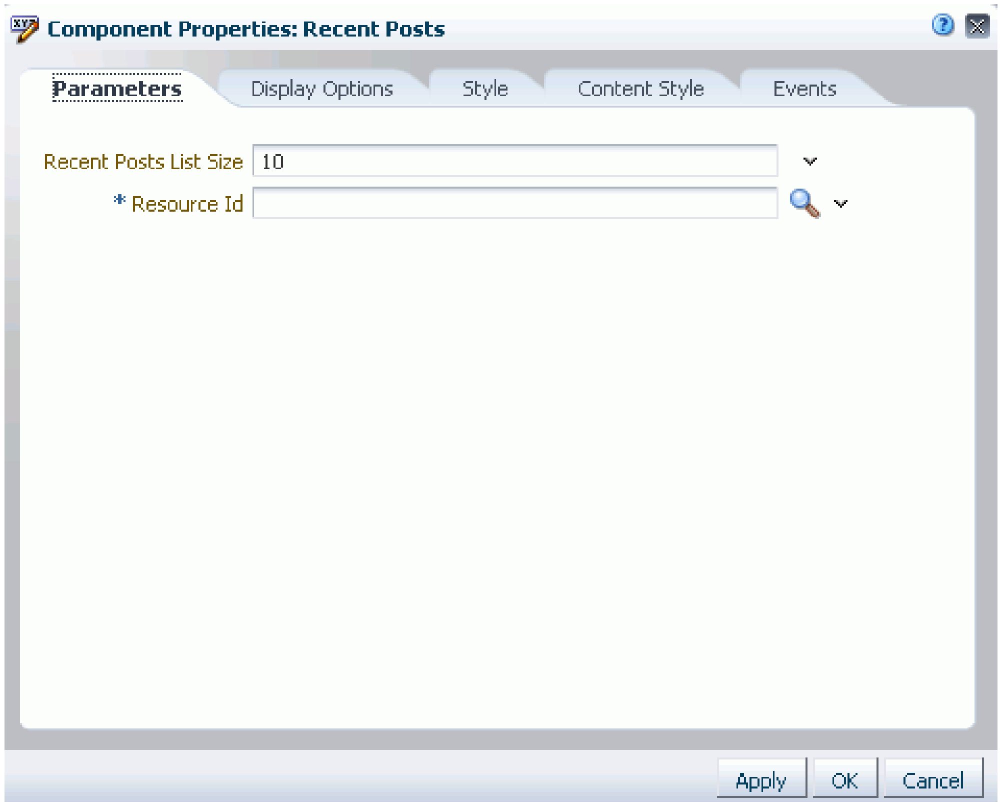
The Recent Posts task flow displays a list of most recent blog posts.

See Also: Section 50.2.1, "Understanding the Blog Task Flows"

Properties that are unique to the Recent Posts task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 50–20).

Tip: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

Figure 50–20 Recent Posts Task Flow Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

50.6.6.1 Recent Posts Task Flow Parameters

Table 50–6 describes the parameters that are unique to the Recent Posts task flow.

Table 50–6 Recent Posts Task Flow Parameters

Parameter	Description
`Recent Posts List Size`	The number of recent posts to display. Default: `10`
`Resource Id`	The resource ID of the blog folder (see Figure 50–8), which can be specified in the following formats: ■ *`connection_name/path_to_folder`* Where, *`connection_name`* is the name of the Content Server connection, and *`path_to_folder`* is the path to the folder on Content Server that you want to expose as a blog. ■ *`connection_name`*`#dCollectionID:`*`dCollectionId`* Where, *`connection_name`* is the name of the Content Server connection, and *`dCollectionId`* is the collection ID of the folder on Content Server that you want to expose as a blog.

50.7 Working with Blog Posts

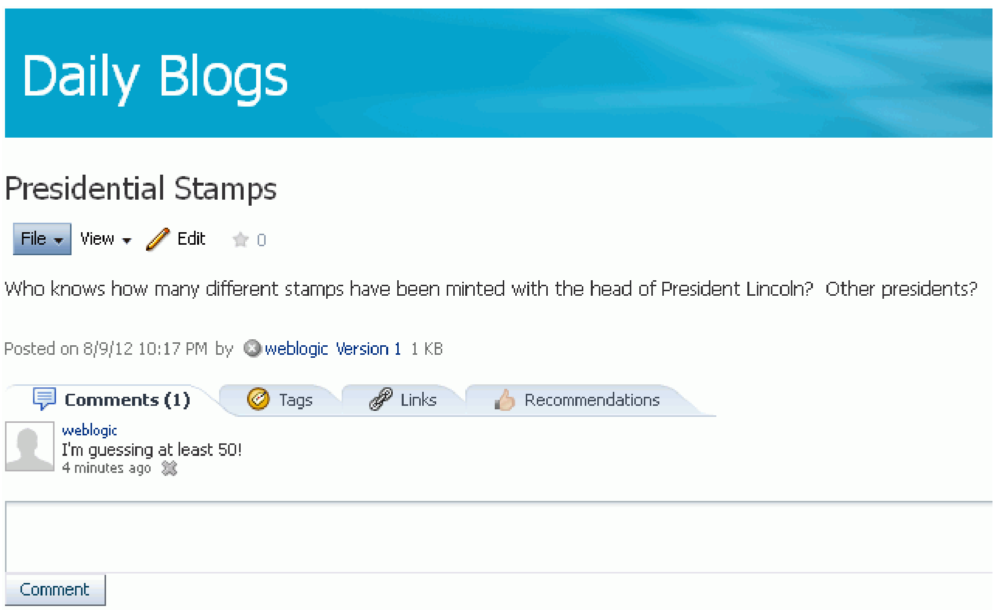
The following sections describe how to add and manage blog post:

- Section 50.7.1, "What You Should Know About Blog Posts"
- Section 50.7.2, "Creating a Blog Post"
- Section 50.7.3, "Viewing a Blog Post"
- Section 50.7.4, "Editing a Blog Post"
- Section 50.7.5, "Deleting a Blog Post"
- Section 50.7.6, "Managing Blog Posts"

50.7.1 What You Should Know About Blog Posts

For each blog post, you can use the controls on the blog post page to perform tasks such as edit, subscribe to, share, and comment on the post (Figure 50–21). For information about these tasks, see Section 50.7.6, "Managing Blog Posts."

Figure 50–21 A Blog Post



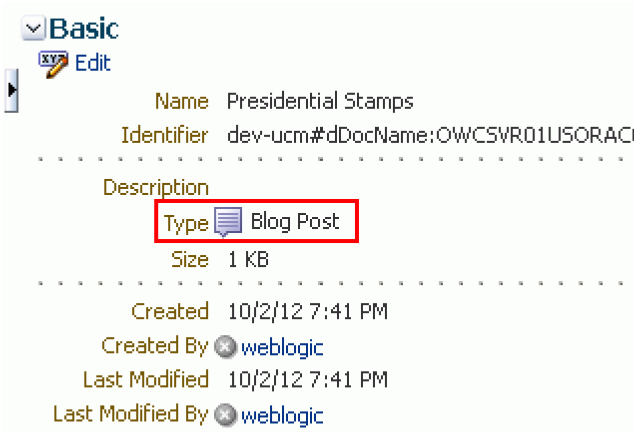
When you create a blog post, a file is created in the content repository with the same name as the blog post title. Subsequently, you can change the blog post title when editing the blog post, but keep in mind that this changes only the display title; the name of the file for the blog post remains the original name. Therefore, you cannot later create a new blog post with the same initial title as the original title, as that file name already exists.

You use the Rich Text Editor (RTE) to add the content and style elements to a blog post. The RTE provides features such as the ability to embed images, create new resources on the fly, and add content. For more information, see Section 43.11, "Using the Rich Text Editor (RTE)."

By default, the entire content of a blog post gets displayed on the blog page. You can choose to display only a selected paragraph by using the **Snippet** icon in the RTE (see Table 43–8, " Rich Text Editor Toolbar Icons and Controls on Rich Text Tab").

When you create a blog post, the `Type` property of the blog post file is set to `Blog Post` (Figure 50–22). To view the properties of a blog post file, see Section 43.22.2, "Working with File Properties."

Figure 50–22 Blog Post Type



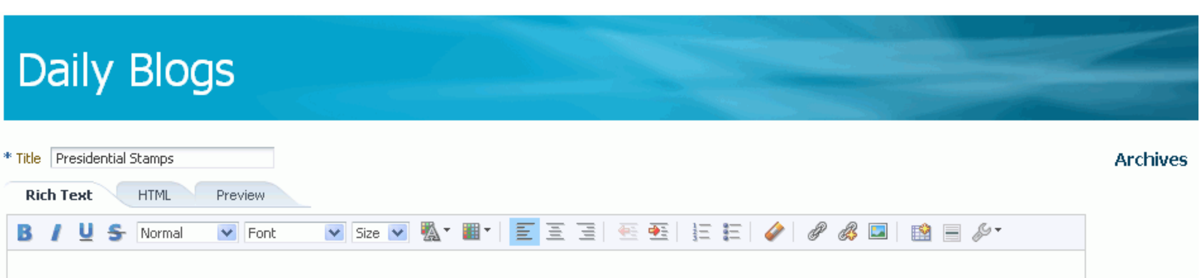
50.7.2 Creating a Blog Post

To create a blog post:

1. Navigate to the blog in which you want to create a blog post.
2. Click **New Post** to open the Rich Text Editor (RTE).
3. In the RTE, in the **Title** field, enter a display name for the blog post (Figure 50–23), up to 250 characters. Special characters (such as `\ / : [ ] * ' " |` ?) are allowed.

> **Note:** The initial title you give a blog post becomes the name of the file that is created in the content repository for the blog post. Subsequently, you can change the blog post title when editing the blog post, but keep in mind that this changes only the display title; the name of the file for the blog post remains the original file name. Therefore, you cannot later create a new blog post with the same initial title as the original title, as that file name already exists. No matter what title you give a blog post, you can always edit the blog post and change the title.

Figure 50–23 Creating a Blog Post



4. Add and preview the text, formatting, styling, and in the **Rich Text**, **HTML**, and/or **Preview** tabbed panes. For information about working with the RTE, see Section 43.11, "Using the Rich Text Editor (RTE)."

5. On the **Preview** tab, choose a mode for publishing the blog post:

   - **Draft**: Select to mark the blog post as a draft. On a blog page, a draft blog post is marked as "Draft". Only the author of a blog post and space moderators can view draft posts. Users with just the viewing permissions can view only published posts.
   - **Publish**: Select to publish the blog post. On a blog page, a published post is marked as "Posted".

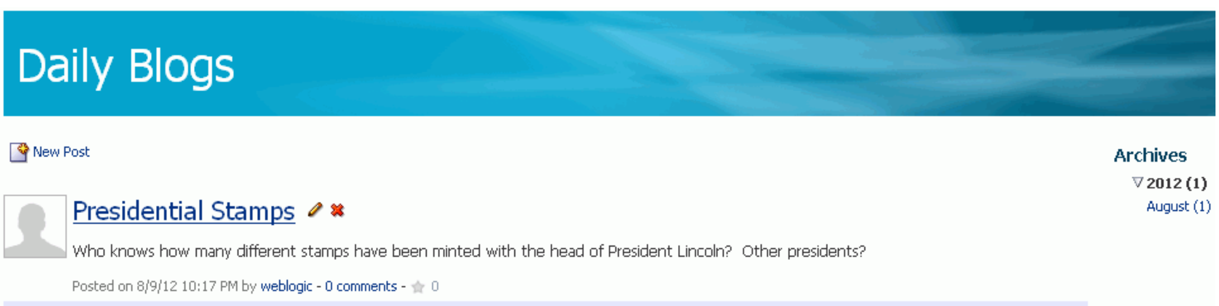
     By default, a post is published with the current date and time details. If you want the blog post to be published on a future date and time, use the date picker. The blog post will be published automatically on the specified date.

     Note: The Activity Stream shows a blog post that has a publish date, regardless of the publish date. Only draft posts are not listed in the Activity Stream.

6. Click **Create** to save your changes and exit the editor.

The new blog post appears as the top-most entry in its blog (Figure 50–24).

Figure 50–24 Blog Page Displaying Blog Post



On the **Documents** page in the space, the new blog post (`Presidential Stamps`) is saved as a document under its parent blog folder (`Daily Blogs`), which in turn, is stored under the `Blogs` folder, as shown in Figure 50–25.

Figure 50–25 Blog and Blog Post in the Document Hierarchy

50.7.3 Viewing a Blog Post

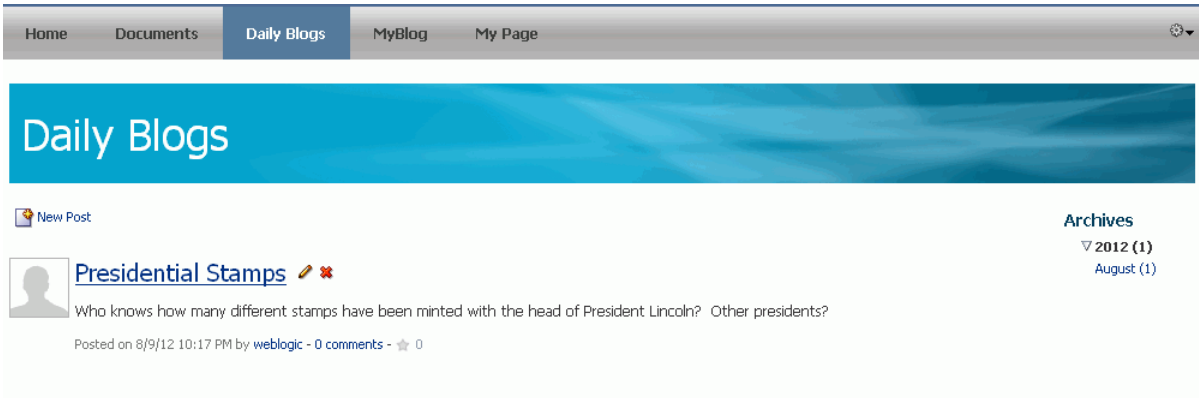
You can view a blog post by opening the page in which it resides, or by opening it as a document in the Document Viewer preview pane.

To view a blog post from a page in which it resides:

- Open the page containing the blog task flow, or created used the Blog page style. The way you open the page depends on the page template in use in your space.

  Figure 50–26 shows a blog post on a page created using the Blog page style.

Figure 50–26 Opening a Blog Post on a Blog Page



To view a blog post in a Document Viewer preview pane:

1. On the **Documents** page or in a Document Explorer, Document Manager, or Folder Viewer task flow, navigate to the `Blogs` folder.
2. Open the blog folder that contains the blog post.
3. Click the blog post file to open it in the Document Viewer preview pane.

   Figure 50–27 shows a blog post in the document hierarchy.

Figure 50–27 Blog and Blog Post in the Document Hierarchy

From the Document Viewer preview pane, if you want to view just the content of the blog post in a separate tab in your browser, click the **View** menu, and select **Open in Browser**.

50.7.4 Editing a Blog Post

You use the Rich Text Editor (RTE) to add or revise the content of your blog posts.

When you open a blog post for editing, Spaces automatically checks the file out. If another user is already editing a blog post when you try to open it, the Documents service displays a message that the blog post has already been checked out. On the **Documents** page or in a Documents service task flow, a lock icon displays alongside a blog post that is checked out. When you hover the mouse cursor over the lock icon, the name of the user who has checked out the blog post displays.

Whenever you save changes to a blog post, Spaces automatically checks the file in and creates a new version of the blog post. This means that the last saved version of a wiki blog post appears as the current version.

To edit a blog post:

1. Open your blog post in edit mode in any of the following ways, depending on your view:
   - On the **Documents** page, or in a Documents service task flow, click in the row of the blog post file you want to edit, then click the **File** menu, and select **Edit**, or right-click the file and select **Edit** from the context menu to open the blog post in the RTE.
   - In the Document Viewer preview pane, click the **Edit** action.
   - In a blog page or a blog task flow, click the **Edit Post** (pencil) icon for the required blog post.
   - In a blog page or a blog task flow, open the blog post by clicking its title, then click the **Edit** action.
2. In the RTE, add, revise, and preview text, formatting, styling, and in the **Rich Text**, **HTML**, and/or **Preview** tabbed panes. For information about working with the RTE, see Section 43.11, "Using the Rich Text Editor (RTE)."
3. Click **Save** to save your changes and continue editing, or click **Save and Close** to save your changes and exit the editor.

50.7.5 Deleting a Blog Post

You can delete a blog post in the following two ways:

- In a blog page or a blog task flow, click the **Delete Post** icon (Figure 50–28) for the required blog post.

Figure 50–28 Deleting a Blog Post

- Navigate to the blog post on the **Documents** page or a Documents service task flow, and delete the blog post file as described in Section 43.16, "Deleting Folders and Files."

50.7.6 Managing Blog Posts

Table 50–7 lists the tasks that you can perform to manage blog posts, with links to the steps that describe how to perform each task for any kind of file.

Table 50–7 Managing Blog Posts

Task	Description	Documentation
Opening a blog post for viewing	You can open a blog post on the **Documents** page or in a Documents service task flow. If your blog post is exposed through a blog page, you can open the blog page to view the blog post in the page.	Section 50.7.3, "Viewing a Blog Post"
Downloading a blog post	You can download blog posts from the content repository to your local system. You can access the **Download** action from the **Documents** page, Documents service task flows, or the Document Viewer preview pane. The **Download** action is not available when you open a blog post directly from the page that contains it. **Note**: Spaces does not support uploading a blog post from the file system. If you upload an HTML file, you cannot convert it to a blog post due to differences in underlying metadata.	Section 43.12.3, "Downloading a File"
Renaming a blog post	You can rename a blog post as desired.	Section 43.13, "Renaming a Folder or File" Section 43.22.2, "Working with File Properties"
Viewing and adding tags to a blog post	You can add tags to a blog post to specify keywords related to the content of the post to make it more widely discoverable in search results.	Section 43.20, "Working with Tags"
Viewing, adding, and deleting comments on a blog post	You can associate comments with a blog post to provide additional information that you may want to convey to other users about it. **Note**: A user with view-only permissions can add comments to a blog post by clicking the **comments** link below the post. The comment display is limited to 500 characters.	Section 43.19, "Viewing, Entering, and Deleting Comments on a File"
Viewing and deleting versions of a blog post	Every time you save a blog post, Spaces saves a new version of the post and maintains the version history.	Section 43.21, "Viewing and Deleting File Version History"
Viewing and modifying properties of a blog post	You can view the basic and advanced properties associated with a blog post. However, you can modify only the name and description of a blog post.	Section 43.22.2, "Working with File Properties"

Table 50–7 (Cont.) Managing Blog Posts

Task	Description	Documentation
Viewing and adding links to other resources (requires `Create Links` permission; see Table 54–3, " Space Permissions - Advanced Permission Model")	Using the **Select Resource** and **New Resource** icons in the RTE, you can add links from a blog post to existing resources, or create and link to new resources. Note that these inline links are not added to the tab associated with the details of the blog post.	Table 43–8, " Rich Text Editor Toolbar Icons and Controls on Rich Text Tab" (**Select Resource** and **New Resource** icons)
Opening or saving blog posts as PDF files	You can open or save the PDF version of the currently open blog post. This choice is available if Content Server is configured to convert blog posts to PDF format, and your application administrator must configure the WebCenter Conversion component, as described in "Enabling the Conversion of Wikis and Blogs into PDFs" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.	Section 43.26, "Opening or Saving PDF Files"
Sharing the URL of a blog post	You can directly access a blog post by using its URL. You can share the link by publishing it to the Activity Stream or sending the link in a mail message.	Section 43.27, "Sharing the URL for a Folder or File"
Subscribing to a blog post	You can subscribe to a blog post to receive notifications for activities such comments, likes, updates, or deletions. You are notified through your selected messaging channel.	Section 43.28, "Subscribing to a File" and Section 39.3.3.3, "Subscribing to a Blog Entry"
Liking or unliking a blog post	To indicate that a blog post is of particular interest to you, you can "like" it. If a post is already liked, you can "unlike" it if you no longer wish to highlight your preference.	Section 43.29, "Liking and Unliking a File"

Part XI

Planning and Building a Space

Part XI of the User's Guide describes how to build and manage spaces other than Home spaces (for information about Home spaces, see Chapter 32, "Exploring the Home Space"). It includes general information about spaces as well as the specifics of managing space members and roles, administering space resources, and working with a space hierarchy that includes subspaces.

Part XI includes the following chapters:

- Chapter 51, "Understanding Space Basics"
- Chapter 52, "Working with Space Templates"
- Chapter 53, "Managing a Space"
- Chapter 54, "Managing Space Members and Roles"
- Chapter 55, "Administering Spaces and Templates"
- Chapter 56, "Working with a Space Hierarchy"

51

Understanding Space Basics

WebCenter Portal: Spaces supports the formation and collaboration of project teams and communities of interest through *spaces*. A space provides a dedicated and readily accessible area for relevant services, pages, and content and supports the inclusion of specified members, each of whom have defined roles associated with permissions in the space. Spaces bring people together in a virtual environment for ongoing interaction and information sharing—in essence, spaces enable the formation and support of social networks.

This chapter provides information about working with spaces. It contains the following sections:

Audience

This chapter is intended for Spaces users who want to learn more about working with spaces in a Spaces application.

51.1 What You Should Know About Spaces

Within any company, large groups or departments frequently must break into smaller groups to focus on a particular goal, project, or even topic. Or, outside of a professional environment, communities of people with a common interest may wish to share and post information to foster the community. To help these groups organize themselves, Spaces provides the notion of *spaces*, which bring content together through a single access point, accessible through the Spaces application or by direct URL, to help groups of people share information and interact in a collaborative social network. For example:

- Internal departments within your company that must share common information, such as HR, Sales, and so on.
- Software projects that must bring together the efforts and input of Development, Quality Assurance, Product Management, Documentation, and Curriculum Development.
- Special interest groups that share a common interest in a particular topic.

Many features and tools to facilitate teamwork are built into the space framework, instantly allowing space members to share documents, discuss issues, schedule meetings, exchange messages, create lists, and much more. Spaces can be monitored through RSS feeds, which you can add to your personalized view of the Home space or view in any external RSS reader.

Spaces provides templates for creating spaces that support different types of endeavors. The flexibility of space templates means that every space can have a different look and feel. You can use an out-of-the-box template, or create your own custom templates using an existing space as the basis for the template. For information about space templates, see Chapter 52, "Working with Space Templates." After creation, Spaces can be completely customized, including the navigation controls, the color scheme, and the look and feel of any task flow or portlet, all from within the browser.

When you create a space, you are the space *moderator*. As the moderator, you manage the space and establish the rules for membership to a space (see Section 54.1, "Setting Up the Membership Policy for a Space"). When a new space is created, Spaces creates default space roles with default permissions. The space moderator can assign space members to these roles and modify the default permissions as required, or create new custom roles (see Section 54.2, "Managing Roles and Permissions for a Space" and Section 54.3, "Managing Members and Assigning Roles").

Any space can be parent to one or more *subspaces*. This allows you to develop a *space hierarchy*. For more information, see Chapter 56, "Working with a Space Hierarchy."

51.2 What Does a Space Look Like?

A newly created space may look similar to Figure 51–1 (side navigation) or Figure 51–1 (top tabbed navigation). It is important to realize, however, that your Spaces administrator or the space moderator has most likely created and applied a custom page template to expose or hide tabs, features, and display a unique look and feel for your organization. A new space that you create may look nothing like these examples.

Figure 51–1 Home Page of a New Space Using the Default Side Navigation Page Template

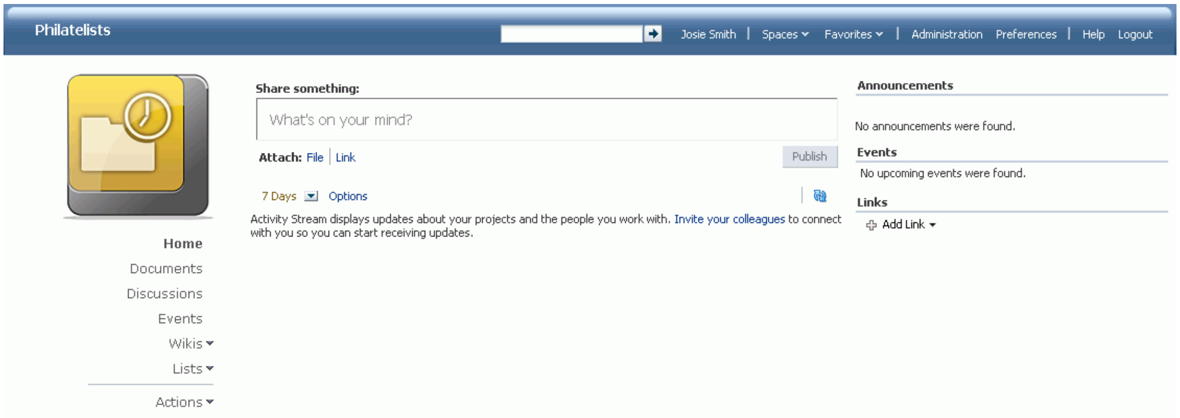
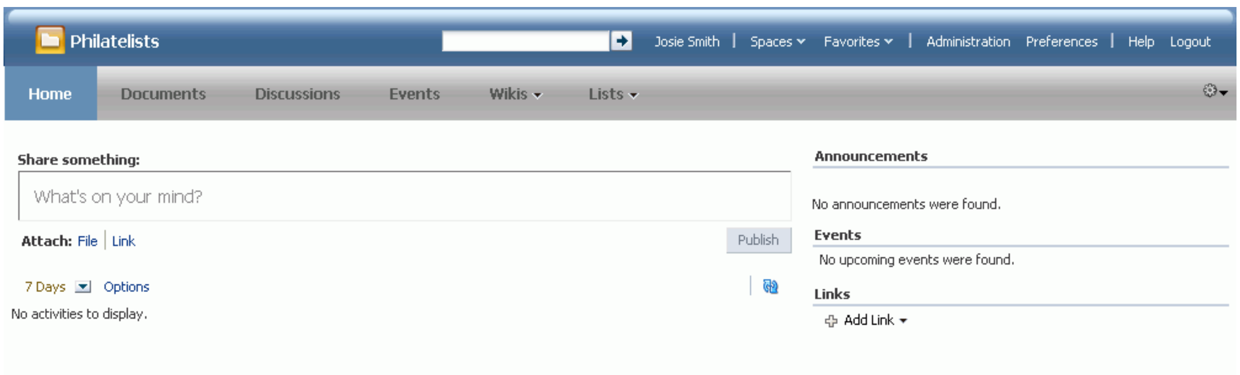


Figure 51–2 Home Page of a New Space Using the Default Top Navigation Page Template



Each page in a space provides access to related information. In the example space above, the **Home** page summarizes important information about the Philatelists club, the **Documents** page lists folders and files associated with the Philatelists club, the **Discussions** page provides a view of ongoing discussions with discussion forum management features, and so on. The space moderator (or any space member assigned the `Moderator` role or a custom role that includes the `Spaces-Manage Configuration` permission) uses the pages available through the space administration settings to build and manage the space, expanding and customizing it as needs change and grow. For information about administration tasks in a space, see Chapter 52, "Working with Space Templates," Chapter 53, "Managing a Space," Chapter 54, "Managing Space Members and Roles." For information about administering all spaces and space templates as the Spaces application administrator, see Chapter 55, "Administering Spaces and Templates."

51.3 Interacting with Spaces Before Logging In (Public User)

Public spaces are available to anyone with Internet access, without logging in to Spaces, allowing a space to be shared with non-members and people outside of the Spaces community.

Public users who are not registered Spaces users can access public spaces in two ways:

- Directly, using the space URL provided to them.
- From the Spaces Welcome page, if their installation is configured to display this page, exposing a link to public spaces (Figure 51–3).

Figure 51–3 Public Spaces Link on Welcome Page

The Spaces administrator controls what a public user can see or do at the application level. For more information, see Section 24.2.4, "Granting Permissions to the Public-User Role."

When a space is made public, the `Public-User` role in the space is automatically granted `View Pages and Content` permission in the space, which allows public users to view pages, lists, events, links and notes. To view announcements, discussions, and documents, the space moderator must explicitly grant these permissions, as described in Section 53.14.5, "Granting Public Access to a Space." The public permissions granted by the space moderator override the public permissions set by the administrator at the application level.

51.4 Viewing and Accessing Available Spaces

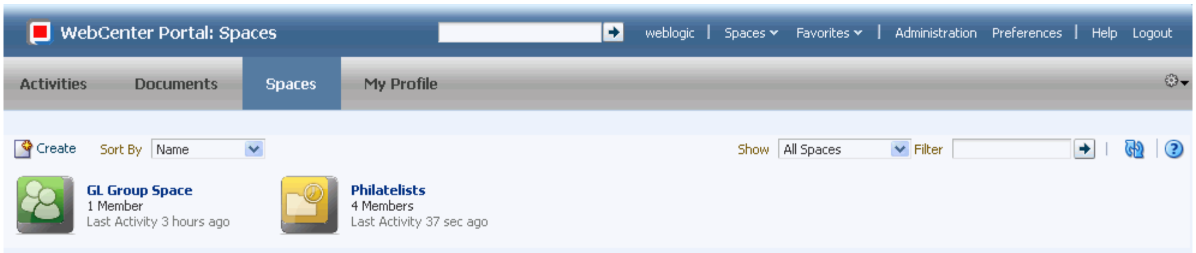
You can participate in multiple spaces and manage your space memberships on the **Spaces** page.

To view and access the spaces that are available to you:

1. Open the **Spaces** page (Figure 51–4) in either of the following ways:
   - In the Home space, click the **Spaces** tab.
   - From the **Spaces** menu, select **Browse Spaces**.

   Tip: You can also access the Home space using a pretty URL. See Appendix A.4, "User Interface URLs for Home Space Pages."

Figure 51–4 Spaces Page in the Home Space



2. On the **Spaces** page, from the **Show** list, select:

   - **All Spaces** (Figure 51–5) to show all spaces that are available to you, both public and private. Spaces defined as *hidden* when created are not shown.

Figure 51–5 Showing All Spaces

   - **Joined by Me** to display spaces of which you are a member.
   - **Moderated by Me** to display spaces for which you have moderator privileges.
   - **Closed Spaces** to display spaces available to you that have been closed by the space moderator (see Section 53.4.5, "Closing or Reactivating a Space"). The content of a closed space remains accessible and searchable to those who still want to reference it and space members can continue working in the space either by selecting **Closed Spaces** as described here, or by direct URL (`http://`*`host`*`:`*`port`*`/webcenter/spaces/`*`space name`*).

3. To list one or more specific spaces, enter a full or partial search term in the **Filter** field, then click the **Filter** icon to refresh the list with all spaces for which a match is found in the **Display Name**, **Description**, or **Search Keywords** (specified on the **General** page in the administration settings for the space).

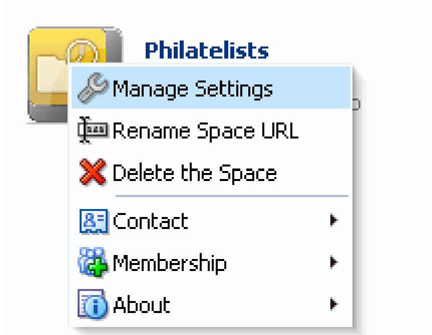
4. To clear the current search string and display all spaces, click the **Clear Filter** icon.

5. To refresh the list of spaces, first ensure that any prior search is cleared (click the **Clear Filter** icon), then click the **Refresh** icon.

6. To go to the Home page of a space, click the space name or icon.

7. To display a menu of actions available on the space, right-click a space icon or name to explore the actions that are available to you, depending on your permissions in the space (Figure 51–6):

Figure 51–6 Space Actions Menu



Note: Space administration selections (**Manage Settings**, **Rename Space URL**, and **Delete the Space**) are shown only if you are the space moderator or have `Manage Configuration` permission in the space.

Select the available actions, depending on your permissions in the space:

- **Manage Settings** to open the space administration settings pages. See Chapter 53, "Managing a Space."
- **Rename Space URL** to change a space URL that other people use to navigate to the space. See Section 53.14.2, "Changing a Space URL."
- **Delete the Space** to delete the space. See Section 53.16, "Deleting a Space."
- **Contact** menu:
  - **Subscribe** to open the Subscribe dialog, where you can select notification messages that you want to receive whenever the listed actions occur within the scope of the space. See Section 39.3.2, "Setting Space-Level Subscriptions."
  - **Send Mail to Members** and **Send Mail to Moderators**. See Section 51.5, "Sending Mail to Space Members or Moderators."
- **Membership** menu:
  - **Change Role** to change your role in the space. See Section 51.12, "Changing Your Role in a Space."
  - **Cancel Membership** to cancel your membership in the space. See Section 51.13, "Cancelling Your Space Membership."
- **About** menu:
  - **About this Space** to view information about the space. See Section 51.6, "Viewing Information About a Space."
  - **Similar Spaces** to view other spaces similar to the current space. A space is considered similar to another space if the same people perform similar actions in it, especially if they edit the content. For more information, see Section 51.7, "Viewing Spaces Similar to the Current Space."
  - **Share Link** to share the URL link to the space with others. See Section 53.14.1, "Publishing the Link to a Space."

51.5 Sending Mail to Space Members or Moderators

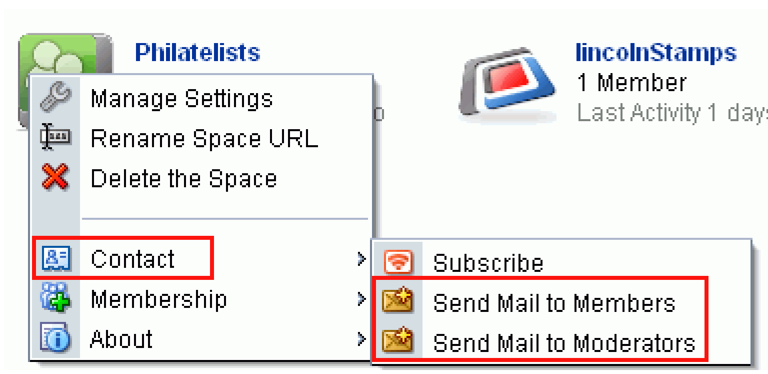
You can send mail to the members or the moderators of a space using the default mail distribution list for the space, or a custom distribution list. For more information, see Section 53.10.2, "Configuring the Mail Distribution List for a Space."

> **Note:** To use the task pane available through the Microsoft Office shared document management functionality (while editing a Microsoft Word, Excel, or PowerPoint file in a space) to send mail to members of a space, see Section 48.3.3.13, "Sending a Message."

To send mail to space members or moderators:

1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), locate the space to which the members or moderators belong, then right-click the space icon or name, and select **Contact**, then **Send Mail to Members** or **Send Mail to Moderators** (Figure 51–7).

Figure 51–7 Space Actions Menu Selection: Send Mail



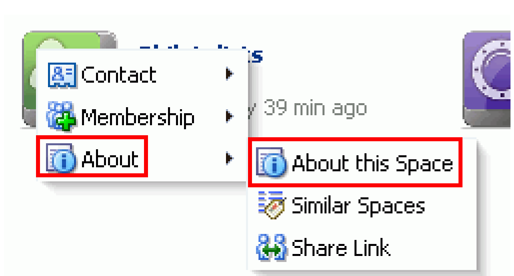
Your mail application opens, where you can compose and send mail to all members or moderators of the space.

51.6 Viewing Information About a Space

To view information about a space:

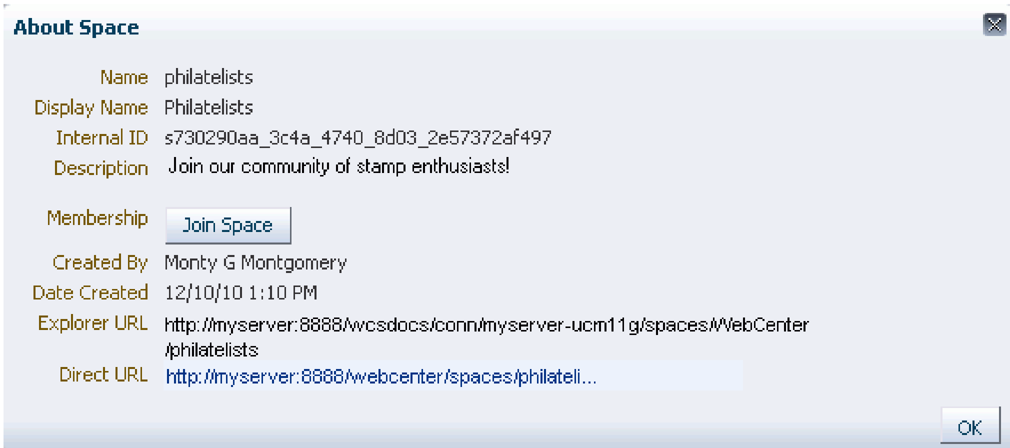
1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), locate the space that you want to learn about, then right-click the space icon or name, and select **About**, then **About this Space** (Figure 51–8).

Figure 51–8 Space Actions Menu: About this Space (for non-moderator role)



The About Space dialog opens (Figure 51–9).

Figure 51–9 About Space Dialog (for non-member)



2. Explore the information in the About Space dialog:

   – **Name**: Internal name of the space displayed in the space URL. To change the internal space name, see Section 53.14.2, "Changing a Space URL." Caution: When you change the internal space name, bookmarks to the space must be updated as they will no longer work.

   – **Display Name**: Display name of the space. This name displays at the top of the space and other places where spaces are available for selection, such as the Spaces Switcher menu and the **Spaces** page. To change the space display name, see Section 53.4.1, "Renaming a Space." Changing the display name does not impact the URL that people use to navigate to the space.

   – **Internal ID**: ID of the space, which other applications may use to reference this space.

   – **Description**: A description of the space, specified when creating the space or in the space administration settings, as described in Section 53.4.2, "Modifying the Description or Keywords for a Space."

   – **Membership**: Your role in the space. If you are not a member of this space and the space allows self-service membership, a **Join Space** button displays here. See Section 51.9.1, "Joining a Space (Registered Spaces User)."

   – **Created By**: User name of the space creator.

   – **Date Created**: Date and time that the space was created.

   – **Explorer URL**: URL used expose the folders and files in a space using Windows Explorer. See Section 48.4.1, "Adding a Space as a Network Place."

   – **Direct URL**: URL that provides direct access to the space.

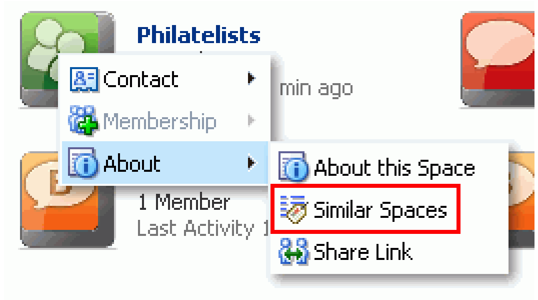
51.7 Viewing Spaces Similar to the Current Space

A space is considered similar to another space if the same people perform similar actions in it, especially if they edit the content. Similar Spaces is provided by the Activity Graph service. For more information, see Section 60.2.3, "Working with the Similar Spaces Task Flow."

To view a list of spaces similar to the current space:

1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), locate the space for which you want to see similar spaces, then right-click the space icon or name, and select **About**, then **Similar Spaces** (Figure 51–10).

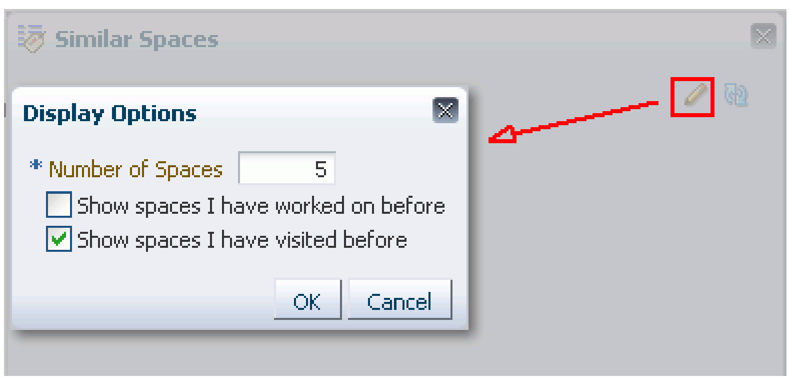
Figure 51–10 Space Actions Menu: Similar Spaces (for non-moderator role)



The Similar Spaces dialog opens.

2. Select a space to open, or click the **Display Options** (pencil) icon (Figure 51–11) to modify the criteria similar spaces.

Figure 51–11 Similar Spaces Display Options Dialog



51.8 Searching for a Space

To search for a space by a string in the Name or Description:

1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), enter a search string in the **Filter** field.
2. Click the **Filter** icon (Figure 51–12).

Figure 51–12 Filter Icon

The **Spaces** page displays spaces where the search string is found in the **Name** or **Description**.

3. To clear the current search string and display all spaces, click the **Clear Filter** icon (Figure 51–12).

Figure 51–13 Clear Filter Icon

51.9 Joining a Space

To become a member of a space, you can join the space. You may be registered with Spaces, or you may be a public user. If a space allows self-service membership (see Section 54.1.1, "Managing Self-Service Membership for a Space"), you can request membership to the space. Or, you may receive an invitation to join a space.

This section includes the following subsections:

- Section 51.9.1, "Joining a Space (Registered Spaces User)"
- Section 51.9.2, "Joining a Space (Unregistered Spaces User)"

51.9.1 Joining a Space (Registered Spaces User)

To become a member of a space, you can join the space. If a space is configured to allow self-service membership, you can request membership to the space. Or, you may receive an invitation to join a space.

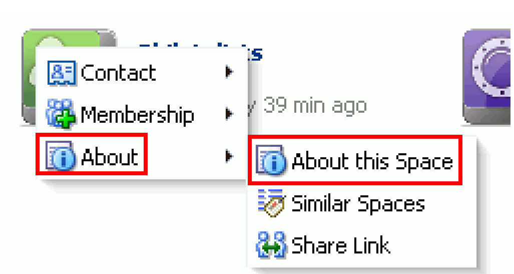
Some membership requests require approval from the space moderator so you may not gain access immediately. You will receive a Worklist notification when your membership is approved.

To join a space:

1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), from the **Show** menu, select **All Spaces**.
2. To join a space, you may have several options available to you, depending on the page template in use. For example, you may be able to simply click a space to open the Request Membership dialog.

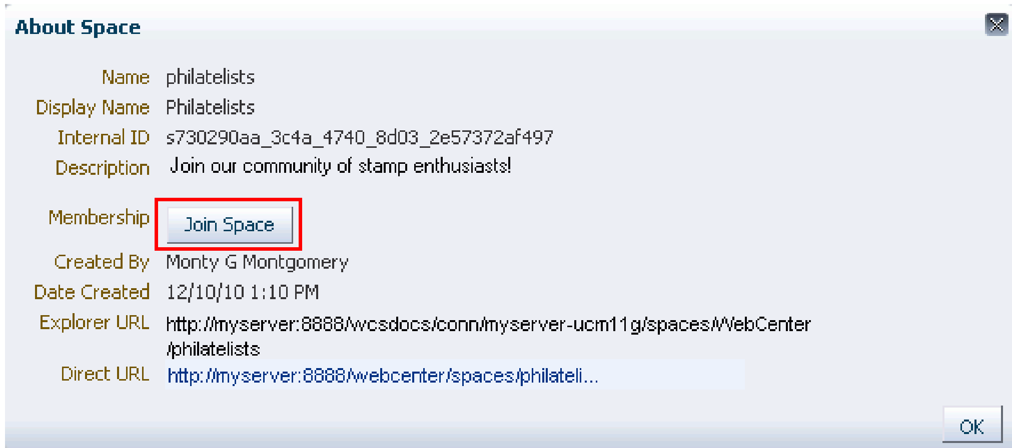
   A generally available method to join a space is through the About Space dialog: right-click the space icon or name, and select **About**, then **About this Space** (Figure 51–14).

Figure 51–14 Space Actions Menu: About this Space (for non-moderator role)



3. In the About Space dialog, next to **Membership**, click **Join Space** (Figure 51–15).

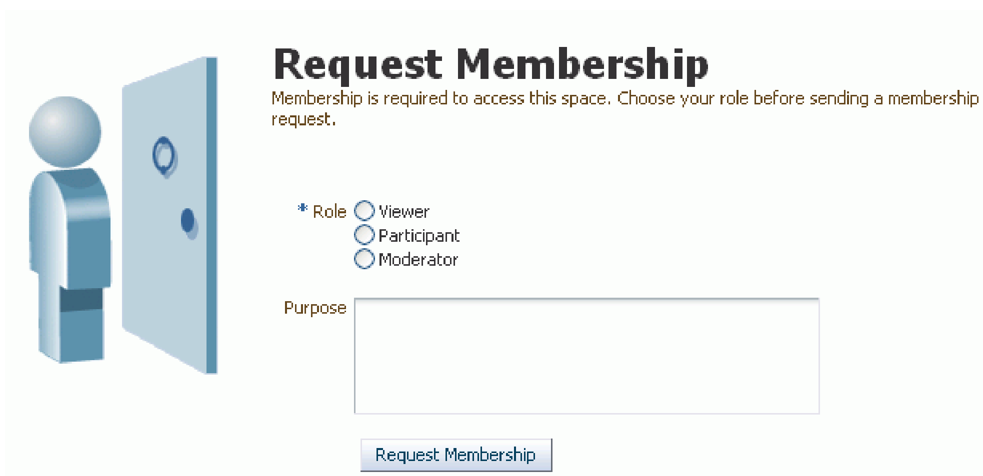
Figure 51–15 About Space Dialog (for non-member)



Note: **Join Space** is active only if the space allows self-service membership (see Section 54.1.1, "Managing Self-Service Membership for a Space"). If **Join Space** is disabled, contact the space moderator directly to request membership.

A space membership request page similar to Figure 51–16 opens, showing the default Request Membership page. Because the space moderator may customize this page, the page and roles you see may be different to the example shown here.

Figure 51–16 Requesting Space Membership



4. Select the type of **Role** you want to play in this space.

Note: Out-of-the-box space roles include `Viewer`, `Participant`, and `Moderator`, but a subset of these or other custom roles names may display, depending on what roles the space moderator has defined for the space.

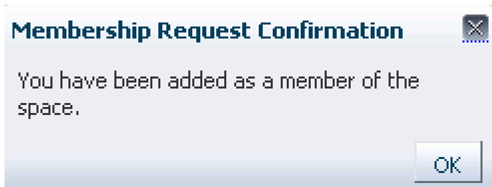
---

5. (Optional) In the **Purpose** field, enter an explanation of why you need access to the space with the role you have requested.

6. Click **Request Membership**.

   You should see a confirmation message similar to Figure 51–17, depending on whether or not the selected role requires moderator approval.

Figure 51–17 Confirmation Message (No Approval Required)



7. Click **OK**.
8. On the **Spaces** page, click the Refresh icon to confirm your new membership status.

Note: If membership requests require approval, you do not gain access immediately. Check back later or monitor your Worklist—you will receive notification as soon as your membership is approved.

51.9.2 Joining a Space (Unregistered Spaces User)

If you are not a registered Spaces user, you can still view public Spaces, but you cannot join a space unless you receive a mail message from the space moderator inviting you to join a space (see Section 54.3.4.5, "Inviting a Non-Registered User"). If you want to join a space, you must become a registered Spaces user.

Some membership requests require approval from the space moderator so you may not gain access immediately. You will receive a Worklist notification when your membership is approved.

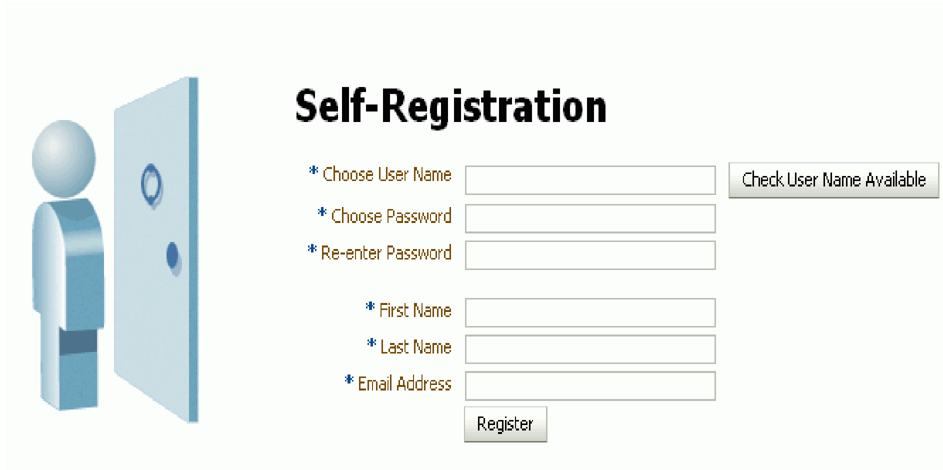
1. In the mail message you receive inviting you to join a space, click the **Register Yourself** link included in the invitation mail to open the Self-Registration page, similar to Figure 51–18. Because the space moderator may customize this page, the page you see may be different to the example shown here.

Note: For the Self-Registration page to display, the membership options for the space administration settings must have either of the following enabled:

- **Allow Self-Service Membership or Self-Service Membership Change (All Roles Available)**
- **Allow Self-Service Membership or Self-Service Membership Change (Selected Roles Available)**

For more information, see Section 54.1.1, "Managing Self-Service Membership for a Space."

Figure 51–18 Registering with Spaces



2. Enter a suitable **User Name**. The user name restrictions depend on the underlying identity store that is configured with Spaces.

   Click **Check User Name Available** to determine whether a Spaces user is registered with that name. Click **OK** to dismiss the confirmation message and, if necessary, enter a different name.

3. Enter a suitable **Password**, and then **Re-enter Password** for verification. The password restrictions depend on the underlying identity store that is configured with Spaces.

4. Enter your **First Name** and **Last Name**, and an **Email Address**.

5. Click **Register**.

Once your User Name and Password are registered with Spaces, the space to which you were invited opens.

51.10 Searching in a Space

Spaces includes the Search field at the top of the application for global (application-wide) searches. To perform searches limited to a single space, the space moderator must create a new Resource Catalog, add the Search task flow from the library to the Catalog, and then assign this Catalog to the space. The Search task flow is not available in the default Resource Catalog. For more information, see Section 58.4, "Narrowing the Scope of Search."

The space moderator can perform searches for individual pages in a space, as described in Section 53.7.3, "Searching for Pages in a Space."

51.11 Working with Pages in a Space

As a space member, you will have access to pages in the space. The space moderator can grant you permissions to view, create, edit, and rename pages in the space. Other space members can grant you permissions to access the pages that they own. Pages that you create are for your own use only, unless you specifically share them with other users.

Working with personal pages in the Home space is no different than working with pages in any space. The tasks described in this section apply to pages in a space and personal pages in the Home space:

- Section 51.11.1, "Showing or Hiding Pages in Your View"
- Section 51.11.2, "Rearranging Page Order in Your View"
- Section 51.11.3, "Opening a Page"
- Section 51.11.4, "Customizing Your View of a Page"
- Section 51.11.5, "Removing All of Your User Customizations from a Page"
- Section 51.11.6, "Creating, Editing, and Managing a Page"

51.11.1 Showing or Hiding Pages in Your View

The space moderator defines which pages are shown and hidden to all space members, as described in Section 53.7.2, "Showing or Hiding Pages in a Space." Additionally, you can customize your own personal view of pages.

To show or hide pages in your personal view of a space:

1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), locate and open the space.
2. Open the **Personalize Pages** page.

   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

3. On the **Personalize Pages** page, select or deselect the **Show Page** check box for the pages you want to show or hide.

   Note: If you deselect the **Show Page** check box for the current page, the **Personalize Pages** page closes and the current page is hidden.

   Within a particular scope, such as a space or the Home space, one page must always be shown; therefore, you cannot use this method to hide all pages within a particular scope.

51.11.2 Rearranging Page Order in Your View

In a space, you can use the **Personalize Pages** page to change the order in which pages are listed or arranged. This is a user customization that affects only your view.

To rearrange page order in a space:

1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), locate and open the space.
2. Open the **Personalize Pages** page.

   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

3. Use the icons in the **Reorder** column to rearrange page order (Figure 51–19).

Note: You can also reorder pages by dragging and dropping the page names

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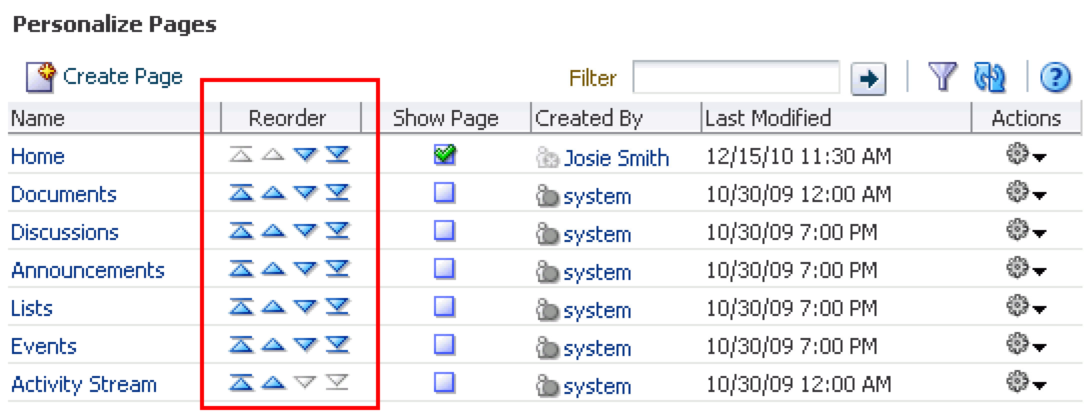
Figure 51–19 Reorder Icons on the Personalize Pages Page



51.11.3 Opening a Page

In a space, members have access to system pages (see Table 7–2, " Seeded System Pages") and member-created pages. The content on a space page is typically targeted to a particular audience or objective. In the Home space, you have access to pages made available by other users, and to your own personal pages.

The way that you access the pages of a space depends on the page template that is defined for the space, the controls that the space moderator or Spaces administrator has made available, and the navigation model in use. In all configurations, however, you can open pages using a *pretty URL* or through the **Personalize Pages** page.

To open a page in a space:

1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), locate and open the space.
2. Open a page in any of the following ways:
   - Click the page name in the space navigation.
   - Enter the following URL in your browser:

     `http://`*`host`*`:`*`port`*`/webcenter/spaces/`*`spaceName`*`/page/`*`pageName`*

     For the Home space, omit *`spaceName`*

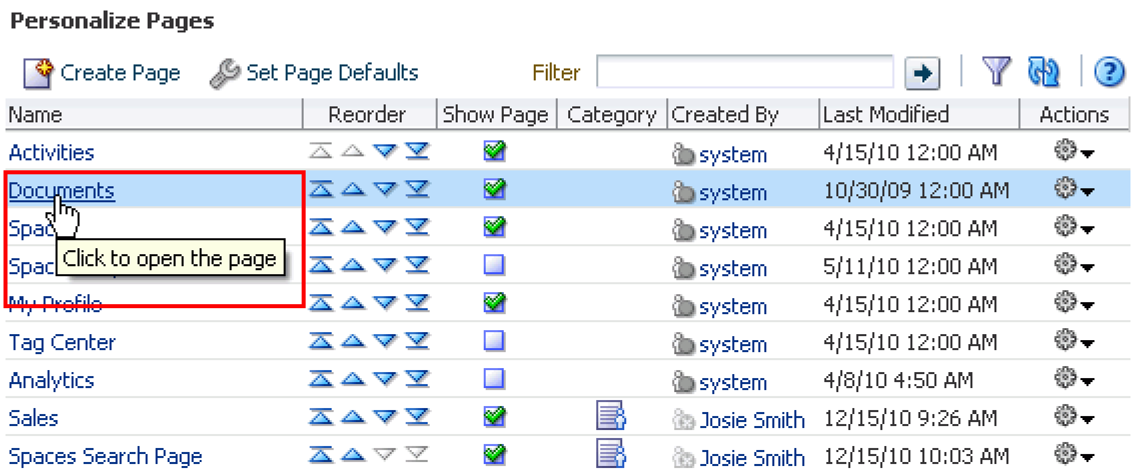
     Tip: Substitute any spaces in the page name with plus (+) characters. For example, to open a page named `My Page`, the URL to this page ends with `My+Page`.

     See Also: For additional URLs to use in navigating to pages, see Appendix A, "Spaces User Interface URLs."

   - Open the **Personalize Pages** page, and click the name of the page you want to open (Figure 51–20).

Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

Figure 51–20 Opening a Page through the Personalize Pages Page



Note: If you view a page at the same time that another user is editing the page, you may not immediately see the results of changes made by the other user in your session. To reliably see any changes, you must view the page after the other user has saved their edits.

51.11.4 Customizing Your View of a Page

You can change your view of a given page in a space in many ways, including rearranging your view of page content, hiding components, changing your page layout, and so on. All of these options are *user customizations*, that is, they affect only your view. All other space members' views remain unchanged.

This section steps you through the process of adjusting your own page view through user customization. It includes the following subsections:

- Section 51.11.4.1, "What You Should Know About User Customizations on a Page"
- Section 51.11.4.2, "Performing User Customizations on Your Page View"

51.11.4.1 What You Should Know About User Customizations on a Page

You can customize the way pages appear in many ways without opening the page editor (Composer). For example, you can reposition, remove, resize, and collapse components, all within just your view of a page.

User customizations are yours and yours alone. That is, the changes you make through the procedures described in the following sections affect only your view of the Spaces application. No other users are affected by your changes.

For example, when you reposition page components in page view mode, that change applies only to your view of the page. Other users may reorganize their own views of pages, and their changes do not affect your view—only their own.

Note: When you revise a component in page view mode while another user deletes the same component in page edit mode, a WebCenter error page opens. Simply navigate back to the original page. The deleted component does not appear, and you can continue working on other components.

51.11.4.2 Performing User Customizations on Your Page View

Whether you can customize a page depends on permissions granted to you or your application role and on how user customizations are configured. You can tell if you have such permission by the presence or absence of the controls discussed in this section. If you do not see these controls, contact your application administrator to ask for a higher-level of access or for a configuration change.

This section describes how to perform the user customizations *rearrange*, *resize*, *minimize*, and *maximize*. It includes the following subsections:

- Section 51.11.4.2.1, "Rearranging Page Content"
- Section 51.11.4.2.2, "Removing Components from Your View of a Page"
- Section 51.11.4.2.3, "Resizing Components"
- Section 51.11.4.2.4, "Collapsing and Expanding Components"

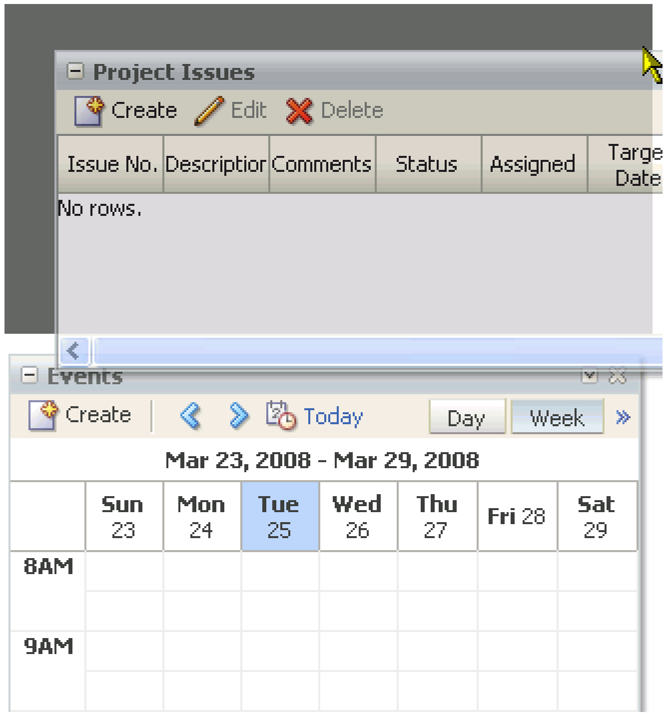
51.11.4.2.1 Rearranging Page Content Use drag-and-drop to rearrange the position of a component on a page. Components moved by drag-and-drop can be moved into any open position on a page.

To rearrange components by dragging and dropping on a page:

- Click and hold the header of the component you want rearrange, drag it to its target position, and drop it onto the page.

  A shadow indicates where the component is placed when you drop it (Figure 51–21).

Figure 51–21 Dragging an Issues List Above an Events Task Flow



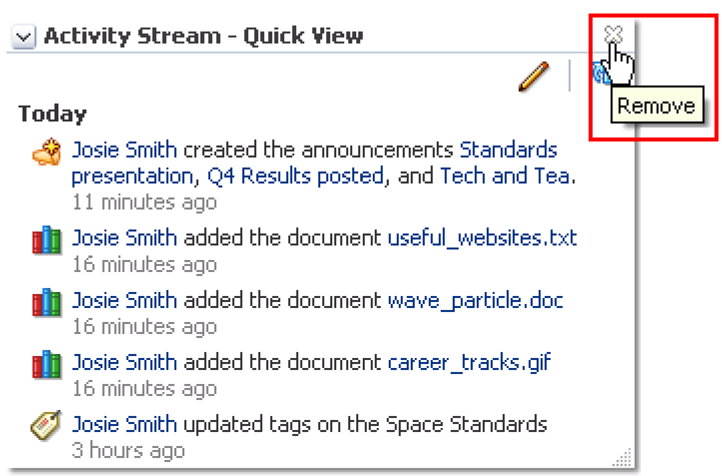
51.11.4.2.2 Removing Components from Your View of a Page If you find that a component, such as a task flow or portlet, is not useful to you and the component displays a **Remove** icon, you can remove it from your view of the page.

Keep in mind that you can restore a removed component only by editing the page and adding a new component instance.

To remove a component from your view of a page:

- Click the **Remove** icon on the component header (see Figure 51–22).

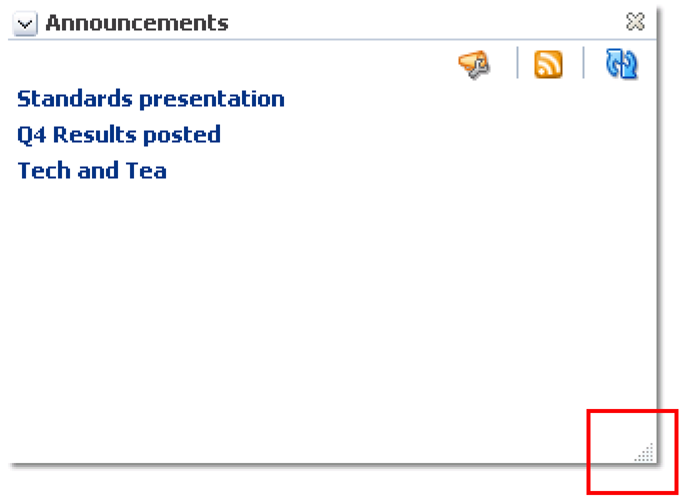
Figure 51–22 Remove Icon on a Task Flow



The component is removed from your view of the page.

51.11.4.2.3 Resizing Components The border and header surrounding a component is also known as *chrome*. Chrome can clarify the boundaries of the component and provide an access point for component actions, such as those on the **Actions** menu and those embedded in the chrome itself. In the latter case, the chrome may include a **Resize** handle that you can use to increase or decrease the height of the component (Figure 51–23).

Figure 51–23 Resize Handle on a Task Flow



> **Note:** The position of the resize handle differs for bidirectionally displayed components. Those components displayed in a right-to-left orientation display the resize handle on the left side.

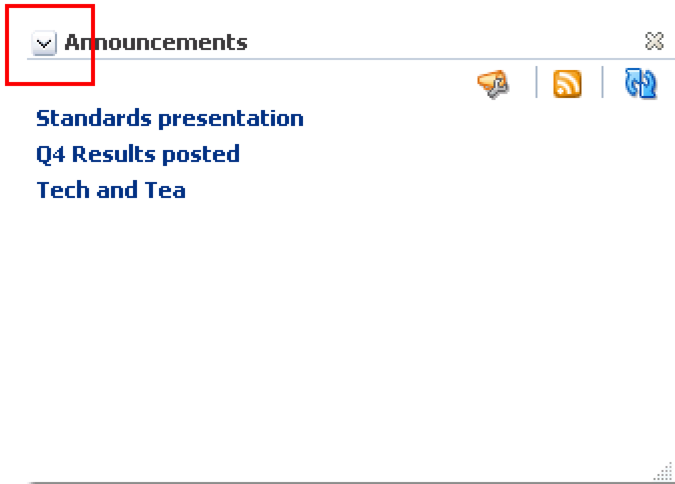
To use this feature, click and hold the **Resize** handle and drag it up to decrease the height of the component or down to increase the height of the component.

51.11.4.2.4 Collapsing and Expanding Components With one click, you can collapse some components so that they roll up like a window shade, useful for removing the visual noise of an unused component from your application view. Collapse is available when a component shows a header. With another click, you can expand a collapsed component.

To collapse and expand components on a page:

1. Click the **Collapse** icon on the component header to roll the component up like a window shade (Figure 51–24).

Figure 51–24 Collapse/Expand Icon on a Task Flow



2. Click the **Expand** icon on the component header to restore the full component to view (Figure 51–25).

Figure 51–25 Collapsed Task Flow

51.11.5 Removing All of Your User Customizations from a Page

You can change your view of a given page in a space in many ways, including rearranging your view of page content, hiding components, and changing your page layout, as described in Section 51.11.4, "Customizing Your View of a Page."

To remove all of your user customizations, such as rearrangement, resizing, or collapsing of task flows in only your view of a page:

1. In the space, display the **Personalize Pages** page.

   Tip: The way you access this page depends on the page template in use. For example, you may access it through an **Actions** menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and select **Reset Layout** to open the Reset Layout dialog.
3. To confirm your intent to remove all of your user customization from the page, click **Reset**.

51.11.6 Creating, Editing, and Managing a Page

To create, edit, populate, share, and manage pages in a space, see Section V, "Working with Pages."

51.12 Changing Your Role in a Space

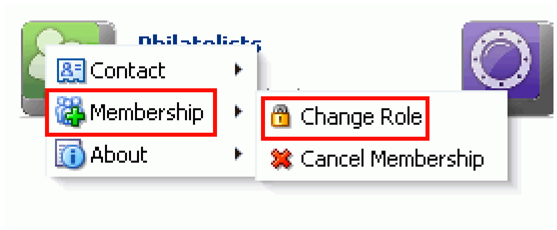
If you are unable to perform all the actions that you would like in your space, you can request a change to your membership role. For example, you might want to participate in an interesting discussion thread or raise a new issue but in your current role you are only allowed to view ongoing discussions.

Role change requests may or may not require approval, depending on how the space moderator has defined membership changes for a particular role (see Section 54.1.1, "Managing Self-Service Membership for a Space"). You will receive a Worklist notification when your new role is approved.

To change your space role:

1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), locate and open the space in which you want to change your role, then right-click the space icon or name, and select **Membership**, then **Change Role** (Figure 51–26).

Figure 51–26 Change Membership Role

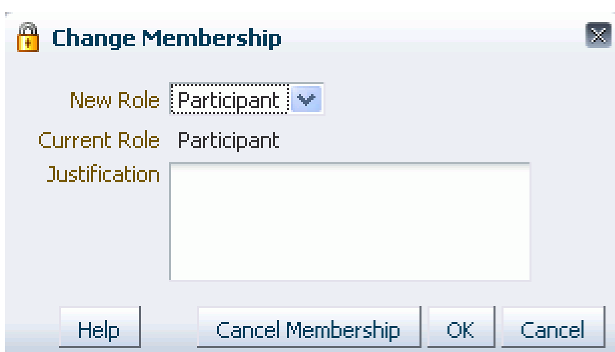


2. In the Change Membership dialog (Figure 51–27), select your preferred role from the **New Role** list.

> **Note:** The **New Role** list is active only if the space allows self-service membership changes (see Section 54.1.1, "Managing Self-Service Membership for a Space"). If **New Role** selections are disabled, contact the space moderator directly to request a member role change.

   If you wish to cancel your membership in the space, click **Cancel Membership**.

Figure 51–27 Change Membership Dialog



   The space moderator controls the list of roles displayed here. Out-of-the-box space roles include `Viewer`, `Participant`, and `Moderator` but a subset of these or other custom roles may display. For more information, see Section 54.1.1, "Managing Self-Service Membership for a Space"

3. Click **OK**.

A confirmation message displays whether or not the selected role change requires approval.

4. Click **OK** to acknowledge the confirmation message.
5. On the **Spaces** page, click the **Refresh** icon to confirm your membership status has changed for the space.

> **Note:** Your new role is not effective immediately when membership change requests require approval. Check back later or monitor your Worklist; your new role will be effective as soon as the space moderator approves it.

51.13 Cancelling Your Space Membership

When you no longer want or need membership in a space, you can cancel your membership.

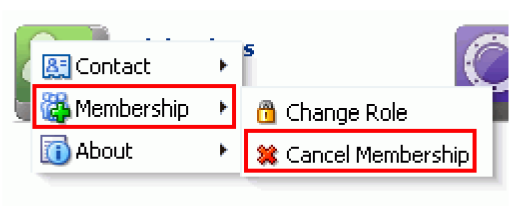
Some cancellation requests require approval from the space moderator so you may not be removed from the space immediately (see Section 54.1.1, "Managing Self-Service Membership for a Space"). You will receive a Worklist notification when your membership is removed.

Once you have successfully cancelled your membership in a space, it will no longer be shown on the **Spaces** page when you select **Joined by Me** from the **Show** menu.

To cancel your membership in a space:

1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), locate and open the space from which you want to remove your membership, then right-click the space icon or name, and select **Cancel Membership** (Figure 51–26).

Figure 51–28 Cancelling Space Membership



A confirmation message displays to confirm that you want to cancel your membership in the space.

2. Click **OK** to acknowledge the confirmation message.
3. On the **Spaces** page, select **Joined by Me** from the **Show** menu, then click the **Refresh** icon to confirm that the space no longer displays.

> **Note:** If a cancellation request requires approval, you are not removed from the space immediately. Check back later or monitor your Worklist; you will receive notification when your unsubscription request is approved or rejected by the space moderator.

52 Working with Space Templates

Space templates provide a consistent look and feel and an efficient way to get started creating a space that is configured exactly as required by an organization.

This chapter includes the following sections:

- Section 52.1, "What You Should Know About Space Templates"
- Section 52.2, "Creating a New Space Template"
- Section 52.3, "Managing Space Templates"

Audience

This chapter is intended for users who want to know more about space templates, create custom space templates, and manage space templates.

To perform the tasks described in this chapter, you need the space-level permissions Space Templates-Create. To publish a portal template for others to use, you need the application-level `Space Templates-Manage All` permission. For information about roles and permissions, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

52.1 What You Should Know About Space Templates

When you create a space, you can base it on one of the out-of-the-box space templates, your own custom space template, or a published space template created by others. Space templates provide a consistent look and feel and an efficient way to get started creating a space that is configured exactly as required by an organization. To learn more about space templates, refer to the following sections:

- Section 52.1.1, "Understanding Out-of-the-Box Space Templates"
- Section 52.1.2, "Understanding Custom Space Templates"

52.1.1 Understanding Out-of-the-Box Space Templates

Spaces provides several space templates out-of-the box from which you can choose when creating a new space. These templates are named according to their general purpose, and can be used as is for a new space or as a starting point for developing your own custom templates.

The out-of-the-box space templates are:

- **Blogger**: Template for a space where members can publish their opinions through blogs, and preconfigures announcements, discussions, documents, events, lists, and mail.

- **Discussion Site**: Template for a space where members can exchange ideas in discussion forums to quickly resolve issues, come up with new product ideas, resolve customer escalations, determine new service offerings, and more.
- **Document Exchange**: Template for a space centered around sharing and organizing documents to enable teams to quickly hone in on delivering agreed upon wording and messaging. This template also enables checkin and workflow around document approvals and working in teams.
- **Portal Site**: Template for a space appropriate for a large organization with several smaller groups or departments, each of which needs to store their own content, engage in discussions, and more. This template speeds enterprise portal construction and delivery and enables teams to easily provide their unique value to the company, promoting their group's charter to all other organizations while securely collaborating within their team or organization.

  This template provides an essentially unpopulated, unconfigured starting point for building a space exactly to your specifications. When you create a space using this template, it results in a blank Home page. All space services such as discussions, announcements, and so on, are disabled.
- **Project Site**: Template for a space where members can share information about a common project and maintain a common calendar. This template provides an optimal structure for supporting a core project team where members might come from different departments to work together toward reaching a common goal.

  The focus of a space based on this template is to streamline the process of starting a new project, defining the project team, and executing on project deliverables. Members can share documents, communicate with one other, keep up to date on status, and generally function better as a team than as individuals working side by side.
- **Team Site**: Template for a space that provides an optimal structure for supporting communities of people who are working together to achieve a common goal, collaborating through document sharing, team announcements, discussion forums, mail, wikis, and more.

  The focus of a space based on this template is to learn more about a subject area through the sharing of expertise, ideas, and content. Team Site spaces provide a consistent, dynamic, timely, and interactive participant experience. For example, all the Java programmers responsible for supporting your customer-facing Web site might want a place to keep up with what's happening in the Java world using discussion forums, links to articles about upcoming patches, and so on.

> **Note:** The out-of-the-box space templates available in prior releases (Basic, Community of Interest, and Group Project) are deprecated. However, if needed, you can expose them in your Spaces application by following the steps in "Exposing Spaces Templates From a Previous Release" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

52.1.2 Understanding Custom Space Templates

A custom space template may be simple, or may include robust functionality such as:

- Preseeded data, such as discussions, documents, lists, member information (including roles), pages, or site resources. When you select such a template to build a new space, the new space includes all the preseeded data.

- Custom java code that executes when you select the template for a new space. For example, custom code may include logic to automatically create a mailing list for a new space. For more information, see the chapter "Extending Spaces Using JDeveloper" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

52.2 Creating a New Space Template

You cannot modify or delete the out-of-the-box space templates described in Section 52.1, "What You Should Know About Space Templates", but any user with Space Templates-Create permission can create new space templates.

To create a new space template, you start by creating a space based on an existing template (see Section 53.2, "Creating a New Space"), and customize it according to your requirements. Then, you can create a new space template based on the customized space that you have developed. During the creation of a space template, you can select to inherit the discussions, documents, lists, member information (including roles), pages, or site resources from the parent space. The security settings for the parent space are inherited by the template.

Note: When creating a new space template, the template does not inherit announcements from the parent space.

As a space template creator, you can publish your space template for others to use; otherwise, it remains private and hidden from others. To make the template public, you must be granted the application level `Space Templates-Manage All` permission.

Note: Spaces administrators can also create space templates to be made available at the application level, and import and export custom space templates from and to other Spaces applications, including seeded data. For more information, see Chapter 55, "Administering Spaces and Templates."

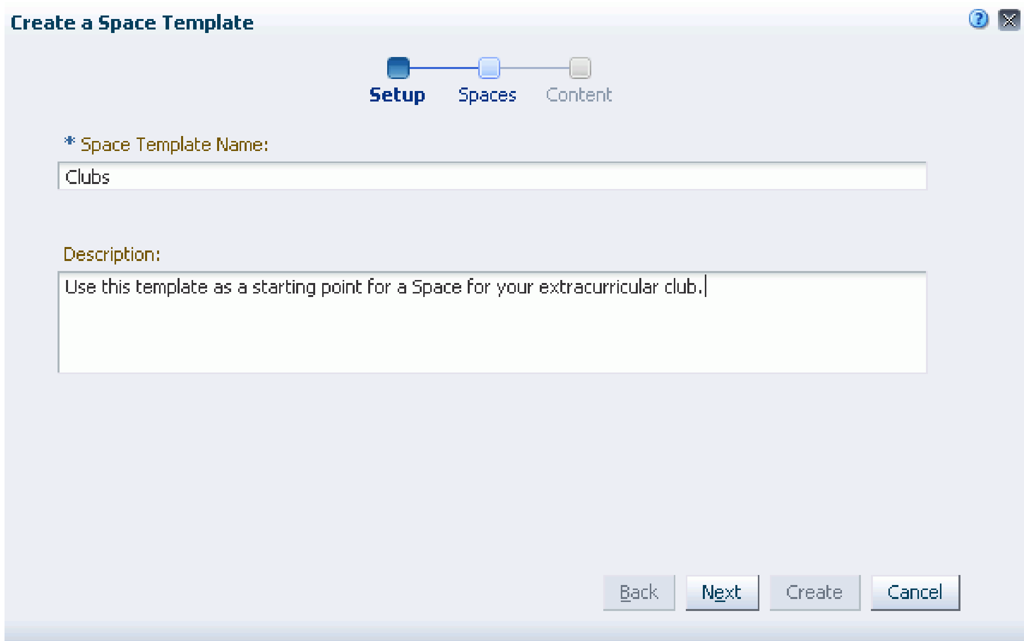
To create a space template:

1. In the Home space, go to the **Space Templates** page.
2. On the **Space Templates** page (see Section 52.3.1, "Viewing Available Space Templates"), click **Create**.

   Note: If you have not created any spaces, and do not have permissions to manage a space, the **Create** link is not available.

   The Create a Space Template dialog opens (Figure 52–1).

Figure 52–1 Create a Space Template Dialog: Setup Step



3. In the **Setup** step, enter a suitable **Space Template Name** and (optionally) **Description**. Choose a name that describes the space template and other Spaces users will recognize. Note that this is your only opportunity to enter a space template description.

   Space template names can contain alphanumeric characters, underscores, spaces, multi-byte characters, and special characters such as `&` and `#`. The maximum allowable length is 200 characters. The following reserved keywords are not allowed as the full space template name in either upper or lower case, or a combination of both—`webcenter`, `pages`, `page`, `spaces`, `space`, `group`, `groups`, `webcenter space`, `webcenter spaces`, `webcenter administration`, `my spaces`, `admin`, `last`. These reserved words are allowable as part of a longer name (for example, `Sales Group`).

4. Click **Next**.

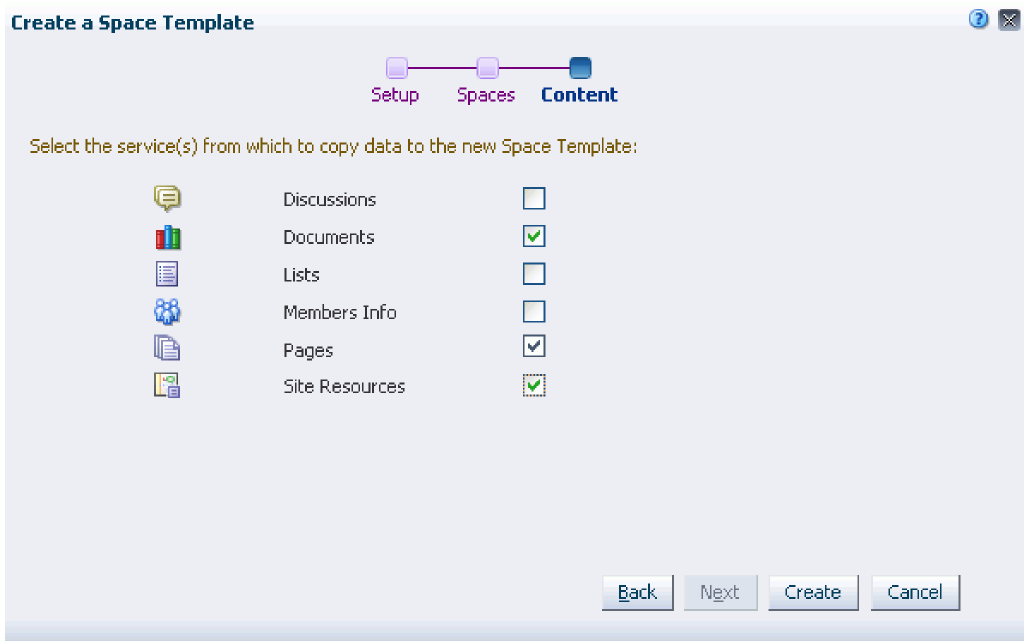
5. In the **Spaces** step, select a space to use as the basis for your new space template, then click **Next**.

6. In the **Content** step, select the services that contain data that you want the space template to inherit from the parent space (Figure 52–2).

Note: Space templates can not inherit Announcements from a parent space.

List definitions are always copied; checking **Lists** in this step specifies that you want to copy the list data, too.

Figure 52–2 Create a Space Template Dialog: Content Step



7. Click **Create**.

> **Note:** If an error message notifies you that the template creation failed because selected services could not be provisioned, the most likely cause is that backend servers (such as UCM or JIVE server) are down. Contact your Spaces administrator to resolve this issue.

The new space template displays on your **Space Templates** page in the Home space. By default, the template is private, which means that only you as the template creator can see the template on your personal **Space Templates** page in the Home space. Other users will not see the private template on their personal **Space Templates** page in the Home space, but users granted the `Application-Manage Configuration` permission can view and manage private templates on the application-level **Space Templates** page. For more information, see Chapter 55, "Administering Spaces and Templates."

8. To publish your space template to make it available to all Spaces users, you must be granted the application-level `Space Templates-Manage All` permission by the Spaces administrator. If you have this permission, select the template name, then click the **Edit** menu, and select **Make Public**.

   The template is published and displays on the **Space Templates** page in the Home space for all users.

52.3 Managing Space Templates

You cannot modify or delete the out-of-the-box space templates provided by Spaces (see Section 52.1.1, "Understanding Out-of-the-Box Space Templates"), but any user with `Space Templates-Create` permission can create new space templates, based on spaces that they own (see Section 52.2, "Creating a New Space Template"), and manage the space templates that they own.

The **Space Templates** page in the Home space displays the out-of-the-box space templates, space templates created by the current user, and published templates available for general use.

The following sections describe the management tasks available to space template creators, Spaces administrators, and users granted the application-level `Space Templates - Manage All` permission:

- Section 52.3.1, "Viewing Available Space Templates"
- Section 52.3.2, "Viewing Information About a Space Template"
- Section 52.3.3, "Searching for a Space Template"
- Section 52.3.4, "Renaming a Space Template"
- Section 52.3.5, "Setting Up Access to a Space Template"
- Section 52.3.6, "Publishing or Hiding Space Templates"
- Section 52.3.7, "Deleting Space Templates"

52.3.1 Viewing Available Space Templates

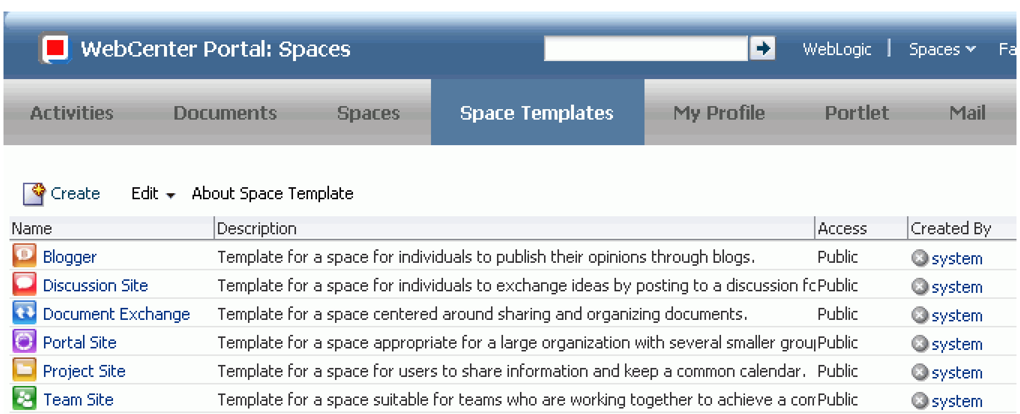
To display the **Space Templates** page, showing the space templates available to you for creating new spaces:

- In the Home space, click the **Space Templates** tab to open the **Space Templates** page (Figure 52–2).

  Tip: You can also access the Home space using a pretty URL. See Appendix A.4, "User Interface URLs for Home Space Pages."

  If the **Space Templates** tab is not exposed in the Home space, refer to Section 51.11.1, "Showing or Hiding Pages in Your View."

Figure 52–3 Space Template Page in Home space

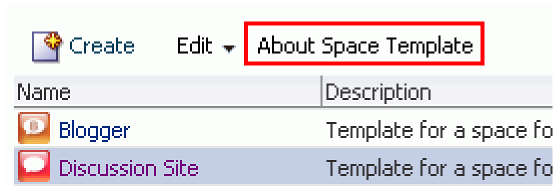


52.3.2 Viewing Information About a Space Template

To view information about a space template:

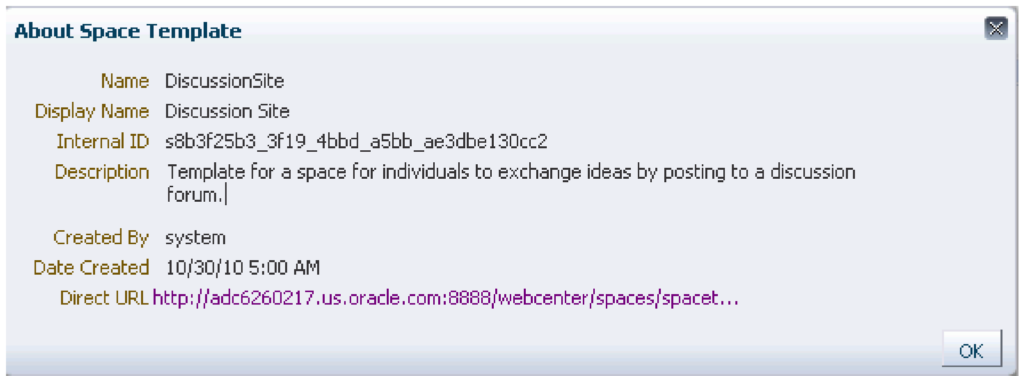
1. On the **Space Templates** page (see Section 52.3.1, "Viewing Available Space Templates"), click in the row of the space template, then click **About Space Template** (Figure 52–4).

Figure 52–4 Opening About Space Template Dialog



The About Space Template dialog opens (Figure 52–5).

Figure 52–5 About Space Template Dialog



2. Explore the information in the About Space Template dialog:

   – **Name**: Internal name of the space template displayed in the space URL. You cannot change the internal name of a space template.

   – **Display Name**: Display name of the space template. This name displays in places where the templates are available for selection, such as the Create a Space dialog and the **Space Templates** page. You cannot change the display name of an out-of-the-box space template. To change the display name of a custom space template that you create, see Section 52.3.4, "Renaming a Space Template."

   – **Internal ID**: ID of the space template, which other applications may use to reference this space template.

   – **Description**: A description of the space template, specified when creating the space template. You cannot modify the description of a space template, unless you rename the template, where you can enter a new description in the Rename dialog, as described in Section 52.3.4, "Renaming a Space Template."

   – **Created By**: User name of the space template creator.

   – **Date Created**: Date and time that the space template was created.

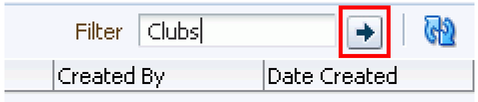
   – **Direct URL**: URL that provides direct access to the space template.

52.3.3 Searching for a Space Template

To search for a space template by a string in the Name or Description:

1. On the **Space Templates** page (see Section 52.3.1, "Viewing Available Space Templates"), enter a search string in the **Filter** field.
2. Click the **Filter** icon (Figure 52–6).

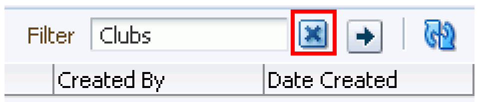
Figure 52–6 Filter Icon



The **Space Templates** page displays space templates where the search string is found in the **Name** or **Description**.

3. To clear the current search string and display all space templates, click the **Clear Filter** icon (Figure 52–7).

Figure 52–7 Clear Filter Icon



52.3.4 Renaming a Space Template

To rename a space template:

1. On the **Space Templates** page (see Section 52.3.1, "Viewing Available Space Templates"), click in the row of the space template.
2. From the **Edit** menu, select **Rename Space Template**.

   The Rename Space Template dialog opens.
3. In the **Display Name** field, enter a new name for the space template. Optionally, enter a **Description**.
4. Click **OK**.

52.3.5 Setting Up Access to a Space Template

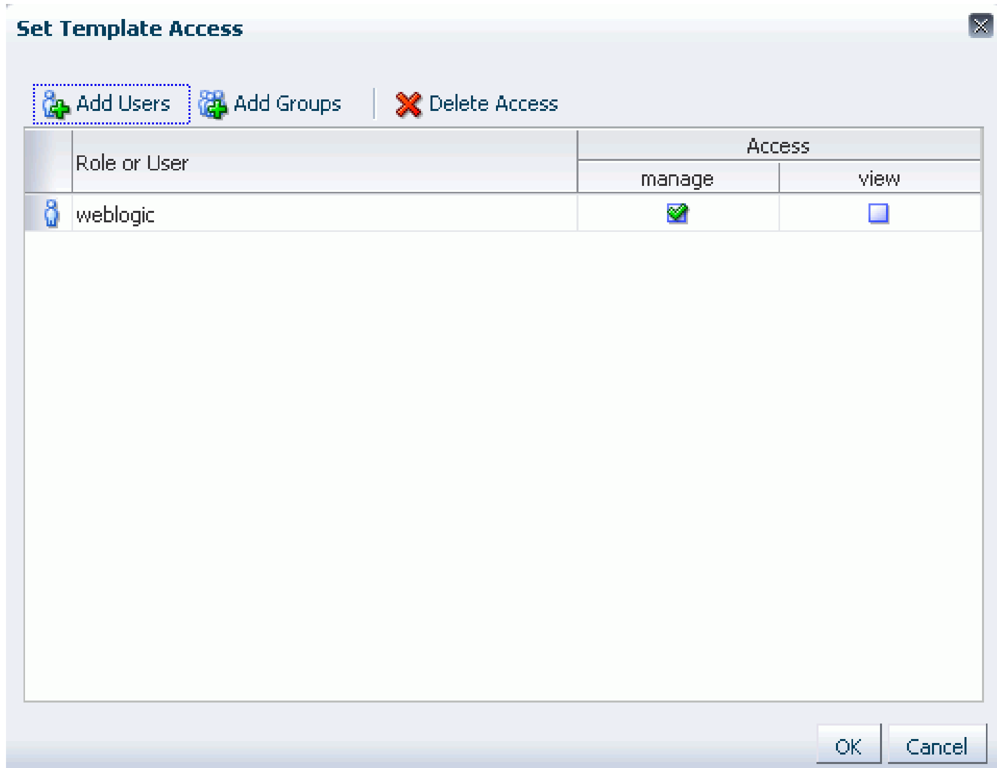
You can grant specific users and groups read-only or manage access to a space template.

To set up access to a space template:

1. On the **Space Templates** page (see Section 52.3.1, "Viewing Available Space Templates"), click in the row of the space template.
2. From the **Edit** menu, select **Set Template Access**.

   The Set Template Access dialog opens (Figure 52–8).

Figure 52–8 Set Template Access Dialog



3. In the Set Template Access dialog:
   - Click **Add Users** to open the Search Users dialog where you can select from a list of users or search for a user name.
   - Click **Add Groups** to open the Search Groups dialog where you can search for a user group.

   For tips on searching for a user or group in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."
4. For each user or user group listed in the Set Template Access dialog, specify which level of access to grant (one permission per user or user group):
   - Select the **View** check box to grant read-only access to the space template.
   - Select the **Manage** check box to grant full access to the space template.
5. Click **OK**.

52.3.6 Publishing or Hiding Space Templates

When you create a space template (see Section 52.2, "Creating a New Space Template"), it is private by default. This means that only you as the template creator can see the template on your personal **Space Templates** page in the Home space. Other users will not see the private template on their personal **Space Templates** page in the Home space. However, administrators and users granted the `Application-Manage Configuration` permission can view and manage all space templates, including your private templates, on the application-level **Space Templates** page. For more information, see Chapter 55, "Administering Spaces and Templates."

To publish or hide space templates that you create to make them available to all Spaces users, you must be granted the application-level `Space Templates-Manage All` permission by the Spaces administrator. If you have this permission:

1. On the **Space Templates** page (see Section 52.3.1, "Viewing Available Space Templates"), click in the row(s) of the space template(s).
2. From the **Edit** menu, select either of the following, depending on the template's current state:
   - **Make Public** to publish the template to all Spaces users.
   - **Remove Public Access** to hide the template from all Spaces users, except yourself (as the template creator) and those users to whom you have specifically granted **View** or **Manage** access in the Set Template Access dialog (see Section 52.3.5, "Setting Up Access to a Space Template").

> **Note:** If you are in the process of creating a new space (see Section 53.2, "Creating a New Space"), and the space template you select for the space is made private by another user before you have completed creating the space, the template remains valid for your use while you are still creating the space.

52.3.7 Deleting Space Templates

> **Note:** Out-of-the-box space templates cannot be deleted. However, Spaces administrators and users granted the application-level `Space Templates-Manage All` and `Application-Manage Configuration` permissions can hide the out-of-the-box templates from everyone's view by making them private on the application-level **Space Templates** page. For more information, see Chapter 55, "Administering Spaces and Templates."

To delete one or more space templates:

1. On the **Space Templates** page (see Section 52.3.1, "Viewing Available Space Templates"), click in the row(s) of the space template(s).
2. From the **Edit** menu, select **Delete Space Template**.

   In the confirmation prompt, click **Delete**.

53 Managing a Space

This chapter provides information about configuring and managing an environment dedicated to a group effort or an area of interest in WebCenter Portal: Spaces. It describes how to access space administration pages, manage services, and perform administrative tasks for all members of a space. It contains the following sections:

Audience

This chapter is intended for users who want to create and manage spaces.

To perform the tasks described in this chapter, users need to be assigned a role that includes the `Manage Configuration` and `Manage Membership` permissions. For information about roles and permissions, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

53.1 Who Is the Space Moderator?

If you have been granted the `Spaces-Create` permission by the Spaces administrator, you can create a space. When you create a space, you become the default space *moderator*, which means that you assigned the Moderator role. In this role, you have Manage All permission in the space, which provides full control over the space presentation and content, as well as administrative responsibilities. When a new space is created, Spaces creates default space roles with default permissions. The space moderator can assign space members to these roles and modify the default permissions as required, or create new custom roles. For more information, see Section 54.2.1.1, "Understanding the Default Roles for a Space".

Note: As a space creator, you will always have Manage All permission in the space, even if your role is changed to one with fewer permissions by default (for example, Participant or Viewer role), or your role is modified to alter your permissions.

Other users may be assigned the Moderator role, or granted the permissions to manage specific areas of the space. For more information, see Section 54.2, "Managing Roles and Permissions for a Space"

53.2 Creating a New Space

A space provides an environment dedicated to a group effort or an area of interest. For more information, see Section 51.1, "What You Should Know About Spaces." If you have been granted the Spaces-Create permission by the Spaces administrator, you can create a space in a Spaces application. As the creator of a space, you are granted the role of Moderator in the space (see Section 53.1, "Who Is the Space Moderator?").

Spaces creates a single discussion forum for a new space. You can modify this default setting to allocate multiple discussion forums to the space. See Section 53.10.3, "Modifying Discussion Forum Settings for a Space."

To create a space:

1. From the **Spaces** menu, select **Create a Space**.

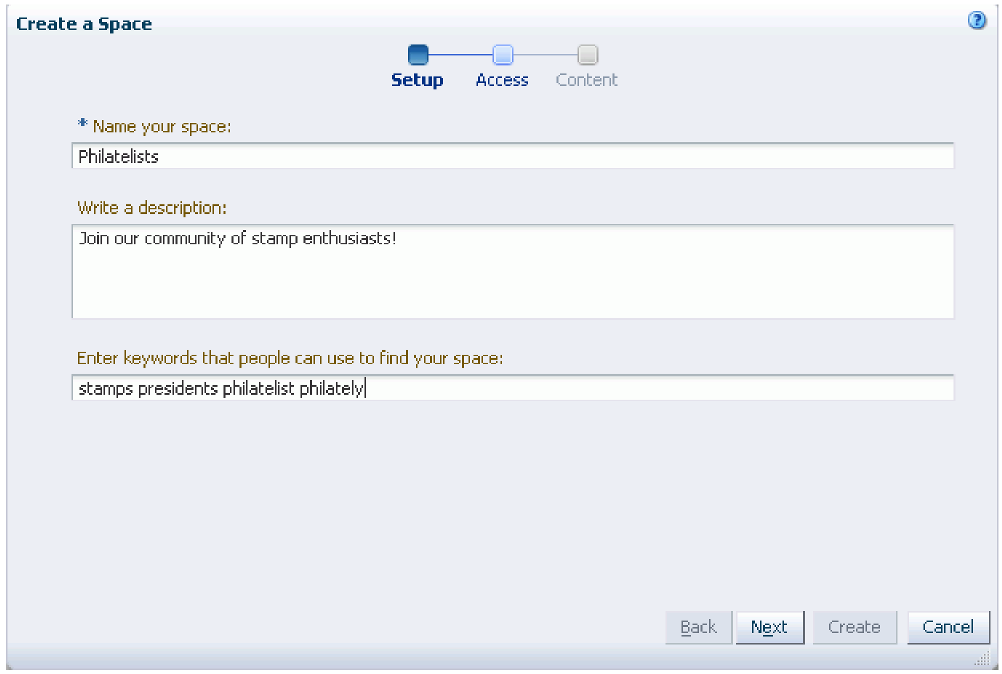
   Alternatively, on the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), click **Create**.

   If you do not see this option, ask your Spaces administrator to grant you Create Spaces permission.

   The Create a Space dialog opens.

2. In the **Setup** step (Figure 53–1), specify a space name and, optionally, a description and keywords for the space. Enter any keywords related to the content of the space to make it more easily discoverable in search results. Separate keywords with a space or comma.

Figure 53–1 Create a Space Dialog: Setup Step



space
****

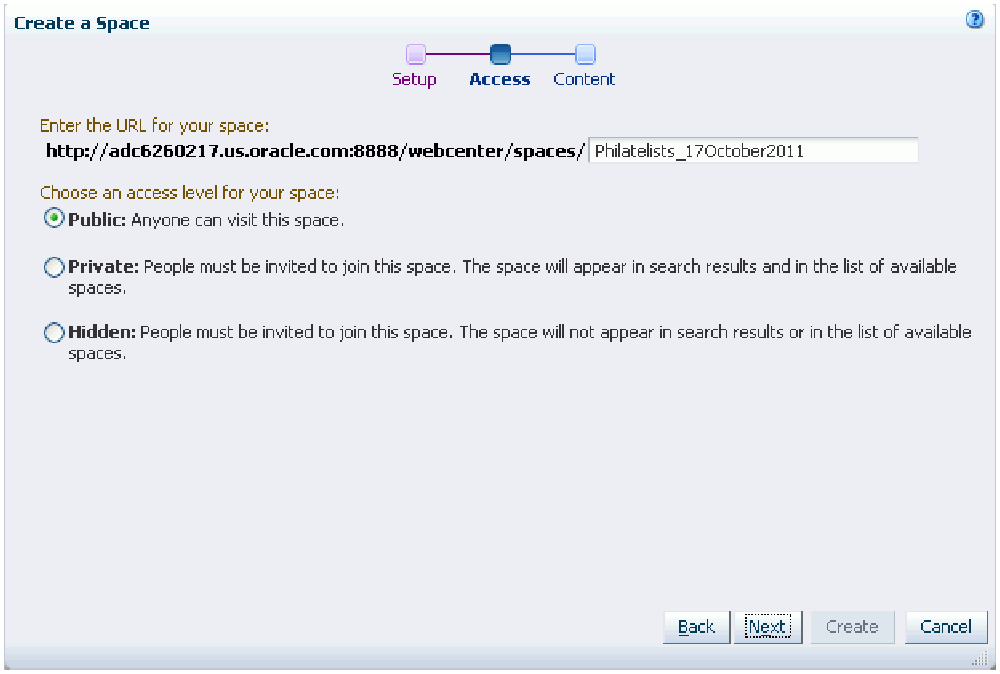
The name that you enter here displays at the top of the space and other places where spaces are available for selection, such as the Spaces Switcher menu and the **Spaces** page. Space names can contain alphanumeric characters, underscores, spaces, multibyte characters, and special characters such as `&` and `#`. The maximum allowable length is 200 characters. The following reserved keywords are not allowed as the full space name either in upper or lowercase, or a combination of both—`webcenter`, `pages`, `page`, `spaces`, `space`, `group`, `groups`, `space`, `spaces`, `webcenter space`, `webcenter spaces`, `webcenter administration`, `my spaces`, `admin`, `last`. These reserved words are allowable as part of a longer name (for example, `Sales Group`).

Note: Spaces removes any character spaces in the display name specified here to derive the initial internal name for the space, appended with the date
(for example, *`spacename`*`_14November2011`).

---

3. Click **Next**.
4. In the **Access** step (Figure 53–2), modify the default URL (*`spacename_date`*) for the space if desired. The internal name of the space is derived from this field. This URL is the pretty URL to access the space.

Figure 53–2 Create a Space Dialog: Access Step



5. Select an access level for the space:

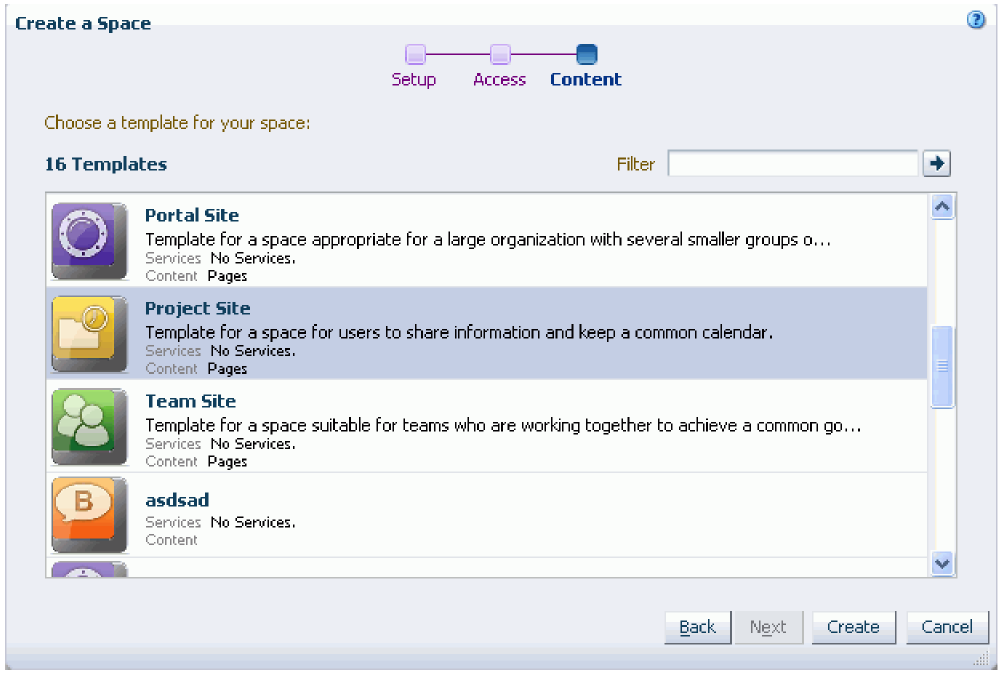
   - **Public** (default): Anyone can visit the space, whether they are a registered Spaces user or not. When this setting is selected, the `Public-User` role in the space is automatically granted permissions to view pages, lists, events, links, notes, announcements, discussions, and documents. Public users to not have edit, create, or manage permissions in the space.
   - **Private**: To access the space, membership is required (either through invitation or self-registration if enabled). The space will be shown in the list of available spaces on the **Spaces** page and will appear in search results.
   - **Hidden**: To access the space, membership is required (through invitation). The space will *not* be shown in the list of available spaces on the **Spaces** page and will *not* appear in search results.

   Note: The selected access level overrides the access level specified by the space template that you will select in the next step. For example, if you select an access level of **Private** for the new space, then select a space template that specifies **Public** access, the space is private. No public metadata is copied from the space template, and public users have no access to the space. Similarly. when you select **Public** for the new space, then select a space template that is **Private** or **Hidden**, public users have permissions to access pages and services in the space.

   ---

6. Click **Next**.
7. In the **Content** step (Figure 53–3), select a space template to use as the basis for your new space. Use the **Filter** field to search for templates by name.

Figure 53–3 Create a Space Dialog: Content Step



See Also: For more information, see Section 52.1, "What You Should Know About Space Templates.".

Note: A custom space template may include preseeded data, such as discussions, documents, lists, member information (including roles), pages, or site resources. When you select such a template, the new space includes all the preseeded data.

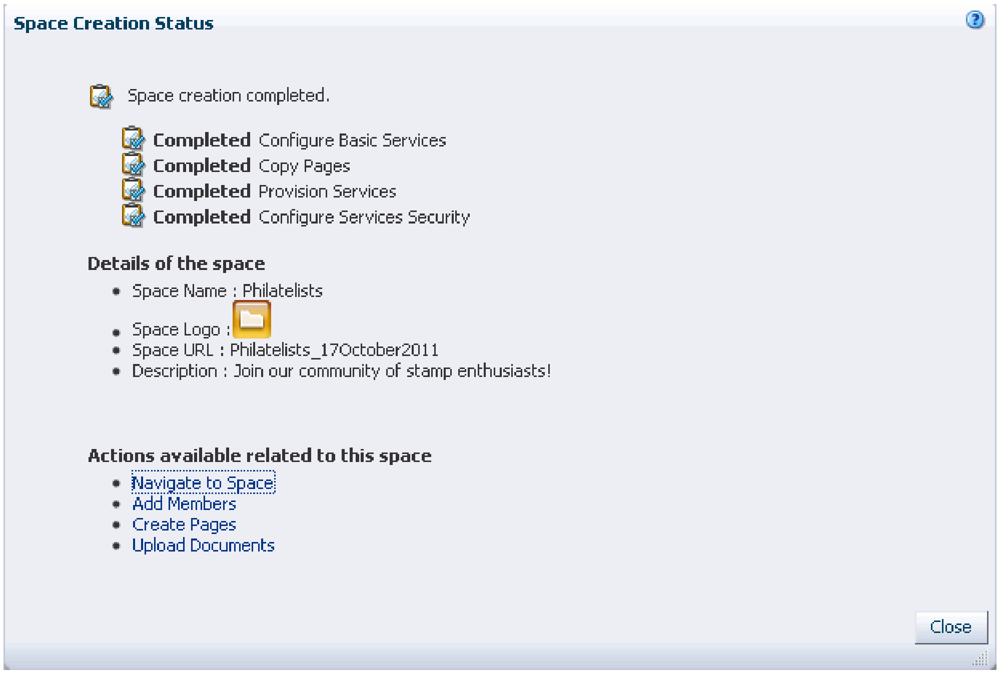
Note: When you select a template on which to base a new space, then subsequently the template is made private by another user before you have completed creating the space, the template remains valid for your use while you are still creating the space.

---

8. Click **Create**.

The Space Creation Status dialog (Figure 53–4) shows the progress, and provides notification when the space is created, along with links to navigate to different areas of the space.

Figure 53–4 Space Creation Status Dialog



9. Perform any of the following actions:
   - Click **Close** to close the dialog and return to the Home space.
   - Click **Navigate to Space** to open the Home page of the new space.
   - Click **Add Members** to open the **Members** page in the space administration settings. For more information, see Section 53.6, "Managing Space Members."
   - Click **Create Pages** to open the **Pages** page in the space administration settings. For more information, see Section 53.7, "Managing Space Pages."
   - Click **Upload Documents** to open the **Documents** page of the new space.

Any space can be parent to one or more *subspaces*. This allows you to develop a *space hierarchy*. For more information, see Chapter 56, "Working with a Space Hierarchy."

53.3 Accessing Space Administration Pages

Space moderators (or anyone granted `Manage` permissions in the space) can access the administration pages for the space:

Page	Description
General	Use this page to set various space properties. For more information, see Section 53.4, "Managing General Administration Settings for a Space."
Roles	Use this page to manage space roles and permissions. For more information, see Section 53.5, "Managing Space Roles."
Members	Use this page to manage space members and assign member roles. For more information, see Section 53.6, "Managing Space Members."
Pages	Use this page to manage space pages. For more information, see Section 53.7, "Managing Space Pages."

Page	Description
Content	For more information, see Section 53.8, "Managing Space Content."
Subspaces	Use this page to manage child spaces of the space. For more information, see Section 53.9, "Managing Subspaces."
Services	Use this page to enable and disable services operating in the space; for example: Announcements, Discussions, Documents, Events, and Lists. For more information, see Section 53.10, "Managing Space Services."
Resources	Use this page to manage the resources for the space. For more information, see Section 53.11, "Managing Space Resources."
Custom Attributes	Use this page to define custom attributes for the space. For more information, see Section 53.12, "Defining Custom Attributes for a Space."

To access administration pages for a space:

1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), select the space.
2. Open the space administration settings pages.

   Tip: The way you access these pages depends on the page template in use. For example, in a side navigation template, you may access space administration pages through a **Manage** menu.

   You can also navigate to these pages using the direct URL provided in Section A.5, "User Interface URLs for Space Pages."

   If you do not have access to the space administration pages, you do not have `Manage` permissions for the space. See Section 51.12, "Changing Your Role in a Space".

53.4 Managing General Administration Settings for a Space

The **General** page of the space administration settings provides access to the tasks described in the following sections:

- Section 53.4.1, "Renaming a Space"
- Section 53.4.2, "Modifying the Description or Keywords for a Space"
- Section 53.4.3, "Taking a Space Offline"
- Section 53.4.4, "Bringing a Space Back Online"
- Section 53.4.5, "Closing or Reactivating a Space"
- Section 53.4.6, "Enabling or Disabling RSS News Feeds for a Space"
- Section 53.4.7, "Changing the Space Icon"
- Section 53.4.8, "Changing the Space Logo"
- Section 53.4.9, "Changing the Page Template for a Space"
- Section 53.4.10, "Changing the Skin for a Space"
- Section 53.4.11, "Changing the Resource Catalogs for Pages and the Page Template for a Space"
- Section 53.4.12, "Changing the Navigation for a Space"

- Section 53.4.13, "Displaying or Hiding a Page Footer in a Space"
- Section 53.4.14, "Customizing the Copyright Statement and Privacy URL"
- Section 53.4.15, "Setting a Space Display Language"
- Section 53.4.16, "Changing the Access to a Space"

53.4.1 Renaming a Space

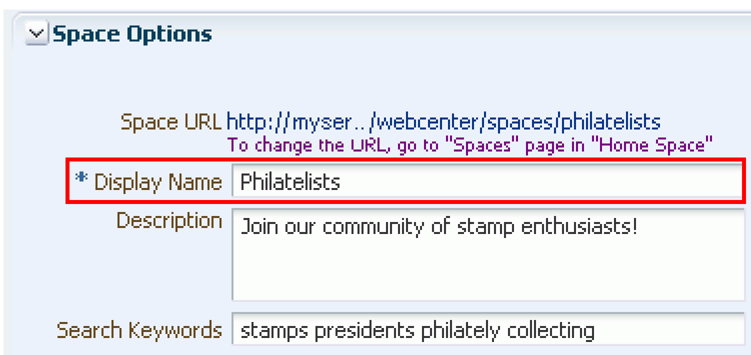
A space *display name* displays at the top of the space and other places where spaces are available for selection, such as the Spaces Switcher menu and the Spaces page.

Note: Changing the display name does not affect the internal name and URL for the space. To change the internal name of a space, see Section 53.14.2, "Changing a Space URL."

To change the display name of a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Space Options**, modify the **Display Name**.

Figure 53–5 Changing a Space Display Name



3. Click **Apply** to save.

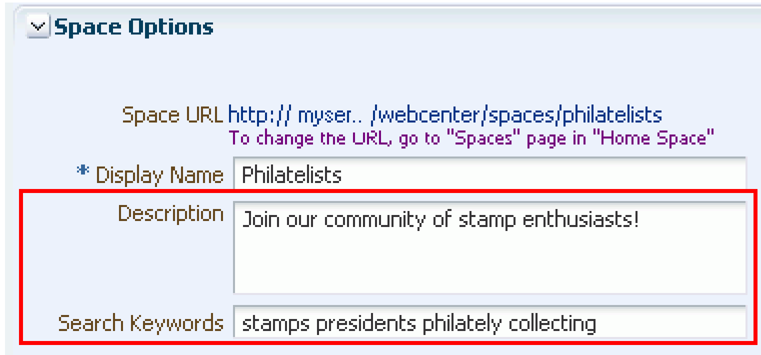
53.4.2 Modifying the Description or Keywords for a Space

A space description appears in the listing of the space on the **Spaces** page. Keywords are useful to make a space more easily discoverable in search results.

To enter or change the description or keywords for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Space Options**, enter or modify the **Description** and/or **Search Keywords** for use in searches on the **Spaces** page. Separate keywords with a space or comma.

Figure 53–6 Modifying a Space Description or Keywords



3. Click **Apply** to save.

53.4.3 Taking a Space Offline

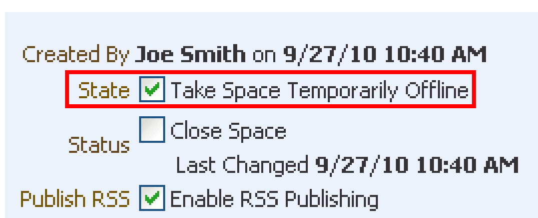
You can take a space temporarily offline for maintenance. For example, if you notice inappropriate content, you can take a space offline to make required updates, then bring it back online. Only the Spaces administrator or space members with `Manage Configuration` permission can access a space that is offline. Other members see the Space Unavailable page (see Section 7.3, "Working with System Pages.").

To permanently close down a space that is not being used any more, see Section 53.4.5, "Closing or Reactivating a Space."

To take a space offline:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Space Options**, select **Take Space Temporarily Offline** (Figure 53–7).

Figure 53–7 Taking a Space Offline



space

****

3. Click **Apply** to save.

53.4.4 Bringing a Space Back Online

When a space is offline, only the Spaces administrator or space members with `Manage Configuration` permission can bring the space back online.

To bring a space back online:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.

2. On the **General** page, under **Space Options**, deselect the **Take Space Temporarily Offline** check box (Figure 53–8).

Figure 53–8 Bringing a Space Back Online

3. Click **Apply** to save.

53.4.5 Closing or Reactivating a Space

You can close a space that is no longer being actively used. Closing a space archives its content. When you close a space, it is removed from everyone's Spaces Switcher menu and displays in the Spaces browser (**Spaces** page) only when a member selects **Closed Spaces** from the **Show** list. The content of a closed space remains accessible and searchable to those who still want to reference it and space members can continue working in the space either by displaying closed spaces on the **Spaces** page, or by direct URL (`http://`*`host`*`:`*`port`*`/webcenter/spaces/`*`space name`*).

When a space is closed, any activities performed in the space are no longer reflected in the Activity Stream in the Home space. Only the Home page of the closed space shows activity in the space.

To close down a space temporarily, take the space offline instead. See Section 53.4.3, "Taking a Space Offline."

To close a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Space Options**, select the **Close Space** check box (Figure 53–9).

Figure 53–9 Closing a Space

   To reactivate the space, deselect the **Close Space** check box.

3. Click **Apply** to save.

53.4.6 Enabling or Disabling RSS News Feeds for a Space

Space members can find out what is happening in a space through RSS news feeds. Within the context of a space, members can:

- Monitor recent activities.
- Track contributions to discussion forums.
- View announcements.
- Watch for revisions to lists.

For more information about publishing RSS new feeds, see Chapter 70, "Working with the RSS Service".

To enable or disable RSS news feeds for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Space Options**, set **Publish RSS** as follows:
   - To allow members access to space information through RSS feeds, select **Enable RSS Publishing** (Figure 53–10).
   - To disable RSS feeds for this space, deselect **Enable RSS Publishing**.

Figure 53–10 Enabling and Disabling Space RSS Feeds

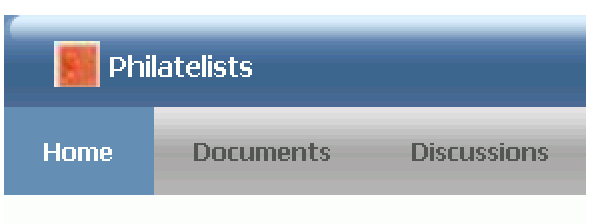
3. Click **Apply** to save.

53.4.7 Changing the Space Icon

The space icon displays alongside the space display name in menus and smaller areas. For example, it may display on the Spaces Switcher menu (Figure 53–11) or at the top of the space (Figure 53–12).

Figure 53–11 Space Icon in Spaces Switcher Menu

Figure 53–12 Space Icon at Top of Space

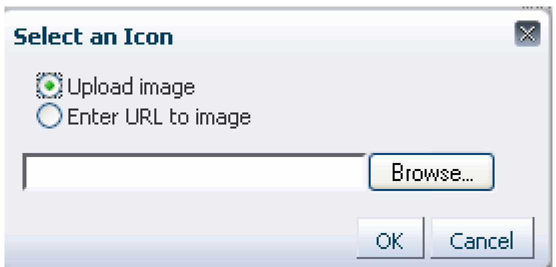


A default icon is provided by the template used when you create the space, but you can assign a different icon if desired.

To change the space icon:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Display Settings**, click **Change** next to the current space icon to open the Select an Icon dialog (Figure 53–13).

Figure 53–13 Select an Icon Dialog



Note: The icon image file can be up to 1 MB. Supported file formats are `.gif` or `.GIF`, `.png` or `.PNG`, and `.jpg` or `.JPG`.

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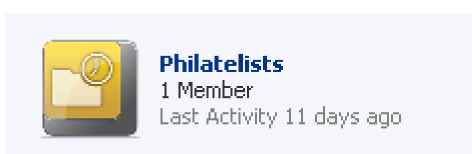
3. In the Select an Icon dialog, click **Browse** to upload a new icon image, or enter the URL to an icon image. Click **OK**.
4. Click **Apply** to save.

53.4.8 Changing the Space Logo

The space logo displays alongside the space name in larger areas. For example, it may display on the **Spaces** page (Figure 53–14).

Figure 53–14 Space Logo on Spaces Page



A default logo is provided by the template used when you create the space, but you can assign a different logo if desired.

To change the space logo:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Display Settings**, click **Change** next to the current space logo to open the Select a Logo dialog (Figure 53–15).

Figure 53–15 Select a Logo Dialog

Note: The logo image file can be up to 1 MB. Supported file formats are `.gif` or `.GIF`, `.png` or `.PNG`, and `.jpg` or `.JPG`.

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3. In the Select a Logo dialog, click **Browse** to upload a new logo image, or enter the URL to a logo image (beginning with `http://`). Click **OK**.
4. Click **Apply** to save.

53.4.9 Changing the Page Template for a Space

A page template defines how individual pages and groups of pages display on a user's screen. For more information about page templates, see Chapter 13, "Working with Page Templates."

Spaces provides several out-of-the-box page templates (see Section 13.1.1, "Out-of-the-Box Page Templates"). Alternatively, portal designers can create custom page templates to offer more ways to display pages on the screen, as described in Section 13.2, "Creating a Page Template." Within a space, you can copy or customize an existing page template, as described below and in Section 53.11, "Managing Space Resources."

By default, a space inherits the page template defined for the space template that you choose when you create the space.

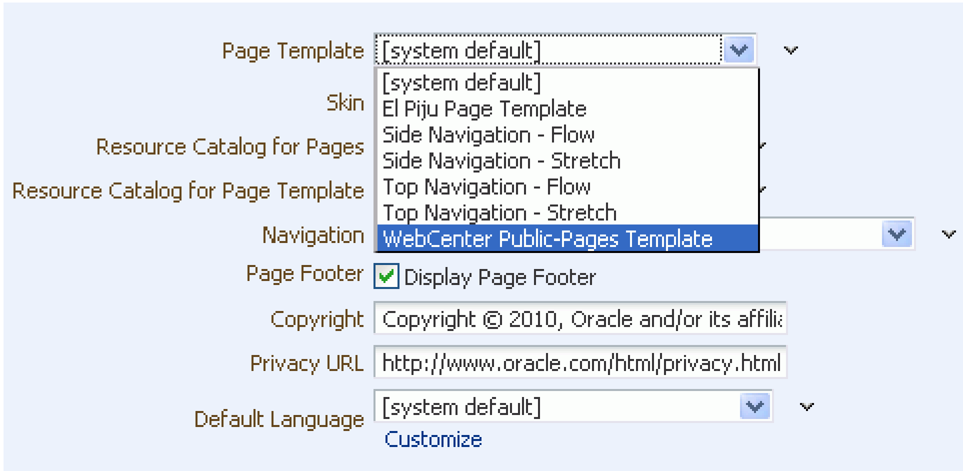
Note: If the space template does not specify a page template, the space uses the default page template specified by Spaces administrator. See Section 5.9, "Choosing a Default Page Template".

You can optionally select a different page template for the space, overriding the space template setting and the application setting.

To change the page template for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Display Settings**, select a new **Page Template** (Figure 53–16).

Figure 53–16 Choosing a Page Template for a Space



The Spaces administrator may choose to hide one or more out-of-the-box page templates (see Section 13.5.1, "Showing and Hiding a Page Template"). The **[system default]** selection applies the page template specified for the application by the Spaces administrator (see Section 5.9, "Choosing a Default Page Template"). Additional custom page templates may be listed if they have been added to the application or the space.

You can add custom page templates for the space to this list in two ways:

- Copy an existing page template into a new page template, completely separate from the original, as described in Section 53.11, "Managing Space Resources."
- Customize an application-level page template to create a new page template for the space. Any changes that are subsequently made to the page template at the application level are automatically cascaded down to the page template at the space level. See Section 13.4, "Customizing a Page Template for a Space."

Note: If you create a new page template for a space, the custom page template is not shown in the **Page Template** list for subspaces of the space. To set the page template for a subspace to the same page template used by its parent space, you must use an EL expression. To make a custom page template available in the **Page Templates** list for all spaces and subspaces, it must be created at the application-level (see Section 13.2, "Creating a Page Template").

If you want Spaces to determine the page template dynamically based on certain criteria, click the **Expression Builder** icon next to the **Page Template** list to open the editor, and then enter an EL expression that specifies the required behavior. For example: in a subspace, the following EL expression sets the **Page Template** to the same setting as the parent space:

```
{srmContext.resourceType['siteTemplate'].displayName['parent_page_
template'].singleResult}
```

3. Click **Apply**.

53.4.10 Changing the Skin for a Space

A skin defines the appearance and look and feel of the application or a space. For more information about skins, see Chapter 14, "Working with Skins."

Spaces provides several out-of-the-box skins (see Section 14.1, "What You Should Know About Skins"). Alternatively, portal designers can develop custom skins to reflect a personality, or to incorporate specific branding, as described in Section 14.2, "Creating a Skin." Within a space, you can copy an existing skin, as described below and in Section 53.11, "Managing Space Resources."

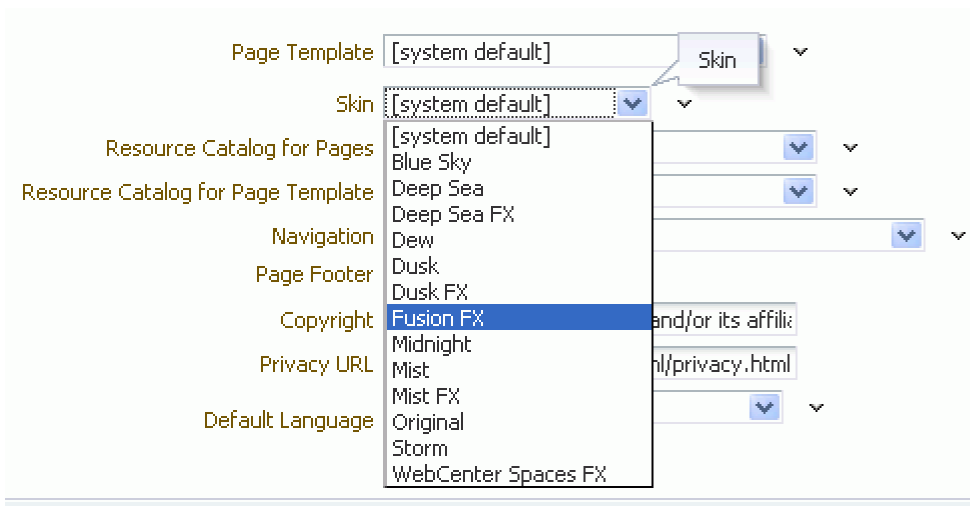
By default, a space inherits its skin from the application-level settings, described in Section 5.4, "Choosing a Default Skin."

You can optionally select a different skin for the space, overriding the application setting. When you change the skin for a space, the skin is applied to all the pages of the space. However, the space administration pages are not affected. They always appear with the default skin, `Fusion FX`.

To change the skin for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Display Settings**, select a new **Skin** in which to wrap the space (Figure 53–17).

Figure 53–17 Choosing a Skin for a Space



The Spaces administrator may choose to hide one or more out-of-the-box skins (see Section 14.4.1, "Showing and Hiding a Skin"). The **[system default]** selection applies the skin specified for the application by the Spaces administrator (see Section 5.4, "Choosing a Default Skin"). Additional custom skins may be listed if they have been added to the application or the space.

You can add custom skins for the space to this list by copying an existing skin into a new skin. For more information, see Section 53.11, "Managing Space Resources."

Note: If you create a new skin for a space, the custom skin is not shown in the **Skin** list for subspaces of the space. To set the skin for a subspace to the same skin used by its parent space, you must use an EL expression. To make a custom skin available in the **Skin** list for all spaces and subspaces, it must be created at the application-level (see Section 14.2, "Creating a Skin").

If you want Spaces to determine the skin dynamically based on certain criteria, click the **Expression Builder** icon next to the **Skin** list to open the editor, and then enter an EL expression that specifies the required behavior.

3. Click **Apply** to save.

53.4.11 Changing the Resource Catalogs for Pages and the Page Template for a Space

When you edit a page or page template in a space, the Resource Catalog lists items that you can select to add to the page or page template. For more information about Resource Catalogs, see Chapter 16, "Working with Resource Catalogs."

Spaces provides two out-of-the-box Resource Catalogs for pages and the page template in a space:

- **Default Space Catalog** for editing individual pages and task flows in a space.
- **Default Page Template Catalog** for editing page templates.

For more information, see Section 16.1.1, "Understanding the Out-of-the-Box Resource Catalogs."

Alternatively, portal designers can develop custom Resource Catalogs, as described in Section 16.2, "Creating Resource Catalogs." Within a space, you can create a new Resource Catalog from scratch or copy an existing Resource Catalog into a new Resource Catalog, as described below and in Section 53.11, "Managing Space Resources."

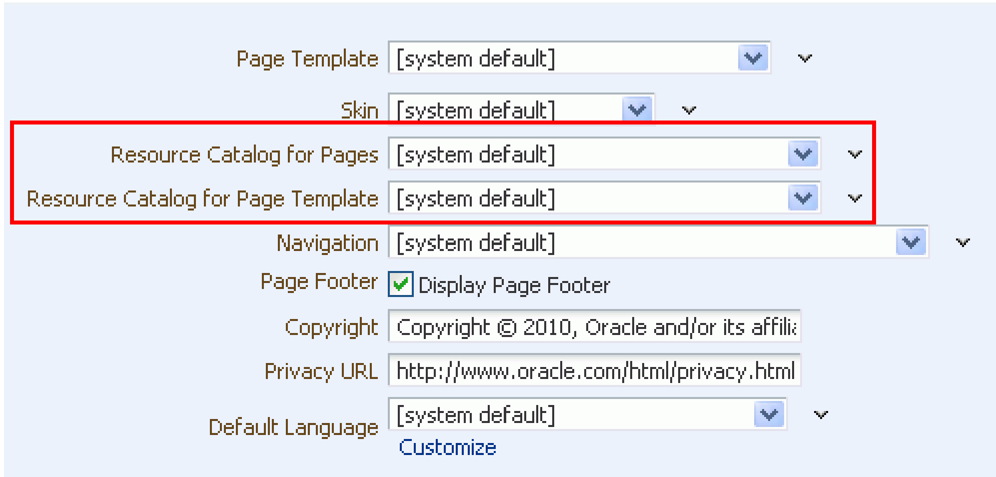
By default, a space inherits the Resource Catalogs for its pages and the page template from the application-level settings, described in Section 5.10, "Choosing Default Resource Catalogs."

You can optionally select different Resource Catalogs for the space, overriding the application settings.

To change the Resource Catalogs used to edit pages or the page template in a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Display Settings**, select a new Resource Catalog from the **Resource Catalog for Pages** or **Resource Catalog for Page Templates** lists (Figure 53–18).

Figure 53–18 Choosing a Resource Catalog for a Space



The Spaces administrator may choose to hide one or more out-of-the-box Resource Catalogs (see Section 16.4, "Showing and Hiding a Resource Catalog"). The **[system default]** selection applies the Resource Catalogs specified for the application by the Spaces administrator (see Section 5.10, "Choosing Default Resource Catalogs"). Additional custom Resource Catalogs may be listed if they have been added to the application or the space.

You can add custom Resource Catalogs for the space to this list by creating a new Resource Catalog from scratch or by copying an existing Resource Catalog into a new Resource Catalog. For more information, see Section 53.11, "Managing Space Resources."

Note: If you create a new Resource Catalog for a space, the custom Resource Catalog is not shown in the **Resource Catalog** lists for subspaces of the space. To set the Resource Catalogs for a subspace to the same Resource Catalogs used by its parent space, you must use an EL expression. To make a custom Resource Catalog available in the **Resource Catalog** lists for all spaces and subspaces, it must be created at the application-level (see Section 16.2, "Creating Resource Catalogs").

If you want Spaces to determine the Resource Catalog dynamically based on certain criteria, click the **Expression Builder** icon next to the **Resource Catalog** lists to open the editor, and then enter an EL expression that specifies the required behavior.

3. Click **Apply** to save.

53.4.12 Changing the Navigation for a Space

Navigation enables space members to see what information the space provides and to get to that information quickly and easily. For more information about navigation models, see Chapter 12, "Working with Navigation."

Spaces provides the following out-of-the-box navigation models for a space:

- **Spaces Administration Options** contains administration options for a space. By default, it includes a **Manage** dropdown menu to provide access to administration settings
- **Spaces Default Navigation Model** displays links to space pages. By default, it is positioned at the top of the sidebar on the left-hand side of a space.
- **Spaces Navigation with Blogs/Wikis/Lists Submenus** displays links to space pages, and links to any documents, blogs, wikis, and lists. By default, it is positioned at the top of the sidebar on the left-hand side of a space.

For more information, see Section 12.1.1, "What You Should Know About Navigation Models."

Alternatively, portal designers can develop custom navigations, as described in Section 12.2, "Building a Navigation Model." Within a space, you can create a new navigation from scratch or copy an existing navigation into a new navigation, as described below and in Section 53.11, "Managing Space Resources."

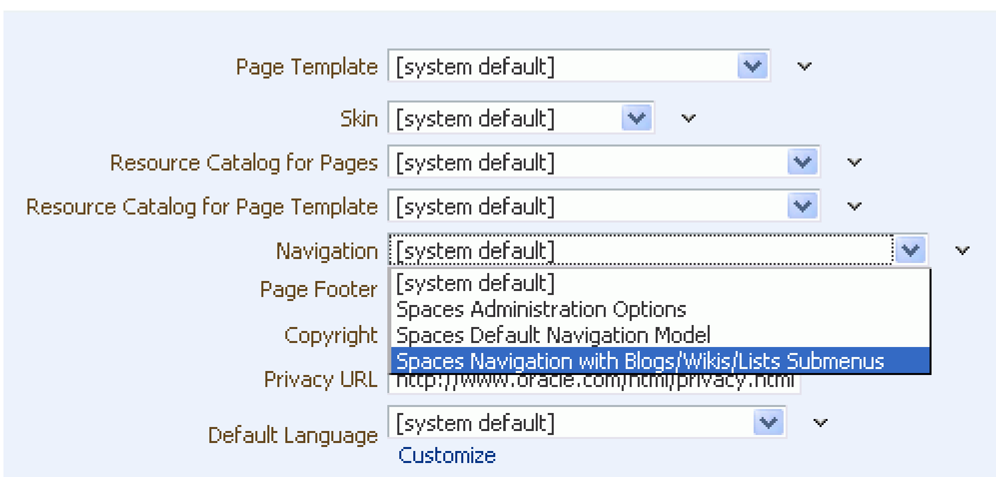
By default, a space inherits its navigation from the application-level settings, described in Section 5.11, "Choosing a Default Navigation."

You can optionally select a different navigation for the space, overriding the application settings.

To change the navigation for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Display Settings**, select a new **Navigation** (Figure 53–19).

Figure 53–19 Choosing a Navigation for a Space



The Spaces administrator may choose to hide one or more out-of-the-box navigation models (see Section 11.4.3, "Showing and Hiding Resources"). The **[system default]** applies the navigation specified for the application by the Spaces administrator (Section 5.11, "Choosing a Default Navigation"). Additional navigation models may be listed if they have been added to the application or the space.

You can add custom navigations for the space to this list by creating a new navigation from scratch or by copying an existing navigation into a new navigation. For more information, see Section 53.11, "Managing Space Resources."

Note: If you create a new navigation for a space, the custom navigation is not shown in the **Navigation** list for subspaces of the space. To set the navigation for a subspace to the same navigation used by its parent space, you must use an EL expression. To make a custom navigation available in the **Navigation** list for all spaces and subspaces, it must be created at the application-level (see Section 12.2.1, "Creating a Navigation Model").

If you want Spaces to determine the navigation dynamically based on certain criteria, click the **Expression Builder** icon next to the **Navigation** list to open the editor, and then enter an EL expression that specifies the required behavior.

3. Click **Apply** to save.

53.4.13 Displaying or Hiding a Page Footer in a Space

A page footer can display copyright details for the space and a link to its Privacy Statement.

To display or hide a page footer for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Display Settings**, select the **Page Footer** check box to display a page footer, or deselect the check box to hide the page footer.
3. Click **Apply** to save.

53.4.14 Customizing the Copyright Statement and Privacy URL

When enabled, the copyright statements and URL to the privacy statement specific to the space display in the page footer of the space (Figure 53–20 and Figure 53–21):

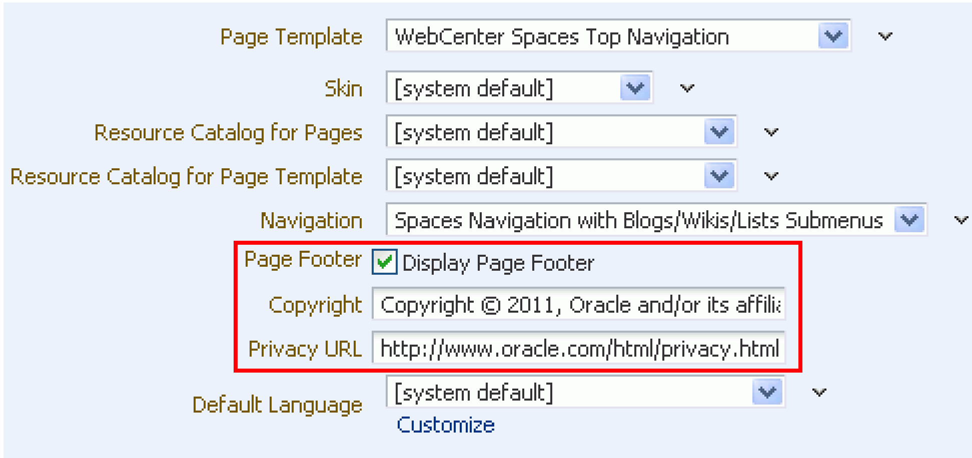
Figure 53–20 Spaces Copyright Statement

Figure 53–21 Spaces Privacy URL

To customize the copyright statement and privacy URL for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Display Settings**, select **Display Page Footer** to display the area at the bottom of the space for the copyright statement and privacy URL (Figure 53–22). Deselect the check box to hide the page footer, including the copyright statement and privacy URL.

Figure 53–22 Customizing the Copyright Statement and Privacy URL



3. In the **Copyright** and **Privacy URL** fields, enter appropriate values.
4. Click **Apply** to save.

53.4.15 Setting a Space Display Language

You can optionally set a space display language to control the language in which the user interface (UI) elements of a particular space render in Spaces. UI elements include button and field labels, application links, screen text, and so on.

For more information about working with languages in Spaces, and the different levels at which a display language can be set, see Chapter 27, "Working with Multilanguage Portals."

Within the scope of viewing a space, the space display language setting is given precedence over all other language settings. For example, if a space named WebCenter Portal Central has its display language set to German, and Monica (a member of WebCenter Portal Central) sets her user preference language to Dutch, assuming no other language settings are in effect:

- Monica views the WebCenter Portal Central space in German, and cannot change this language setting.
- Monica views other parts of Spaces, outside the WebCenter Portal Central space, in Dutch.

Note: If you create a space based on a space template that is defined to use a specific language, that language setting is not inherited by the space. Instead, the initial language setting for a new space is based on the order of precedence described in Section 27.1.1, "Display Language Precedence.".

To set a space display language:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Display Settings**, select a language for the space from the **Default Language** list (Figure 53–23).

Figure 53–23 Setting the Space Display Language

If you want Spaces to determine the language dynamically based on certain criteria, click the **Expression Builder** icon next to the property field to open the editor, and then enter an EL expression that specifies the required behavior.

3. To customize the languages displayed in the **Default Language** list, click **Customize**. For example, your Spaces application might be available in 27 different languages, but you may only need to display the content in your space in three or four different languages, so you could filter the list to display a subset of languages.

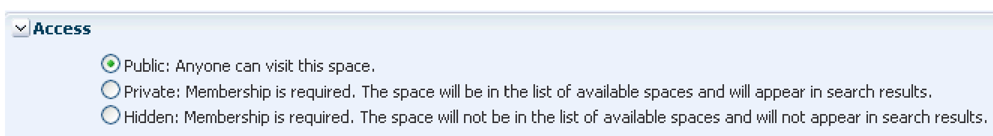
53.4.16 Changing the Access to a Space

Access to a space is defined when the space is created (see Section 53.2, "Creating a New Space"). This access can be changed to make the space more visible or less visible.

To change the access to a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **General** page.
2. On the **General** page, under **Access**, select how you want the space to be exposed:

Figure 53–24 Space Access Settings



- **Public**: Anyone can visit the space, whether they are a registered Spaces user or not. When this setting is selected, the `Public-User` role in the space is automatically granted `View Pages and Content` permission in the space, which allows public users to view pages, lists, events, links, and notes. To grant public users permissions to view announcements, discussions, and documents, you need to grant these permissions, as described in Section 53.14.5, "Granting Public Access to a Space."
- **Private**: To access the space, membership is required (either through invitation or self-registration if enabled). The space will be shown in the list of available spaces on the **Spaces** page and will appear in search results.
- **Hidden**: To access the space, membership is required (through invitation). The space will *not* be shown in the list of available spaces on the **Spaces** page and will *not* appear in search results.

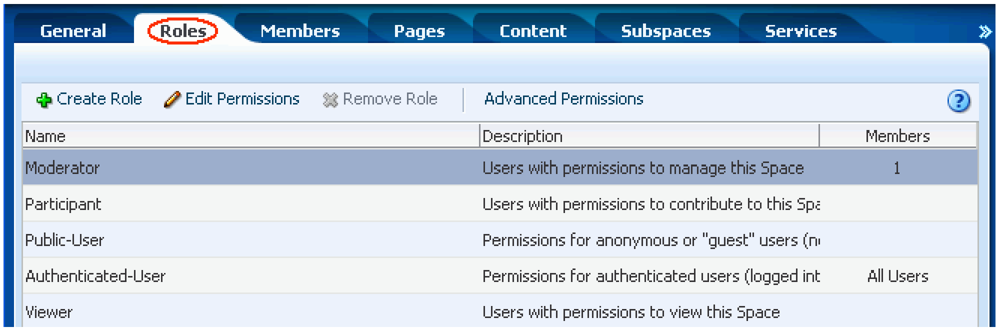
3. Click **Apply** to save.

53.5 Managing Space Roles

To manage the roles for assigning permissions in a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Roles** page.

Figure 53–25 Space Administration: Roles Page



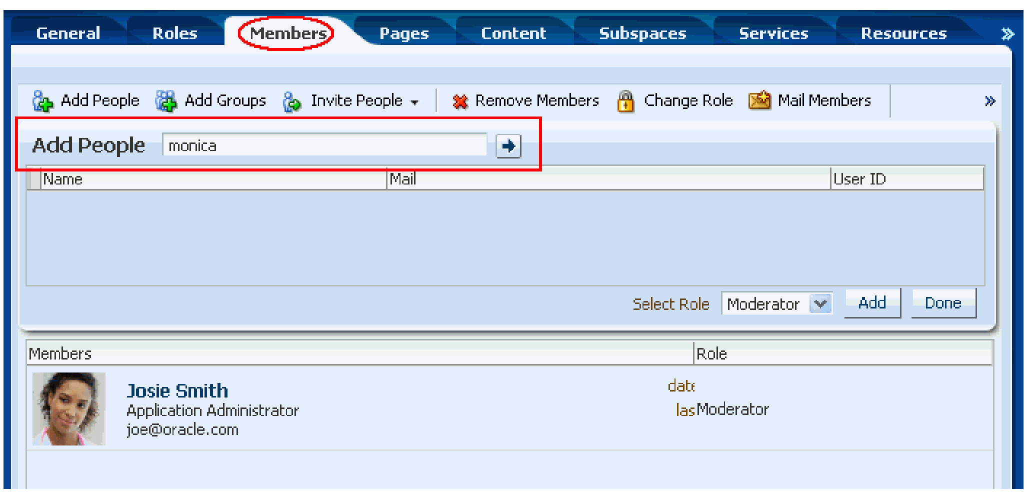
2. To work with space roles, refer to Chapter 54, "Managing Space Members and Roles."

53.6 Managing Space Members

To manage the members of a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Members** page.

Figure 53–26 Space Administration: Members Page



2. To work with space members, refer to Chapter 54, "Managing Space Members and Roles."

53.7 Managing Space Pages

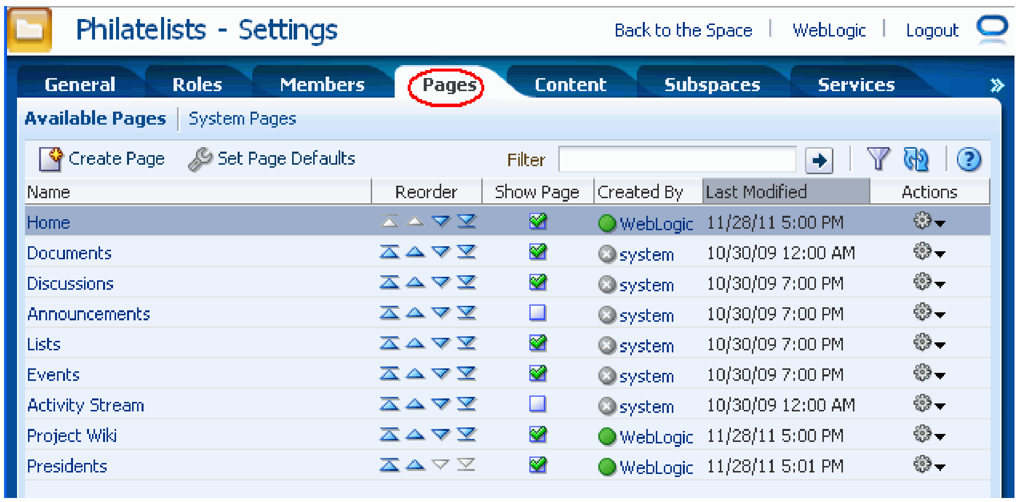
In a space, members have access to member-created pages and system pages. The content on a space page is typically targeted to a particular audience or objective.

Depending on the permissions granted, members can create and edit member-created pages as described in Chapter 17, "Creating and Managing Pages."

System pages are provided to support a rapid deployment of your portal. They fulfill a range of needs, from a finished informational page (the **Unauthorized** page) to pages that provide content that is generated on the spot and tailored to members of the space (the **Activity Stream** page). For complete information about system pages, including how to customize them, see Section 7.3, "Working with System Pages."

As a space moderator, you can manage all pages in the space through the **Pages** page (Figure 53–27).

Figure 53–27 Space Administration: Pages Page



The following sections describe how to manage pages in a space. These tasks can be performed only by a space moderator, and affect all members of the space:

- Section 53.7.1, "Setting Page Creation Defaults for a Page in a Space"
- Section 53.7.2, "Showing or Hiding Pages in a Space"
- Section 53.7.3, "Searching for Pages in a Space"
- Section 53.7.5, "Removing All User Customizations from a Page in a Space"
- Section 53.7.6, "Copying a Page in a Space"
- Section 53.7.7, "Renaming a Page in a Space"
- Section 53.7.8, "Changing Access Permissions on a Page in a Space"
- Section 53.7.9, "Deleting a Page in a Space"
- Section 53.7.10, "Exposing a Space Page in the Home space"
- Section 53.7.11, "Sending a Link to a Page in a Space"
- Section 53.7.12, "Viewing Information About a Page in a Space"

53.7.1 Setting Page Creation Defaults for a Page in a Space

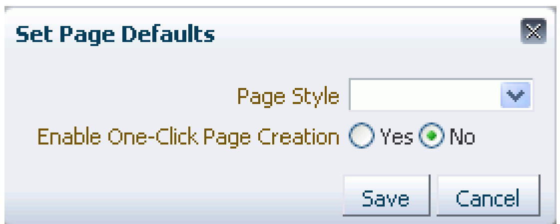
If your Spaces application administrator has made the option available, you can set page creation defaults to reduce the number of steps required to create a page in a space. That is, you can specify the page style that is selected by default when you open the Create Page dialog. You can also select to bypass the Create Page dialog, which enforces the default page style.

> **Tip:** When you skip the Create Page dialog, the new page has a generic name. For information about renaming pages, see Section 17.6, "Renaming a Page."

To set space page creation defaults:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.
2. On the **Pages** page, click **Set Page Defaults** to display the Set Page Defaults dialog (Figure 53–28).

Figure 53–28 Set Page Defaults Dialog



3. Select a page layout from the **Page Style** dropdown list.

> **See Also:** For information about the seeded page styles, see Section 15.1, "What You Should Know About Page Styles." Your application administrator may provide additional custom page styles or restrict page styles to a shorter list.

4. Select an option next to **Enable One-Click Page Creation**:

   Yes: Bypass the Create Page dialog, and create all space pages using the specified **Page Style**. This enforces a common look and feel across the entire space.

   No: Display the Create Page dialog, with the specified **Page Style** selected as the default in the Create Page dialog for all space pages. Space members can select a different style for their new space pages.

5. Click **Save** to save your changes and exit the dialog.

53.7.2 Showing or Hiding Pages in a Space

As a space moderator, you can control the display of pages in the space in either of the following ways:

- Define a navigation model for the space to control what pages display and in what order and hierarchy. See Section 53.11, "Managing Space Resources" to access the Navigations resource for the space and Chapter 12, "Working with Navigation" to build a navigation that includes the pages of the space.
- If the navigation used by the space shows all pages in the space, selectively show or hide pages in the space administration settings on the **Pages** page, as described below.

To show or hide pages for all members in a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.

2. On the **Pages** page, select or deselect the **Show Page** check box for the pages you want to show or hide.

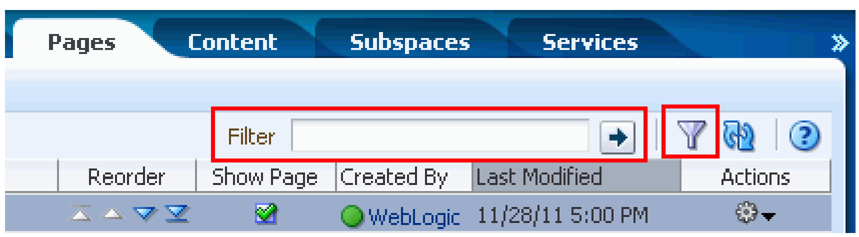
Individual space members can customize their own personal view of pages in the space, as described in Section 51.11.1, "Showing or Hiding Pages in Your View."

53.7.3 Searching for Pages in a Space

To search for pages in a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.
2. On the **Pages** page, use either of the following search methods:
   - **Filter search**: Enter a full or partial search string in the **Filter** field (Figure 53–29), then click the **Filter** icon to refresh the list with all space pages for which a match is found in **Name** *or* **Created By**. To clear the current search string and display all space pages, click the **Clear Filter** icon.
   - **Filter panel**: Click the **Show or hide the filter panel** icon (Figure 53–29) to display a filter panel above the page list, then enter a full or partial search string in the fields above **Name** and/or **Created By**, and press Enter to refresh the list with all space pages that match the filtering criteria. To clear the current search string and display all space pages, clear the filter panel fields and press Enter.

Figure 53–29 Searching for Pages in a Space



To refresh the list of pages, first ensure that any prior filter is cleared (click the **Clear Filter** icon), and no filter is specified in the filter panel, then click the **Refresh** icon.

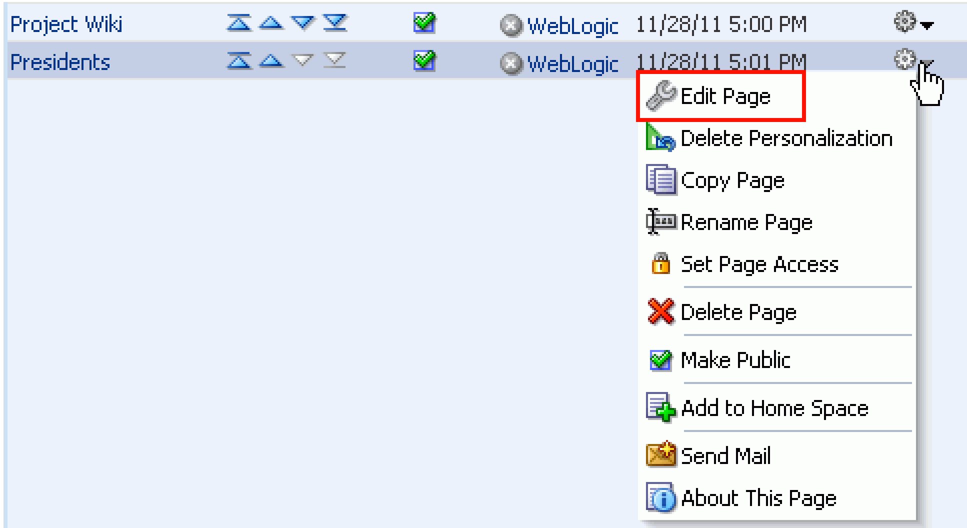
53.7.4 Editing a Page in a Space

As a space moderator, you can open any page in the space in the page editor, Composer.

To edit a space page:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.
2. On the **Pages** page, click the **Actions** icon for the page, and select **Edit Page** (Figure 53–30) to open Composer.

Figure 53–30 Editing a Page in a Space



3. See Chapter 18, "Editing a Page."

53.7.5 Removing All User Customizations from a Page in a Space

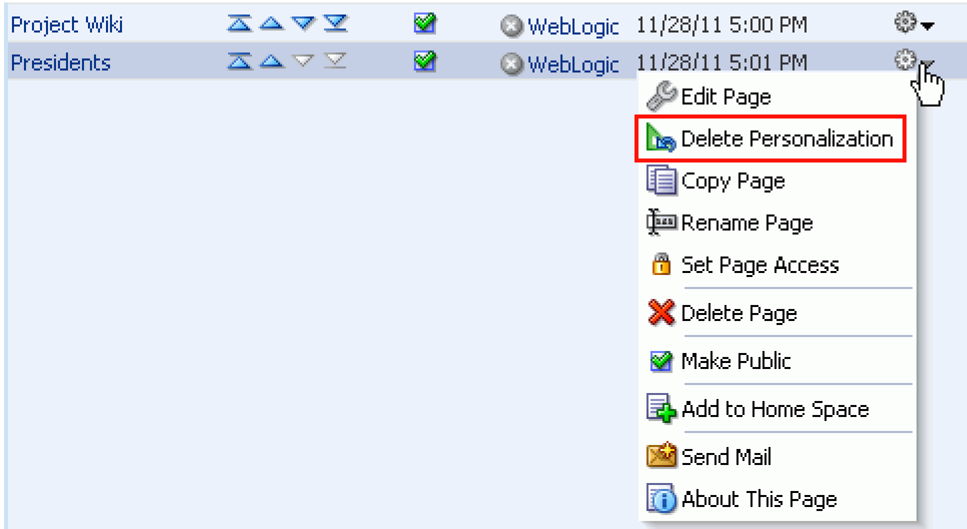
Individual space members can add and remove their own customizations from their personal view of pages in the space, as described in Section 51.11.4, "Customizing Your View of a Page."

As a space moderator, you can return a page to its default settings, removing all user customizations from a selected space page. This action removes user changes to the space page such as rearrangement, resizing, or collapsing of task flows in all space members' view of the page.

To remove all user customizations from a space page:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.
2. On the **Pages** page, click the **Actions** icon for the page, and select **Delete Personalization** (Figure 53–31) to open the Delete Personalization confirmation dialog.

Figure 53–31 Removing User Customizations from a Space Page



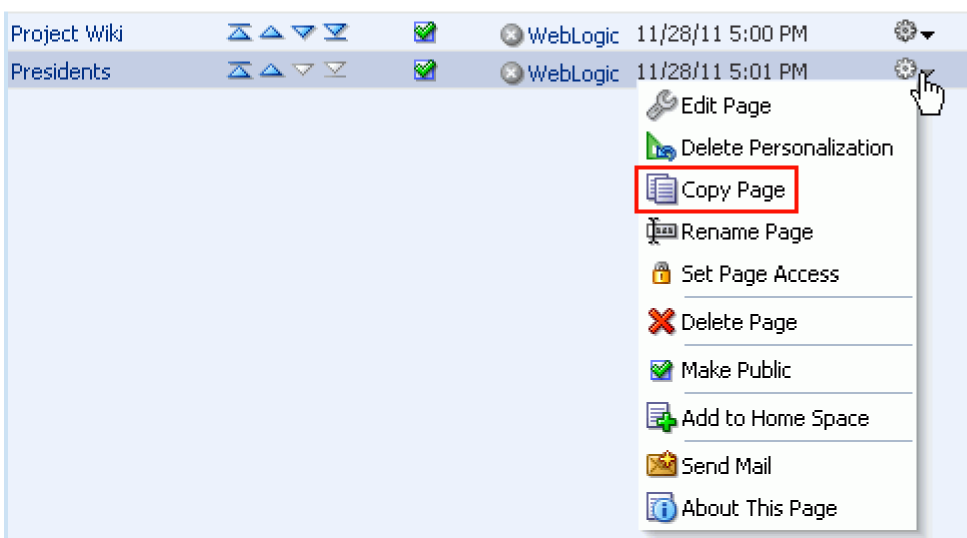
3. To confirm that you want to remove all user customizations from the page, click **OK**.

53.7.6 Copying a Page in a Space

To copy a page in a space for use by all space members:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.
2. On the **Pages** page, click the **Actions** icon for the page, and select **Copy Page** (Figure 53–32) to open the Copy Page dialog.

Figure 53–32 Copying a Page in a Space



3. Enter a name for the new page, and click **OK**.

Note: You must have the `Spaces-Manage All` permission (see Table 54–2, " Space Permissions - Simple Permission Model") to copy a page that is available to all members of a space. If you have not been granted this permission, then the **Copy Page** selection is not available to you.

53.7.7 Renaming a Page in a Space

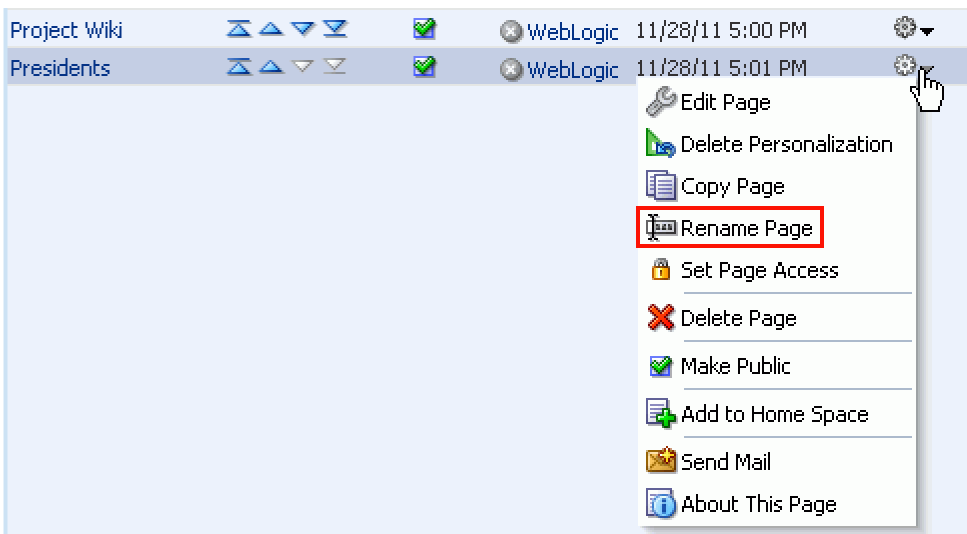
When you rename a page, keep in mind that any pretty URLs that use the old name will be broken. Also note that system pages, such as the **Announcements**, **Lists**, and **Events** pages, do not provide the option of being renamed.

> **See Also:** For information about pretty URLs, see Appendix A, "Spaces User Interface URLs."

To rename a page in a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.
2. On the **Pages** page, click the **Actions** icon for the page, and select **Rename Page** (Figure 53–33) to open the Rename Page dialog.

Figure 53–33 Renaming a Page in a Space



3. Enter a new name for the page, and click the **Save** icon.

53.7.8 Changing Access Permissions on a Page in a Space

Note: To make an entire space public, see Section 53.14.5, "Granting Public Access to a Space."

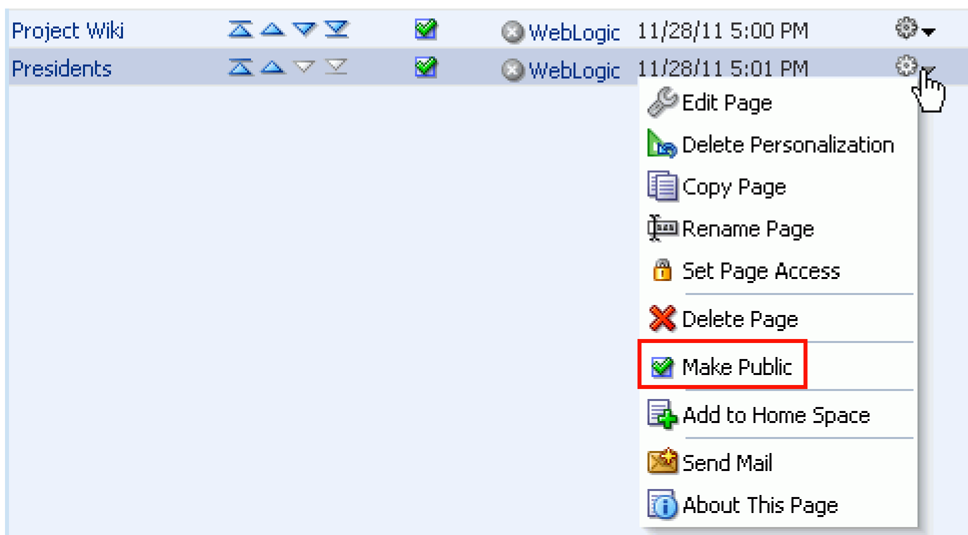
As the space moderator, you are authorized to view and manage security for any page in the space. Page owners normally determine who can see the space pages they create (see Section 17.7, "Controlling User Access to a Page"), but when a page owner is not available, the space moderator may be required to make changes.

In a public space, public users (who are assigned the `Public-User` role by Spaces) are granted `View Pages and Content` permission in the space by default, which allows public users to view pages, lists, events, links and notes. If you want to restrict access to a specific page, you can remove public view access from the page. Spaces provides a shortcut to grant and remove public read-only access to a page using the page **Actions** icon menu:

- To grant read-only access to a specific page in a public space, select **Make Public** (Figure 53–34). The menu selection changes to **Remove Public Access**.
- To restrict access to a specific page to space members only, select **Remove Public Access**.

Note: These selections are active only if the space is public (see Section 53.14.5, "Granting Public Access to a Space").

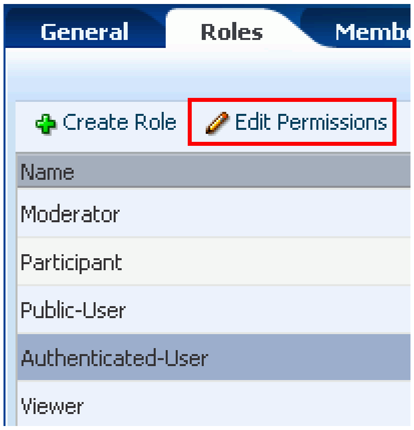
Figure 53–34 Granting Read-Only Access to a Page in a Public Space



To control the access to a specific page in a space at a more detailed level:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Roles** page.
2. On the **Roles** page, select the role for which you want to specify page access permissions, then click **Edit Permissions** (Figure 53–35). For information about the default Spaces roles in this list, see Section 54.2.1.1, "Understanding the Default Roles for a Space."

Figure 53–35 Granting Spaces User Access to Space



3. In the Edit Permissions dialog, deselect any check boxes for page permissions under **Basic Services**, which apply to *all* pages in the space. For information about the permissions listed in the Edit Permission dialog, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."
4. Click **Save**.
5. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.
6. To modify user access to a page, click the **Actions** icon for the page, and select **Set Page Access** (Figure 53–36) to open the Set Page Access dialog (Figure 53–37).

Figure 53–36 Controlling Access to a Page in a Space

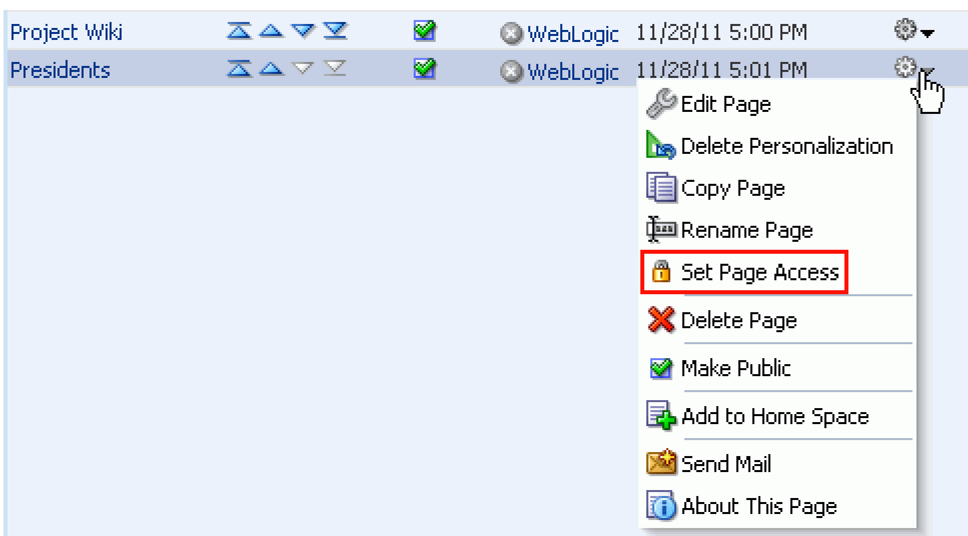
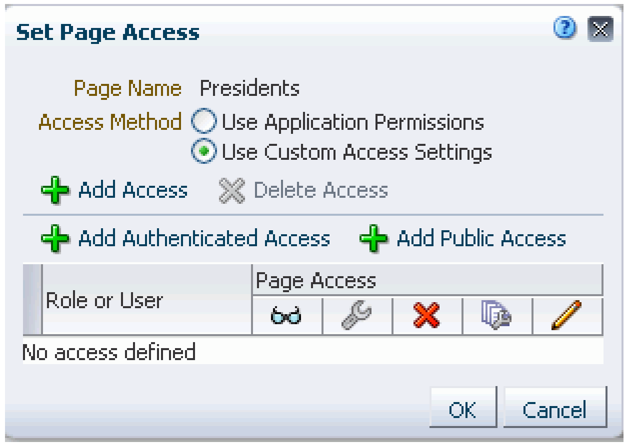


Figure 53–37 Set Page Access Dialog



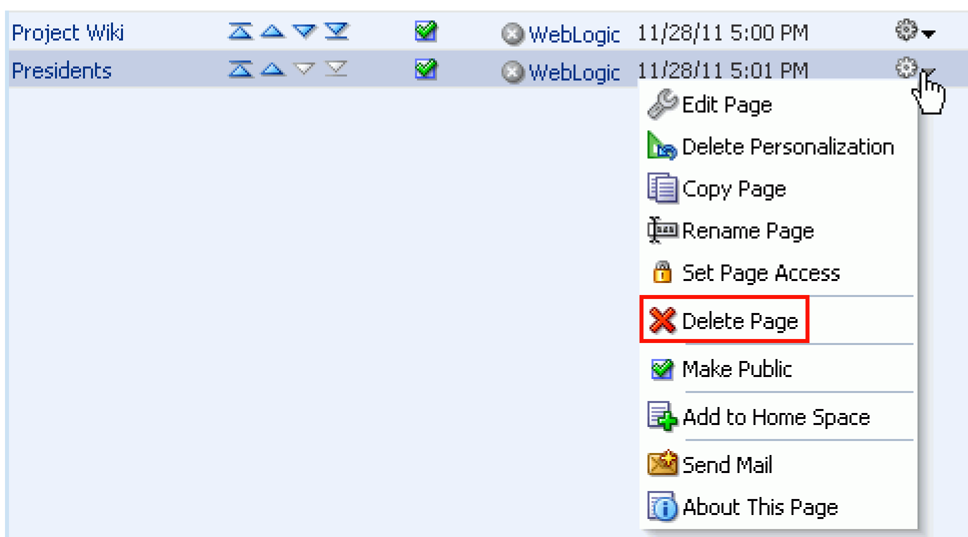
7. Follow the general steps for setting page access in Section 17.7, "Controlling User Access to a Page", beginning with Step 3.

53.7.9 Deleting a Page in a Space

To delete a page in a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.
2. On the **Pages** page, click the **Actions** icon for the page, and select **Delete Page** (Figure 53–38) to display the Delete Page dialog.

Figure 53–38 Deleting a Page in a Space



3. Confirm deletion of the page, and click **Delete**.

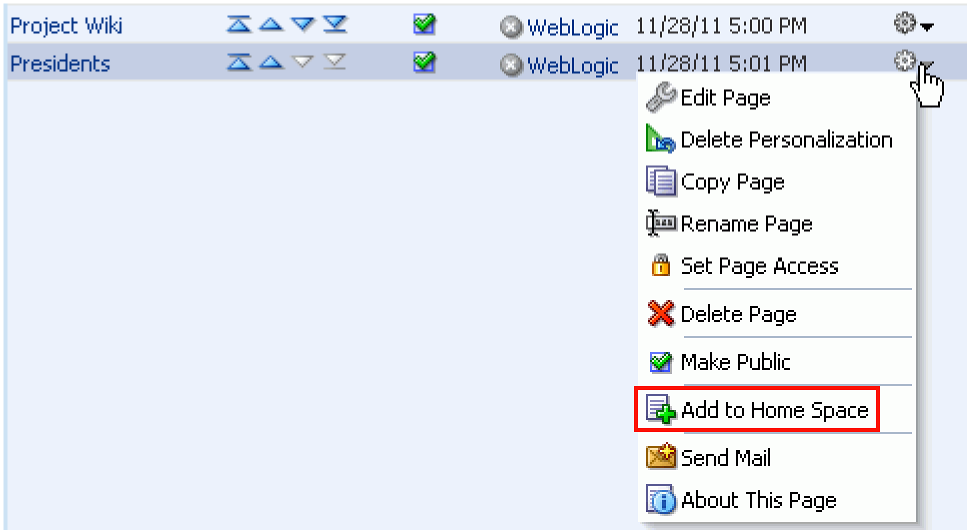
53.7.10 Exposing a Space Page in the Home space

To add a space page to the list of pages in the Home space, visible to all Spaces users:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.

2. On the **Pages** page, click the **Actions** icon for the page, and select **Add to Home space** (Figure 53–39).

Figure 53–39 Exposing a Space Page in the Home space



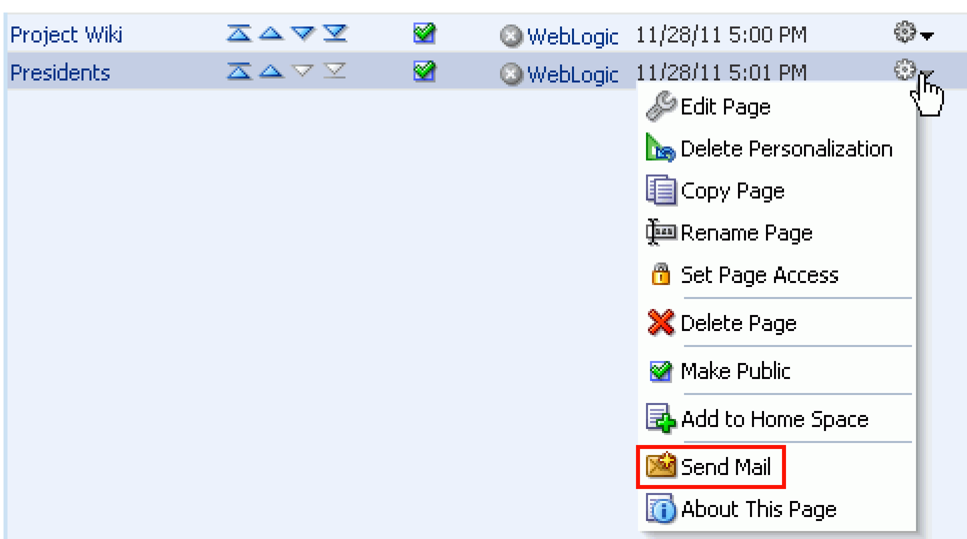
When you add a space page to the Home space, the page scope remains that of the space.

53.7.11 Sending a Link to a Page in a Space

To send mail to space members prepopulated with a link to a particular page:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.
2. On the **Pages** page, click the **Actions** icon for the page, and select **Send Mail** (Figure 53–40) to open your mail application compose window, showing a URL link to the page.

Figure 53–40 Sending a Link to a Page in a Space

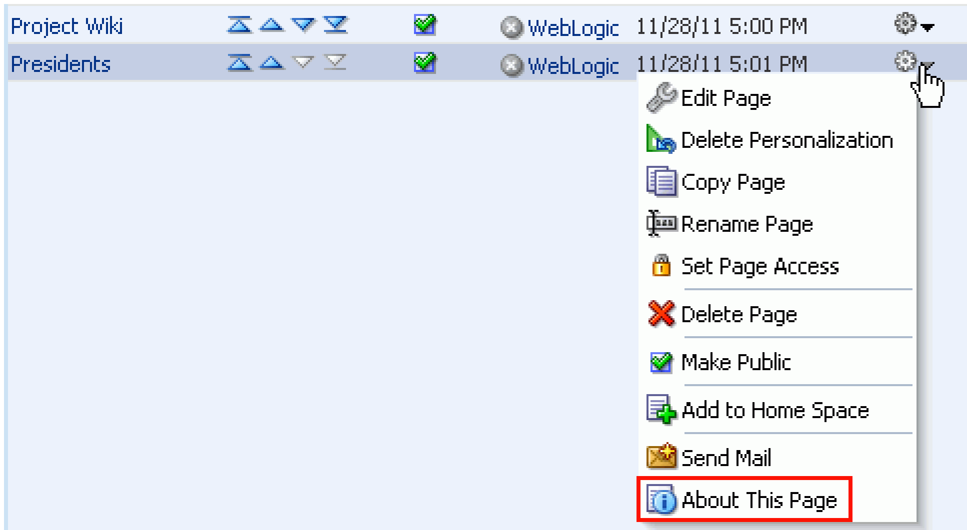


53.7.12 Viewing Information About a Page in a Space

To view information about a page in a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Pages** page.
2. On the **Pages** page, click the **Actions** icon for the page, and select **About This Page** (Figure 53–41) to open the Page Information dialog, which shows Name, Created By, Date Created, Last Modified, and Direct URL.

Figure 53–41 Viewing Information About a Page in a Space

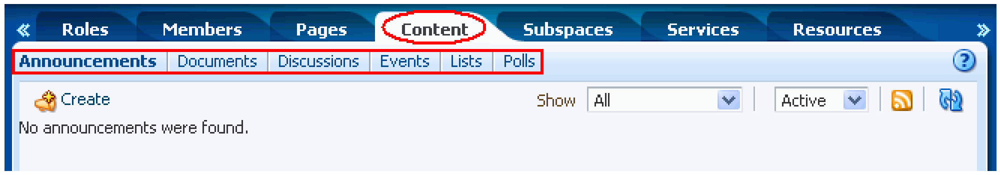


53.8 Managing Space Content

To manage the content in a space in a centralized location:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Content** page.
2. On the **Content** page (Figure 53–42), click the subtab for the service that supports the content with which you want to work:
   - Announcements. For more information, see Chapter 61, "Working with the Announcements Service."
   - Documents. For more information, see Section 43.1.1, "Understanding the Document Explorer Task Flow."
   - Discussions. For more information, see Chapter 62, "Working with the Discussions Service."
   - Events. For more information, see Chapter 63, "Working with the Events Service."
   - Lists. For more information, see Chapter 66, "Working with the Lists Service."
   - Polls. For more information, see Chapter 69, "Working with the Polls Service."

Figure 53–42 Space Administration: Content Page



The subtabs provide quick access to creating and managing content made available through the services that are enabled in the space:

53.9 Managing Subspaces

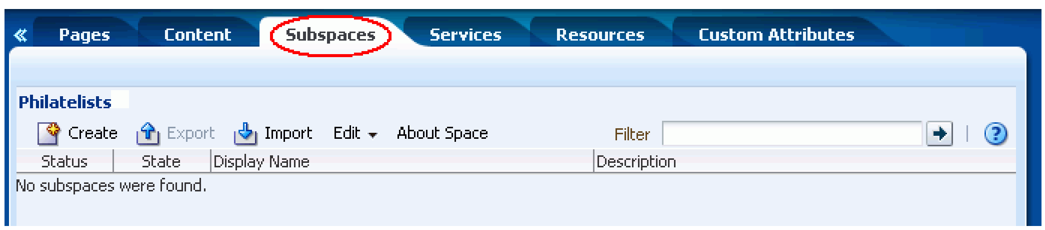
To manage the subspaces of a space:

1. In the parent space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **subspaces** page (Figure 53–43).

   Tip: The way you access this page depends on the page template in use. For example, in a side navigation template, you may access it through a **Manage** menu.

   You can also navigate to this page using the direct URL provided in Section A.5, "User Interface URLs for Space Pages."

Figure 53–43 Space Administration: Subspaces Page



2. To work with subspaces, refer to Chapter 56, "Working with a Space Hierarchy."

53.10 Managing Space Services

Most service-related configuration is the responsibility of the Fusion Middleware administrator. The administrator configures and maintains service connections, which make the services available in Spaces. For more information, see "Managing Oracle WebCenter Portal Services" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. Also see Section 55.4, "Enabling and Disabling Services."

You can check the **Services** page to see which services are available and can enable or disable services as required. If a service is not shown on the **Services** page, then the administrator has not configured that service connection.

You use the **Roles** page to configure role permissions for each service that is enabled in the space. If a service is not shown on the **Roles** page, then the service is disabled in the space. For more information, see Section 54.2.3, "Viewing and Editing Permissions of a Space Role."

When you enable a service in a space, you are automatically granted `Manage` permissions on that service.

The following sections describe service-related configuration activities that space moderators can perform in a space:

- Section 53.10.1, "Enabling and Disabling Services Available to a Space"
- Section 53.10.2, "Configuring the Mail Distribution List for a Space"
- Section 53.10.3, "Modifying Discussion Forum Settings for a Space"
- Section 53.10.4, "Publishing Space Mail in a Discussion Forum"
- Section 53.10.5, "Configuring a Shared Mail Connection for a Space"
- Section 53.10.6, "Creating and Managing Space Event Categories"

53.10.1 Enabling and Disabling Services Available to a Space

Most services operating within a space are optional. Optional services include Announcements, Discussions, Documents, Space Events, Instant Messaging and Presence, and Lists.

When you disable a service, task flows associated with the service are no longer available. For example, if you disable the Discussions service:

- The Discussions page is not shown in the space.
- Discussions task flows included in custom space pages are replaced with a message `Service was not enabled for this space.`
- Discussions task flows are not offered in the Resource Catalog for space pages.

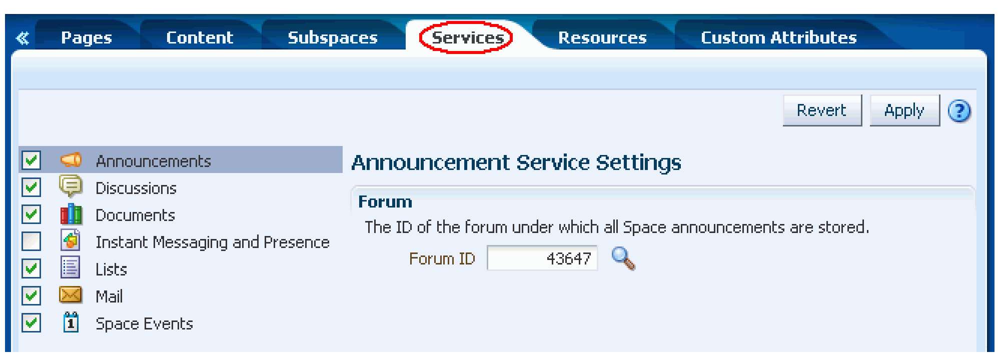
Additionally, permissions granted for disabled services are removed, and any existing data associated with the Discussions, Announcements, Documents, Space Events, and Lists services is deleted from the space when you disable these services.

Space members do not automatically gain access to service-related task flows when you enable them here. You must also grant appropriate usage permissions for the service on the **Roles** page, as described in Section 54.2.3, "Viewing and Editing Permissions of a Space Role".

To enable or disable a service in your space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Services** page.

Figure 53–44 Space Administration: Services Page



2. On the **Services** page, select or deselect check boxes to enable or disable services, respectively.

Note: If you disable the Mail service, Spaces deletes the default distribution list that was automatically created for the space. Attempts to send mail to all members of the space opens the mail window with the **To** field blank instead of pre-populated with the mail distribution list.

If you previously specified a custom distribution list (see Section 53.10.2, "Configuring the Mail Distribution List for a Space"), then disable the Mail service, the custom distribution list is not deleted, but the relationship between the distribution list and the space is deleted.

Note: The Documents service is exposed on the **Services** page in a space only with Content Server 11*g*. If the connected content repository is Content Server 10*g*, the Documents service is not available in the space administration settings (**Services** and **Roles**). To use the Documents service functionality in 10*g*, you can create a page in a space and add Documents service task flows to the page (see Section 43.4, "Adding a Documents Service Task Flow to a Page").

Refer to the online help for the **Services** page for more information about each of the services.

3. Click **Apply** to save.
4. To allow space members to access the enabled services, grant appropriate permissions to the services for each member role on the **Roles** page. See Section 54.2.3, "Viewing and Editing Permissions of a Space Role".

53.10.2 Configuring the Mail Distribution List for a Space

Mail distribution lists provide an efficient mechanism for space communication. Spaces creates a default distribution list for every space when the Mail Server is Microsoft Exchange and Microsoft Active Directory Server (ADS) is installed, with the active directory connection details (LDAP) provided in the mail server connection settings. For more information, see "Managing the Mail Service" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

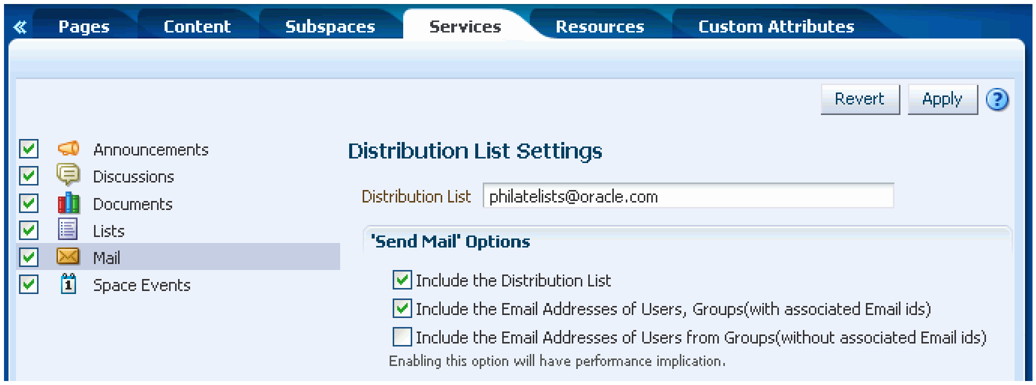
The default distribution list is named `space_name@mail_domain`. For example, the default distribution list for a space named `Finance Project` is `FinanceProject@mail_domain`, where `mail_domain` is derived from the LDAP Domain setting in the Edit Mail Server Connection screen (accessed through Oracle Enterprise Manager). As members leave or join the space, Spaces automatically updates the default distribution list to synchronize with the space membership. Note that this functionality is provided only the Mail Server is Microsoft Exchange and Microsoft Active Directory Server (ADS) is installed.

If the Mail service is disabled, Spaces deletes the default distribution list that was automatically created for the space. Attempts to send mail to all members of the space (see Section 51.5, "Sending Mail to Space Members or Moderators") opens the Mail Compose dialog with the **To** field blank instead of prepopulated with the mail distribution list.

Instead of using the default distribution list, you can modify the distribution list for space mail, as follows:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Services** page.
2. On the **Services** page, select **Mail** (Figure 53–45).

Figure 53–45 Configuring the Space Mail Distribution List



3. (Optional) To change the current space mail distribution list, type a new **Distribution List** that you have configured in MS Exchange. Allowable characters are alphanumeric, dash (-), and underscore (_). Any other character is converted to a dash (-), and spaces are removed.

   If the **Distribution List** field is left blank, the compose mail dialog will not include a distribution list in the **To** field.

   Note: Members of the new custom distribution list are not managed by Spaces. As members leave or join the space, they are not automatically removed from or added to the custom distribution list. If you disable the Mail service, the custom distribution list is not deleted, but the relationship between the distribution list and the space is deleted.

   ---

4. Under **'Send Mail' Options**, select any combination of the check boxes:
   - Select **Include the Distribution List** to populate the **To** field of the compose mail dialog with the value specified in **Distribution List** (either the default space mail distribution list, or a custom distribution list you specify).
   - Select **Include the Email Addresses of User, Groups (with associated Email ids)** to populate the **To** field of the compose mail dialog with the mail addresses of all space members and groups that have associated mail addresses.
   - When groups defined for the space do not have associated mail addresses, select **Include the Email Addresses of Users from Groups (with associated Email ids)** to populate the **To** field of the compose mail dialog with the mail addresses of all space members in every group in the space.

Note: This selection can potentially generate an extremely large distribution list, and create performance issues or mail server errors. Your application administrator can use the WLST `setMailServiceProperty` command `mail.recipient.limit` property to restrict the number of recipients to a message, as described in "setMailServiceProperty" in *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

---

5. Click **Apply**.

53.10.3 Modifying Discussion Forum Settings for a Space

By default, Spaces creates a single discussion forum for a new space. You can modify this default setting to allocate multiple discussion forums to the space.

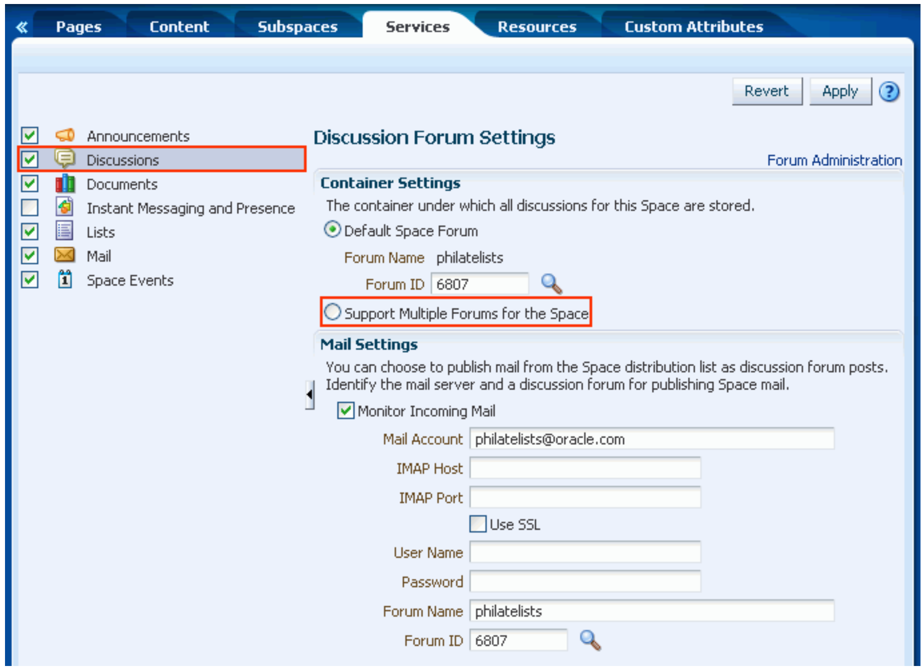
Spaces stores all discussion forums and categories under the application root category on the discussions server. The Spaces administrator can change the root category, as described in Section 6.2.2, "Specifying Where Discussions and Announcements are Stored on the Discussions Server". If required, you can change the default storage location for the discussion forums for a particular space.

For more information about the discussions server, see "Managing the Announcements and Discussions Services" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. For more information about the Discussions service, see Chapter 62, "Working with the Discussions Service."

To modify the discussion forum settings for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Services** page.
2. On the **Services** page, select **Discussions**.
3. (Optional) To launch the Jive Forums Administration Console, the Web-based tool for configuring and managing discussion forums, click **Forum Administration**.
4. To allocate multiple discussion forums to the space, select **Support Multiple Forums for the Space** (Figure 53–46).

Figure 53–46 Space Discussion Forum Settings: Single Forum



space

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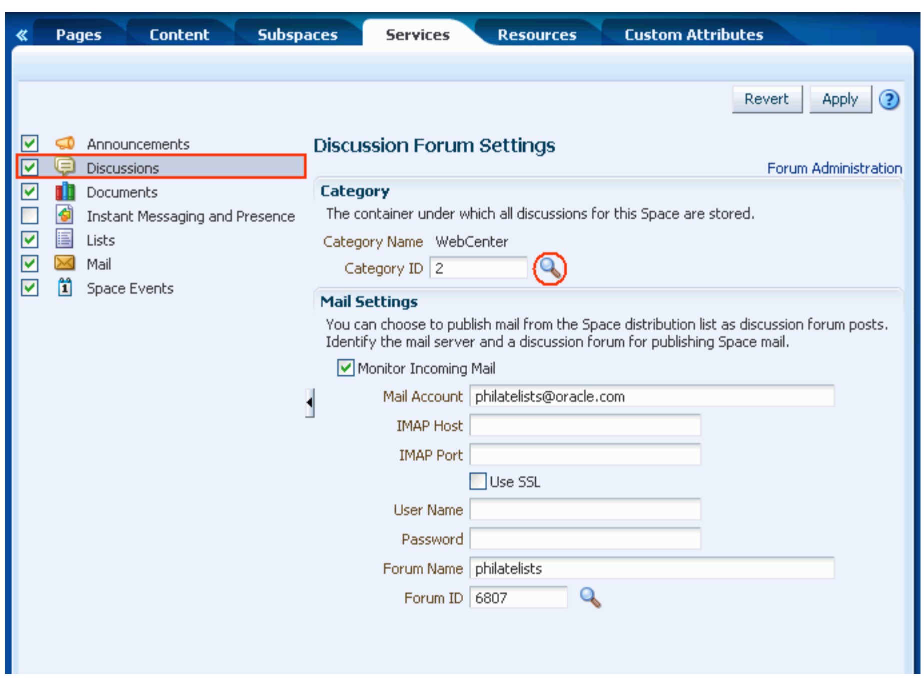
5. Click **Apply**.

   The page refreshes to show a category, under which the multiple forums are stored (Figure 53–47).

Figure 53–47 Space Discussion Forum Settings: Multiple Forums



6. To store space discussions in a different category and discussion forum than those specified by **Category Name** and **Forum Name**, click the **Choose a category for Space** icon (Figure 53–47) to change the storage location.
7. Click **Apply** on to save the settings.

53.10.4 Publishing Space Mail in a Discussion Forum

Communication through the space mail distribution list can be published as discussion forum posts. When a mail message is new, a new topic is created for it. When a mail message is a reply to an existing mail message, a topic reply is created for it.

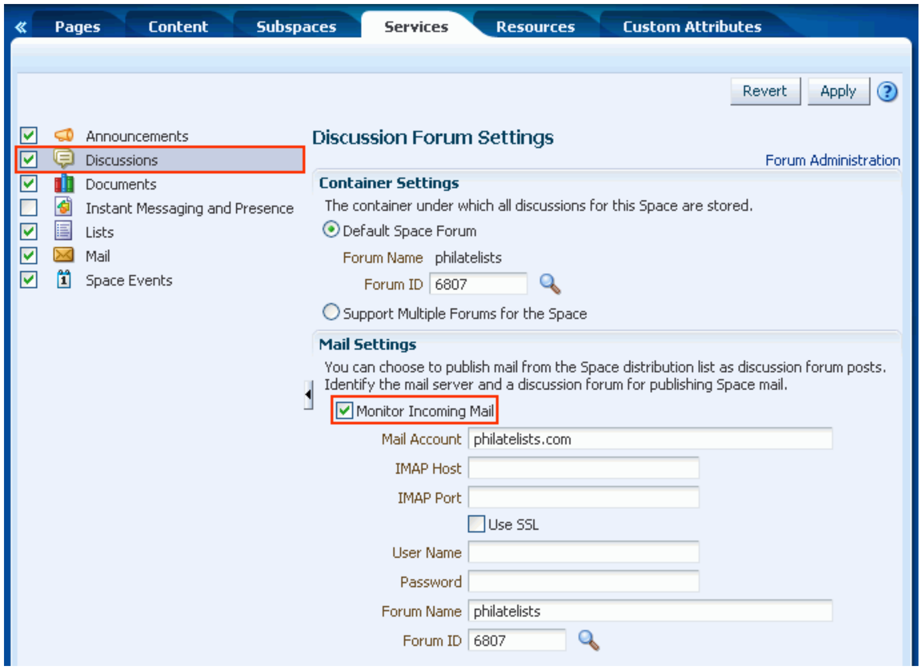
Note: Spaces supports Microsoft Exchange server or any mail server that supports IMAP4 and SMTP. To enable Spaces users to access mail within a Spaces application and perform basic operations such as read, reply, and forward, you must first register the appropriate mail server with the Spaces application. The Mail service is not configured out-of-the-box. Refer to "Setting Up Mail Server Connections" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

To publish space mail in a discussion forum:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Services** page.
2. On the **Services** page, select **Discussions**.
3. To publish space mail on a discussion forum of your choice, select **Monitor Incoming Email** (Figure 53–48).

   To disable this feature so that mail is not published for any space, deselect this check box.

Figure 53–48 Space Discussion Forum Settings: Mail



4. Enter the space **Mail Account**.

   This is the distribution list used to mail space members. For details, see Section 53.10.2, "Configuring the Mail Distribution List for a Space."

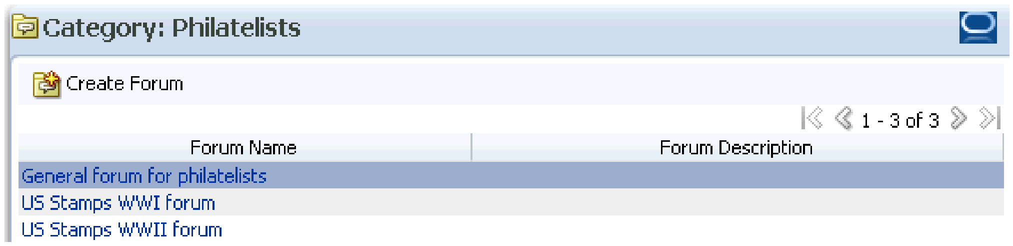
   Note: If you specify a mail distribution list that has been defined as the distribution list for a different space, then the mail sent to that distribution list is by default archived in the discussion forum specified in the Mail Settings for that space. Mail sent to a space distribution list can only be archived one time in one forum, on a first come first served basis.

   ---

5. In the **IMAP Host** field, enter the name of the computer where the IMAP (Internet Message Access Protocol) service is running; in **IMAP Port**, enter the port on which the IMAP service listens.
6. Select **Use SSL** if a secured connection (SSL) is required for incoming mail over IMAP.
7. Enter the **User Name** and **Password** of a space member with sufficient privileges to modify these settings (`Manage` privilege).
8. To publish space mail on a different discussion forum than the forum specified by **Forum Name**, edit the value in **Forum Name** or **Forum ID**

   Click the **Choose a forum for Space mail** icon to display list of available forums in the space (Figure 53–49).

Figure 53–49 Selecting a Forum for Space Mail



9. Single-click a forum in the list to select it.

   Alternatively, create a forum from scratch. Click **Create Forum**, then enter a suitable name and description.

   > **Note:** If no forum is specified for mail archiving, or the specified forum is deleted, mail sent to the distribution list is not archived anywhere.

10. Click **Apply** to save the settings.

53.10.5 Configuring a Shared Mail Connection for a Space

When a space is configured to use a *shared mail connection*, users do not have to specify credentials when sending mail using the WebCenter Portal Mail Service.

To configure a shared mail connection for a space:

1. Confirm that Spaces is using the WebCenter Portal Mail service to send mail.

   See Section 6.3.1, "Enabling Shared Mail Connections for Send Mail Notifications".

2. Ask your Fusion Middleware administrator to set up a mail connection that uses an external application configured with the shared credentials you require, and then record the name of that mail connection.

   For details, see "Setting Up a Shared Mail Connection" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

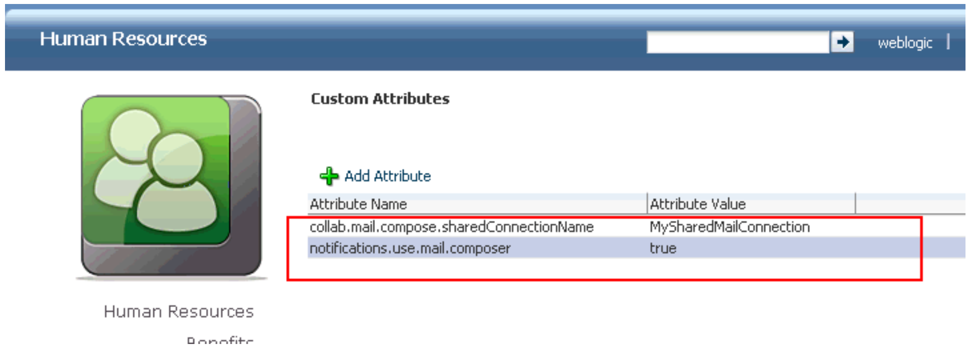
3. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Custom Attributes** page.

4. On the Custom Attributes page, add the custom attributes listed in Table 53–1 (and as shown in Figure 53–50):

Table 53–1 Custom Attributes for Shared Mail Connections

Name	Value
`collab.mail.compose.sharedConnectionName`	Name of the shared mail connection. For example: `MySharedMailConnection`
`notifications.use.mail.composer`	Must be set to `true`.

Figure 53–50 Setting Shared Mail Connection Attributes for a Space



5. (Optional). By default, Send Mail notifications are disabled for public/anonymous users. To enable them in a space, add the following space custom attribute:

   ```
   notifications.anonymous.enabled = true
   ```

53.10.6 Creating and Managing Space Event Categories

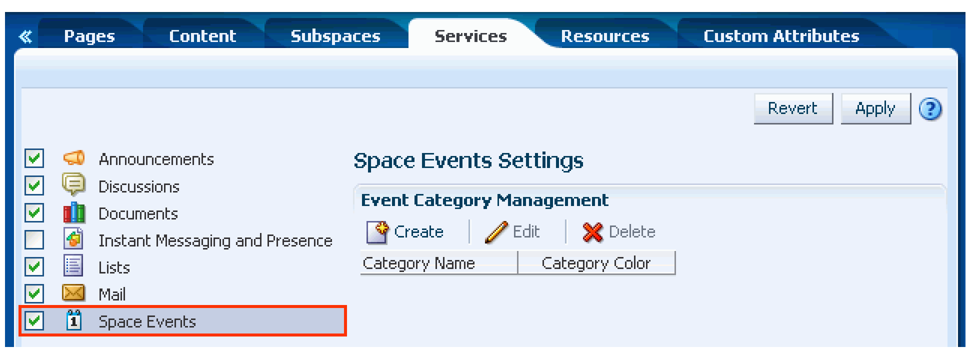
Space event categories enable users to group certain events together (for example, Team Meeting, Vacation, Customer Meeting, and so on).

Categories have a name and an optional color. If a color is selected, events belonging to the category are displayed in that color on the **Events** page or in an Events task flow.

To create and manage event categories in a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Services** page.
2. On the **Services** page, select **Space Events** (Figure 53–51).

Figure 53–51 Working with Space Event Categories



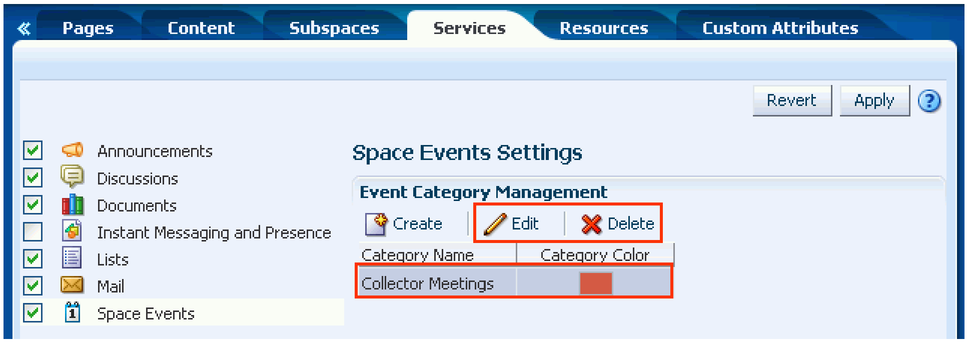
3. To create a new space event category, click **Create**. In the Create Category dialog, enter a **Category Name**, and select a color for the event category, then click **OK**.

   For information about assigning a category to an event, see Chapter 63, "Working with the Events Service," and specifically Section 63.2.4, "Scheduling Events."

   The category to which an event belongs also displays when a user hovers the mouse pointer over the event on the **Events** page or in an Events task flow. Users can also filter the **Events** page or an Events task flow to display events belonging to one or more specific categories. For more information see Section 63.2.3.4, "Filtering Events by Category."

4. To edit or delete a space event category, select the category, then click either **Edit** or **Delete** (Figure 53–52).

Figure 53–52 Editing or Deleting a Space Event Category



53.11 Managing Space Resources

The resources for a space and the tasks associated with managing those resources are identical to the resources for the entire Spaces application. For more information, see Chapter 11, "Working with the Resources that Compose a Portal or Community." Any custom resources that you create for a space can be managed in both the space and by the Spaces administrator.

Table 53–2 describes the support available for creating various resources in a space.

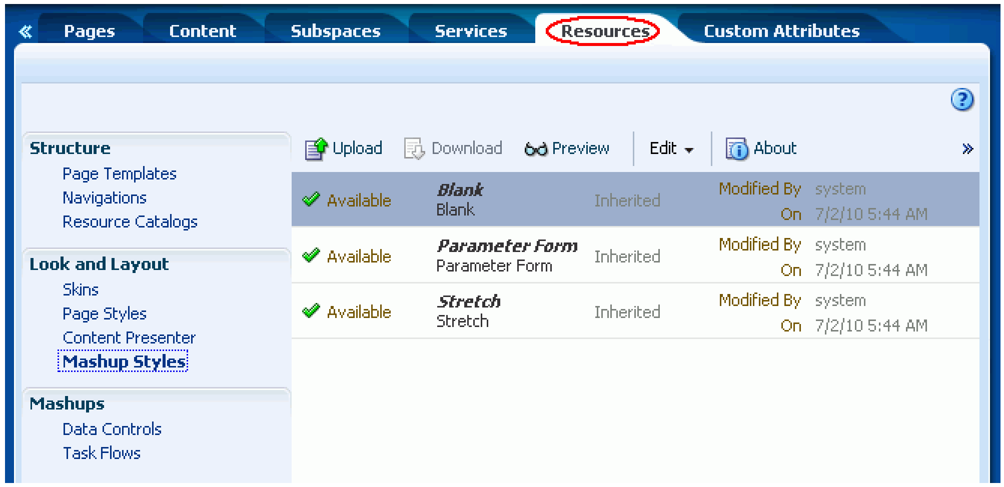
Table 53–2 Support for Creating Resources in a Space

Resource	Can You Create the Resource in a Space?	How can the Resource be Created?
Page Templates	Yes	Only by extending another page template.
Navigations	Yes	From scratch or by extending another navigation
Resource Catalogs	Yes	From scratch or by extending another Resource Catalog
Skins	Yes	Only by making a copy of another skin
Page Styles	No	(Not applicable)
Content Presenter templates	No	(Not applicable)
Mashup Styles	No	(Not applicable)
Data Controls	Yes	Only from scratch
Task flows	Yes	Only from scratch

To view, manage, or create resources for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), display the **Resources** page (Figure 53–49).

Figure 53–53 Space Administration: Services Page



2. On the **Resources** page, select the resource you want to view or manage:
3. Refer to the following sections for tasks related to working with space resources:
   - Section 11.1.5, "Viewing Information About a Resource"
   - Section 11.2, "Creating Resources"
   - Section 11.4, "Managing Resources"

53.12 Defining Custom Attributes for a Space

Every space includes built-in attributes such as name, description, date created, icon, and so on. In addition to these built-in attributes, you can add custom attributes that are unique to the space and its characteristics.

Custom attributes let you specify additional space information (metadata). Custom attributes are propagated throughout the space. Any space pages, task flow, or portlet that delivers customized content based on parameter values can accept custom attribute values and display content accordingly using the following Expression Language (EL) syntax to access the custom attribute value:

```
#{spaceContext.currentSpace.metadata.customAttributes[attributeName]}
```

A custom attribute is simply a name value pair (such as `customerId=400`, `orderId=11`, or `userName=Smith`). The custom attribute name is unique within a space. For example, if you build a space for customer analysis purposes, it might contain several custom task flows that take the parameter `customerId` as an input: task flows such as Customer Sales History, Customer Satisfaction Rating, Future Sales Prospects, or Customer Contact Information. With a custom attribute defined named `customerId` with an appropriate customer value, all the task flows that can accept a `customerId` can display information specific to that customer.

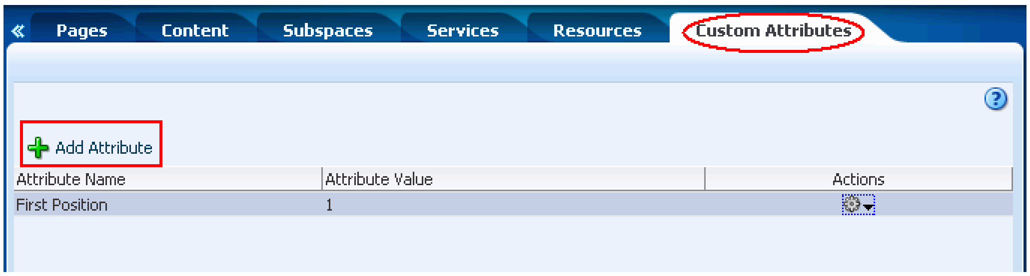
A custom attribute can also be dynamic, using Expression Language (EL) expressions. For example, a custom attribute could use an EL expression to read a value that is passed in. A URL that displays the space could pass the attribute value in the URL (for example, `customerid=10`), which would be applied to the custom attribute using the EL expression. For more information, see Section 22.4, "Passing Parameter Values Through the Page URL."

New spaces based on a space template that includes custom attributes will inherit the custom attributes and their values.

To add a custom attribute for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Custom Attributes** page.
2. On the **Custom Attributes** page, click **Add Attribute** (Figure 53–54).

Figure 53–54 Space Administration: Custom Attributes Page



space

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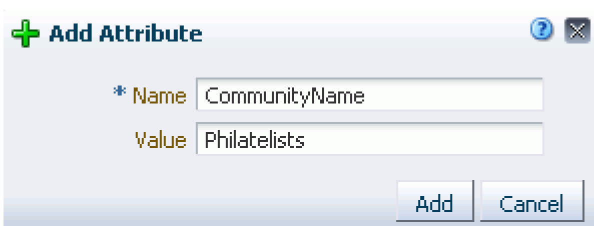
The Add Attribute dialog opens (Figure 53–55).

Figure 53–55 Entering Custom Attribute Name and Value



3. Enter a unique **Name** for the attribute.
4. Optionally, enter a **Value** for the custom attribute. You can type a static value, or specify a dynamic value by entering an Expression Language (EL) expression. See Appendix B, "Expression Language (EL) Expressions."
5. Click **Add** to save the custom attribute and display it in the list on the **Custom Attributes** page.
6. To edit or delete a selected attribute, click the **Actions** icon for the attribute and select the desired action:
   – **Edit Attribute** to display the Edit Attribute dialog to modify the attribute name or value.
   – **Delete Attribute** to display the Delete Attribute dialog to remove the attribute from the space.

53.13 Adding Wikis or Blogs to a Space

You can include wikis and blogs as pages in a space.

Wiki pages are populated and monitored by a collaborative group of users with common interests and goals. Users with sufficient permission on a wiki can edit the page to add to, revise, or remove information. Everyone works together to create resource pages that are relevant, useful, and up-to-date. For more information, see Chapter 49, "Working with Wiki Documents."

Blogs, however, are more personal records of experiences and opinions. Blog pages provide a useful means of capturing and publishing the knowledge and opinions of subject matter experts who are members of the space. For more information, see Chapter 50, "Working with Blogs."

53.14 Making a Space Available

Once you have created a space, you probably want others to be able to use it. As the space moderator, you can determine whether the space should be discoverable only by other Spaces users, or publicly available:

- Section 53.14.1, "Publishing the Link to a Space"
- Section 53.14.2, "Changing a Space URL"
- Section 53.14.3, "Making a Space Known (Discoverable)"
- Section 53.14.4, "Granting Spaces Users Access to a Space"
- Section 53.14.5, "Granting Public Access to a Space"

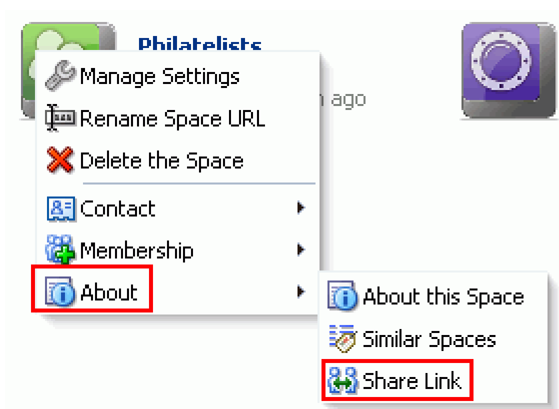
53.14.1 Publishing the Link to a Space

You can share the link to a space with others by publishing the link to the space. With appropriate permissions, users can directly access a space by clicking the link that specifies the space display name.

To publish the direct link to a space:

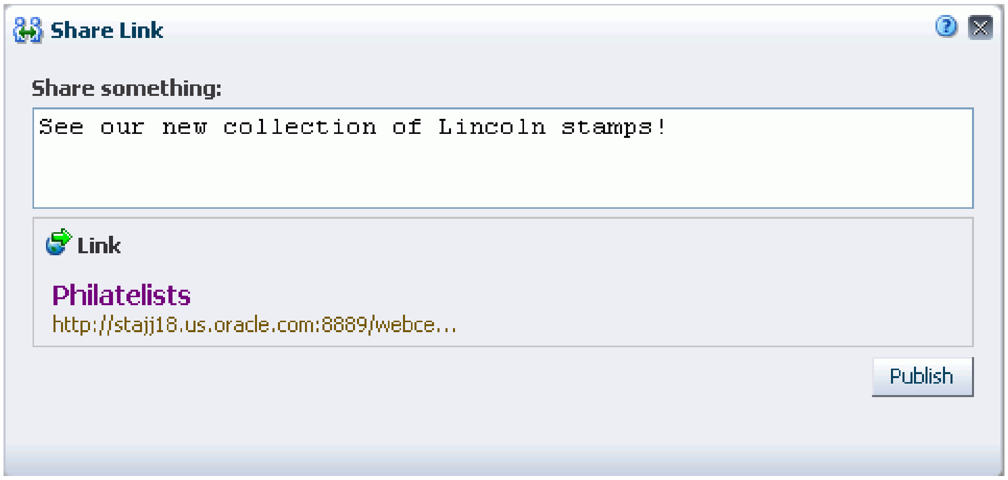
1. On the **Spaces** page (Section 51.4, "Viewing and Accessing Available Spaces"), locate the space you want to share, then right-click the space icon or name, and select **About**, then **Share Link** (Figure 53–56).

Figure 53–56 Space Actions Menu Selection: Share Link



The Share Link dialog opens (Figure 53–57).

Figure 53–57 Share Link Dialog for a Space



2. Optionally, enter a comment to appear with the link.
3. Click **Publish**, then close the Share Link dialog.

   The URL to the space is added to the Activity Stream in the Home space for all users or groups who have permission to access the space, along with your comments, if entered.

53.14.2 Changing a Space URL

You can change the pretty URL that other people use to navigate to a space, which also changes the internal name of the space. The format of a space pretty URL is as follows:

`http://`*`host`*`:`*`port`*`/webcenter/spaces/`*`internal_space_name`*

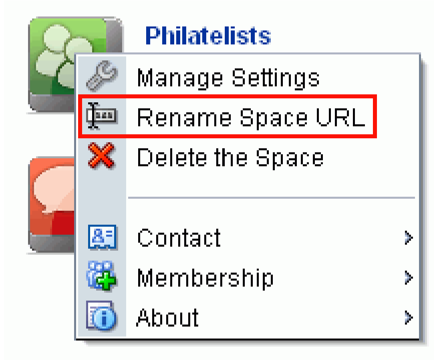
For example: `http://mycompany:8888/webcenter/spaces/philatelists`.

When you change the space URL, it is important to note that any existing bookmarks to the space will no longer work. If you wish to simply change the display name; that is, the name displayed at the top of the space and on dialogs and pages where users can select the space, see Section 53.4.1, "Renaming a Space."

To change a space URL:

1. On the **Spaces** page (Section 51.4, "Viewing and Accessing Available Spaces"), locate the space you want to rename, then right-click the space icon or name, and select **Rename Space URL** (Figure 53–58).

Figure 53–58 Space Actions Menu Selection



2. In the Rename Space URL dialog (Figure 53–59), revise the space internal name portion of the URL as desired.

Figure 53–59 Rename Space URL Dialog

3. Click **OK**.

53.14.3 Making a Space Known (Discoverable)

You can make a space discoverable by other Spaces users on their **Spaces** page and in search results to let them know that it exists. Making a space discoverable does not make its content accessible. Users interested in the space can request membership through self-service (if enabled) or by mail.

To make a space discoverable by other Spaces users:

1. Set general access to the space:
   - If you are creating a new space, select either **Public** or **Private** in the Access step of the Create a Space dialog, as described in Section 53.2, "Creating a New Space."
   - If the space is currently **Hidden**, select either **Public** or **Private** on the **General** page of the space administration settings, as described in Section 53.4.16, "Changing the Access to a Space."
2. (Optional) To allow users to join the space, you can enable self-registration too (you can still retain control by requiring approval for any subscription request). See Section 54.1.1, "Managing Self-Service Membership for a Space".
3. To add or invite specific Spaces users and groups to the space, allow Spaces users to self-subscribe, or invite non-Spaces users to subscribe to the space, see Section 54.3, "Managing Members and Assigning Roles."

53.14.4 Granting Spaces Users Access to a Space

After making the space discoverable (see Section 53.14.3, "Making a Space Known (Discoverable)"), the next step is to assign the permissions that you want different user roles to have in the space, if the default permissions are not satisfactory.

Spaces users have the default `Authenticated-User` role. A space is not fully accessible until you give the `Authenticated-User` role permissions to access the pages of the space:

- To grant access to the entire space: In the Edit Permissions dialog, under **Pages**, select the desired check boxes for page permissions, which apply to *all* pages in the space. See Section 54.2, "Managing Roles and Permissions for a Space" for detailed information.
- To grant access to a limited number of individual pages in the space, see Section 53.7.8, "Changing Access Permissions on a Page in a Space."

Note: To use the task pane available through the Microsoft Office shared document management functionality (while editing a Microsoft Word, Excel, or PowerPoint file in a space) to add members to a space, see Section 54.3.4, "Adding Members to a Space."

53.14.5 Granting Public Access to a Space

You can make a space available to anyone with access to the Spaces instance that contains the space. Registering for a Spaces account is not required. The public information provided allows the space to be shared with non-members and people outside of the Spaces community.

Public users who are not registered Spaces users can access public spaces in two ways:

- Directly, using the space URL provided to them.
- From the Spaces Welcome page, if their installation is configured to display this page (Figure 53–60).

Figure 53–60 Public Spaces Link on Welcome Page

Public users are assigned the `Public-User` role, which has no access to space information by default. To grant public access to a space, including its pages and any content and services you want to expose on the public pages:

1. Specify the general access settings for the space:

   - If you are creating a new space, select **Public** in the Access step of the Create a Space dialog, as described in Section 53.2, "Creating a New Space."
   - If the space is currently **Hidden** or **Private**, select **Public** on the **General** page of the space administration settings, as described in Section 53.4.16, "Changing the Access to a Space."

   When a space is made public, the `Public-User` role is automatically granted `View Pages and Content` permission in the space, which allows public users to view pages, lists, events, links and notes.

   To see what the public view of a space will look like, copy the **Direct URL** value in the About Space dialog (see Section 51.6, "Viewing Information About a Space"), log out of Spaces, and paste the URL into your browser. Because you are logged out of Spaces, only pages designated as public display.

2. (Optional) To allow public users to join your space, you may want to enable self-registration too (you can still retain control by requiring approval for any subscription request). See Section 54.1.1, "Managing Self-Service Membership for a Space".

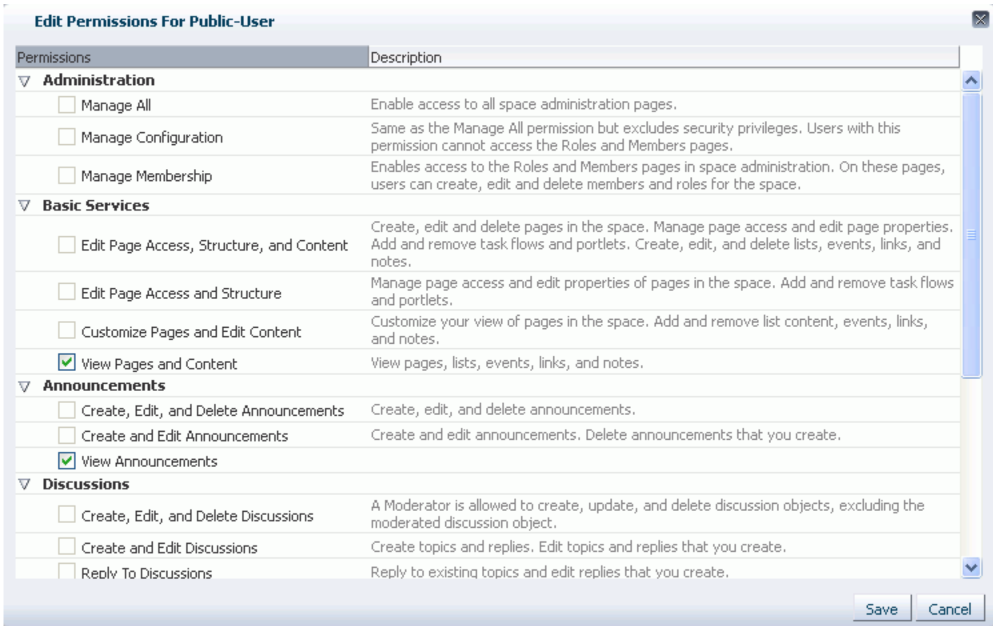
3. Now that you have made the space public, the next step is to assign additional permissions that you want `Public-User` user role to have in the space, if the default read-only `View Pages and Content` permission is not sufficient. You can additionally grant public users permissions to view announcements, discussions, and documents.

   In the space administration settings, display the **Roles** page.

   > **Tip:** The way you access this page depends on the page template in use. For example, in a side navigation template, you may access it through a **Manage** menu.
   >
   > You can also navigate to this page using the direct URL provided in Section A.5, "User Interface URLs for Space Pages."

4. On the **Roles** page, select **Public-User**, then click **Edit Permissions** to open the Edit Permissions for Public-User dialog (Figure 53–61).

Figure 53–61 Granting Permissions to Public User



space
****

5. In the Edit Permissions dialog, select the check boxes for the desired public permissions for the space to view announcements, discussions, or documents. For information about the permissions listed in the Edit Permission dialog, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

   The public permissions that you grant here override the public permissions set by the administrator at the application level (see Section 24.2.4, "Granting Permissions to the Public-User Role").

6. If you want to restrict public access to certain pages in the space, see Section 53.7.8, "Changing Access Permissions on a Page in a Space."

7. Click **Save**.

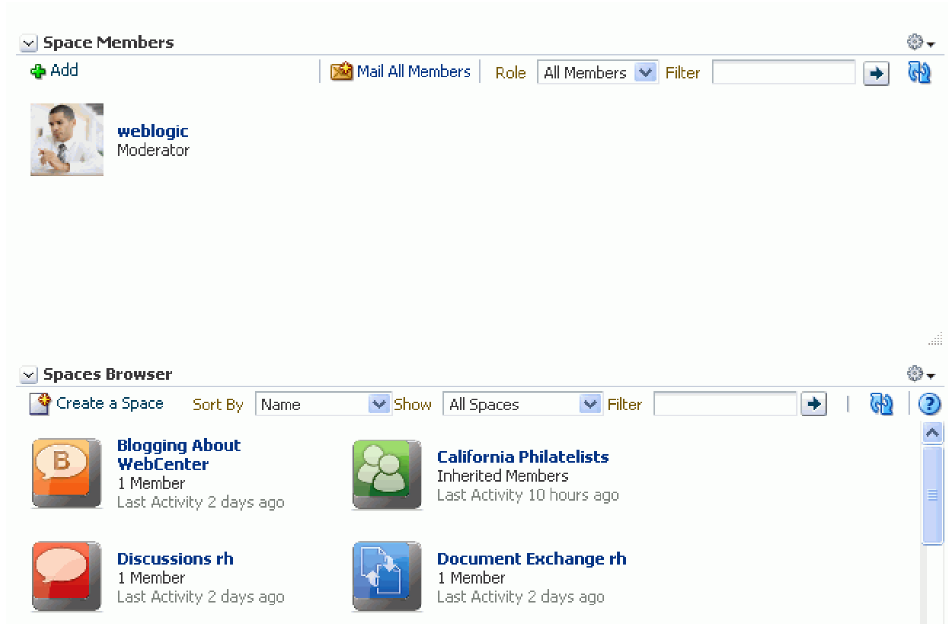
53.15 Working with the Space Task Flows

Spaces provides two space task flows that you can add to a page (Figure 53–62):

- **Space Members**: Adds an area that shows the space members and provides controls to add new members, send a mail message to all members, filter the list by role, and search for members. For more information about this task flow, see Section 54.4, "Working with the Members Task Flow."

- **Spaces Browser**: Adds an area that operates identically to the **Spaces** page, as described in Section 51.4, "Viewing and Accessing Available Spaces."

Figure 53–62 Space Task Flows: Space Members and Spaces Browser



The following sections provide information about working with the space task flows:

- Section 53.15.1, "Adding a Space Task Flow to a Page"
- Section 53.15.2, "Setting Space Task Flow Properties"

53.15.1 Adding a Space Task Flow to a Page

To add a space task flow to a page:

1. Go to the page where you want to add the task flow, and open the page in edit mode.

   See Also: For more information, see Section 18.1, "Entering and Exiting Composer."

2. Click **Add Content** to open the Resource Catalog.
3. Locate the Space Members and Spaces Browser task flows in the Resource Catalog.

   Note: These task flows are not available in the default Resource Catalogs provided out-of-the-box with Spaces, so you will only see entries for the space task flows if they have been added to the Resource Catalog that has been made available to the page.

   For more information, see Chapter 16, "Working with Resource Catalogs", specifically Section 16.3.1.2, "Adding Resources" (in the Add Resource Catalog Item dialog, select **Task Flows**, then scroll to **Spaces Browser** and/or **Space Members**).

4. Click **Add** next to the space task flow you want to add to the page, then **Close** the Resource Catalog.
5. Click **Save**, then **Close** the page.

53.15.2 Setting Space Task Flow Properties

The Space Members and Spaces Browser task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 53–63 and Figure 53–64).

Figure 53–63 Space Members Task Flow Component Properties

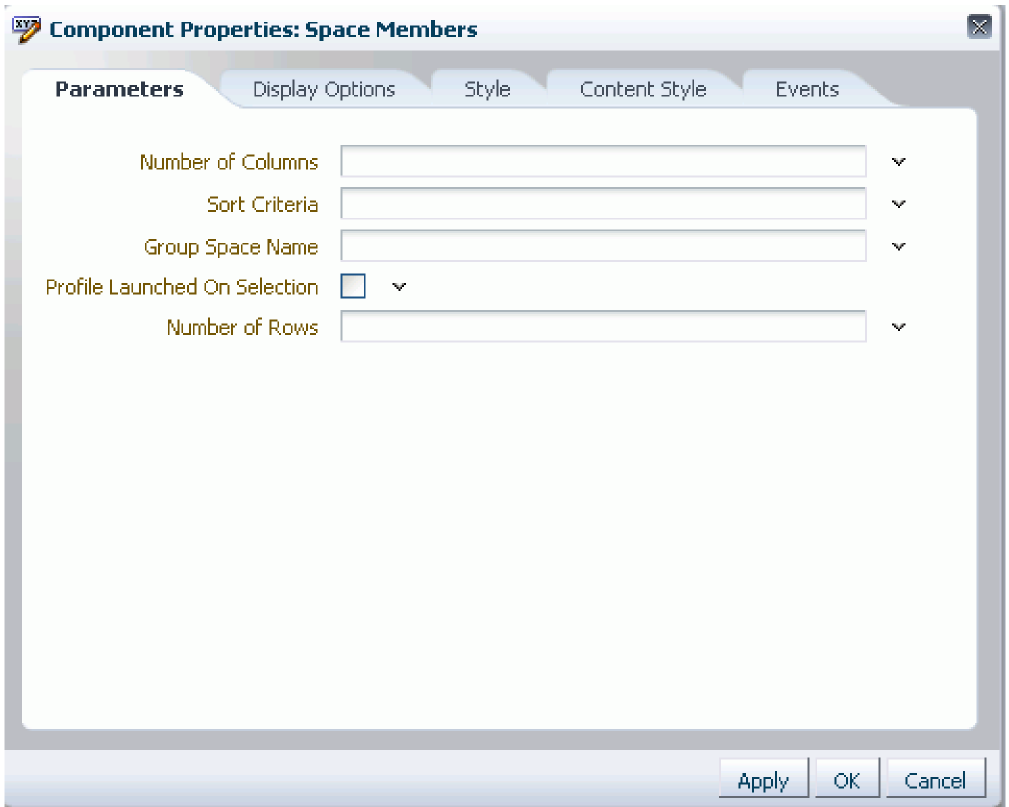
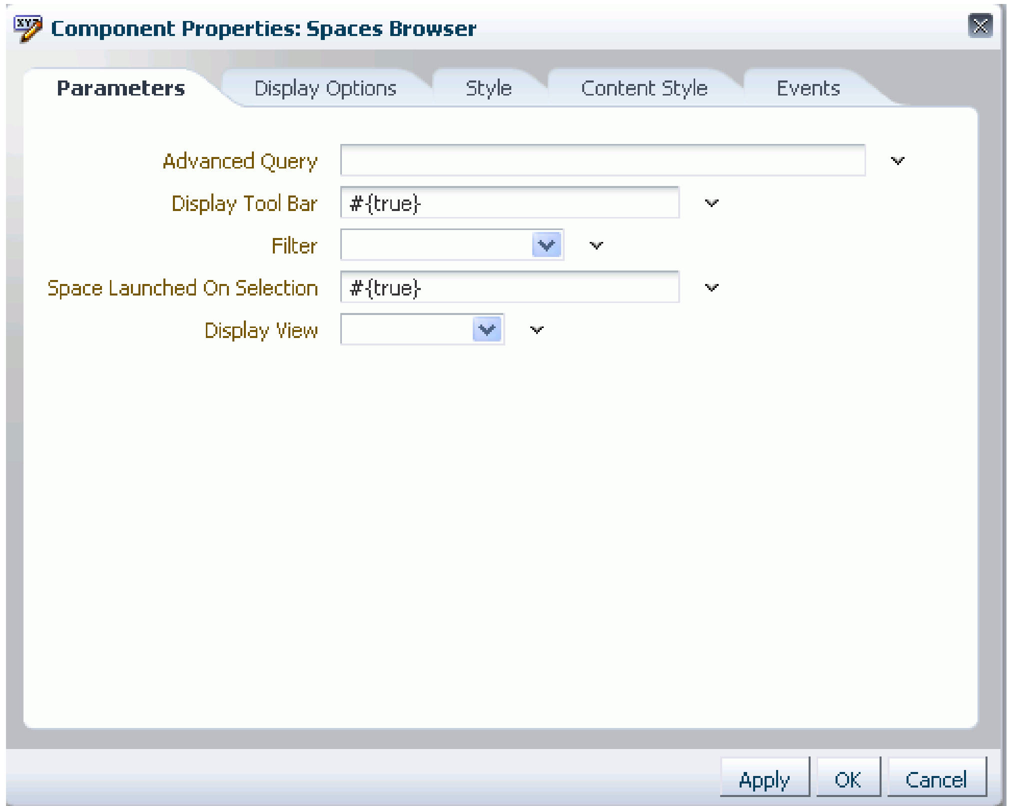


Figure 53–64 Spaces Browser Task Flow Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the spaces task flows and describe the properties on the **Parameters** tab for each task flow:

- Section 53.15.2.1, "What You Should Know About the Spaces Task Flow Properties"
- Section 53.15.2.2, "Setting Space Members Task Flow Properties"
- Section 53.15.2.3, "Setting Spaces Browser Task Flow Properties"

53.15.2.1 What You Should Know About the Spaces Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 53.15.2.3, "Setting Spaces Browser Task Flow Properties" and Section 53.15.2.2, "Setting Space Members Task Flow Properties." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6.4, "Working with Component Display Options" and Section 18.6.6, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

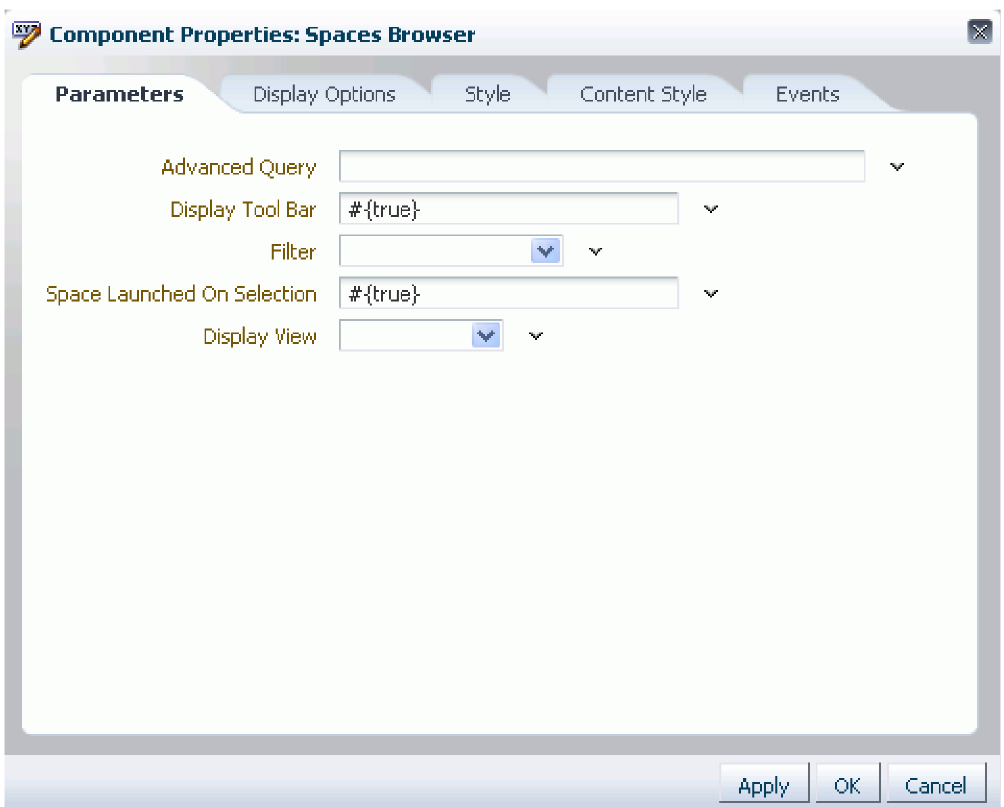
53.15.2.2 Setting Space Members Task Flow Properties

See Section 54.4.7, "Setting Members Task Flow Properties."

53.15.2.3 Setting Spaces Browser Task Flow Properties

Properties that are unique to the Spaces Browser task flow are shown on the **Parameters** tab of the Component Properties dialog (Figure 53–65).

Figure 53–65 Spaces Browser Task Flow Component Properties



For information about the properties on the other tabs, which are common to all Spaces components, see Section 18.6, "Modifying Page Components."

53.15.2.3.1 Spaces Browser Task Flow Parameters Table 53–3 describes the parameters that are unique to the Spaces Browser task flow.

Table 53–3 Spaces Browser Task Flow Parameters

Parameter	Description

`Advanced Query`	Specifies an EL expression to retrieve a list of spaces based on custom criteria. The expression may include the population from which to choose, a `WHERE` clause, and sort criteria. Do *not* wrap the expression in `#{` and `}`. Optionally, use a backslash as an escape character for quotes and backslashes (expression syntax is valid with or without an escape character).
	Examples:
	■ To display all subspaces of a named parent space:
	`spaceContext.spacesQuery.parentSpaceName['`*`parent_space_name`*`']`
	or
	`spaceContext.spacesQuery.parentSpaceName['`*`parent_space_guid`*`']`
	■ To display top-level subspaces of a named parent space:
	`spaceContext.spacesQuery.parentSpaceName['`*`parent_space_guid`*`'].shape['ROOT_LEVEL']`
	■ To sort the results based on certain criteria (in this example, discoverable spaces sorted alphabetically, then by date last updated):
	`spaceContext.spacesQuery.unionOf.ALL_QUERIABLE.sort['sp.discoverable']['asc'].sort['sp.lastUpdateDate’]['desc']`
	For additional examples: in the Expression Editor, select **Space Info**, then select from the list of examples to show the associated EL expression. To use an expression, remember to remove any enclosing `#{` and `}`.
	For help with syntax, refer to Appendix B, "Expression Language (EL) Expressions" and the JavaDoc for `oracle.webcenter.spaces.query.SpacesQueryParameters`.

`Display Tool Bar`	Specifies whether the tool bar displays: ■ `#{true}` (default): Display the toolbar. ■ `#{false}`: Hide the toolbar.
`Display View`	Specifies the type of layout in which to display spaces in the Spaces Browser. ■ `Card Layout`: Display spaces in a card view. ■ `Tiled Layout` (default): Display spaces in a tiled view.
`Filter`	Specifies which spaces should display in the Spaces Browser task flow. ■ `Show All` (default) ■ `Show Joined` ■ `Show Moderated` ■ `Show Public` ■ `Show Discoverable` (all Public and Private spaces)
`Space Launched on Selection`	Specifies whether to navigate to a space when selected in the Spaces Browser task flow: ■ `#{true}` (default): Clicking a space opens the space on the Home page. ■ `#{false}`: Clicking a space does not navigate to the space. Instead, allows user to select the space, staying on the same page with the selected space highlighted.

53.16 Deleting a Space

When a space has been closed or inactive for some time, you may want to remove it from Spaces. The Spaces administrator can remove any space in the application, as described in Section 55.2.6, "Deleting a Space." If you are the moderator or a member with `Manage Configuration` permission of a space, you can delete that space, as described in the steps below. Deleting a space is permanent; it cannot be restored after it is deleted.

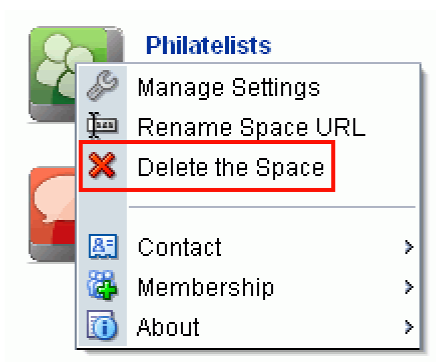
Deleting a space means that:

- All pages associated within the space are deleted.
- All space data managed by Spaces (links, lists, notes, tags, and space events) is deleted.
- All space roles and membership is deleted.
- Content managed by discussions and announcements is deleted when it is stored in the default forum or category created by Spaces. However, content managed by nondefault forums or categories is not deleted (see Section 53.10.3, "Modifying Discussion Forum Settings for a Space").
- The space mail distribution list that is automatically created bySpaces is deleted. However, distribution lists that are customized by the space moderator are not deleted (see Section 53.10.2, "Configuring the Mail Distribution List for a Space").
- Content managed by external services, such as content repositories, mail, and so on, is removed.

To delete a space:

1. On the **Spaces** page (Section 51.4, "Viewing and Accessing Available Spaces"), locate the space that you want to delete, then right-click the space icon or name, and select **Delete the Space** (Figure 53–66).

Figure 53–66 Deleting a Space



space
****

2. In the confirmation prompt, click **Delete** to confirm or **Cancel** to preserve the space.

54

Managing Space Members and Roles

This chapter provides information about managing members and roles for a space. It contains the following sections:

- Section 54.1, "Setting Up the Membership Policy for a Space"
- Section 54.2, "Managing Roles and Permissions for a Space"
- Section 54.3, "Managing Members and Assigning Roles"
- Section 54.4, "Working with the Members Task Flow"

Audience

This chapter is intended for users who are responsible for managing space members and their role assignments. It describes how to set up a space membership policy and define member roles and responsibilities.

This chapter is intended for users assigned, minimally, the space `Moderator` role or a custom role that includes the default permissions granted to a moderator.

The Spaces administrator has the authority to expose or hide some features and services for all spaces. Contact your administrator if some tasks discussed in this chapter are not available to you.

Note: For more information about space roles, see Section 54.2.1, "What You Should Know About Roles and Permissions for a Space."

54.1 Setting Up the Membership Policy for a Space

Space moderators determine the membership policy for their space, choosing between an "invitation only" membership policy, allowing users to join themselves by subscribing to (and unsubscribing from) the space, adding new members directly, or using any combination of these membership options.

Enabling self-service does not necessarily mean that users automatically gain access to a space. Moderators can still control who joins (or leaves) the space through an approval process.

Default membership permissions are derived from the template used to create the space. Moderators can change these settings at any time. This section describes:

- Section 54.1.1, "Managing Self-Service Membership for a Space"
- Section 54.1.2, "Managing Self-Service Membership Removal from a Space"

54.1.1 Managing Self-Service Membership for a Space

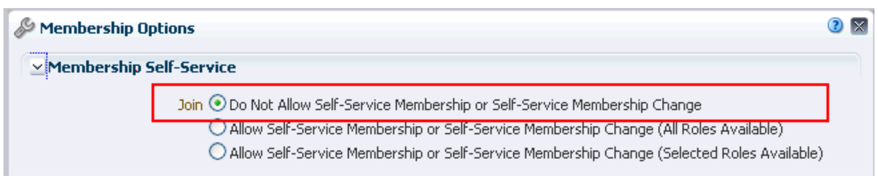
As a space moderator, you can limit access to a space by invitation only, or allow users to join themselves, without an invitation, through self-service.

Additionally, you may allow users to join a space or change their space membership without approval, or require approval for certain roles. When membership requests require approval, new members do not automatically gain access when they subscribe to a space. Instead, the moderator receives a subscription notification to accept or reject.

To manage self-service for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Members** page.
2. On the **Members** page, click **Membership Options** in the toolbar.
3. Under **Membership Self-Service**:
   - To prevent non-members from joining the space through self-service or requesting changes to their current membership, select **Do Not Allow Self-Service Membership or Self-Service Membership Change** (Figure 54–1).

     Figure 54–1 Disabling Self-Service

   - To allow non-members to join a space and members to request changes to their current membership, select **Allow Self-Service Membership or Self-Service Membership Change (All Roles Available)**.

     Note: If you select this option, make sure that other people can see the space on their **Spaces** page and through searches (see Section 53.14.3, "Making a Space Known (Discoverable)").

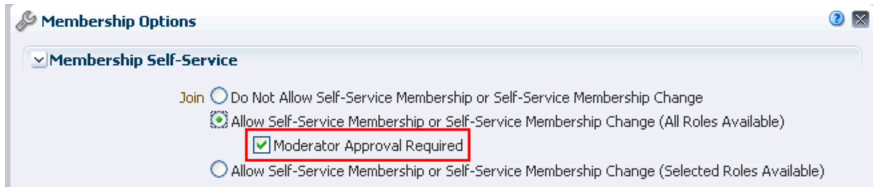
     When you select this option:

     – Any Spaces user can join the space (see Section 51.9, "Joining a Space").

     – After joining the space, members can change their role in the space, or cancel their membership (see Section 51.12, "Changing Your Role in a Space" and Section 51.13, "Cancelling Your Space Membership").
4. To be notified of self-service requests so you can approve or reject them before users become members of the space, select **Moderator Approval Required** (Figure 54–2).

   Tip: This check box only displays when Spaces workflows are configured for your application and the Worklist service is up and running. See also Section 55.6.1, "Troubleshooting Spaces Workflows."

Figure 54–2 Specifying Membership Request Approval Requirements

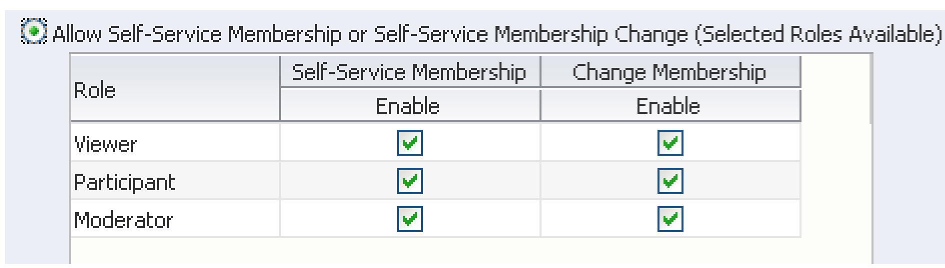


5. To specify which roles users see on Request Membership and Change Membership pages, select **Allow Self-Service Membership or Self-Service Membership Change (Selected Roles Available)** to display a table showing all the roles available (Figure 54–3).

   - Select **Enable** to offer the role on the Request Membership and Change Membership pages. Deselect **Enable** to hide a role.
   - Select **Approval Required** to specify that moderator approval is required before the request is granted. The request is sent to the moderator's Worklist to approve or reject (if the space has multiple moderators, all moderators receive the request; only one moderator must process the request). Deselect **Approval Required** to allow the change without moderator approval.

     Tip: This check box displays only when Spaces workflows are configured for your application and the Worklist service is up and running. See also, Section 55.6.1.2, "Troubleshooting Issues with Spaces Workflows."

Figure 54–3 Choosing Roles Available on Self-Service Membership



6. Click **Save**.

54.1.2 Managing Self-Service Membership Removal from a Space

If moderator approval is required to unsubscribe from a space, an unsubscription request is sent to the moderator's Worklist when a member leaves, which the moderator can choose to either accept or reject.

To configure approval options for cancelling space membership:

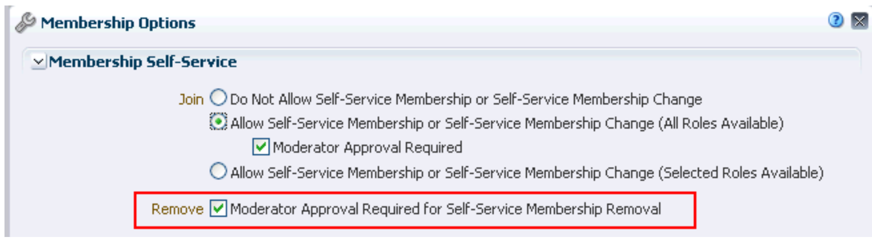
1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Members** page.
2. On the **Members** page, click **Membership Options** in the toolbar.
3. Under **Membership Self-Service** (Figure 54–4):

   - To specify that moderator approval is required to leave a space, select **Moderator Approval Required for Self-Service Membership Removal**.

- To allow members to leave without approval, deselect **Moderator Approval Required for Self-Service Membership Removal**.

  Tip: This check box only displays when Spaces workflows are configured for your application and the Worklist service is up and running. See also Section 55.6.1.2, "Troubleshooting Issues with Spaces Workflows."

Figure 54–4 Specifying Unsubscribe Request Approval Requirements



4. Click **Save**.

54.2 Managing Roles and Permissions for a Space

The space moderator is responsible for setting up roles to control what members can do in the space. Space moderators can manage permission assignments for existing roles, create new roles, and delete roles that are no longer required.

This section describes how moderators manage member roles and permissions:

- Section 54.2.1, "What You Should Know About Roles and Permissions for a Space"
- Section 54.2.2, "Defining Custom Roles for a Space"
- Section 54.2.3, "Viewing and Editing Permissions of a Space Role"
- Section 54.2.4, "Using the Advanced Permission Model"
- Section 54.2.5, "Deleting Roles in a Space"

54.2.1 What You Should Know About Roles and Permissions for a Space

When you create a new space, the Spaces application automatically creates some default roles, with default permissions. If the default roles do not meet the needs of the space, space moderators can modify the permissions of the default roles, or define new custom roles. This section includes the following information:

- Section 54.2.1.1, "Understanding the Default Roles for a Space"
- Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space"
- Section 54.2.1.3, "Understanding Custom Roles in Spaces"

54.2.1.1 Understanding the Default Roles for a Space

Table 54–1 describes the default roles in a space.

Note: These default roles are always available for spaces based on out-of-the-box templates. Spaces based on user-defined templates may offer a different set of default roles. The default permissions assigned to the default roles are shown in Table 54–2.

Table 54–1 Default Roles for Spaces

Space Role	Description	Modify Permissions	Delete Role
`Moderator`	The `Moderator` role is automatically assigned to the creator of a space. This role is automatically granted the highest level of permissions, as shown in Table 54–2. The space moderator or anyone with the space `Manage All` permission can modify permissions as necessary and appropriate.	Yes (except for `Manage All`)	No
`Participant`	The `Participant` role is automatically granted the default permissions shown in Table 54–2. The space moderator or anyone with space `Manage All` permission can grant additional permissions as necessary and appropriate.	Yes	Yes
`Viewer`	The `Viewer` role is automatically granted the default permissions shown in Table 54–2. The space moderator or anyone with space `Manage All` permission can grant additional permissions as necessary and appropriate.	Yes	Yes
`Authenticated-User`	The `Authenticated-User` role is given to authenticated users of the Spaces application, with no access to space information by default. Once logged in, users assigned this role always inherit any permissions granted to the `Public-User` role. To grant access to a space, additional permissions must be granted by the space moderator or anyone with space `Manage All` permission (see Section 54.2.3, "Viewing and Editing Permissions of a Space Role").	Yes	No
`Public-User`	Any user with access to the Spaces application who is not logged in assumes the `Public-User` role. Users with the `Public-User` role have no access to space information by default. Such users are anonymous, unidentified, and space permissions must be granted explicitly by the space moderator or anyone with space `Manage All` permission (see Section 54.2.3, "Viewing and Editing Permissions of a Space Role" and Section 53.14.5, "Granting Public Access to a Space").	Yes	No

54.2.1.2 Understanding Permissions and Permission Models in a Space

Members can perform actions within a space as specified by the permissions assigned to their role.

When assigning permissions to roles, moderators can choose the standard permission model, or switch to the advanced permission model:

- **Standard permission model**:
  - *Administration* permissions allow a moderator to assign the `Manage All`, `Manage Configuration`, or `Manage Membership` permission to a selected role.
  - *Basic Services* permissions collectively control access to pages, lists, events, links and notes.

  - *Resources* permissions collectively control access to all resources types, including page templates, navigations, skins, Resource Catalogs, and so on.

  Table 54–2 lists the permission categories and permissions that are available with the standard permission model.

- **Advanced permission model**:
  - *Administration* permissions allow a moderator to assign the `Manage All`, `Manage Configuration`, or `Manage Membership` permission to a selected role.
  - Separate categories allow a moderator to control access to the individual services and resources listed in Table 54–3.

  While detailed permissions give you more flexibility over role assignments, they can become complex to manage and maintain.

It is the space template that determines the default permission model for a space. Spaces that are based on out-of-the-box space templates adopt the simpler, standard permission model by default, but moderators can switch to the advanced permission model if required. However, if you switch to using the advanced permission model for a space, you cannot revert back to standard permissions model. For more information. see Section 54.2.4, "Using the Advanced Permission Model."

> **Note:** Permissions do not inherit the privileges of "lesser" permissions. Therefore, be careful to assign the appropriate set of permissions to allow users to perform required actions. For example, whenever you assign the `Create` permission, select the `View` permission too.

Table 54–2 Space Permissions - Simple Permission Model

Permission Category	Permissions	Roles Granted Permission By Default
Administration	**Manage All** - Enable access to all space Administration Settings pages. Includes `Manage Configuration` and `Manage Membership` permissions. **Manage Configuration** - Same as the `Manage All` permission but excludes security privileges. Users with this permission cannot access the Roles and Members pages. Users with the `Manage Configuration` permission must be allowed to view the space. **Manage Membership** -Enables access to the Roles and Members pages in the space administration settings. Through these pages, users can create, edit, and delete members and roles for the space.	`Moderator`

Table 54–2 (Cont.) Space Permissions - Simple Permission Model

Permission Category	Permissions	Roles Granted Permission By Default
Basic Services (Lists, Events, Links, and Notes)	**Edit Page Access, Structure, and Content** - Create, edit and delete pages in the space. Manage page access and edit page properties. Add and remove task flows and portlets. Create, edit, and delete lists, events, links, and notes. Specifically, users with this permission can perform the following operations within the space: ■ Lists - Create, delete, edit, update, and view lists ■ Events - Create, delete, edit, and view events ■ Links - Create, and delete links ■ Notes - Create, delete, edit, and view events	`Moderator`
	Edit Page Access and Structure - Manage page access and edit properties of pages in the space. Add and remove task flows and portlets.	`Moderator`
	Customize Pages and Edit Content - Customize your view of pages in the space. Add and remove list content, events, links, and notes.	`Moderator` `Participant`

	View Pages and Content - View pages, lists, events, links, and notes in the space.	`Moderator`
		`Participant`
		`Viewer`

Announcements	**Create, Edit, and Delete Announcements** - Perform any operation on announcements associated with the space.	`Moderator`
	Create and Edit Announcements - Create and edit announcements. Delete announcements that you create. Users with the `Edit` permission must be allowed to view announcements.	`Participant`
	View Announcements - View announcements.	`Participant` `Viewer`
Discussions	**Create, Edit, and Delete Discussions** - Perform any operation on discussions associated with the space; create topics and replies. Edit and delete any topic or reply.	`Moderator`
	Create and Edit Discussions - Create topics and replies. Edit topics and replies that you create. Users with this permission must be allowed to view discussions.	`Participant`
	Reply To Discussions - Reply to existing topics and edit replies that you create. Users with this permission must be allowed to view discussions.	`Participant`
	View Discussions - View discussions.	`Participant` `Viewer`
Documents	**Administration** - Configure document workflows and access control settings.	`Moderator`
	Delete Documents - Delete any folder and any file in the space, including wikis and blogs. Users with this permission can also move folder and files. Users with the `Delete` permission must be allowed to create and view folders and files.	`Moderator` `Participant`

Table 54–2 (Cont.) Space Permissions - Simple Permission Model

Permission Category	Permissions	Roles Granted Permission By Default
	Create and Edit Documents - Create files, wikis, blogs, and folders, and upload files. Delete files, wikis, blogs, and folders that you create. Delete other files and folders if permissions allow. Users with the `Create` permission must be allowed to view folders and files.	`Moderator` `Participant`

	View Documents - Browse files, wikis, blogs, and folders.
	
	Note about subspaces: If you want public users and authenticated users to have `View Document` permissions on a subspace, do not grant the `View Document` permission to both the `Public-User` and the `Authenticated-User` role. If you grant the `View Document` permission to public users, authenticated users inherit the `View Document` permission automatically.
	
	If you want to revoke `View Document` permissions from public users but grant `View Document` permissions to authenticated users, then revoke the permission from the `Public-User` role and add it to the `Authenticated-User` role.
		`Moderator`
		`Participant`
		`Viewer`

Resources	**Create, Edit, and Delete Resources** - Create, edit, and delete resources owned by the space, such as page, templates, navigations, Resource Catalogs, skins, page styles, content presenter templates, mashup styles, task flows, and data controls. **Create Resources** - Create new resources for the space. **Edit Resources** - Edit resources owned by the space.	`Moderator`

Table 54–3 Space Permissions - Advanced Permission Model

Permission Category	Permissions	Roles Granted Permission By Default
Administration	**Manage All** - Enable access to all space administration pages. Includes `Manage Configuration` and `Manage Membership` permissions. **Manage Configuration** - Same as the `Manage All` permission but excludes security privileges. Users with this permission cannot access the Roles and Members pages. Users with the `Configure` permission must be allowed to view the space. **Manage Membership** -Enables access to the Roles and Members pages in the space administration settings. Through these pages, users can create, edit and delete members and roles for the space.	`Moderator`
Pages	**Create, Edit, and Delete Pages** - Create and delete pages in the space. Manage page access and edit page properties. Add and remove page content.	`Moderator`

Table 54–3 (Cont.) Space Permissions - Advanced Permission Model

Permission Category	Permissions	Roles Granted Permission By Default
	Create Pages - Create pages in the space.	
	Edit Pages - Edit page properties and content for any page in the space.	Moderator
	Delete Pages - Delete any page in the space.	
	Customize Pages - Customize your page view.	Moderator Participant
	View Pages - View pages in the space.	Moderator Participant Viewer
Announcements	**Create, Edit, and Delete Announcements** - Perform any operation on announcements associated with the space.	Moderator
	Create and Edit Announcements - Create and edit announcements. Delete announcements that you create. Users with the `Edit` permission must be allowed to view announcements.	Participant
	View Announcements - View announcements.	Participant Viewer
Content Presenter Templates	**Create, Edit, and Delete Content Presenter Templates** - Create, edit and delete Content Presenter display templates for the space.	
	Create Content Presenter Templates - Create Content Presenter display templates for the space.	
	Edit Content Presenter Templates - Edit space-level Content Presenter display templates. For more information, see Chapter 42, "Publishing Content Using Content Presenter".	
Discussions	**Create, Edit, and Delete Discussions** - Perform any operation on discussions associated with the space; create topics and replies. Edit and delete any topic or reply.	Moderator
	Create and Edit Discussions - Create topics and replies. Edit topics and replies that you create. Users with this permission must be allowed to view discussions.	Participant
	Reply To Discussions - Reply to existing topics and edit replies that you create. Users with this permission must be allowed to view discussions.	Participant
	View Discussions - View discussions.	Participant Viewer
Documents See also Section 43.32, "Troubleshooting Documents Service Issues."	**Administration** - Configure document workflows and access control settings.	Moderator

Table 54–3 (Cont.) Space Permissions - Advanced Permission Model

Permission Category	Permissions	Roles Granted Permission By Default
	Delete Documents - Delete any folder and any file in the space. Users with this permission can also move folder and files. Users with the Delete permission must be allowed to create and view folders and files.	`Moderator` `Participant`
	Create and Edit Documents - Create files and folders, and upload files. Delete files and folders that you create. Delete other files and folders if permissions allow. Users with the Create permission must be allowed to view folders and files.	`Moderator` `Participant`

	View Documents - Browse files and folders.	`Moderator`
		`Participant`
		`Viewer`

Links	**Create and Delete Links** - Create and delete links between objects, and manage link permissions. **Create Links** - Create links between objects. **Delete Links** - Delete a link between two objects.	
Lists	**Create, Edit, and Delete Lists** - Create, edit, and delete lists and list data. **Create Lists** - Create lists. **Edit Lists** - Edit list column definitions. **Delete Lists** - Delete any list. **Edit List Data** - Add, edit, and delete list data. **View Lists** - View lists and list data.	
Mashup Styles	**Create, Edit, and Delete Mashup Styles** - Create, edit and delete mashup styles for the space. **Create Mashup Styles** - Create mashup styles for the space. **Edit Mashup Styles** - Edit space-level mashup styles. For more information, see Section 29.3.4, "Managing Mashup Styles".	
Navigations	**Create, Edit, and Delete Navigations** - Create, edit and delete navigations for the space. **Create Navigations** - Create navigations for the space. **Edit Navigations** - Edit space-level navigations. For more information, see Chapter 12, "Working with Navigation".	
Notes	**Create, Edit, and Delete Notes** - Create, edit and delete notes for the space. **Create Notes** - Create notes for the space. **Edit Notes** - Edit notes. **Delete Notes** - Delete notes. **View Notes** - View notes.	

Table 54–3 (Cont.) Space Permissions - Advanced Permission Model

Permission Category	Permissions	Roles Granted Permission By Default
Page Styles	**Create, Edit, and Delete Page Styles** - Create, edit and delete page styles for the space. **Create Page Styles** - Create page styles for the space. **Edit Page Styles** - Edit space-level page styles. For more information, see Chapter 15, "Working with Page Styles".	
Page Templates	**Create, Edit, and Delete Page Templates** - Create, edit and delete page templates for the space. **Create Page Templates** - Create page templates for the space. **Edit Page Templates** - Edit space-level page templates. For more information, see Chapter 13, "Working with Page Templates".	
Resource Catalogs	**Create, Edit, and Delete Resource Catalogs** - Create, edit and delete Resource Catalogs for the space. **Create Resource Catalogs** - Create Resource Catalogs for the space. **Edit Resource Catalogs** - Edit space-level Resource Catalogs. For more information, see Chapter 16, "Working with Resource Catalogs".	
Skins	**Create, Edit, and Delete Skins** - Create, edit and delete skins for the space. **Create Skins** - Create skins for the space. **Edit Skins** - Edit space-level skins. For more information, see Chapter 14, "Working with Skins".	
Space Events	**Create, Edit, and Delete Events** - Create, edit and delete events for the space. **Create Events** - Create events. **Edit Events** - Edit any event. **Delete Events** - Delete any event. **View Events** - View events.	
Task Flows	**Create, Edit, and Delete Task Flows** - Create, edit and delete task flows based on a mashup style for the space. **Create Task Flows** - Create task flows for the space. **Edit Task Flows** - Edit space-level task flows. For more information, see Section 29.3, "Creating and Managing Task Flows".	

54.2.1.3 Understanding Custom Roles in Spaces

If the default roles do not meet the requirements of your space, moderators can define custom roles that better suit space members. See Section 54.2.2, "Defining Custom Roles for a Space."

Alternatively, moderators can modify the permissions assigned to the default roles. See Section 54.2.3, "Viewing and Editing Permissions of a Space Role."

54.2.2 Defining Custom Roles for a Space

If the default roles provided by the Spaces application do not meet the needs of the space, you can define custom roles to better suit the requirements of your members.

To create a new role for a space:

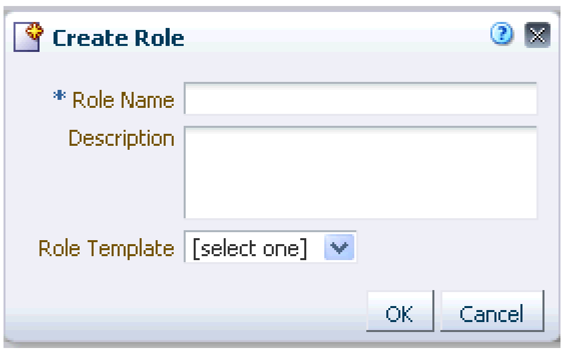
1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Roles** page.

   On the **Roles** page, current roles defined for the space display as columns in the table.

2. To define a new role for the space, click **Create Role**.

   The Create Role dialog box opens (Figure 54–5).

Figure 54–5 Creating a New Role for a Space



3. Enter a suitable **Role Name**. Names can contain alphanumeric characters, blank spaces, @, and underscores. Ensure that role names are self-descriptive to make it as obvious as possible which member should belong to which roles.

4. Enter a **Description** for the role.

5. Optionally, select a **Role Template**.

   The new role inherits permissions from the role template. You can modify these permissions in the next step. If you do not select a role template, the new role is created with no permissions.

   Select **Moderator** to create a role that inherits full administrative privileges for the space. Select **Viewer** (if available) to create a role starting with minimal, view-only privileges.

6. Click **OK**.

   The new role appears as a column in the table on the **Roles** page.

7. To modify permissions for the role, click **Edit Permissions**, then select or deselect each permission check box. For details, see Section 54.2.3, "Viewing and Editing Permissions of a Space Role".

   Take care to assign appropriate access rights when assigning permissions for new roles. Do not allow users to perform more actions than are necessary for the role but at the same time, try not to restrict them from activities they must perform.

54.2.3 Viewing and Editing Permissions of a Space Role

The Edit Permissions dialog lists permissions available for the space, pages in the space, space resources, and services that are enabled for the space. If a service is not shown, then either no permissions are required for that service (for example, the Mail service), or the service is disabled in the space. For more information, see Section 53.10.1, "Enabling and Disabling Services Available to a Space."

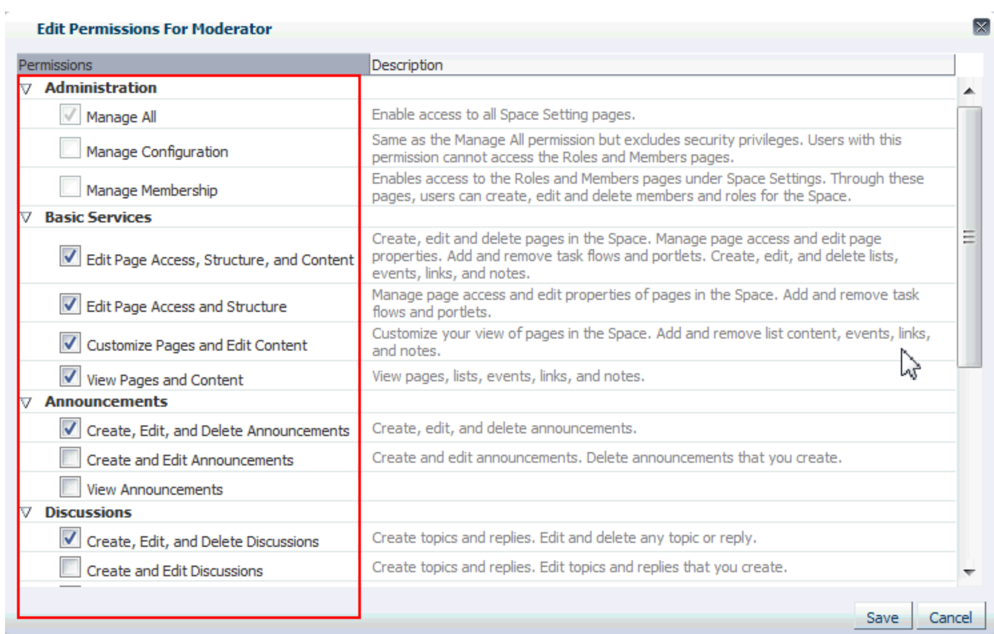
If the default permissions assigned by the Spaces application do not meet the needs of the space, or you want to change previously assigned permissions, you can modify the permissions to better suit your role requirements.

Note: The `Moderator` role permission `Manage All` cannot be modified.

To change the permissions assigned to a role:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Roles** page.
2. On the **Roles** page, select the role you want to change, then click **Edit Permissions**.
3. In the Edit Permissions dialog, select or deselect the check boxes to enable or disable permissions for a role (Figure 54–6). See Table 54–2, " Space Permissions - Simple Permission Model".

Figure 54–6 Modifying Permissions for a Space (Simple Permission Model)



4. Click **Save**.

New permissions are effective immediately.

Note: For more detailed information about granting access permissions to a space, and to individual pages within a space, refer to Section 53.14.4, "Granting Spaces Users Access to a Space".

54.2.4 Using the Advanced Permission Model

Advanced permissions are detailed permissions that give you more flexibility over role assignments, but can become complex to manage and maintain. For example, you can set create, edit, view, and delete permissions for individual services and resources, rather than setting the same permission for all services or all resource types.

If you switch to using the advanced permission model, you cannot revert back to standard permissions model. For more information, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

To use advanced permissions:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Roles** page.
2. On the **Roles** page, click **Advanced Permissions**.

   A warning message displays.
3. Click **OK** to continue.
4. On the Roles page, Click **Edit Permissions**.
5. In the Edit Permissions dialog, select or deselect the check boxes to enable or disable permissions for a role. See Table 54–3, " Space Permissions - Advanced Permission Model".

New permissions are effective immediately.

Note: For more detailed information about granting access permissions to a space, and to individual pages within a space, refer to Section 53.14.4, "Granting Spaces Users Access to a Space".

54.2.5 Deleting Roles in a Space

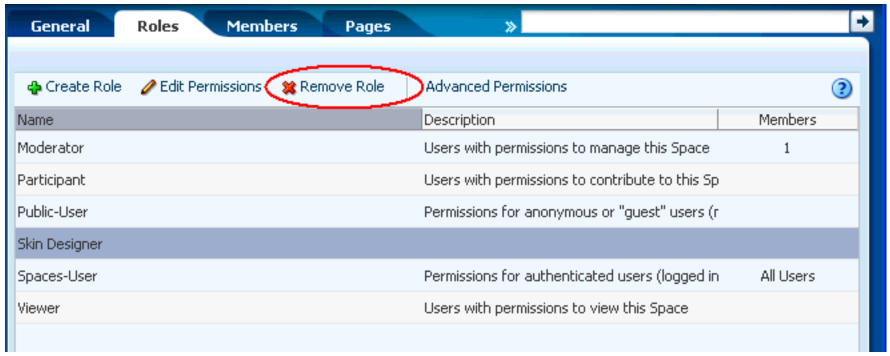
When a role is no longer required, the space moderator can remove it from the space. This helps maintain a valid role list and prevents inappropriate role assignment.

Note: The roles `Moderator`, `Authenticated-User`, and `Public-User` cannot be deleted.

To delete a role in a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Roles** page.
2. On the **Roles** page, select the role you want to delete, then click **Remove Role** (Figure 54–7).

Figure 54–7 Deleting a Role for a Space



3. In the Delete Role confirmation dialog box, click **Delete** to confirm that you want to delete the role.

54.3 Managing Members and Assigning Roles

This section describes how moderators manage membership for a space. It includes the following subsections:

- Section 54.3.1, "What You Should Know About Space Membership"
- Section 54.3.2, "Viewing the Members of a Space"
- Section 54.3.3, "Composing Messages to New Members"
- Section 54.3.4, "Adding Members to a Space"
- Section 54.3.5, "Changing Member Role Assignments"
- Section 54.3.6, "Approving Requests for Membership of a Space"
- Section 54.3.7, "Communicating with Moderators and Members of a Space"
- Section 54.3.8, "Revoking Membership to a Space"

54.3.1 What You Should Know About Space Membership

Member participation is central to any space. It is the moderator's responsibility to manage membership and determine member participation through the permissions assigned to the various roles defined for the space. A space can gather members in several ways:

- If a space is discoverable (see Section 53.14.3, "Making a Space Known (Discoverable)"), it can be made known to anyone logged in to the Spaces application through searches and the **Spaces** page.
- If a space is made public (see Section 53.14.5, "Granting Public Access to a Space"), it is available to anyone with access to the Spaces application, providing that the `Public-User` role is granted with appropriate permissions.
- Moderators can add or invite individual members or groups at the time a space is created, or later (see Section 54.3.4, "Adding Members to a Space").

54.3.2 Viewing the Members of a Space

To review the current membership for a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Members** page.
2. In the **Members** table, review the current list of members and their current role assignments.
3. Using the **Filter** dropdown, select **All Members** to see a full list or select the name of a role to list members with a particular role.

54.3.3 Composing Messages to New Members

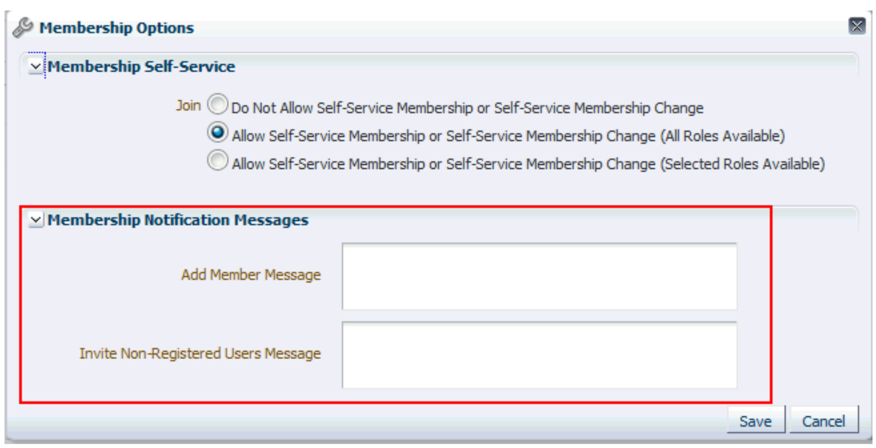
When you add or invite someone to your space, they receive a message through the Mail service (if configured) and through their Worklist (if Worklists are set up). Before you start recruiting new members, take some time to compose suitable greetings and messages for the following scenarios:

- Adding an existing user as a member of your space.
- Inviting an existing user to join your space.
- Inviting someone to register with the Spaces application and join your space.

To compose messages sent out to new members:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Members** page.
2. On the **Members** page, click **Membership Options** to open the Membership Options dialog (Figure 54–8).

Figure 54–8 Editing Messages to New Members



3. Under **Membership Notification Messages**, enter messages in the appropriate sections, as required:

   - **Add Member Message** - Enter a short message to include in membership notifications. Use the message text to welcome new members and introduce your space. Membership notifications display in a user's Worklist. The notification includes a link to the space.
   - **Invite Member Message** - Enter a short message to include in membership invitations to users who are registered with Spaces. Use the message text to describe the space and how it might be of use to them.

     This option requires that workflows are configured for the application. Membership invitations display in a user's Worklist and the invitation includes a secure URL that the invited party must click to accept the membership invitation. See also Section 55.6.1.2, "Troubleshooting Issues with Spaces Workflows."

- **Invite Non-Registered Users** - Enter a short message to include in membership invitations to people who are not registered Spaces users. Use the message text to describe the space and how it might be of use to them. Membership invitations are sent by e-mail. The invitation includes a secure URL that the invited party must click to accept the membership invitation. Unregistered users will then be prompted to register with Spaces before gaining access to your space.

4. Click **Save**.

54.3.4 Adding Members to a Space

This section describes various ways that a moderator can enlist members for your space:

- Section 54.3.4.1, "Searching for a User or Group in the Identity Store"
- Section 54.3.4.2, "Adding Registered Users and Groups"
- Section 54.3.4.3, "Inviting a Registered User"
- Section 54.3.4.5, "Inviting a Non-Registered User"
- Section 54.3.4.4, "Allowing a Registered User to Self-Subscribe"

54.3.4.1 Searching for a User or Group in the Identity Store

The search mechanism used by Spaces to locate users and groups in the identity store follows specific rules. Keep the following tips in mind when you construct your search terms:

- The search operates on First Name, Last Name, Mail Address, User ID, and Common Name. For example, in Oracle Internet Directory (OID), the search operates on `givenname`, `sn`, `mail`, `uid`, and `cn`.

  For information about mapping user attributes to their corresponding names in different LDAP directory servers, see "Mapping User Attributes to LDAP Directories" in *Oracle Fusion Middleware Application Security Guide*.

- Specify a wildcard (`*`) character anywhere in the search string to substitute for preceding or following characters.
- The search is *not* case-sensitive.
- Leave the search term blank to list all users (or groups) in the identity store.
- To search for a First Name, Last Name, Mail Address, User ID, or Common Name, specify one search term, specifying at minimum the first letter in any of these values.
- To search for First Name or Last Name, specify two search terms separated by a space to search in First Name and Last Name, respectively. Specify at minimum the first letter in each value.
- To search for a First Name or Last Name, either of which have multiple names, specify multiple search terms separated by spaces. The multiple names are treated as a single field, including the space character. The first search term specifies the search on the First Name field and the last search term specifies the search on the

Last Name field. The intervening search terms are ignored. Specify at minimum the first letter of each value.

For example, the following entry in the identity store defines a Spaces user:

First Name (`givenname`)=`James Robert`
Last Name (`sn`)=`van Order`
Mail Address (`mail`)=`jim.van.order@example.com`
User ID (`uid`)=`jimbo`
Common Name (`cn`)=`Jim`

Table 54–4 lists search terms that will show this user in the search results. For search terms that will *not* show this user in the search results, see Table 54–5.

Table 54–4 Search Terms That Find James Robert van Order

Search Terms	Search Results

`Jam`
`jam`
`Jam*`
`*ames`
	`Jam` found in First Name (`James`).
	Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.

`van` `Van`	`van` found in Last Name (`van Order`). Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.

`jimbo`
`Jimbo`
`*imbo`
	`jimbo` found in User ID (`jimbo`).
	Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.

`jim` `Jim`	`jim` found in Mail Address (`jim.van.order@example.com`), User ID (`jimbo`), and Common Name (`Jim`). Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.
`James Order` `james order`	`James` found in First Name (`James`); `Order` not found in Last Name (`van Order`). Results show all users where first search term begins the First Name, **or** second search term *begins* the Last Name.
`Robert van` `robert Van`	`Robert` not found in First Name (`James`); `van` found in Last Name (`van Order`). Results show all users where first search term begins the First Name, **or** second search term *begins* the Last Name.
`James van Order` `james Van order`	`James` found in First Name (`James`), `Order` not found in Last Name (`van Order`). Results show all users where first search term begins the First Name, **or** last search term *begins* the Last Name. Intervening term is ignored.
`James Robert van Order` `james robert Van order`	`James` found in First Name (`James`); `Order` not found in Last Name (`van Order`). Results show all users where first search term begins the First Name, **or** last search term begins the Last Name. Intervening terms are ignored.

Table 54–5 lists search terms that will *not* show this user in the search results.

Table 54–5 Search Terms That Do Not Find James Robert van Order

Search Terms	Search Results
`ames`	`ame` not found in First Name (`James`), Last Name (`van Order`), Mail Address (`jim.van.order@example.com`), User ID (`jimbo`), or Common Name (`Jim`). Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.
`Order` `order`	`Order` not found in First Name (`James`). Results show all users where search term begins the First Name.
`Robert Order` `robert order`	`Robert` not found in First Name (`James`), and `Order` not found in Last Name (`van Order`). Results show all users where first search term begins the First Name, **or** second search term begins the Last Name.

54.3.4.2 Adding Registered Users and Groups

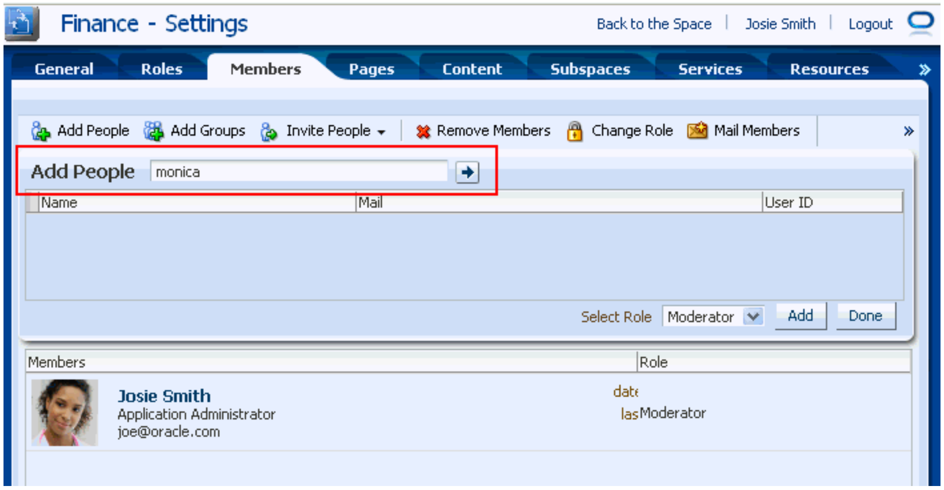
As a space moderator, you can add any user currently registered with Spaces as a member of your space. Existing users receive notification through the Mail service (if configured) and through their Worklist (if Worklists are set up).

To add a member to your space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Members** page.
2. (Optional) On the **Members** page, click **Membership Options** to edit the greeting messages sent to new members (see Section 54.3.3, "Composing Messages to New Members") and then click **Save** to close the Membership Options dialog.
3. Select one of:
   - **Add People** to add one or more individual users as members of the space.
   - **Add Groups** to add multiple users belonging to a named user group in the identity store. Subsequent changes or updates to the group are automatically reflected in the space.
4. If you know the exact name of the person or group, enter the name in the box provided, separating multiple names with a comma (Figure 54–9).

   If you are not sure of the name, you can search the identity store. See Section 54.3.4.1, "Searching for a User or Group in the Identity Store."

Figure 54–9 Adding a New Member



5. Select one or more user names from the list. Ctrl-Click to select multiple names.
6. From the **Select Role** list, select a role for the new members. If the role you want is not listed, create a role that meets your requirements (see Section 54.2.2, "Defining Custom Roles for a Space").
7. Click **Add**.

All the users and groups you select display in the **Members** table.

Note: When adding groups, keep the following in mind:

- Names of user groups are clickable, enabling you to drill down to see individual user names of group members.
- A list of members does not display for dynamic groups based on Oracle Entitlements Server (OES) roles, since OES roles are based on dynamic attributes and therefore do not have any static members. For more information, see "Configuring Dynamic Groups" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.
- For the Spaces application to properly maintain enterprise group-to-role mappings, back-end servers, such as the discussions server and content server, must support enterprise groups too. When back-end servers do not support enterprise groups, the message "`Group [name] not found in the Identity Store`" displays. For more information, see Section 24.3, "Troubleshooting Issues with Users and Roles".

54.3.4.3 Inviting a Registered User

As a space moderator, you can invite anyone who is currently registered with Spaces to become a member of your space. Invited users receive notification through the Mail service (if configured) and through their Worklist (if Worklists are set up).

To invite someone to become a member of your space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Members** page.

2. (Optional) On the **Members** page, click **Membership Options** to edit the greeting message sent to invited members (see Section 54.3.3, "Composing Messages to New Members") and then click **Save** to close the Membership Options dialog.

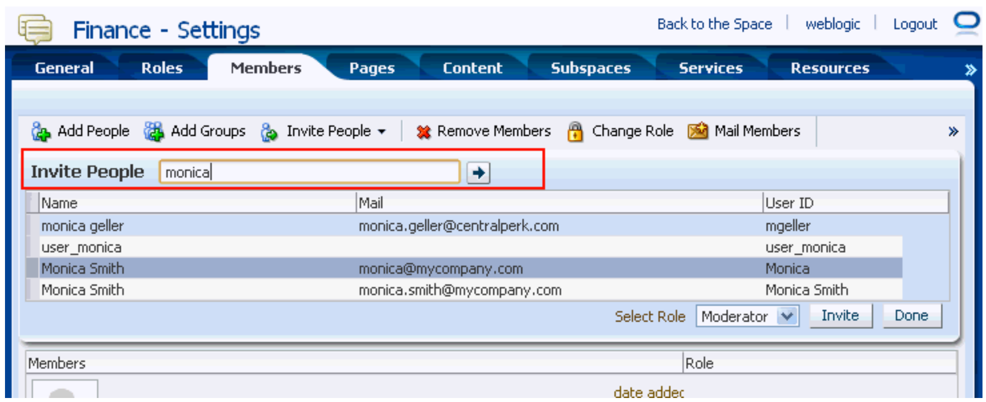
3. Click **Invite People**, then select **Invite Registered Users** to invite individual users to become a member of the space.

> **Note:** **Invite People** displays only when the Mail service and the Worklist service are configured.

4. If you know the exact name of the person, enter the name in the box provided, separating multiple names with a comma (Figure 54–9).

   If you are not sure of the name you can search the identity store. For search tips, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."

Figure 54–10 Inviting a New Member



5. Select one or more user names from the list.

6. Select a role for the invited members. If the role you want is not listed, create a role that meets your requirements (see Section 54.2.2, "Defining Custom Roles for a Space").

7. Click **Invite**.

If you want to cancel an invitation, delete the invited member from the list.

54.3.4.4 Allowing a Registered User to Self-Subscribe

Self-subscription enables existing Spaces users to request membership without an invitation from the space moderator. Certain types of spaces, especially interest-based communities, are particularly suited to this form of member enrollment as the space often reaches a wider audience.

The capabilities of self-service members depends on which roles you decide to offer on the Request Membership page. For more information, see Section 54.1.1, "Managing Self-Service Membership for a Space."

If a user's self-subscription request is pending approval by the space moderator, the user's attempt to access the space opens the Home space. When a user is a member of a space, the user's attempt to access the space opens the first accessible page of the space.

54.3.4.5 Inviting a Non-Registered User

If your Spaces application allows non-registered people to self-register, space moderators can invite anyone with a valid mail address to join the space. Prospective members receive an invitation by mail, inviting them to join the space. Upon accepting the invitation, non-registered users are prompted to register with Spaces before gaining access to the space.

To invite someone outside the Spaces community to join your space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Members** page.
2. On the **Members** page, click **Membership Options** to edit the greeting message that is sent to people who are not yet registered Spaces users (see Section 54.3.3, "Composing Messages to New Members") and then click **Save** to close the Membership Options dialog.
3. Click **Invite People**, then select **Invite Non-Registered Users**.

> **Note:** **Invite People** displays only when the Mail service and the Worklist service are configured. **Invite Non-Registered Users** is available only when the Spaces administrator has enabled **Allow Self-Registration Through Invitations** and **Allow Public Users to Self-Register**. See Chapter 25, "Enabling Self-Registration."

4. Enter the **Email Address(es)** for one or more prospective members, separated by commas.
5. Select a **Role** for the prospective members. If the role you want is not listed, create a role that meets your requirements (see Section 54.2.2, "Defining Custom Roles for a Space").
6. Click **Invite**.

Prospective members receive an mail invitation to join the space with the message you composed in Step 2. The invitation includes a secure, self-registration URL that the invited party can click to register with the Spaces application and accept space membership (see Section 51.9.2, "Joining a Space (Unregistered Spaces User)".

54.3.5 Changing Member Role Assignments

A space moderator can change a member's role at any time. Users are notified of membership changes through their Worklist.

To change a member's current role in a space:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Members** page.
2. On the **Members** page, select one or more members, and then click the **Change Role** icon.
3. In the **Change Role** dialog box, select a different role.

   If you are not sure which role to select, click the **Roles** tab to determine the range of actions that current roles allow (see Section 54.2.3, "Viewing and Editing Permissions of a Space Role"). If the existing roles do not meet your requirements, consider creating a new role (see Section 54.2.2, "Defining Custom Roles for a Space").

4. Click **OK**.

54.3.6 Approving Requests for Membership of a Space

As a space moderator, notifications appear in your Worklist to approve or reject requests for space membership or a new role in the space. For more information, see Section 72.3, "Working with the Worklist Service Task Flow."

The person making the request receives notification of your decision. If you reject a request, you can enter the reason for the rejection.

54.3.7 Communicating with Moderators and Members of a Space

You can send messages to individual members, and also to the moderator(s) or all the members of a space. The Spaces application creates a default distribution list for every space if the Mail server is Microsoft Exchange and active directory connection details (LDAP) are provided in the mail server connection settings. As members leave or join the space, the default distribution list updates automatically.

For information about setting up a custom space mail distribution list, see Section 53.10.2, "Configuring the Mail Distribution List for a Space".

There are several ways to communicate with the moderator(s) and members of a space:

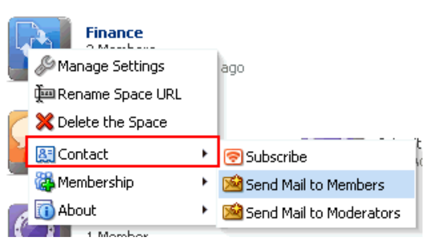
- Sending a Message from the Spaces Browser
- (Moderators only) Sending a Message from the Members Page

54.3.7.1 Sending a Message from the Spaces Browser

To send a message to the moderator(s) or all members from the **Spaces** page:

1. On the **Spaces** page (see Section 51.4, "Viewing and Accessing Available Spaces"), find the space to which you want to send mail. If it is not shown, use **Filter** or **Search** to list it.
2. Right-click the space's icon, then select **Contact**, then **Send Mail to Members** or **Send Mail to Moderators** (Figure 54–11).

Figure 54–11 Actions Menu



54.3.7.2 Sending a Message from the Members Page

(Moderators only) To send a message to all members, or an individual member, from the **Members** page:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Members** page.
2. Under **Members**:

- To send a message to all members of the space, click **Mail Members** in the toolbar.
- To send a message to an individual member, click the member's icon, and then click the members mail address.

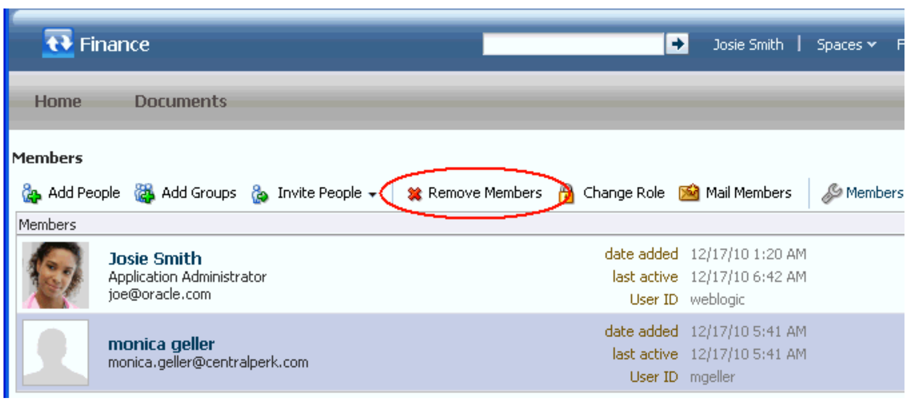
54.3.8 Revoking Membership to a Space

Moderators can revoke user membership for a space at any time. Users receive notification through their Worklist when you cancel their membership.

To revoke membership:

1. In the space administration settings (see Section 53.3, "Accessing Space Administration Pages"), open the **Members** page.
2. Select one or more one or more users or groups, then click **Remove Member**. (Figure 54–12)

Figure 54–12 Removing a Member



3. In the Remove Members dialog box, click **Remove** to confirm.

54.4 Working with the Members Task Flow

The Spaces application provides a Members task flow which lists all the members of a particular space. This task flow is an abbreviated version of the **Members** page in the space administration settings, as described in Section 54.3.2, "Viewing the Members of a Space."

To add a Members task flow to a page, see Section 53.15.1, "Adding a Space Task Flow to a Page."

This section includes the following subsections:

- Section 54.4.1, "What You Should Know About the Members Task Flow"
- Section 54.4.2, "Managing Space Membership Through the Members Task Flow"
- Section 54.4.3, "Contacting All Space Members"
- Section 54.4.4, "Contacting Individual Members of a Space"
- Section 54.4.5, "Sorting Members"
- Section 54.4.6, "Filtering Members"
- Section 54.4.7, "Setting Members Task Flow Properties"

54.4.1 What You Should Know About the Members Task Flow

The Members task flow enables you to get an at-a-glance view of the members of a space. It lists the members of the space and also shows each user's role within the space, such as `Moderator`, `Participant`, or `Viewer`. The Members task flow also provides a quick way of getting to the space administration **Members** page where you can manage space membership, if you have the appropriate permissions.

To add a Members task flow to a page, see Section 53.15.1, "Adding a Space Task Flow to a Page."

Note: Names of user groups are clickable enabling you to drill down to see individual user names of group members.

A list of members does not display for dynamic group based on Oracle Entitlements Server (OES) roles since OES roles are based on dynamic attributes and therefore do not have any static members. For more information, see "Configuring Dynamic Groups" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

54.4.2 Managing Space Membership Through the Members Task Flow

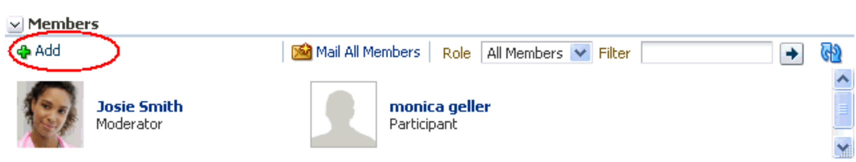
Moderators can quickly access the tools for managing space membership from the Members task flow.

To manage space membership:

1. Log in and locate the Members task flow.
2. In the Members task flow, click the **Add** icon (Figure 54–13).

   The **Add** icon only displays to moderators or members with the space permission `Manage All`.

Figure 54–13 The Add Icon in the Members Task Flow



3. This takes you to the **Members** tab where you can add members as described in Section 54.3.4.2, "Adding Registered Users and Groups."
4. On the **Members** tab, you can also remove members, invite users to join the space, and edit exiting members' roles within the space. For more information, see Section 54.3, "Managing Members and Assigning Roles."

54.4.3 Contacting All Space Members

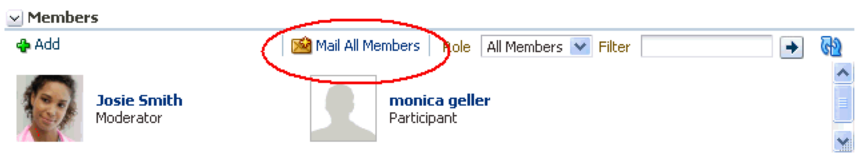
If you have a message to send to all members of the space, you can do this from the Members task flow.

To contact all space members:

1. Log in and locate the Members task flow.
2. Click **Mail All Members** in the Members task flow toolbar (Figure 54–14).

You may be presented with a login window. If so, then enter your user name and password for your mail application. If your preferences are set up to deliver your login credentials automatically, then you can start your message right away. For more information about login credentials and preferences, see Chapter 38, "Setting Your Personal Preferences."

Figure 54–14 Mail All Members Icon in the Members Task Flow



3. Compose your message and click **Send**.

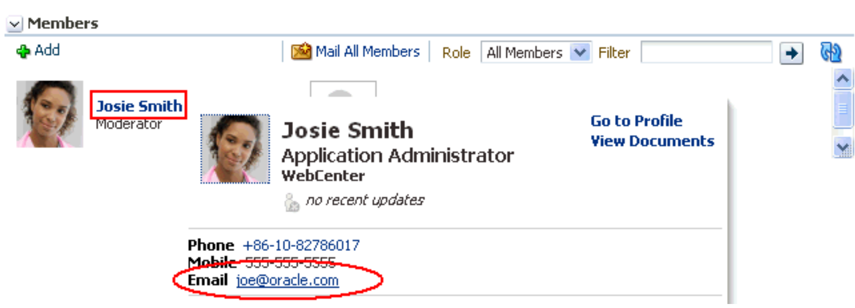
54.4.4 Contacting Individual Members of a Space

It's easy to contact a space member from the Members task flow:

To contact a member:

1. Log in and locate the Members task flow.
2. In the Members task flow, click the name of the member you want to contact (Figure 54–15).

Figure 54–15 Contacting a Member Using the Members Task Flow



By default, when you click a member's name their profile summary displays. From here, you can contact the member by mail, send them an instant message, and so on. For more information, see Section 33.5.1, "Viewing Profile Details."

The profile does not display if the **Profile Launched on Selection** parameter is disabled, for details see Section 54.4.7.2, "Members Task Flow Parameters".

54.4.5 Sorting Members

You can sort the list of members by name or by recent activity. Use the **Sort Criteria** parameter described in Section 54.4.7.2, "Members Task Flow Parameters".

54.4.6 Filtering Members

Use filtering to help find a particular member in the Members task flow.

To filter the list of members:

1. Log in and locate the Members task flow.

2. In the Members task flow, enter a full or partial name in the **Filter** field (Figure 54–16), and then click the Filter arrow icon to the right of the field.

Figure 54–16 Filtering Options in the Members Task Flow

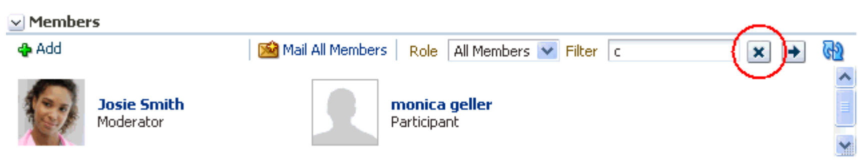
3. The list of members refreshes, displaying only those members that match the search term.

   Filtering searches against a listed member's user name. For example, if your search criteria is "c", the search results might include members named "chris", "vicki", or "weblogic".

4. Alternatively, filter the members by role by selecting a **Role** from the dropdown list.

5. To return the list of members to its default display, click the **Clear Filter** icon (Figure 54–17) and select **All Members** from the Role dropdown.

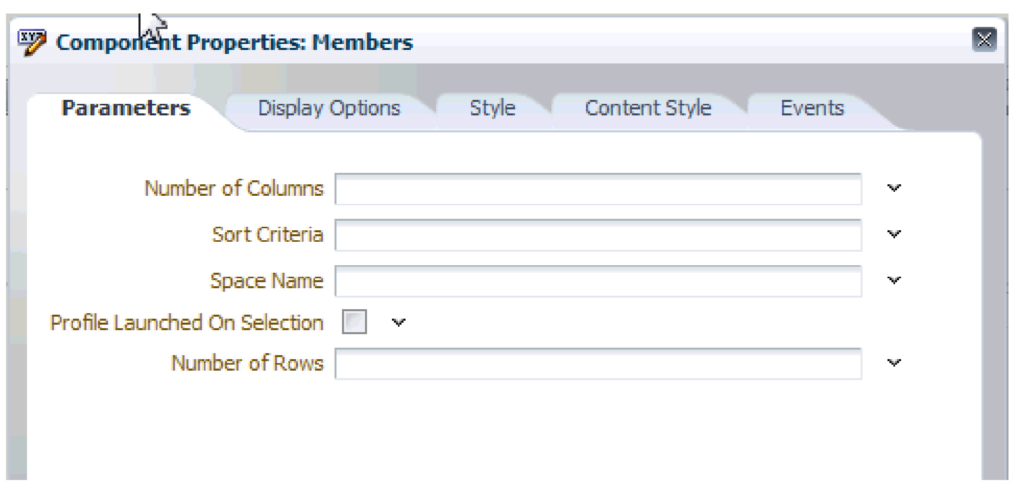
Figure 54–17 Clear Search Icon in the Members Task Flow



54.4.7 Setting Members Task Flow Properties

The Members task flow has associated properties, which users with sufficient privileges can access from the Component Properties dialog in Composer (Figure 54–18).

Figure 54–18 Members Task Flow Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Members task flow and describe the properties on the **Parameters** tab:

- Section 54.4.7.1, "What You Should Know About Members Task Flow Properties"
- Section 54.4.7.2, "Members Task Flow Parameters"

54.4.7.1 What You Should Know About Members Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 54.4.7.2, "Members Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For information about wiring pages and components, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

> **Note:** Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.
>
> EL validation is not performed on non-generic display options.

54.4.7.2 Members Task Flow Parameters

Table 54–6 describes the parameters that are unique to the Members task flow.

Table 54–6 Members Task Flow Properties: Parameter Tab

Parameter	Description
`Space Name`	The name of the space for which to display members. The default value is the current space. Use this parameter to display member details for a different space. You can obtain a space's name from its About this Space dialog. Express values using the following formats: ■ **Constant**—Express a constant value, such as `Marketing`. ■ **Page parameter**—Enter a page parameter to fetch the value from the page on which the task flow is placed. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components." ■ **EL expression**—Enter an Expression Language (EL) expression.
`Number of Columns`	The number of columns used to display members. The default is null which means 'no limit' and in this case member details wrap to fill the entire width of the task flow. To fix the number of members displayed in each row, enter the number of 'columns' you require. Horizontal scroll bars display if there is not enough space to display the number of members specified here. Express values using the following formats: ■ **Constant**—Express a constant value, such as `2` or `5`. ■ **Page parameter**—Enter a page parameter to fetch the value from the page on which the task flow is placed. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components." ■ **EL expression**—Enter an Expression Language (EL) expression.
`Number of Rows`	The number of rows used to display members. The default is null which means that member details wrap to fill the space available. Vertical scroll bars display if there is not enough space to display all the members. To fix the maximum number of rows displayed, enter the number of 'rows' you require. Previous and Next buttons automatically display if more member details are available. Express values using the following formats: ■ **Constant**—Express a constant value, such as `2` or `5`. ■ **Page parameter**—Enter a page parameter to fetch the value from the page on which the task flow is placed. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components." ■ **EL expression**—Enter an Expression Language (EL) expression.
`Profile Launched on Selection`	Determines whether to launch a profile popup when you select a member's name. Deselect this option if you do not want to launch profile details.
`Sort Criteria`	The order in which to sort the members. Specify `LAST_ACTIVITY_TIME` to sort the members in descending order of date/time at which they were last involved in any activity. If not specified, members are sorted by name, alphabetically.

55

Administering Spaces and Templates

This chapter describes how a Spaces administrator with `Spaces-Manage All` or `Space Templates-Manage All` permissions can manage everyone's spaces and space templates in Spaces.

It includes the following sections:

For more information about exporting and importing an entire Spaces application, see "Exporting and Importing Entire Spaces Application for Data Migration" *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Audience

To perform the tasks in this chapter, you must have the Spaces `Administrator` role or a custom role that grants one of the following permissions.

- `Application-Manage All`
- `Application-Manage Configuration`

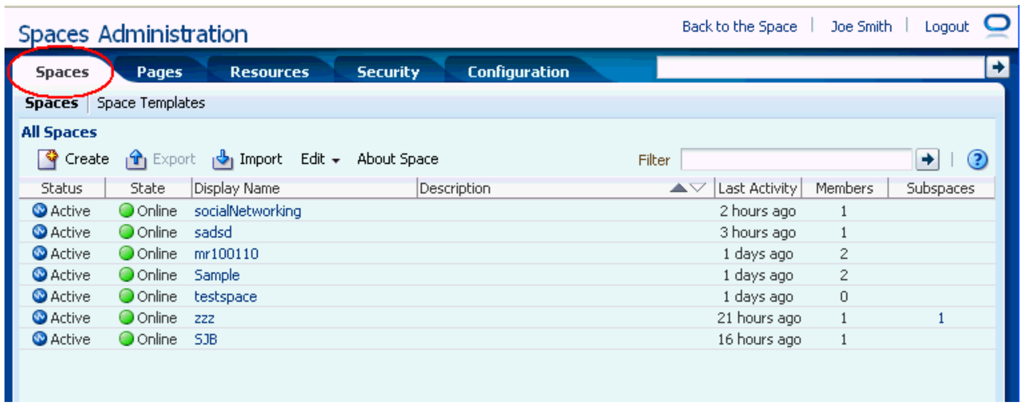
55.1 What You Should Know About Administering Spaces and Templates

Spaces administrators with `Spaces-Manage All` or `Space Templates-Manage All` permissions can manage any space or space template from Spaces Administration (Figure 55–1). From here, you can take any space temporarily offline and close down any spaces deemed inactive. Administrators can rename and edit any space, as well as delete spaces when they are no longer required.

Space moderators do not have access to this page. While moderators may perform some of these tasks for spaces that they own through space administration pages, the Spaces administrator can perform these tasks for all spaces.

The Spaces Administration pages also offers import and export services that enable you to back up or move information between Spaces applications, and stage or production environments. Import and export options are only available to users with *full* administrative permission, that is, have the `Application-Manage All` permission. See also Section 55.5, "Importing and Exporting Spaces and Space Templates."

Figure 55–1 Spaces Administration - Spaces



For application-level permissions required to perform administrative tasks through these tabs, see Section 23.3, "Understanding Application Roles and Permissions."

55.2 Performing Administrative Tasks for All Spaces

Spaces administrators can change the status of any space. This section describes the steps to perform the following tasks:

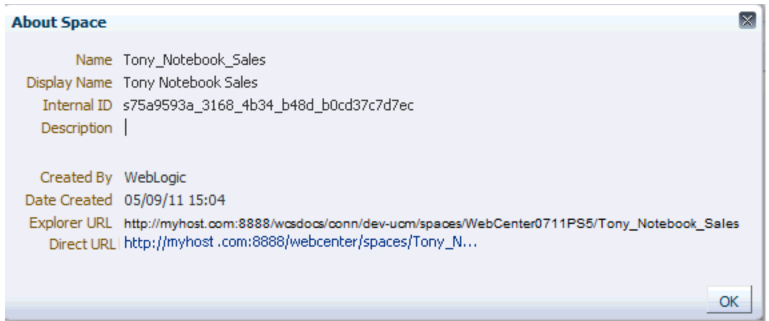
- Section 55.2.1, "Viewing Information About Any Space"
- Section 55.2.2, "Taking Any Space Offline"
- Section 55.2.3, "Bringing Any Space Back Online"
- Section 55.2.4, "Closing Any Space"
- Section 55.2.5, "Activating Any Space"
- Section 55.2.6, "Deleting a Space"

55.2.1 Viewing Information About Any Space

Spaces administrators can view and manage any space through Spaces Administration. From here, you can quickly see whether spaces are active, online, offline, how recently a space was accessed, and membership numbers.

The toolbar offers additional options for editing, changing status, and deleting spaces, and if you select **About Space** you can access useful information such as the space's direct URL and internal ID (Figure 55–2).

Figure 55–2 About Space Dialog



By default, spaces are listed alphabetically. To view the information sorted by a different column, click the sort icon for the column. Sort icons appear when you hover the mouse cursor over the column header.

To display the Administration page for all spaces:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages.".

2. Click **Spaces**, then **Spaces** (Figure 55–1).

55.2.2 Taking Any Space Offline

When a space is offline, members of the space who do not have `Spaces-Manage All` permission are unable to access the space. If members try to access the space, they will see the *Space Unavailable* page. See also Section 7.3, "Working with System Pages."

Administrators and members with the `Spaces-Manage All` permission can access a space that is offline. So if, for example, an administrator who notices inappropriate content can take a space offline, fix the content, and bring it back online later.

To permanently close down a space that is not being used any more, see Section 55.2.4, "Closing Any Space".

To take a space offline:

1. Open Spaces Administration.

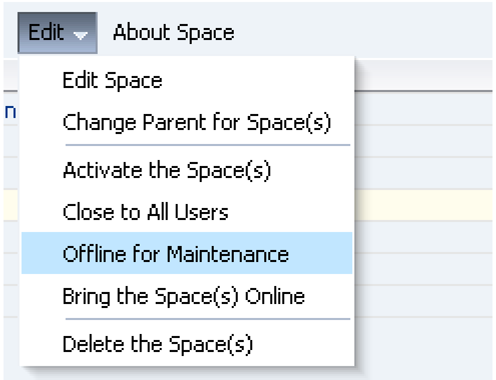
   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Spaces** (Figure 55–1).

3. On the **Spaces** page, select the space you require by highlighting the row in the table. Ctrl-Click rows to select more than one space.

4. From the **Edit** menu, select **Offline for Maintenance** (Figure 55–3).

Figure 55–3 Taking a Space Offline



5. Click **OK**.

55.2.3 Bringing Any Space Back Online

To bring any space back online:

1. Open Spaces Administration.

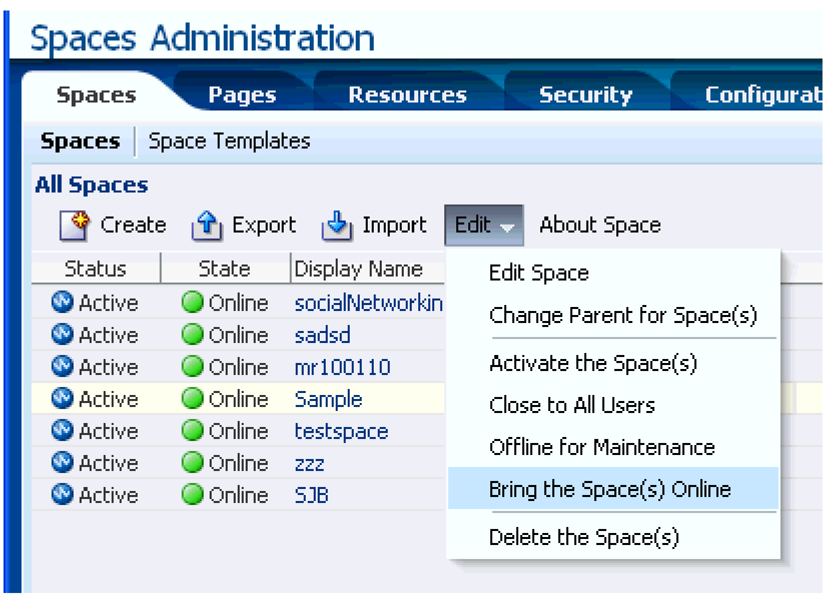
   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Spaces** (Figure 55–1).

3. On the **Spaces** page, select the required space by highlighting the row in the table. Ctrl-Click to select more than one space.

4. From the **Edit** menu, select **Bring the Space Online** (Figure 55–4).

Figure 55–4 Bringing a Space Online



5. Click **OK**.

55.2.4 Closing Any Space

A Spaces administrator can close any space that is no longer being used. When you close a space, the content is archived. The space is removed from everyone's "Spaces switcher menu" to avoid clutter. The space's content remains accessible and searchable to those who still want to reference it and space members can continue working in the space.

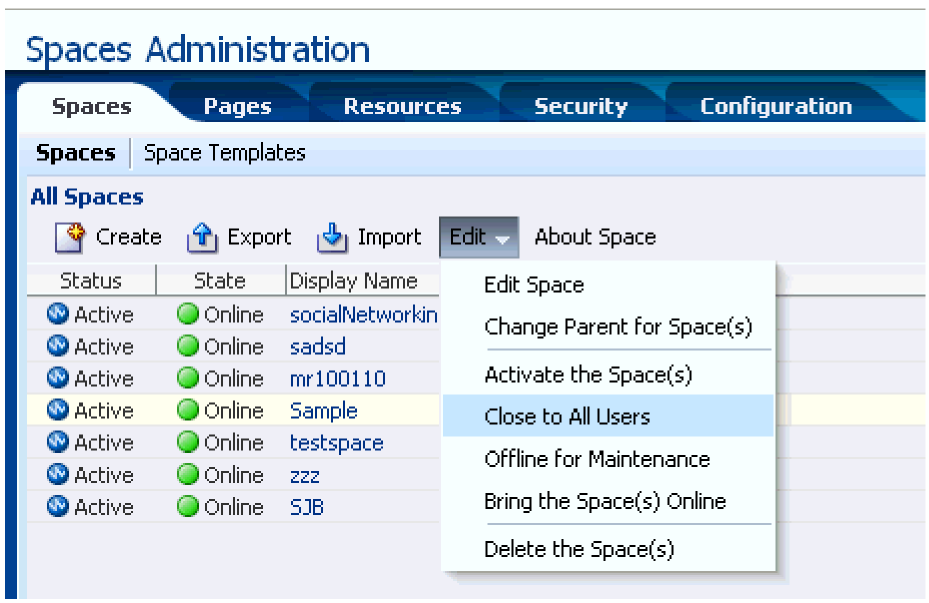
If you want to close down a space temporarily, take the space offline instead. See Section 55.2.2, "Taking Any Space Offline".

To close a space:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click **Spaces** (Figure 55–1).
3. On the **Spaces** page, select the required space by highlighting the row in the table. Ctrl-Click to select more than one space.
4. From the **Edit** menu, select **Close to All Users** (Figure 55–5).

Figure 55–5 Closing a Space



5. Click **OK**.

55.2.5 Activating Any Space

Spaces administrators and space moderators may close a space if it is no longer being used. If you want to reopen a space, you can activate it.

To activate a space:

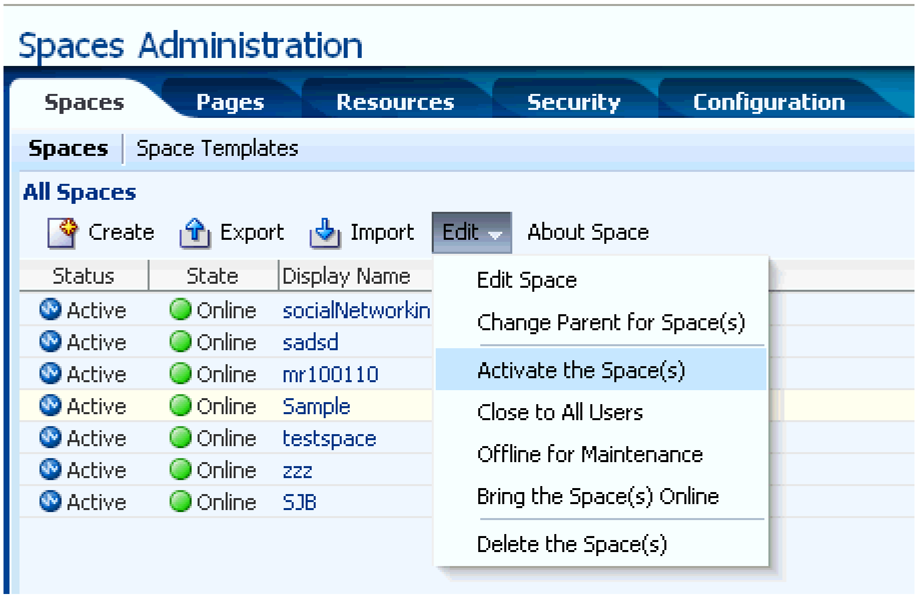
1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click **Spaces** (Figure 55–1).

3. On the **Spaces** page, select the required space by highlighting the row in the table. Ctrl-Click to select more than one space.

4. From the **Edit** menu, select **Activate the Space** (Figure 55–6).

Figure 55–6 Activating a Space



5. Click **OK**.

55.2.6 Deleting a Space

Spaces administrators with the `Spaces-Manage All` permission can delete any space. Once a space is removed from Spaces it cannot be recovered. Spaces are permanently removed and current members will no longer see the space in their view.

When you delete a space:

- All pages associated with the space are deleted.
- Links, lists, notes, tags, and events) associated with the space is deleted.
- Space roles and membership details are deleted.
- Content managed by discussions and announcements is deleted when it is stored in the default forum or category created by the space. Content managed by nondefault forums or categories is not deleted (for details, see Section 53.10.3, "Modifying Discussion Forum Settings for a Space").
- The space mail distribution list that is automatically created by the Spaces application is deleted. However, distribution lists that are customized by the space moderator are not deleted (for details, see Section 53.10.2, "Configuring the Mail Distribution List for a Space").
- Content managed by external services, such as content repositories, mail, and so on, is removed.
- If the space is a parent in a space hierarchy, child subspaces are deleted too.

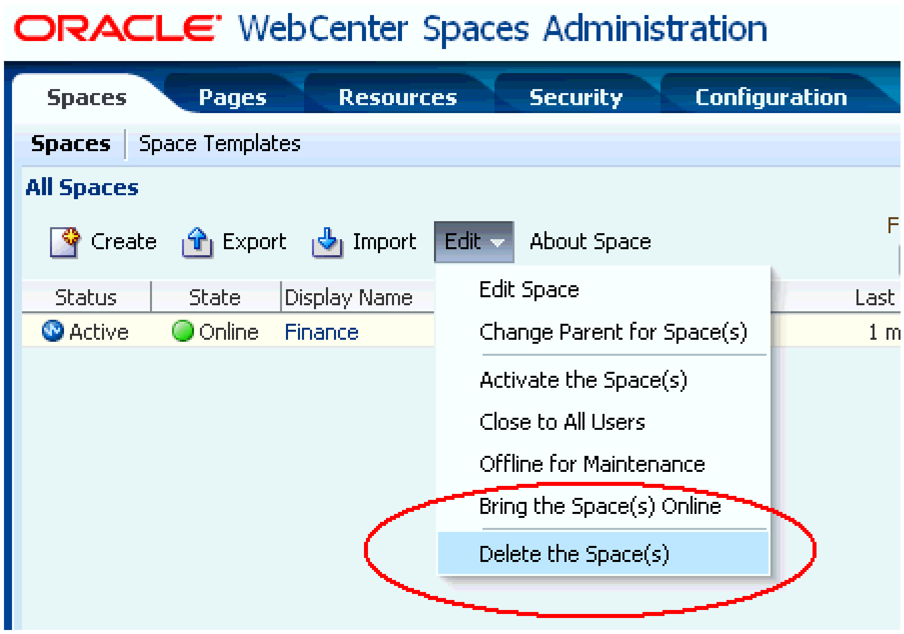
You cannot delete a space while the moderator is editing space settings, but there are no other restrictions.

To delete a space that is no longer required:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."
2. Click **Spaces** (Figure 55–1).
3. On the **Spaces** page, select the required space by highlighting the row in the table. Ctrl-Click to select more than one space.
4. Select the **Edit** menu, and select **Delete the Space(s)** (Figure 55–7).

Figure 55–7 Deleting a Space



5. Click **Delete** to confirm that you want to delete the space(s).

If the delete process fails for any reason, the space is not removed from the administrator's **Spaces** tab; this sometimes happens when a back-end server cannot be contacted. If the administrator clicks **Delete** again from here, the space will be removed.

55.3 Performing Administrative Tasks for All Space Templates

Spaces administrators with the `Space Templates-Manage All` permission can review, publish, hide, and delete any space template. This section describes how to perform these tasks:

- Section 55.3.1, "What You Should Know About Managing Space Templates"
- Section 55.3.2, "Viewing Space Templates"
- Section 55.3.3, "Publishing and Hiding Space Templates"
- Section 55.3.4, "Deleting a Space Template"

55.3.1 What You Should Know About Managing Space Templates

When creating a space, users can base it on one of the out-of-the-box space templates, their own custom space template, or a published space template created by others. Space templates provide a consistent look and feel and an efficient way to get started creating a space that is configured exactly as required by an organization. For more information, see Section 52.1, "What You Should Know About Space Templates."

Spaces administrators with the `Space Templates-Manage All` permission can manage *every* space template from Spaces Administration (Figure 55–8). You can see which space templates are currently available and delete space templates when they are no longer required. You can also publish templates—making them available to everyone—or restrict them to private use only.

It is important to keep the template list up to date and valid. Anyone who creates a space will see public templates as well as their own private templates.

The **Space Templates** page provides import and export services, too. For more information, see Section 55.5, "Importing and Exporting Spaces and Space Templates.".

Figure 55–8 Spaces Administration - Space Templates Page

55.3.2 Viewing Space Templates

Spaces administrators or users with the `Space Templates-Manage All` permission can view and manage any space through Spaces Administration. You can quickly see who created each space template, and the date on which it was created. The **Edit** menu offers additional options for deleting space templates, and you can publish and hide templates from here, too.

By default, space templates are listed alphabetically. To view the information sorted by a different column, click the sort icon for the column. Sort icons appear when you hover the mouse cursor over the column header.

To see a list of every space template in Spaces, together with their description, creator, and other useful information:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Spaces**, then **Templates** (Figure 55–8).

55.3.3 Publishing and Hiding Space Templates

While the Spaces application can accommodate any number of templates, a limited number of templates is sometimes more effective. The Spaces administrator or users with the `Space Templates-Manage All` permission can maintain the template list through Spaces Administration. To view the **Space Templates** page, a user must additionally be granted `Application-Configure` permission by the Spaces administrator.

To publish or hide a space template (including the out-of-the-box templates):

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Spaces**, then **Templates** (Figure 55–8).

3. Select the required space templates by highlighting the row in the table. Ctrl-Click rows to select more than one space template.

4. From the **Edit** menu, select:

   - **Make Public** to share the template with everyone.
   - **Remove Public Access** to remove the template from the space template lists in the Home space for all users, except for the template owner.

5. Confirm your selection.

55.3.4 Deleting a Space Template

Spaces administrators or users with the `Space Templates-Manage` permission can delete any space template, except out-of-the-box templates.Deleting a space template does not effect on the portals that were created using the space template

To delete a space template that is no longer required:

1. Open Spaces Administration.

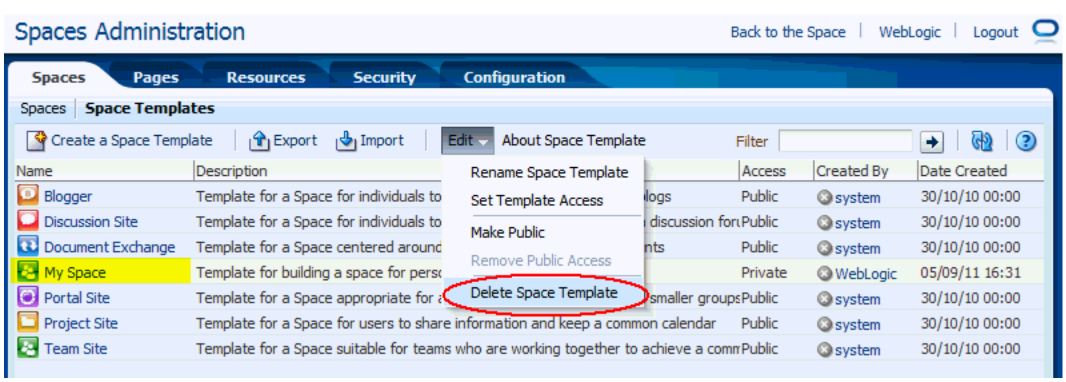
   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Spaces**, then **Templates** (Figure 55–8).

3. Select the required space templates by highlighting the row in the table. Ctrl-Click rows to select more than one space template.

4. From the **Edit** menu (Figure 55–9), select **Delete Space Template**.

Figure 55–9 Deleting a Space Template



5. Click **Delete** to confirm that you want to delete the selected template(s).

55.4 Enabling and Disabling Services

You can enable and disable services for individual spaces. In most cases, the space moderator will manage service requirements for their own space, but Spaces administrators can also perform this task if required to do so. For details, see Section 53.10.1, "Enabling and Disabling Services Available to a Space".

Spaces services, such as Discussions and Mail, are configured by your Fusion Middleware Administrator through Fusion Middleware Control or using the WLST command-line tool. All services automatically become available in the Spaces application when the application starts up—no additional configuration is required inside Spaces.

There is no facility to disable services for the entire application as the Fusion Middleware Administrator takes care of this through Fusion Middleware Control. See "Getting the Spaces Application Up and Running" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

55.5 Importing and Exporting Spaces and Space Templates

Spaces provides a set of export and import utilities that enable you to back up or move information between Spaces applications, and stage or production environments. To use these utilities you must have the Spaces `Administrator` role or a custom role that grants the `Application-Manage All` permission.

This section describes how to export and import spaces and space templates through Spaces Administration pages. It includes the following sections:

- Section 55.5.1, "Exporting Spaces"
- Section 55.5.2, "Importing Spaces"
- Section 55.5.3, "Exporting Space Templates"
- Section 55.5.4, "Importing Space Templates"
- Section 55.6.3, "Troubleshooting Issues with Space Import and Export"

Fusion Middleware Administrators can also export and import spaces and space templates using WLST commands. To find out more about these WLST commands, how to migrate the back-end data associated with spaces, and also how to export an entire Spaces application, see "Exporting and Importing a Spaces Application for Data Migration" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

55.5.1 Exporting Spaces

Spaces administrators can export individual spaces and import them into other Spaces applications. Each space must be taken offline, even if only temporarily, to prevent data conflicts during the export process. See Section 53.4.3, "Taking a Space Offline."

Space information is exported into a single export archive (`.ear` file). The `.ear` file contains a metadata archive (`.mar` file) and, optionally, a single XML file containing space security policy information. You can save export archives to your local file system or to a remote server file system.

For more information about what is exported, read "Understanding Spaces Export and Import" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

The export process does not include data associated with external services such as Mail, Discussions, Announcements, Instant Messaging and Presence, Events, and

Documents, as all this data is stored on external servers. To learn how to move data associated with these services, refer to documentation for that product. See also "Migrating Back-end Components for Individual Spaces" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Note: Space artifacts must be located in the *content directory* to be exported. For example, icons and images, and so on, associated with a page template must be placed in the page template's content directory to be exported. For more information, see Section 11.4.2.1, "What You Should Know About a Resource's Properties."

If the space contains Web Service data controls, all the associated Web Services must be up and accessible for the export to succeed.

Out-of-the-box templates and user customizations are never exported. For information on user customizations, see Section 51.11.4.2, "Performing User Customizations on Your Page View."

Spaces administrators can export spaces through Spaces Administration as described here. Fusion Middleware administrators can also export spaces using WLST commands. For details, see "Exporting Individual Spaces Using WLST" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

You can also export space templates but this is a separate process. You cannot export spaces and space templates into a single archive. For details, see Section 55.5.3, "Exporting Space Templates."

To export one or more spaces through Spaces Administration

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Spaces**.

3. Select the space required by highlighting the row in the table.

   Ctrl-click rows to select more than one space.

   Ensure that all the spaces you select (and subspaces) are *offline*. Spaces must be taken offline, even if only temporarily, to prevent data conflicts during the export process. Unsaved changes are not exported. See also Section 53.4.3, "Taking a Space Offline."

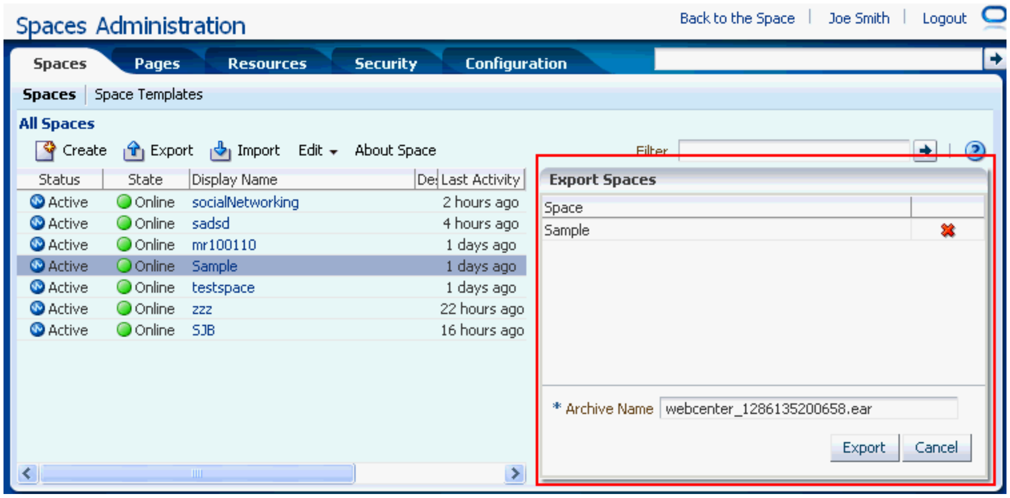
   Note: Other members with the `Spaces-Manage All` permission should not edit Spaces during the export process.

   ---

4. Click **Export** in the toolbar.

   The Export Spaces dialog box opens (Figure 55–10).

Figure 55–10 Exporting Spaces



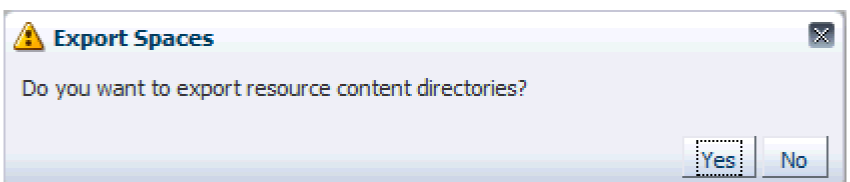
5. Change the **Archive Name** or accept the default name.

   To ensure uniqueness, the default `.ear` filename contains a timestamp: webcenter_<timestamp>.ear

6. Click **Export**.

7. If any of the spaces selected for export include custom portal resources, you must specify whether or not you want to include resource-specific content in the space archive (Figure 55–11).

Figure 55–11 Exporting Custom Resource Content



   Do one of the following:

   - Click **Yes** to export content, such as images and icons, that is referenced by portal resources in the archive (skins, page templates, and so on).

     The Spaces application stores content for all portal resources under a 'shared' directory (`oracle\webcenter\siteresources\scopedMD\shared\...`) rather than on a space-by-space basis. Consider the following before exporting content directories for the resources in your archive:

     – Entire content directories are exported rather than individual files. For example, if a skin references two files (`...\shared\skins\logos\mylogo.gif` and `...\shared\skins\icons\myicon.gif`), the entire content of both directories (`\logos` and `\icons`) are exported.

     – The size of `\shared\...` content directories. If your Spaces installation utilizes a large number of portal resources (both at the application-level as well as by individual spaces and space templates) then the number of files stored under the `\shared` directory or a `\shared` subdirectory is potentially large.

– On import, all files under the content directories are uploaded to the target application and existing files with the same name are overwritten. While you can opt not to upload content directories on import, it's an all or nothing approach, that is, you cannot upload content specific to a particular resource or space.

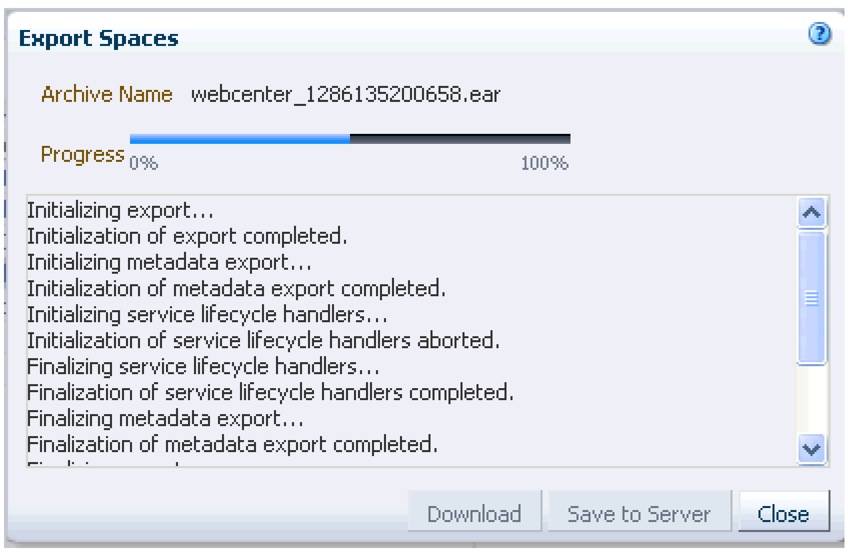
- Click **No** to exclude content under the `\shared` directory that is referenced by portal resources.

  If your choose not to include resource content directories in the archive, your system administrator can migrate the resource content for you later on if required (using `exportMetadata/importMetadata` WLST commands). For details, see "Exporting Spaces Resources" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

8. Progress information is displayed during the export process (Figure 55–12).

   When the export process is complete, specify a location for the export archive (`.ear`).

Figure 55–12 Exporting Spaces In Progress



Select one of:

- **Download**. Saves the export `.ear` file to your local file system.

  Your Browser downloads and save the archive locally. The actual download location depends on your Browser set up.

- **Save to Server**. Saves the export `.ear` file to a server location.

  In the Save to Server dialog box (Figure 55–13), enter a suitable path in **Server Location** (for example, `/tmp`), then click **Save**. Ensure that the server directory you specify has `write` permissions.

Figure 55–13 Saving Space Export Archives to a Server Location

9. Click **Close**.

The export archive (`.ear`) is saved to the specified location.

55.5.2 Importing Spaces

Spaces administrators can import a space archive (`.ear`) into another Spaces application.

On import, *all* spaces included in the archive are created or re-created on the target application. Existing spaces are deleted then replaced, and new spaces are created.

If you intend to import spaces with names identical to those available on the target application, ensure that those spaces are offline in the target application. It is not possible to overwrite a space, on import, if it is online. For details, see Section 53.4.3, "Taking a Space Offline."

Spaces are locked during an import operation to prevent simultaneous imports/exports of the same space. If someone else is importing a particular space, all subsequent attempts to import (or export) the same space are blocked.

All spaces need a security policy to work properly so, when you import a brand new space for the first time, you must include the space's security policy. Existing spaces have a security policy in place so in this case, it's up to you whether to overwrite the security information on import or maintain the existing security policy.

When you import a space with security, security policy updates do not apply immediately. Any user logged in to the Spaces application must log out and log back in to adopt new security policies for the space.

Note: User IDs in the source and target environments must match to ensure that the space members in the target are exactly the same as those in the source. If a shared identity store is not used, your system administrator must migrate users to the target. Refer to "Migrating Back-end Components for an Entire Spaces Application" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

If data migration is important, you can elect to import data associated with the space such as activity streams, events, feedback, lists, links, message boards, people connections, and profiles. Documents and discussions can be migrated for individual spaces too but migrating externally stored data is a separate process, as described in "Migrating Back-end Components for Individual Spaces" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Spaces administrators can import spaces through Spaces Administration as described here. Fusion Middleware administrators can also import spaces using WLST commands. For details, see "Importing Individual Spaces Using WLST" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

To import one or more spaces or subspaces:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

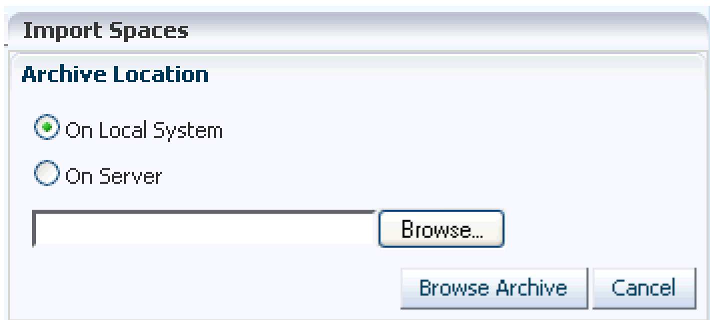
2. Click **Spaces**.

3. Click **Import** in the toolbar.

   > **Tip:** To import one or more spaces *as a subspace* of an existing space, select the target space *before* clicking the **Import** button.

   The Import Spaces dialog box opens (Figure 55–14).

Figure 55–14 Importing Spaces



4. Specify the location of your space archive (`.ear`). Select one of:

   - **On Local System**. Enter the location in the text box. Alternatively, click **Browse** to locate the directory on the local file system where the `.ear` file is stored.
   - **On Server**. Enter the path, including the archive filename, in the text box. For example, `/tmp/MySpaceExport.ear`. You can specify any shared location accessible from this Spaces application.

5. Click **Browse Archive** to review the content available for import.

6. Set import options as described in Table 55–1:

Table 55–1 Space Import Options

Field	Description
Include Services Data	Select to import the following ■ Data stored in the WebCenter repository for the following services: Activity Stream, Events, Feedback, Lists, Links, Message Boards, People Connections, Profiles, and Tags ■ Default settings for Profiles, Message Boards, Feedback, Connections, Activity Stream ■ Activity Stream Task Flow Customizations Deselect this option if you do not want to import any data associated with lists, events, tags, links, connections, profiles, message boards, activity streams, and feedback. For example, when moving a space from a test environment to a stage or production environment where test data is not required.

Table 55–1 (Cont.) Space Import Options

Field	Description
Include Customizations	Select to import space customizations. For information about which customizations are optional on import, read "Understanding Spaces Export and Import" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. If you deselect this option: ▪ New spaces are imported without customizations (that is, default task flows are imported without any customizations and the default space settings are used). ▪ If you are importing a space that already exists on the target, existing customizations on the target are preserved. Note: Portlet and page customizations are always imported.
Include Security Policy	Select to import security information with the space. When selected, the following security related information is imported: ▪ Space roles (and permissions assigned to each role). ▪ Space members (and member role assignments). Deselect this option if you do not want to import space security information. This option is useful when importing spaces between a stage and production environments, where: ▪ Members used during testing are not required in the production environment. ▪ The space exists on the production instance and you do not want to overwrite the security information. **Note:** When importing a brand new space, always select (check) this option as you cannot import a new space without a security policy.

7. Click **Import**.

   - If you try to import spaces that exist in the target Spaces application, the **Confirm Replace** dialog displays. You must confirm whether you want to overwrite the existing spaces.

     To delete existing spaces and replace them with imported versions, answer **Yes**. Answer **No** to cancel the import process.

   - If the import process detects a conflict between the spaces you are trying to import and those which exist on the target, a message displays to help you resolve the issue. For example, conflict messages display if a space on the target application has the same name but a different GUID to a space you are trying to import. In this instance you could change the name of the source space and create a new export archive, or rename the conflicting space in the target application and import the same archive.

   - If the archive you are importing contains resource content directories, the **Overwrite Content Directory** dialog displays. You must confirm whether to import *all* content directories referenced by portal resources (skins, page templates, and so on) in the archive or only import new files/directories.

     To import all content directories in the archive, overwriting existing content directories, answer **Yes**. Answer **No** to only import new files, that is, content directories and files that do not already exist on the target.

> **Note:** The Spaces application stores content used by portal resources, such as images and icons, under the 'shared' content directory: `oracle\webcenter\siteresources\scopedMD\shared\...`

An information message displays when all spaces import successfully.

8. Click **Close** to dismiss the Import Space window.

Imported spaces are *offline* initially because, mostly, some additional work is required before they are ready for general use. For example, you may want to migrate data associated with back-end components. For details, refer to the "Migrating Back-end Components for Individual Spaces" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*:

Once content and membership details are finalized you may bring the space online, see Section 53.4.4, "Bringing a Space Back Online."

55.5.3 Exporting Space Templates

Spaces administrators can export space templates and import them into other Spaces applications. Out-of-the-box templates cannot be exported.

Space templates can include pages, resources, discussions, lists, service information, and security information such as custom roles and current members; no other data, such as documents, are stored with the template.

While export and import utilities are primarily used to move information between Spaces applications, the space template export feature is also useful as a backup service, and for sharing and exchanging templates with others.

Space template information is exported into a single export archive (`.ear` file). The `.ear` file contains a metadata archive (`.mar` file) and a single XML file containing space security policy information.

You can save export archives to your local file system or to a remote server file system.

Spaces administrators can export space templates through Spaces Administration as described here. Fusion Middleware administrators can also export space templates using WLST commands. For details, see "Exporting Space Templates Using WLST" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

> **Note:** You can also export space information but this is a separate process. For details, see Section 55.5.1, "Exporting Spaces". You cannot export spaces and space templates into a single archive.

To export one or more spaces templates from Spaces Administration:

1. Open Spaces Administration.

   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Spaces**, then **Space Templates**.

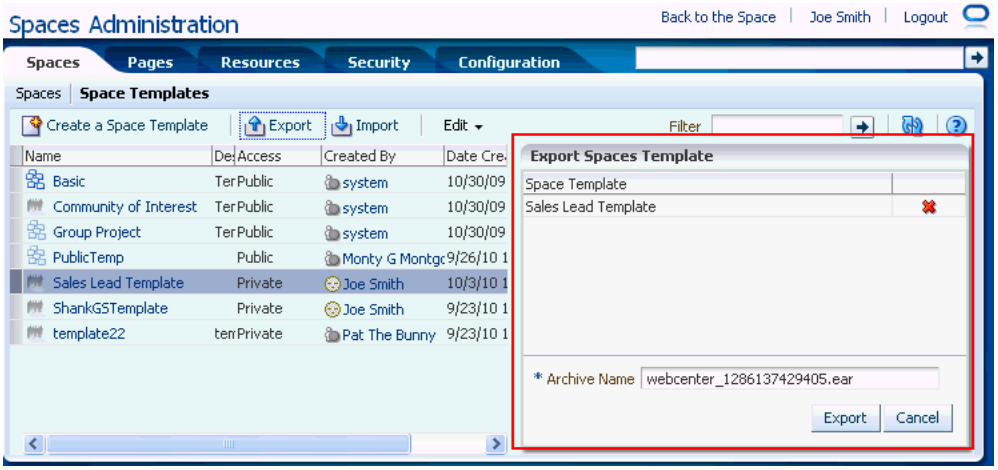
3. Select the space template required by highlighting the row in the table.

   Ctrl-click rows to select more than one space template.

4. Click **Export** on the toolbar.

   The Export Space Template dialog box opens (Figure 55–15).

Figure 55–15 Exporting Space Templates



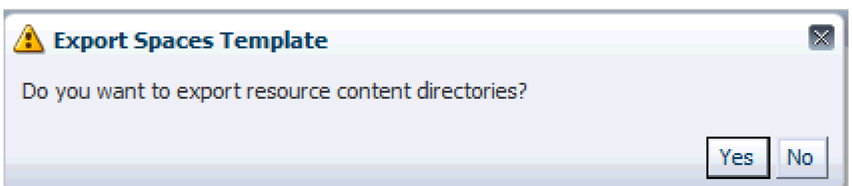
5. Change the **Archive Name** or accept the default name.

   To ensure uniqueness, the default `.ear` filename contains a timestamp: `webcenter_<timestamp>.ear`

6. Click **Export**.

7. If any of the space templates selected for export include custom portal resources, you must specify whether or not you want to include resource-specific content in the space template archive (Figure 55–11).

Figure 55–16 Exporting Custom Resource Content



Do one of the following:

- Click **Yes** to export content, such as images and icons, that is referenced by portal resources (skins, page templates, and so on).

  The Spaces application stores content referenced by portal resource under the 'shared' directory (`oracle\webcenter\siteresources\scopedMD\shared\...`) rather than on a template-by-template basis. Consider the following before exporting content directories for the resources in your archive:

  – Entire content directories are exported rather than individual files. For example, if a skin references two files (`...\shared\skins\logos\mylogo.gif` and `...\shared\skins\icons\myicon.gif`), the entire content of both directories (`\logos` and `\icons`) are exported.

  – The size of `\shared\...` content directories. If your Spaces installation utilizes a large number of portal resources (both at the application-level as well as by individual spaces and space templates) then the number of files stored under the `\shared` directory or a `\shared` subdirectory is potentially large.

  – On import, all files under the content directories are uploaded to the target application and existing files with the same name are overwritten. While you can opt not to upload content directories on import, it's an all or nothing approach, that is, you cannot upload content specific to a particular resource or space template.

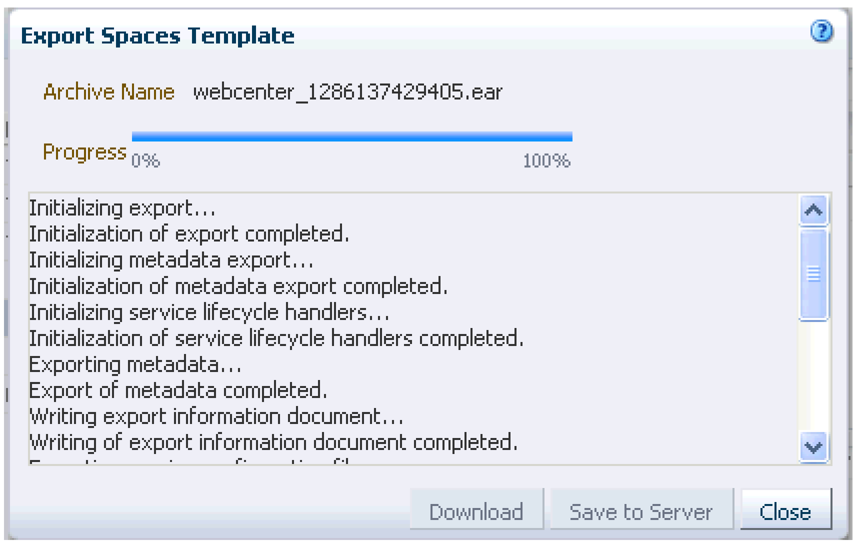
- Click **No** to exclude content under the `\shared` directory that is referenced by portal resources.

  If your choose not to include resource content directories in the archive, your system administrator can migrate the resource content for you later on if required (using `exportMetadata/importMetadata` WLST commands). For details, see "Exporting Spaces Resources" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

8. Progress information is displayed during the export process (Figure 55–17).

   When the export process is complete, specify a location for the export archive (`.ear`).

Figure 55–17 Exporting Space Templates In Progress



   Select one of:

   - **Download**. Saves the export `.ear` file to your local file system.

     Your browser downloads and saves the archive locally. The actual download location depends on your browser set up.

   - **Save to Server**. Saves the export `.ear` file to a server location. For example, `/tmp`. Ensure that there are write permissions on the server directory that you specify.

     After clicking **Save to Server**, enter the **Server Location** and then click **Save**.

9. Click **Close**.

The export archive (`.ear`) is saved to the specified location.

55.5.4 Importing Space Templates

Spaces administrators can import a space template archive (`.ear`) into another Spaces application.

On import, *all* space templates included in the archive are re-created on the target application. If a space template exists on the target, then it is deleted and replaced. If a space template does not exist, then it is created.

Newly imported space templates are not immediately available for general use. You must publish the imported templates to make them available to everyone. See Section 52.3.6, "Publishing or Hiding Space Templates."

If you want the Documents service to be enabled in spaces created from imported templates, you must migrate the space template's folder (on Content Server) to the target instance as well. For details, see "Importing the Back-end Folder for a Space Template" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Spaces administrators can import space templates through Spaces Administration as described here. Fusion Middleware administrators can also import space templates using WLST commands. For details, see "Importing Space Templates Using WLST" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Note: If the archive contains content directories for custom portal resources, only new content directories/files are uploaded on import. There is no option to upload *all* content in the archive through Spaces Administration, that is, you cannot overwrite all existing content directories from here. An option to upload and overwrite all content directories is available using the WLST command `importGroupSpaces`. For details, see "Importing Space Templates Using WLST" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

To import one or more space templates through Spaces Administration:

1. Open Spaces Administration.

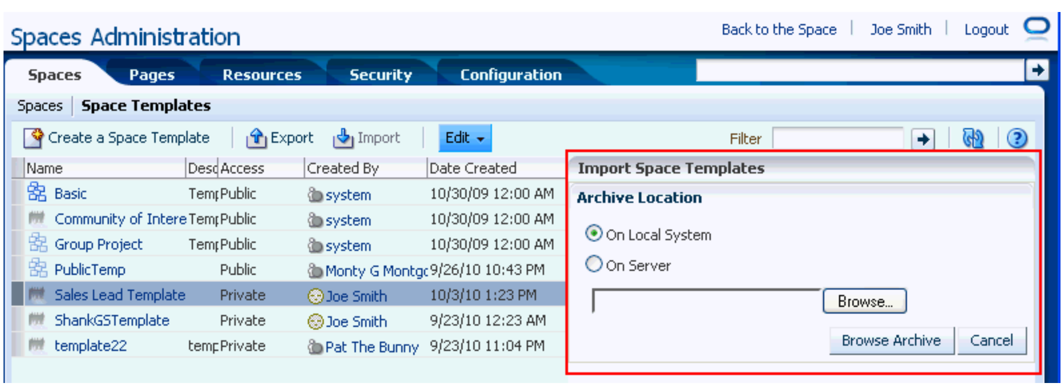
   For details, see Chapter 4, "Accessing Spaces Administration Pages."

2. Click **Spaces**, then **Space Templates**.

3. Click **Import** on the toolbar.

   The Import Space Templates dialog box opens (Figure 55–18).

Figure 55–18 Importing Space Templates



4. Specify the location of your space template archive (`.ear`). Select one of:

- **On Local System**. Enter the location in the text box. Alternatively, click **Browse** to locate the directory on the local file system where the `.ear` file is stored.
- **On Server**. Enter the path, including the archive filename, in the text box. For example, `/tmp/MySpaceTemplateExport.ear`. You can specify any shared location accessible from this Spaces application.

5. Click **Browse Archive** to review the content available for import.
6. Click **Import**.

   If you try to import a space template that exists in the Spaces application, the **Confirm Replace** dialog displays. You must confirm whether you want to overwrite the existing space templates.

   To delete existing space templates and replace them with imported versions, answer **Yes**. Answer **No** to cancel the import process.

   An information message displays when all templates import successfully.
7. Click **Close** to dismiss the Import Space Templates window.

Newly imported space templates are not immediately available for general use. You must publish the imported templates to make them available to everyone. See Section 11.4.3, "Showing and Hiding Resources."

55.6 Troubleshooting

This section includes troubleshooting information in the following sections:

- Section 55.6.1, "Troubleshooting Spaces Workflows"
- Section 55.6.2, "Troubleshooting WebCenter Service Issues"
- Section 55.6.3, "Troubleshooting Issues with Space Import and Export"

55.6.1 Troubleshooting Spaces Workflows

If you experience issues with Spaces workflows, review the following sections:

- Section 55.6.1.1, "Validating the SpacesWorkflow Configuration"
- Section 55.6.1.2, "Troubleshooting Issues with Spaces Workflows"

55.6.1.1 Validating the SpacesWorkflow Configuration

The *Oracle Fusion Middleware Installation Guide for Oracle WebCenter* describes how to install and configure Spaces workflows. For details, see "Back-End Requirements for Spaces Workflows". You can validate the workflow configuration as follows:

1. Log in to Spaces.
2. Create a space and then navigate to the **Members** tab (Space Settings).
3. Invite a new member with any role (say `User2`).
4. Log out, and then log in as `User2`.
5. Navigate to a **Worklist** task flow.
6. Open the invite notification and click the **Accept** button.
7. Open the space.

If the Spaces workflows are working properly, the newly created space ia available to `User2`. If the space is not available or listed, there is some issue with the configuration.

55.6.1.2 Troubleshooting Issues with Spaces Workflows

If Spaces workflows are not working properly, follow these steps to help troubleshoot the issue:

1. Check that Spaces workflows are deployed on the Oracle SOA server:

   a. Log in to Fusion Middleware Control.

   b. Check that `WebCenterWorklistDetailApp.ear` is deployed.

   c. Verify that `sca_CommunityWorkflows.jar` is deployed.

   For details, see "Oracle SOA Server - Extending the Domain" in *Oracle Fusion Middleware Installation Guide for Oracle WebCenter*.

2. Ensure the Web Service connection between the Oracle SOA server and the Spaces application is secure:

   a. Check the alias in the keystore file on the Oracle SOA server.

   For example, use the following command to list the content of the keystore file on the Oracle SOA server:

   `keytool -list -v -keystore bpel.jks -storepass <password>`

   There should be an entry with:

   ```
   Alias name: webcenter_spaces_ws
   ```

   See "Setting Up the SOA Domain" in *Oracle Fusion Middleware Installation Guide for Oracle WebCenter*.

   b. Verify that the credential stores for both Spaces and Oracle SOA server are configured correctly.

   See "Updating the Credential Store" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

   c. Check that keystores exist at both ends of the connection, for example:

   - `webcenter.jks` (copied to Spaces server end)

   - `bpel.jks` (copied to Oracle SOA server end)

   For example, the following commands generate `webcenter.jks` and `bpel.jks`:

   ```
   keytool -genkeypair -keyalg RSA -dname
   "cn=webcenter,dc=us,dc=oracle,dc=com" -alias webcenter -keypass mypassword
   -keystore webcenter.jks -storepass mypassword -validity 360
   keytool -exportcert -v -alias webcenter -keystore webcenter.jks -storepass
   mypassword -rfc -file webcenter.cer
   keytool -importcert -alias webcenter_spaces_ws  -file webcenter.cer
   -keystore bpel.jks -storepass mypassword
   keytool -genkeypair -keyalg RSA -dname "cn=bpel,dc=us,dc=oracle,dc=com"
   -alias bpel -keypass mypassword -keystore bpel.jks -storepass mypassword
   -validity 360
   keytool -exportcert -v -alias bpel -keystore bpel.jks -storepass mypassword
   -rfc -file bpel.cer
   keytool -importcert -alias bpel -file bpel.cer -keystore webcenter.jks
   -storepass mypassword
   ```

See "Creating the SOA Domain Keystore" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

d. Configure role members for the `BPMWorkflowAdmin` application role in Oracle SOA server (`soa-infra`).

When associating the domain with an identity store that does not contain the user `weblogic`, you must assign some other valid user to the application role `BPMWorkflowAdmin`. Use WLST commands to do this from the SOA Oracle home, for example, to assign a user named "monty" that exists in LDAP:

```
cd $SOA_ORACLE_HOME/common/bin/
wlst.sh

connect('<admin username>','<admin password>',
'mysoahost.example.com:7001')
revokeAppRole(appStripe="soa-infra", appRoleName="BPMWorkflowAdmin",
principalClass="oracle.security.jps.service.policystore.ApplicationRole",
principalName="SOAAdmin")
grantAppRole(appStripe="soa-infra", appRoleName="BPMWorkflowAdmin",
principalClass="weblogic.security.principal.WLSUserImpl",
principalName="monty")
```

See "Security Commands" in the *Oracle Fusion Middleware WebLogic Scripting Tool Command Reference*.

55.6.2 Troubleshooting WebCenter Service Issues

When you create a space, an error similar to the following may display if enabling a service exceeds the time allowed:

```
Space created with the following warning(s) : Issues were faced while
provisioning the service(s) - List Service. Check the space services
settings page if these services have been provisioned.
```

When a space is created, services are enabled in parallel in multiple threads. If provisioning a service exceeds the specified timeout, the thread is interrupted. The timeout may be exceeded due to time needed to copy the metadata when the latency between the midtier and the database is too high, network issues, database performance issues, and so on.

To check if the issue is due to exceeding the timeout, search the log file for a message similar to the following:

```
[2009-10-19T08:43:22.659+00:00] [WC_Spaces] [WARNING] []
[oracle.webcenter.webcenterapp] [tid: [ACTIVE].ExecuteThread: '0' for queue:
'weblogic.kernel.Default (self-tuning)'] [userId: weblogic] [ecid:
0000IHfxTHMDScX_TtCCyc1Ar22000002f,0] [APP: webcenter] Concurr: The thread is
timed out in 5000 milisec. for oracle.webcenter.list:Execution timedout[[
    queued :   13 ms
    suspended :    0 ms
    running : 5787 ms
    timeout : 5000 ms
    service : oracle.webcenter.community
    resource : oracle.webcenter.list
    source : oracle.webcenter.concurrent.RunnableTask@43c4d1
             (oracle.webcenter.concurrent.RunnableTask)
    submission : 3
]]
```

In this case, the running time of 5787 ms exceeded the timeout of 5000 ms.

If possible, the root cause of the timeout should be addressed; for example, resolve networking or database performance issues. Once this is done, the space can be created again and the error should not be encountered. If the performance cannot be improved and the error persists, the timeout value may be increased for the service encountering the error. Refer to the chapter "Oracle WebCenter Portal Performance Tuning" in the *Oracle Fusion Middleware Performance and Tuning Guide* for more information on setting concurrency management parameters in `adf-config.xml`.

55.6.3 Troubleshooting Issues with Space Import and Export

This section contains the following subsections:

- Section 55.6.3.1, "Space Blocked After Unsuccessful Export or Import"
- Section 55.6.3.2, "Page or Space Not Found Message After Import"
- Section 55.6.3.3, "Space Import Archive Exceeds Maximum Upload File Size"
- Section 55.6.3.4, "Maximum Number of Spaces Exceeded on Export"
- Section 55.6.3.5, "Lists Not Imported Properly"
- Section 55.6.3.6, "Importing from the Subspaces Page"
- Section 55.6.3.7, "Unable to Import a Space If the Source and Target Applications Share the Same Content Server"

55.6.3.1 Space Blocked After Unsuccessful Export or Import

If an error occurs during a space export/import operation, some space(s) may appear blocked. To unblock a space, bring the space back online temporarily, and then take the space offline again to complete the export/import operation. Switching between the online and offline modes will unblock the space.

55.6.3.2 Page or Space Not Found Message After Import

When users first log in to Spaces after an import operation, they may see a "Page not found" or "Space not found" message if the page or space they last visited no longer exists. Last accessed page information is retained during import operations which is why these messages display sometimes.

55.6.3.3 Space Import Archive Exceeds Maximum Upload File Size

Problem

There is a file size limitation uploading content to Spaces. If your export archive exceeds the maximum upload size, the import operation through Spaces Administration will fail.

Solution

Ask your system administrator to import the space archive using WLST. For details, see "Importing Individual Spaces Using WLST" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Alternatively, modify the maximum upload size in `webcenter-config.xml`. The default maximum upload size is 2 MB. See also "Changing the Maximum File Upload Size" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

55.6.3.4 Maximum Number of Spaces Exceeded on Export

Problem

The maximum number of spaces that you can export must be less than or equal to 80% of the connection pool size specified for the MDS Data Source. If you try to export too many spaces you might see a `ResourceLimitException` error:

```
Weblogic.common.resourcepool.ResourceLimitException
```

Solution

Export fewer spaces. Alternatively, ask your system administrator to modify the connection pool setting. For details, see "Setting JDBC Data Source" in *Oracle Fusion Middleware Performance and Tuning Guide*.

55.6.3.5 Lists Not Imported Properly

Problem

Lists are not importing properly due to list definition differences in the source and target systems.

Solution

Consider exporting and importing list data. This ensures that list data is consistent with the list definitions being imported.

If you choose to import without data, the list data in the target system is migrated to be consistent with the imported list definitions. If a list column data type is changed, the column values are converted from the target data type to the imported data type, if possible, otherwise the value is deleted. If a list column is removed during import, the column values are deleted.

55.6.3.6 Importing from the Subspaces Page

Problem

When you import a space from the Spaces **Administration-Spaces** page, the imported space does not automatically become a subspace of the current space. The newly imported space displays in the **Spaces** switcher menu, Spaces Browser task flow, or the **Spaces** page, which display all the spaces that are available to you.

Solution

You can import a space as a subspace by selecting the parent space on the **Spaces** page before you import the archive.

55.6.3.7 Unable to Import a Space If the Source and Target Applications Share the Same Content Server

You cannot export/import spaces or space templates between two different Spaces applications that share the same Content Server.

Similarly, you cannot use the Document Migration Utility to migrate space documents between two different Spaces applications that share the same Content Server.

56

Working with a Space Hierarchy

This chapter provides information about working with a space hierarchy consisting of a parent space and its subspaces in WebCenter Portal: Spaces. It contains the following sections:

Audience

This chapter is intended for users who want to create and manage subspaces in a space hierarchy.

To perform the tasks described in this chapter, users need to be assigned a role that includes the `Manage Configuration` permission. For information about roles and permissions, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

The Spaces administrator has the authority to expose or hide some features and services for all spaces. Contact your administrator if some tasks discussed in this chapter are not available to you.

56.1 What You Should Know About Space Hierarchies

A *space hierarchy* consists of a parent space and one or more subspaces. A subspace is simply a child space created in an existing space. A space hierarchy provides several benefits:

- **Organization**: Spaces with related content can be grouped together under a parent space. For example, in a software development environment, subspaces can be dedicated to primary features under the parent product space. Or, each department can maintain a subspace under a company's parent space. Other hierarchical structures may be specific to your company, such as the unique requirements of a Spaces applications that are provided to your customers.
- **Navigation**. The hierarchical organization provides for logical navigation and drilling down into required areas for more information. For example, users can

navigate through a product hierarchy from product family to products to demos, or into different departments and functions in a company.

- **Delegated administration**: A subspace can be managed by a user who does not necessarily have access to the parent space. In this way, an administrator can maintain control of a parent space, and assign individual owners to any number of subspaces, who in turn can delegate administration to others.
- **Inherited membership**: A subspace can optionally inherit the membership defined for the parent space as a starting point. Subsequently, membership can be modified to suit the purposes of the subspace.
- **Security**. Content may be generally accessible, where a limited number of users have administrative permissions, or security may be identical to the parent space, or completely overridden by the administrator of the subspace.

For information about creating a subspace, see Section 56.3, "Creating a Subspace."

56.2 Understanding Inheritance in Space Hierarchies

A newly created subspace inherits all services enabled for the parent space, along with the security (members, roles, and permissions) defined in the parent space.

Note: Folders and files in the parent space are not automatically available to the subspace.

56.2.1 Inheriting Security

When you create a subspace, the initial security (members, roles, and permissions) is inherited from the parent space.

To change the security settings of members, roles, and permissions in a subspace, see Section 56.7.1, "Modifying Inheritance Security Settings for a Subspace."

Any roles that are defined in the template that is used to create the subspace are ignored.

56.2.2 Inheriting Services

If security inheritance is enabled (see Section 56.7.1, "Modifying Inheritance Security Settings for a Subspace."), the subspace initially inherits all services enabled for the space template on which it is based. You can further limit services available to the subspace, but cannot provision new services in the subspace that are not enabled in the parent space.

If the space template used to create the subspace has additional services enabled that are not enabled in the parent space, those additional services will *not* be available in the subspace. Conversely, if the template has fewer services enabled than the parent space, the subspace will inherit only the subset of services that are enabled in the template.

For example:

- If a template used to create a subspace has the Discussions, Lists, and Documents services enabled, and the parent space has only Discussion and Lists enabled, then the subspace will have only Discussion and Lists enabled, not Documents.

- If a template used to create a subspace has the Discussions and Lists services enabled, and the parent space has Discussions, Lists, and Documents enabled, then the subspace will have only Discussions and Lists enabled, not Documents.

If security inheritance is *not* enabled, then the subspace inherits all services that are enabled in the space template.

56.3 Creating a Subspace

You can create one or more subspaces (child spaces) in any space. From a parent space, you can navigate to its subspaces.

Note: If you create a new resource (page template, skin, Resource Catalog, or navigation) for a space, the new custom resource is not shown for selection in the administration settings for subspaces of the space. To set a resource for a subspace to the same custom resource used by its parent space, you must use an EL expression (see Section 53.4.9, "Changing the Page Template for a Space", Section 53.4.10, "Changing the Skin for a Space", Section 53.4.11, "Changing the Resource Catalogs for Pages and the Page Template for a Space", and Section 53.4.12, "Changing the Navigation for a Space"). To make a custom resource available for selection in all spaces and subspaces, it must be created at the application level (see Section 11.2, "Creating Resources").

To create a subspace of the current space:

1. Do either of the following, depending on the permissions you have been granted:

   - On the **Home** page of the space, click the link to create a subspace.

     Tip: The location of the **Create Subspace** link depends on the page template in use by the space. For example, in a side navigation template, you may access it through a **Subspaces** menu, or an **Actions** menu.

   - In the space administration settings, display the **Subspaces** page, then click the **Create** icon.

     Tip: The way you access this page depends on the page template in use. For example, in a side navigation template, you may access it through a **Manage** menu.

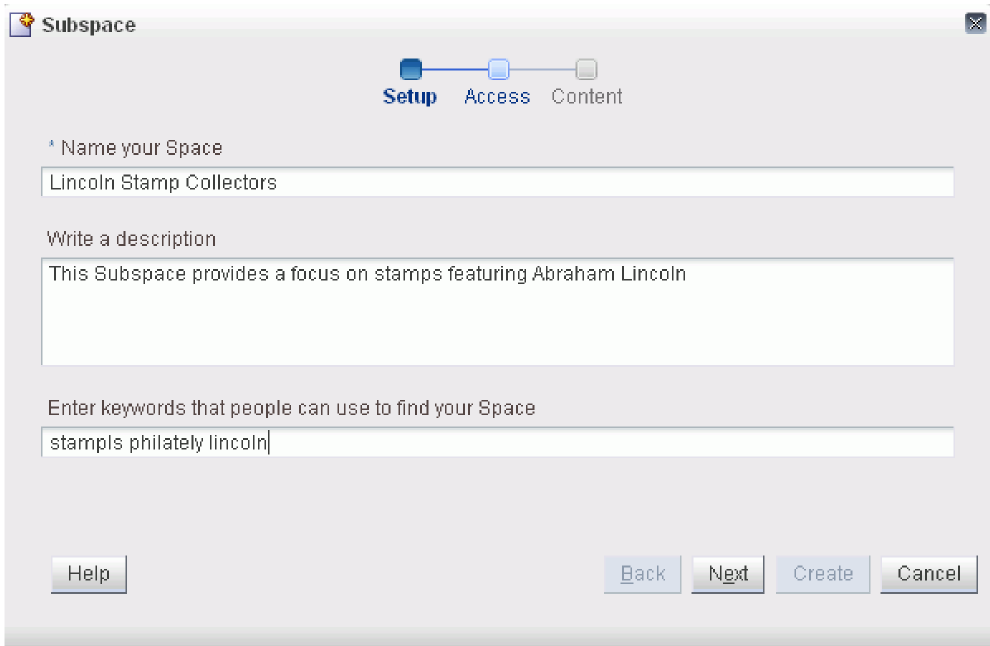
     You can also navigate to this page using the direct URL provided in Section A.5, "User Interface URLs for Space Pages."

   If you do not see these options, ask your Spaces administrator to grant you `Create Spaces` permission.

   The Create a Subspace dialog opens.

2. In the **Setup** step (Figure 56–1), specify a subspace name and, optionally, a description and keywords for the subspace. Enter any keywords related to the content of the subspace to make it more easily discoverable in search results. Separate keywords with a space or comma.

Figure 56–1 Create a Subspace Dialog: Setup Step



The name that you enter here displays at the top of the subspace and other places where spaces are available for selection, such as the Spaces Switcher menu and the **Spaces** page. Subspace names can contain alphanumeric characters, underscores, spaces, multi-byte characters, and special characters such as `&` and `#`. The maximum allowable length is 200 characters. The following reserved keywords are not allowed as the full subspace name either in upper or lowercase, or a combination of both—`webcenter`, `pages`, `page`, `spaces`, `space`, `group`, `groups`, `space`, `spaces`, `webcenter space`, `webcenter spaces`, `webcenter administration`, `my spaces`, `admin`, `last`. These reserved words are allowable as part of a longer name (for example, `Sales Group`).

3. Click **Next**.

4. In the **Access** step (Figure 56–2), modify the last value of the URL for the subspace if desired. This value can be same as the space name. This value can be same as the subspace name.

Figure 56–2 Create a Subspace Dialog: Access Step

Note: The initial security (members, roles, and permissions) is inherited from the parent space. To change the security settings of members, roles, and permissions in a subspace, see Section 56.7.1, "Modifying Inheritance Security Settings for a Subspace."

---

5. Click **Next**.
6. In the **Content** step, select a template to use as the basis for your new subspace. Use the Filter field to search for templates by name.

   See Also: For more information, see Section 52.1, "What You Should Know About Space Templates".

Note: A custom space template may include seeded data, such as folders and files, discussion forums, wikis, lists, announcements, or links. When you select such a template, the new subspace includes all the seeded data.

Any roles that are defined in the template that is used to create the subspace are ignored.

---

7. Click **Create**.

   The new subspace opens, displaying its **Home** page. As the subspace creator, you are automatically granted the `Moderator` role for this subspace, and can begin to populate, customize, and manage the subspace as required.

Note: Folders and files in the parent space are not automatically available to the subspace.

56.4 Viewing a Space Hierarchy

The extent to which you can see subspaces and parent spaces depends on your role and permissions, as described in the following sections:

- Section 56.4.1, "Viewing Subspaces of a Parent Space"
- Section 56.4.2, "Viewing Parent Spaces of a Subspace"

56.4.1 Viewing Subspaces of a Parent Space

You can view the subspaces of a space in any of the following ways, depending on the permissions you have been granted:

- On the **Home** page of the parent space, click **Subspaces** to expose a list of the subspaces for the space.

  Tip: The location of the **Subspaces** link depends on the page template in use by the space. For example, it may be available through a **Subspaces** menu in a side navigation, or through a **Subspaces** link at the top of the application in top tabbed navigation.

- In the space administration settings, display the **Subspaces** page.

  Tip: The way you access this page depends on the page template in use. For example, in a side navigation template, you may access it through a **Manage** menu.

  You can also navigate to this page using the direct URL provided in Section A.5, "User Interface URLs for Space Pages."

- (Spaces administrator only) Open Spaces Administration (see Chapter 4, "Accessing Spaces Administration Pages"), and on the **Spaces** page, click a link under the **Subspaces** column that shows the number of subspaces belonging directly to a parent space. The **Spaces** page refreshes with a list of subspaces for the parent space, which may in turn show another level of subspaces.

  For more information about application-level space administration, see Chapter 55, "Administering Spaces and Templates."

56.4.2 Viewing Parent Spaces of a Subspace

Navigating from a subspace to a parent space can be accomplished by adding a link to the page template for the subspace. This is a design decision made by the page template developer, and may be exposed depending on whether or not the security of the parent space allows direct access from the subspace.

56.5 Creating a Custom Space Hierarchy Navigation

Spaces application designers can build custom navigation models, which can be added to the pages for a space to allow end users to easily navigate the space hierarchy. For more information, see Section 12.2.2.1.5, "Adding a List of Subspaces to a Navigation Model."

56.6 Moving a Subspace

Spaces administrators with `Spaces-Manage All` permission can move subspaces from their current parent space. All of the metadata (such as pages, navigation, security, and so on) and data is maintained when a subspace is moved.

To move one or more subspaces from their current parent space:

1. In the space administration settings, display the **Subspaces** page.

   > **Tip:** The way you access this page depends on the page template in use. For example, in a side navigation template, you may access it through a **Manage** menu.
   >
   > You can also navigate to this page using the direct URL provided in Section A.5, "User Interface URLs for Space Pages."

2. On the **Subspaces** page, click in the row of the subspace that you want to move. Ctrl-click to select multiple subspaces.
3. From the **Edit** menu, select **Change Parent for Space(s)**.
4. In the Select New Parent dialog, choose the new parent space, or select the **No Parent Space** check box to move the subspace to the root space of the space hierarchy.

   > **Note:** All spaces and subspaces in the Spaces application are listed, which means you can move the selected subspace lower in the space hierarchy, under another subspace.

5. Click **OK**.
6. In the confirmation prompt, click **OK**.

56.7 Managing a Subspace

Within a subspace, management tasks are the same as within any top-level space, as described in the following chapters:

- Chapter 53, "Managing a Space"
- Chapter 54, "Managing Space Members and Roles"
- Chapter 55, "Administering Spaces and Templates"

Additionally, subspaces include the following administrative task that are not applicable to parent spaces:

- Section 56.7.1, "Modifying Inheritance Security Settings for a Subspace"

56.7.1 Modifying Inheritance Security Settings for a Subspace

On creation, a subspace inherits its initial security (members, roles, and permissions) from the parent space. If you set custom security for the subspace, you cannot revert back to inheriting security from the parent space.

To modify the members, roles, and permissions of a subspace:

1. In the subspace administration settings, display the **General** page.

> **Tip:** The way you access this page depends on the page template in use. For example, in a side navigation template, you may access it through a **Manage** menu.
>
> You can also navigate to this page using the direct URL provided in Section A.5, "User Interface URLs for Space Pages."

2. On the **General** page, under **Space Options**, deselect the **Security Setting** check box to specify that the subspace should not inherit security settings from the parent space (Figure 56–3).

Figure 56–3 Inheriting Security from a Parent Space

   Once this check box has been deselected, it becomes inactive and you cannot revert back to inheriting security from the parent space.

3. Click **Apply** to save.

   Note that the administration settings now expose the **Roles** and **Members** pages, and the **Access** section displays on the **General** page.

Part XII

Analyzing and Monitoring Your Portal

Part XII of the User's Guide provides information about analyzing your portal's usage and performance metrics.

Part XII includes Chapter 57, "Analyzing Usage and Performance Metrics."

57

Analyzing Usage and Performance Metrics

The Analytics service offers real-time usage and activity reporting for your portal. This chapter describes how to use the pages and task flows provided through the Analytics service. It includes the following sections:

- Section 57.1, "What You Should Know About the Analytics Service"
- Section 57.2, "Working with Analytics Task Flows"
- Section 57.3, "Setting Analytics Task Flow Properties"

For Analytics task flows to work, the Analytics schema(ACTIVITIES) must be installed and configured, and a connection set up between your application and the Analytics Collector. For more details on the Analytics schema and information on managing the Analytics service backend, see “Managing the Analytics Service” in *Oracle Fusion Middleware Administrator’s Guide for Oracle WebCenter Portal*. This chapter describes how to add Analytics task flows to application pages at runtime; to learn how to add Analytics task flows at design time, using Oracle JDeveloper, see *Oracle Fusion Middleware Developer’s Guide for Oracle WebCenter Portal*.

Audience

This chapter is intended for Spaces administrators with the `Application-Manage Configuration` permission and individual space moderators who want to analyze activity within their spaces.

57.1 What You Should Know About the Analytics Service

The Analytics service allows Spaces administrators and moderators to track and analyze Spaces traffic and usage. The Analytics service provides the following basic functionality:

- Usage Tracking Metrics: The Analytics service collects and reports metrics of common Spaces functions, including community and portlet traffic.
- Behavior Tracking: The Analytics service can be used to analyze Spaces metrics to determine usage patterns, such as page visit duration and usage over time.
- User Profile Correlation: The Analytics service can be used to correlate metric information with user profile information. Usage tracking reports can be viewed and filtered by user profile data such as country, company or title.

Note: Profile information is cached meaning that changes to a user profile are not visible in reports until the cache is updated. The default cache time is 60 minutes, but this value can be changed by your administrator.

This section contains the following topics:

- Understanding the Analytics Administration Page in Spaces
- Understanding Analytics Task Flows in Spaces
- Access to Analytics Task Flows in Spaces

57.1.1 Understanding the Analytics Administration Page in Spaces

An *analytics console* that displays metrics for the entire Spaces application is available to Spaces administrators with the `Manage Configuration` permission. The console consists of four pages, grouping several different reports:

- **Summary Metrics** - portal traffic, page views, and login metrics
- **Space Metrics** - Space usage and response times
- **Portlet Metrics** - portlet views and response times
- **Service Metrics** - Usage of searches, documents, wikis, blogs and discussions

Figure 57–1 Analytics Console for Administrators

Out-of-the-box, this console is available through a business role page named *Analytics*. It is the Spaces administrator's responsibility to grant people permissions to see the Analytics page. This page is intended for anyone who needs to analyze access and usage statistics; this could include administrators, sales or marketing managers or directors, business analysts, and so on.

Just like other business role pages, the Analytics page is pushed to all the users to whom it is assigned, appearing in the Home space. Once the Analytics page is available in the Home space, users can show and hide the page through the Manage Page dialog.

See also Section 7.1.4, "Specifying the Target Audience for a Business Role Page."

57.1.2 Understanding Analytics Task Flows in Spaces

This section lists and describes all the Analytics task flows that are provided with Spaces. The following task flows are available out-of-the-box:

Application Analytics:

- WebCenter Traffic
- Page Traffic
- Login Metrics

Space Analytics:

- Space Traffic
- Space Response Time

Portlet Analytics:

- Portlet Traffic
- Portlet Instance Traffic
- Portlet Response Time
- Portlet Instance Response Time

Service Analytics:

- Search Metrics
- Discussion Forum Metrics
- Document Metrics
- Wiki Metrics
- Blog Metrics

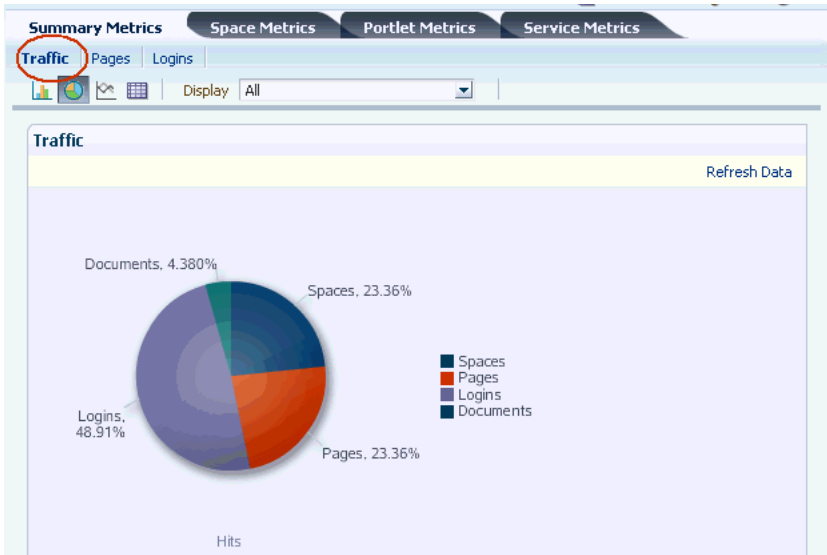
Note: The images shown in the following sections represent one view of each report. However each report can be customized to display the data in different ways (for example, a bar chart, a pie chart, a line chart, or a table). For information on customizing reports, see Section 57.2.2, "Customizing Analytics Reports" and Section 57.2.3, "Personalizing Your Analytics Report View."

57.1.2.1 WebCenter Traffic

The WebCenter Traffic task flow (Figure 57–2) displays a summarized view for common events within the portal.

Use this task flow to track application-wide events—space views, page views, portlet views, logins, number of searches, wiki views, blog views, discussion forum views, and document views.

Figure 57–2 Analytics Task Flow - WebCenter Traffic

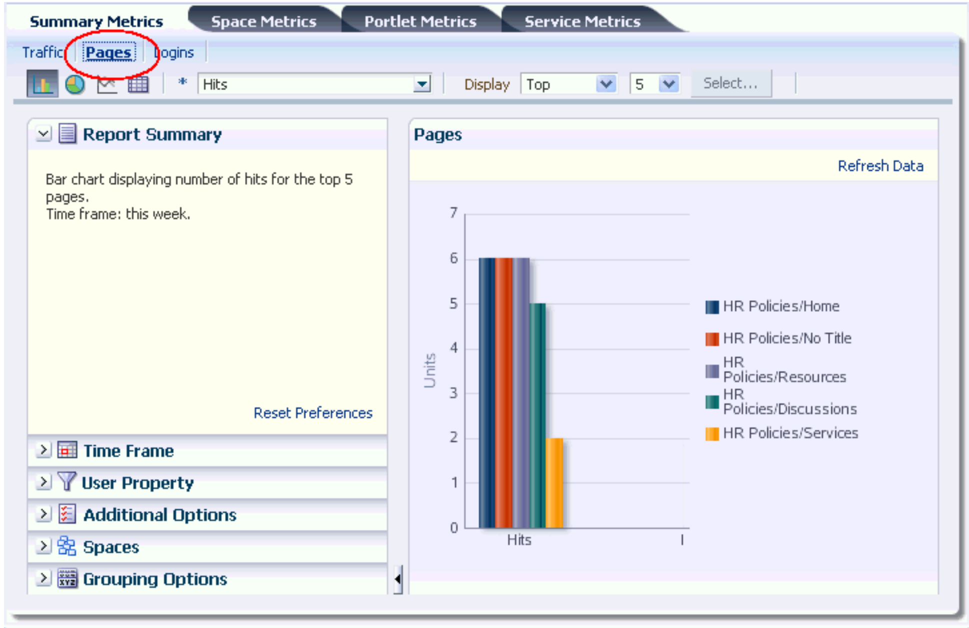


57.1.2.2 Page Traffic

The Page Traffic task flow (Figure 57–3) displays the number of page hits and the number of unique users that have visited any portal page.

Use this task flow to quickly see the most visited pages (top pages) and/or the least visited pages (bottom pages). You can view page data by hits (total number of page views) and/or users (unique number of users who viewed pages). You can filter the report to show data only for specific pages (in the **Display** options list, select **Specify**, then click **Select**, select pages, then click **OK**) or pages from specific spaces (in the Spaces query options).

Figure 57–3 Analytics Task Flow - Page Traffic



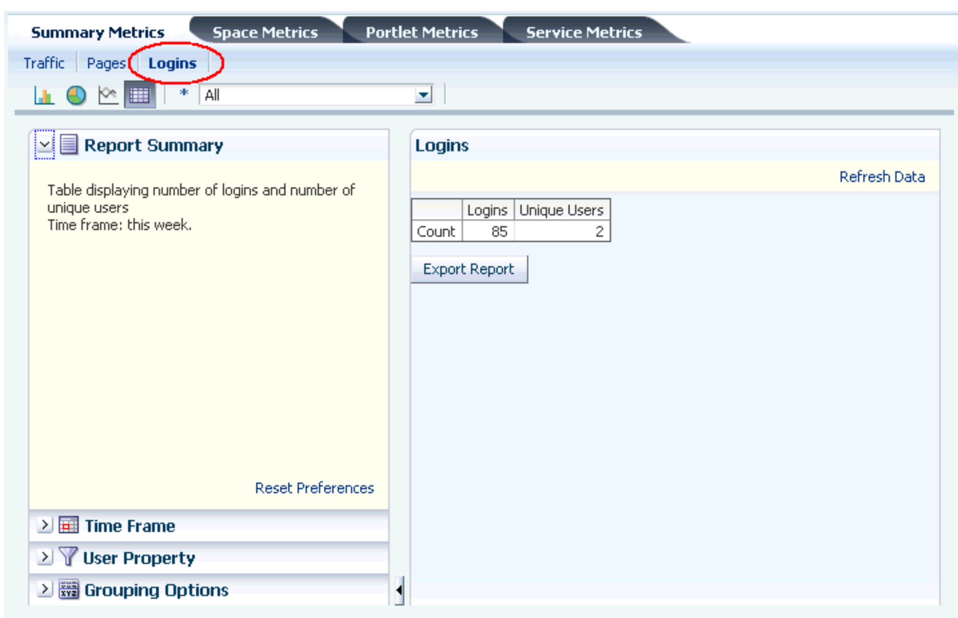
Note: Pages belonging to the *Home space* are excluded by default but there is an option to include this information if you want to do so.

57.1.2.3 Login Metrics

The Login task flow (Figure 57–4) reports the number of times users log in to Spaces.

Use this task flow to see the total number of portal logins and/or the number of times unique users logged into the portal.

Figure 57–4 Analytics Task Flow - Login Metrics

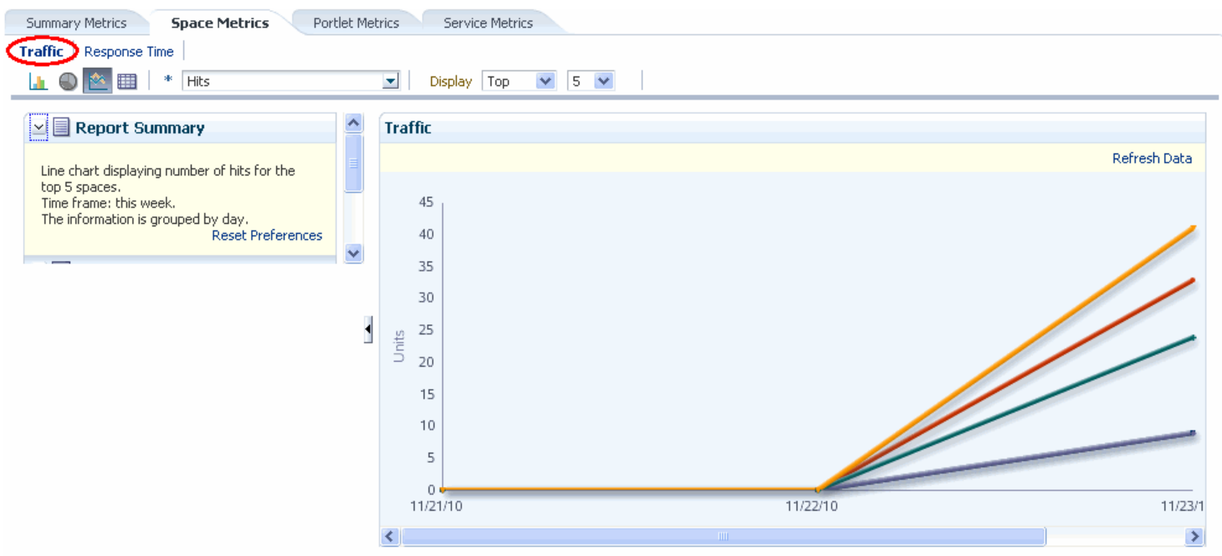


57.1.2.4 Space Traffic

The Space Traffic task flow (Figure 57–5) displays usage information—the number of page hits, number of unique users, and the number of unique visits (multiple consecutive page views within the same space during the same Spaces session is treated as one visit)—for individual Spaces.

Use this task flow to quickly see the most popular spaces (top), and the least popular spaces (bottom). You can filter the data to only show specific spaces or show all spaces.

Figure 57–5 Analytics Task Flow - Space Traffic



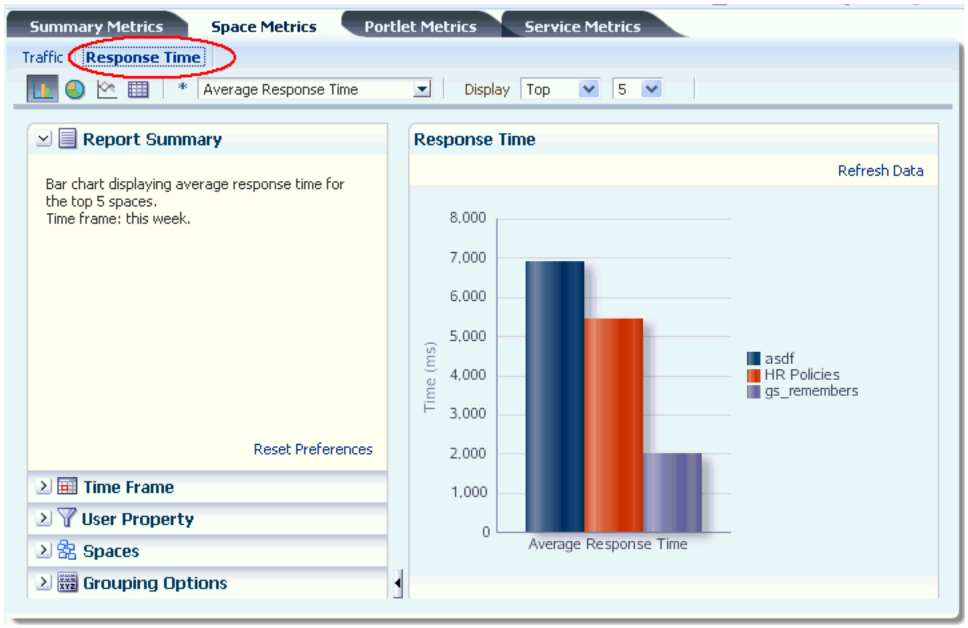
Note: The Home space is not included in the data.

57.1.2.5 Space Response Time

The Space Response Time task flow (Figure 57–6) displays page performance information—average, minimum, or maximum response time—for individual spaces over any time period you specify.

Use this task flow to quickly see the slowest spaces (bottom), and the fastest spaces (top). You can filter the data to only show specific spaces or show all spaces.

Figure 57–6 Analytics Task Flow - Space Response Time



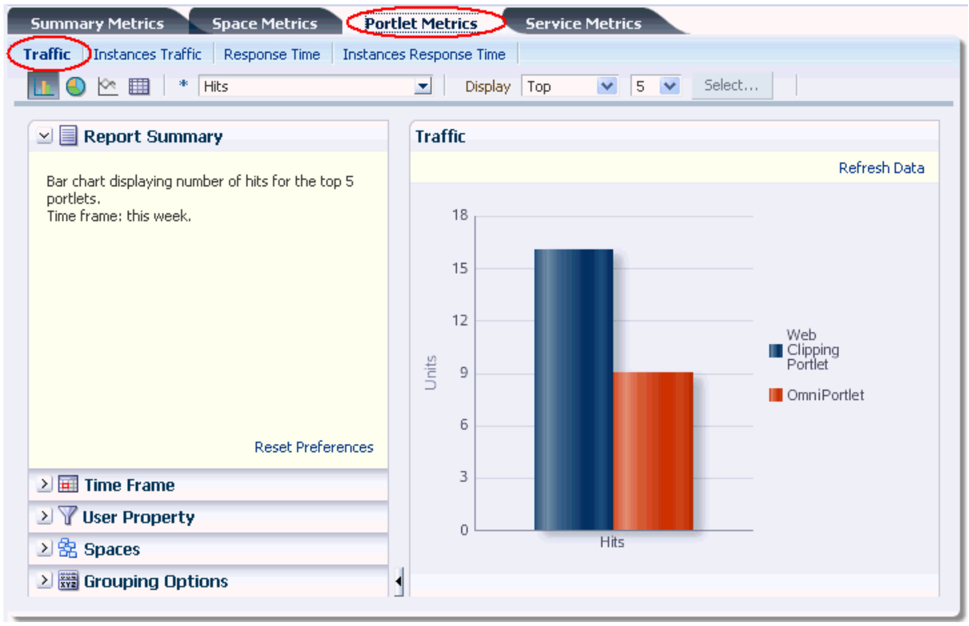
Note: The Home space is not included in the data.

57.1.2.6 Portlet Traffic

The Portlet Traffic task flow (Figure 57–7) displays portlet usage information—the number of portlet hits (the number of times a portlet is displayed) and number of unique users that access a portlet.

Use this task flow to quickly see the most popular portlets (top), and the least popular portlets (bottom). You can filter the data to only show specific portlets or show all portlets. Similarly, you can filter the portlet data by Space.

Figure 57–7 Analytics Task Flow - Portlet Traffic



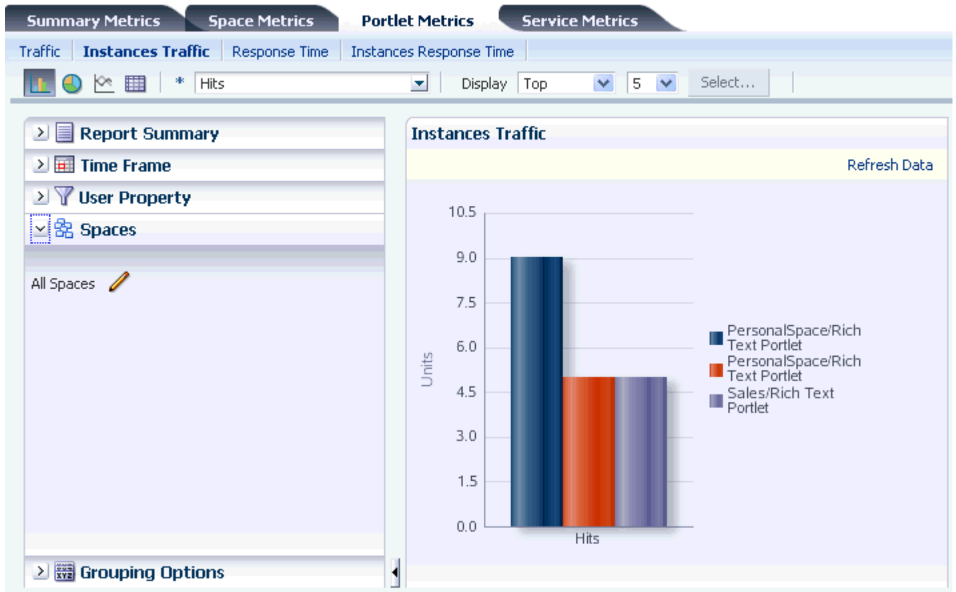
Note: The Home space is not included in the data.

57.1.2.7 Portlet Instance Traffic

The Portlet Instance Traffic task flow (Figure 57–8) displays usage information—the number of portlet hits (the number of times a portlet is displayed) and number of unique users that access a portlet—for individual portlet instances. If the same portlet displays on several different pages, each placement is considered as a portlet instance.

Use this task flow to quickly see the most popular portlet instances (top), and the least popular portlet instances (bottom). You can filter the data to only show specific portlet instances or show all portlet instances. Similarly, you can filter the portlet data by space.

Figure 57–8 Analytics Task Flow - Portlet Instance Traffic



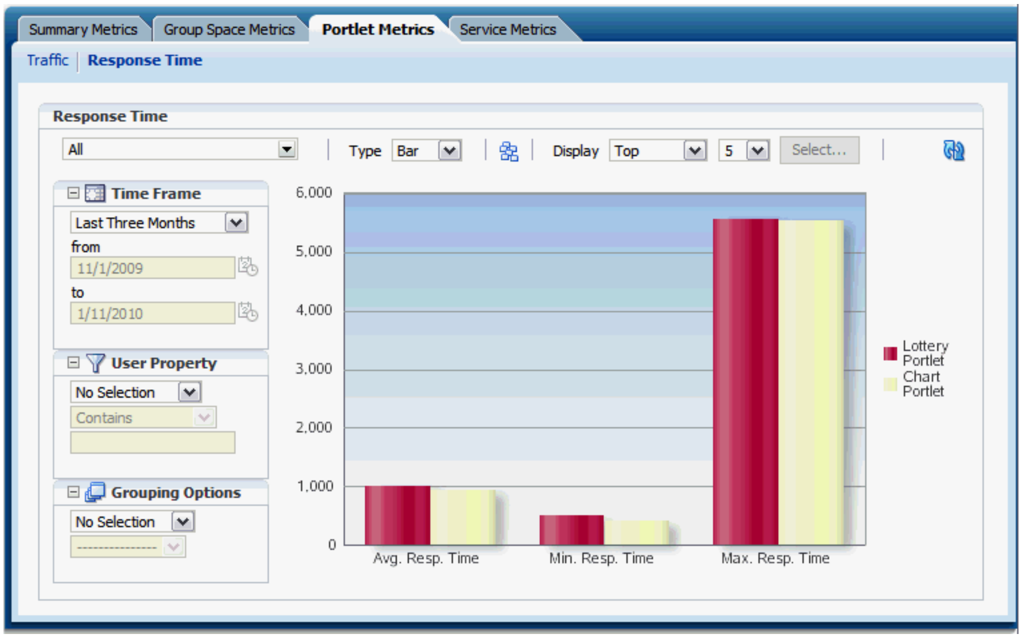
Note: The Home space is not included in the data.

57.1.2.8 Portlet Response Time

The Portlet Response Time task flow (Figure 57–9) displays performance information—average, minimum, and maximum response time—for individual portlets.

Use this task flow to quickly see the slowest portlets (bottom), the fastest portlets (top), and compare performance data. Portlet response times are important because there is often a direct link between page performance and the slowest portlets. When troubleshooting poor performance within a space, it is important to identify the worst performing portlets. You can filter the data to only show specific portlets or show all portlets. Similarly, you can filter the portlet data by space.

Figure 57–9 Analytics Task Flow - Portlet Response Time

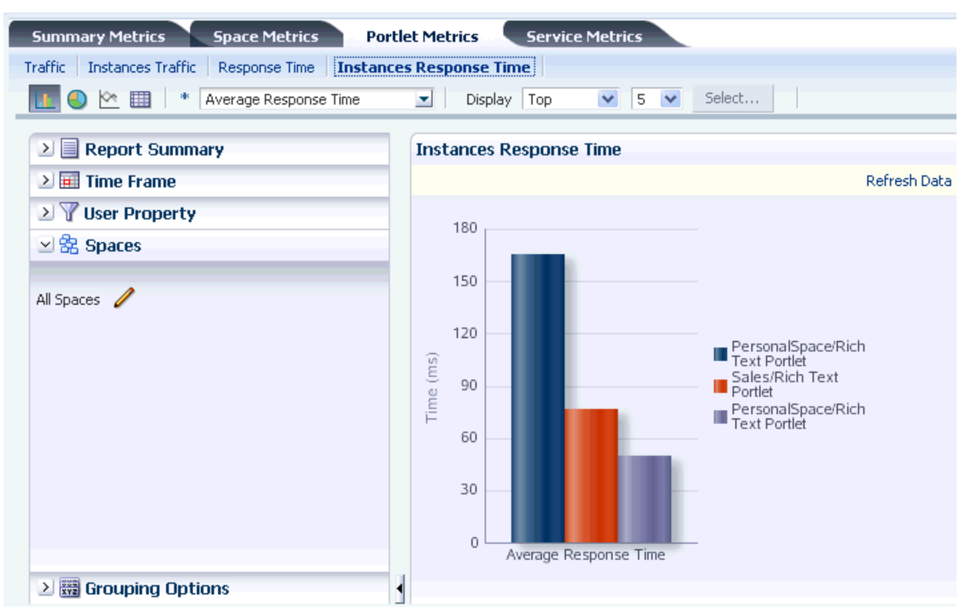


57.1.2.9 Portlet Instance Response Time

The Portlet Instance Response Time task flow (Figure 57–10) displays performance information—average, minimum, and maximum response time—for individual portlet instances. If the same portlet displays on several different pages, each placement is considered as a portlet instance.

Use this task flow to quickly see the slowest portlet instances (bottom), the fastest portlet instances (top), and compare performance data. You can filter the data to only show specific portlet instances or show all portlet instances. Similarly, you can filter the portlet data by space.

Figure 57–10 Analytics Task Flow - Portlet Instance Response Time

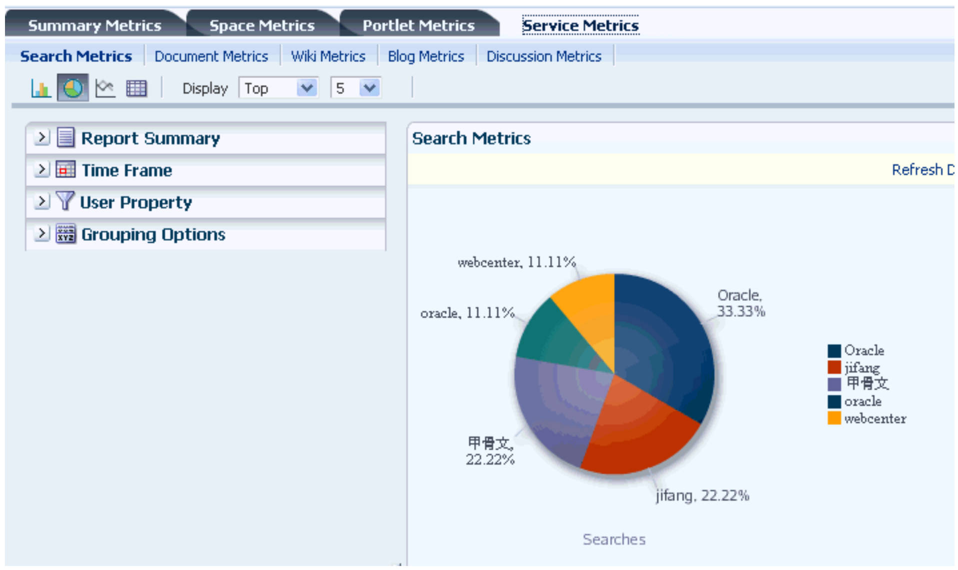


57.1.2.10 Search Metrics

The Search Metrics task flow (Figure 57–11) tracks searches performed within the portal.

Use this task flow to quickly see the most popular (top) and least popular (bottom) search phrases.

Figure 57–11 Analytics Task Flow - Search Metrics



57.1.2.11 Document Metrics

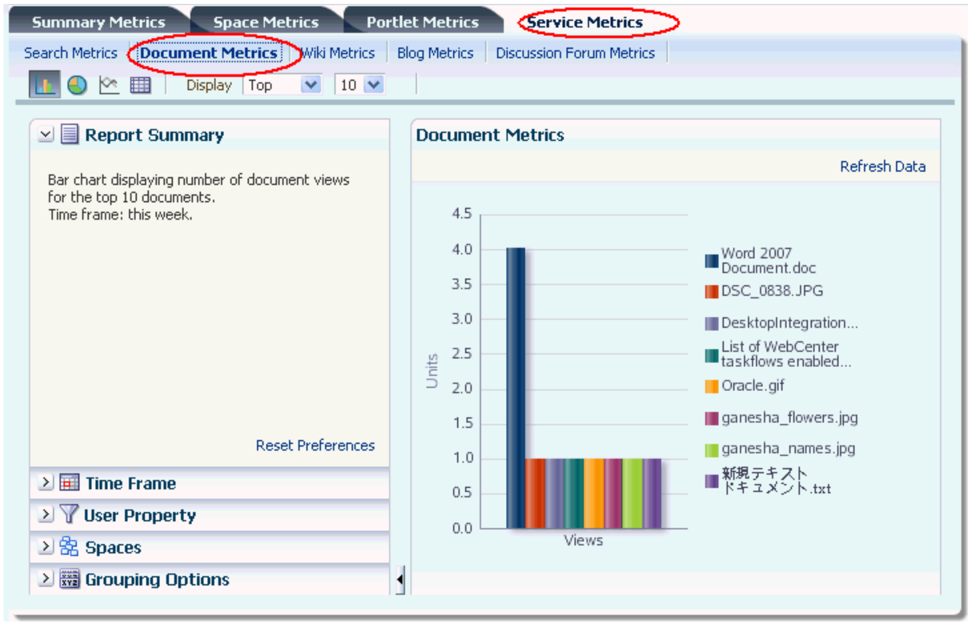
The Document Metrics task flow (Figure 57–12) tracks how often a document is accessed.

Use this task flow to quickly see the most popular (top) and least popular (bottom) documents. You can filter the data to only show specific spaces or show all spaces.

Note: Documents in the Home space are included in this report.

Note: If you have two different documents with the same name, they are treated as two separate documents. The metrics include the parent folder for context.

Figure 57–12 Analytics Task Flow - Document Metrics

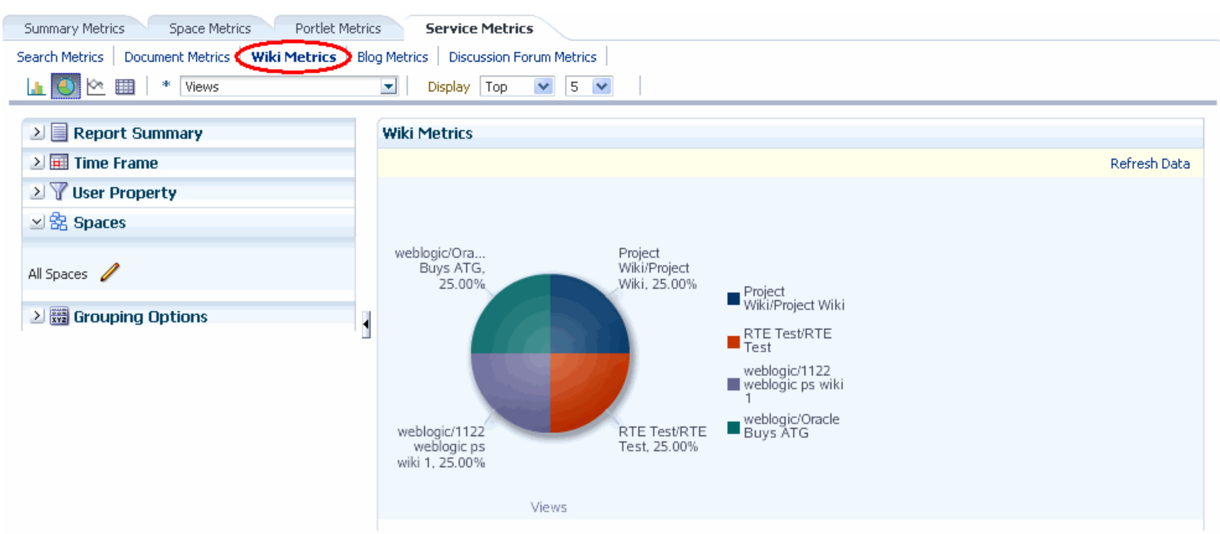


57.1.2.12 Wiki Metrics

The Wiki Metrics task flow (Figure 57–15) tracks how often wikis are accessed within the portal.

Use this task flow to quickly see the most popular (top) and least popular (bottom) wikis. You can filter the data to only show specific spaces or show all spaces.

Figure 57–13 Analytics Task Flow - Wiki Metrics



57.1.2.13 Blog Metrics

The Blog Metrics task flow (Figure 57–14) tracks how often blogs are accessed within the portal.

Use this task flow to quickly see the most popular (top) and least popular (bottom) blogs. You can filter the data to only show specific spaces or show all spaces.

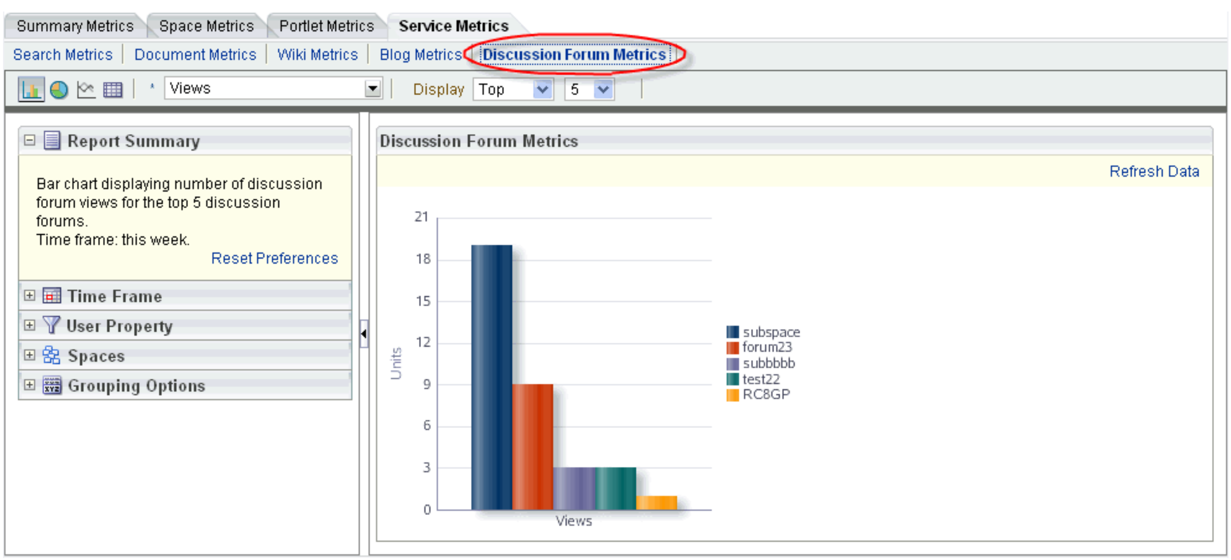
Figure 57–14 Analytics Task Flow - Blogs Metrics

57.1.2.14 Discussion Forum Metrics

The Discussion Forum Metrics task flow (Figure 57–15) tracks discussion forums within the portal.

Use this task flow to quickly see the most popular (top) and least popular (bottom) discussions. You can filter the data to only show specific spaces or show all spaces.

Figure 57–15 Analytics Task Flow - Discussion Metrics



57.1.3 Access to Analytics Task Flows in Spaces

In Spaces, Resource Catalogs only display analytics task flows to users with appropriate permissions:

- Administrators - Users with the `Administrator` role have access to all the Analytics task flows

- Moderators - Within a space, members with the `Moderator` role can only access task flows specific to that space

After a task flow is added to a page, anyone with access to the page can see the task flow.

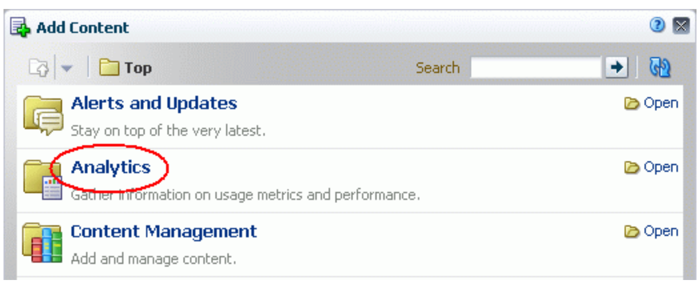
57.2 Working with Analytics Task Flows

This section contains the following topics:

57.2.1 Adding Analytics Task Flows to a Page

The process of adding an Analytics task flow to a page is the same as for any other task flow (for more information, see Section 18.5, "Adding a Component to a Page"). The process varies only in where you can find these task flows in the Resource Catalog. All the Analytics task flows are under the **Analytics** folder.

Figure 57–16 Analytics Folder in Resource Catalog



Note: When you add an Analytics task flow to a space, it displays information for that space, not for all spaces.

57.2.2 Customizing Analytics Reports

If you want to set defaults for Analytics reports, you can do so by editing the report settings in page Edit mode. Any changes you make while in Edit mode will become the default report settings for all users in page View mode. For example, you can edit the Analytics page, changing the following settings on the **Summary Metrics** page in the Traffic report: set the report type to pie chart, set the time frame to this week, and remove Discussion Forums from the display. When users visit the Analytics page, those settings will be applied by default. Users can then edit the report as necessary for their needs. This can be useful if there are particular settings you know are commonly used by your users, or to customize a particular instance of an Analytics task flow on a group-specific page.

You can also configure the report settings to determine the controls available to users in View mode. In page Edit mode, click the **Configure report preferences** icon to display the Report Settings popup. In this popup, you can specify whether to show or hide the following report settings:

- **Chart**

- **Chart Style** list allows you to select a color scheme for reports
- **Chart Type Options** allows you to show or hide the chart types (bar, pie, line, table) at the top of the report

- **Data Selection**
  - **Report Summary** allows you to show or hide the Report Summary section to the left of the report
  - **Metrics Selector** allows you to show or hide the list of metrics (Hits, Unique Users, and such)
  - **Display Options** (not available with Logins) allows you to show or hide the list of display options (Spaces, Pages, Portlets, and such)
  - **Selection Button** (not available with Traffic, Logins, Space Traffic, Space Response Time, Search Metrics, Document Metrics, Wiki Metrics, Blog Metrics, Discussion Forum Metrics) allows you to show or hide the **Specify** option in the **Display** list and the **Select** button at the top of the report
  - **Additional Options** (not available with Traffic, Logins, Space Traffic, Space Response Time, Portlet Traffic, Portlet Instances Traffic, Portlet Response Time, Portlet Instances Response Time, Search Metrics, Document Metrics, Wiki Metrics, Blog Metrics, Discussion Forum Metrics) allows you to show or hide the Additional Options section to the left of the report
- **Filtering**
  - **Time Frame Filters** allows you to show or hide the Time Frame section to the left of the report
  - **User Property Filters** allows you to show or hide the User Property section to the left of the report
  - **Space Filter** (not available with Traffic, Logins, Search Metrics) allows you to show or hide the Spaces section to the left of the report
- **Grouping**
  - **Group By Options** allows you to show or hide the Grouping Options section to the left of the report

57.2.3 Personalizing Your Analytics Report View

Analytics task flows include display options at the top of the report and query options to the left of the report. These options enable you to personalize the report for your needs by changing the metrics included in the report and the way the report is presented. Most options are the same for all Analytics task flows.

57.2.3.1 Report Display Options

The report display options at the top of the report enable you to select the type of report, select the type of metrics to include, and, for some task flows, control the top/bottom range to display.

Report Types

You can display your report as a bar chart, pie chart, line chart, or table depending on the display and query options you select. To choose your report type, click the associated icon.

Table 57–1 lists the report types available for different display and query options. It includes the following columns:

- Selected Metrics specifies what has been selected in the list of metrics, a single metric or multiple metrics.

> **Note:** Search Metrics and Document Metrics task flows show only those single metrics; there is no list to select metrics.

- Group By Options specifies what has been selected in the Grouping Options section to the left of the report, **No Selection** or one of the available selections.
- Bar, Pie, Line, and Table specify whether you can view that type of report with the specified selections.

Table 57–1 Display Options for the Analytics Task Flows

Selected Metrics	Group By Option	Bar	Pie	Line	Table
Single metric Login Traffic task flow	No selection	N	N	N	Y
Single metric All other task flows	No selection	Y	Y	N	Y
Single metric	Time interval, user property, or Both*	Y	N	Y	Y
Multiple metrics WebCenter Traffic and Login Traffic task flows	No selection	Y	Y	N	Y
Multiple metrics All other task flows	No selection	Y	N	Y	Y
Multiple metrics WebCenter Traffic and Login Traffic task flows	Time interval or user property	Y	N	Y	Y
Multiple metrics All other task flows	Time interval or user property	N	N	N	Y
Multiple metrics Login Traffic task flow	Both*	N	N	N	Y

* The grouping option **Both** is available only for the Login Traffic task flow.

Metrics

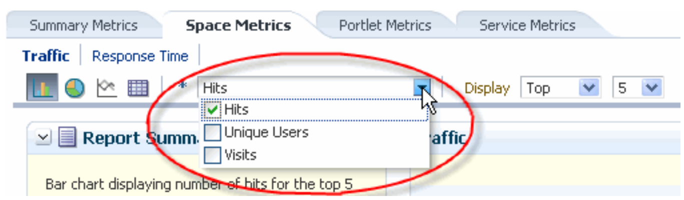
You can select which type of metrics to include in your report. Your metrics options differ depending on the task flow you are using:

- WebCenter Traffic: Spaces, Pages, Portlets, Logins, Searches, Wikis, Blogs, Discussion Forums, Documents
- Page Traffic: Hits, Unique Users
- Login Metrics: Logins, Unique Users
- Space Traffic: Hits, Unique Users, Visits
- Space Response Time: Average Response Time, Minimum Response Time, Maximum Response Time
- Portlet Traffic: Hits, Unique Users

- Portlet Instance Traffic: Hits, Unique Users
- Portlet Response Time: Average Response Time, Minimum Response Time, Maximum Response Time
- Portlet Instance Response Time: Average Response Time, Minimum Response Time, Maximum Response Time
- Search Metrics: This task flow shows only search metrics, so it does not include an option to select metrics.
- Document Metrics: This task flow shows only document metrics, so it does not include an option to select metrics.
- Wiki Metrics: Views, Unique Users
- Blog Metrics: Views, Unique Users
- Discussion Forum Metrics: Views, Unique Users

To select which metrics to include in your report, select the metrics from the list above the report.

Figure 57–17 Analytics Task Flow - Metrics Selection



Top, Bottom, or Custom Ranges

With some task flows you can specify whether you want to see the top, bottom, all, or a custom ranges of metrics in your report. Use these options to see the most and least popular items in your portal.

To display the top or bottom ranges of metrics in your report, in the lists above the report, select **Top** or **Bottom**, and then select a number to define the range.

To display a custom range, in the list above the report, select **Specify**, then click **Select**.

The top and bottom options are available for Pages, Portlet Traffic, Portlet Instances Traffic, Response Time, Portlet Response Time, Portlet Instances Response Time.

The custom range option is available for Pages, Traffic, Response Time, Portlet Traffic, Portlet Instances Traffic, Response Time, Portlet Response Time, Portlet Instances Response Time, Search Metrics, Document Metrics, Wiki Metrics, Blog Metrics, Discussion Forum Metrics.

57.2.3.2 Query Options

Analytics task flows include the following query options to the left of the report:

- **Report Summary**

  Displays a summary of the selected display and query options shown in the report.

- **Time Frame**

  Enables you to specify the date range for the metrics displayed in the report. You can select from the following options: Yesterday, Today, This Week, Last Week, This Month, Last Month, Last Three Months, Last Six Months, This Year, Last Year, or you can specify your own date range.

- **User Property**

  Enables you to filter your report by user property. After selecting a property from the list, you can specify a value that the property must contain or must not contain, and only metrics that apply to the filtered property display in the report.

  - **Property**: Select a property on which to filter the report. You can select City, Company, Country, Department, Display Name, Employee ID, IM User, Manager, Phone, State or Province, Street, Title, or ZIP code
  - **Operator**: Select how you want to filter the property. You can select **Contains** or **Does Not Contain**.
  - **Value**: Type a value on which to filter the property.

  > **Note:** To search using a wildcard (for example, `%` or `?`), you must prefix the wildcard with a forward slash (`\`). For example, to search for `give` or `giving`, type `giv\%` in the **Value** box.

- **Additional Options**

  Enables you to include Home space pages in report data. These options are available with the Pages task flow (in the Page Traffic report).

- **Spaces**

  When Analytics task flows display in the Home space or on a business role page, you can choose which spaces to include in your report. When Analytics task flows are used within a particular space, only metrics only for that space display; the Spaces option is unavailable (grayed out).

  To specify the spaces to include in your report, click the **Space Filter** icon to display the Specify Spaces popup. Select the spaces you want to include in your report, using CTRL+click and SHIFT+click to select multiple spaces.

  This option is not available with the Traffic, Logins, or Search Metrics task flows.

- **Grouping Options**

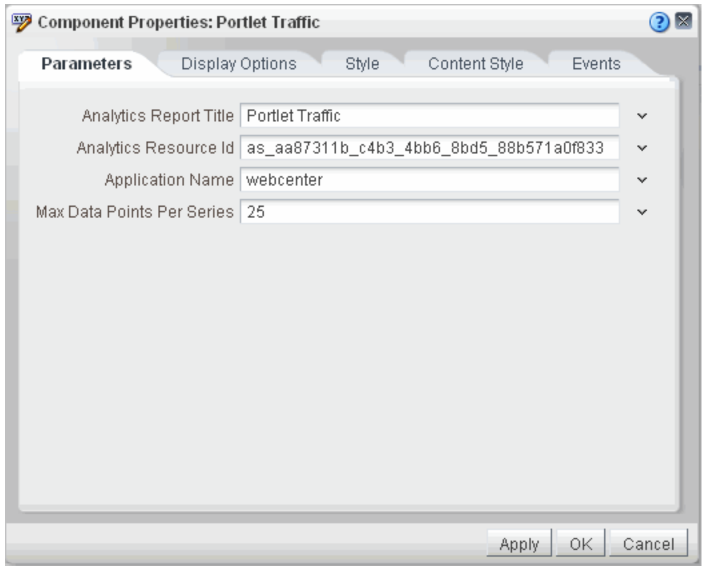
  Enables you to select an option by which to group the metrics in your report. You can group by a time interval (Hour, Day, Week, Month, or Year), a user property, or, with the Logins task flow, both.

  > **Note:** This setting affects the available display options for the report (see Table 57–10).

57.3 Setting Analytics Task Flow Properties

The Analytics service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 57–18).

Figure 57–18 Analytics Task Flow - Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Events service task flows and describe the properties on the Parameters tab:

- Section 57.3.1, "What You Should Know About the Analytics Service Task Flow Properties"
- Section 57.3.2, "Analytics Service Task Flow Parameters"

57.3.1 What You Should Know About the Analytics Service Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 57.3.2, "Analytics Service Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For information about wiring pages and components, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

57.3.2 Analytics Service Task Flow Parameters

Table 57–2 describes the parameters that are unique to the Analytics service task flows.

Table 57–2 Analytics Task Flow Parameters

Parameter	Description
Analytics Report Title	Specifies the display title that appears above the analytics data. **Note:** ■ Use the Analytics Report Title rather than the Text property on the **Display Options** page. Changing the Text value has no effect on Analytics task flows. ■ You cannot change the report titles in the Analytics console.
Analytics Resource Id	Specifies the MDS document used to store user customizations/application customizations for the task flow instance in MDS. **Warning:** Do not edit this value.
Application Name*	Specifies the WebCenter Portal application for which you want to display analytics data. For Spaces, this is always `webcenter`. The analytics database can be used to store event data from multiple applications so this parameter is required to identify which application data to display. If omitted, the task flow displays analytics data for all supported WebCenter Portal applications.
Max Data Points Per Series	Indicates the maximum number of data points to be displayed in a bar or line chart. The default value is 25. Valid values are between 1 and 1000. **Note:** Increasing the number of data points might increase the time it takes to render the report.

Part XIII

Searching WebCenter and Other Sources

Part XIII of the User's Guide provides information about searching both WebCenter Portal: Spaces and sources outside of WebCenter Portal: Spaces. It includes information about creating your own search terms using the Tags service.

Part XIII includes the following chapters:

58 Working with the Search Service

This chapter describes how to use the features provided through WebCenter Portal's Search.

This chapter includes the following sections:

- Section 58.1, "What You Should Know About Searching in WebCenter Portal"
- Section 58.2, "Searching in Your Application"
- Section 58.3, "Working with the Search Service Task Flows"
- Section 58.4, "Narrowing the Scope of Search"
- Section 58.5, "Setting Individual Preferences for Search Results"
- Section 58.6, "Customizing Search Results with Attributes and Refiners"
- Section 58.7, "Setting Search Service Task Flow Properties"

Audience

This chapter is intended for users who want to use and manage search, as well as administrators in Spaces with the `Application-Manage Configuration` permission and individual space moderators who want to configure search within their spaces. For more information, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

58.1 What You Should Know About Searching in WebCenter Portal

WebCenter Portal provides search through an intuitive user interface. With all relevant information easily navigable, you do not have to switch between applications performing multiple searches.

By default, the search looks for your search terms in every searchable tool and service enabled in the application.

- Administrators can narrow the scope of searches to specific spaces, services, and document types. They also can add attributes to the list of standard attributes returned with each search result item, and they can hide standard refiners available to users with search results. For more information, see Section 58.4, "Narrowing the Scope of Search" and Section 58.6, "Customizing Search Results with Attributes and Refiners."
- Individual users can configure the services to which a search has access with personal preferences. They also can configure the order of search results. For more information, see Section 58.5.1, "Selecting the Services to Search."

In all cases, searches return only the results you are authorized to view. For example, if you are not a member of the *Finance* space, then any search results from that space do not display.

Information is searched by name and content. When a search is run for a term that has been added as a tag to a document, the document is returned in the results, and the related tags appear in the Tag refiner section. For more information about tagging, see Chapter 59, "Working with the Tags Service."

In addition to WebCenter Portal's search, the Documents tool provides its own search engine for file searches. This saves time and increases the relevancy of results by narrowing the scope of a search to files. The Documents tool searches within a specific space's document library. For more information, see Section 43.31, "Searching for Documents."

Another type of search is used for finding users in the identity store (for example, by clicking the **Find User** icon in a Mail compose window (Figure 58–1). For more information, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."

Figure 58–1 Find User Icon in a Mail Compose Window

58.1.1 Using the Oracle Secure Enterprise Search Adapter

WebCenter Portal provides two ways of searching your application:

- Oracle Secure Enterprise Search (SES) adapter
- Oracle WebCenter Portal live search adapters

With WebCenter Portal: Spaces applications, the internal live search adapters are set as the default search platform; however, large-scale implementations should be configured to use Oracle SES for best performance. Oracle SES provides unified ranking results for the following resources:

- Documents, including wikis and blogs
- Announcements and Discussions
- Spaces, lists, page content, and people resources in Spaces

> **Note:** WebCenter Portal: Spaces includes the additional Oracle SES crawler that indexes spaces, lists, pages, and people resources in Spaces. This crawler is not supported in WebCenter Portal: Framework applications.

For example, when you run a search for a user name, most likely, you are looking for that persons's contact information (that is, the exact user name in the People Connections service), not necessarily documents that the user wrote. The unified ranking in Oracle SES enables you to see the most relevant results, across all different types of searches, without configuring Search Preferences.

Additionally, with Oracle SES as the search engine, you can use the wildcard character [*] in the middle or end of a term for wildcard matching. For example, when you search for keywords like `wiki` or `page`, Oracle SES does not return the wiki page MyWikiPage in search results. However, `My*` or `My*Page` does return MyWikiPage.

See Also: "Configuring Search with WebCenter Portal's Search Adapters" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*

58.1.2 Limitations with Search

Note the following limitations with searching in WebCenter Portal:

- Several special characters are filtered out in WebCenter Portal search. For example, when you search for the keyword **Q2&Total**, WebCenter Portal returns search results for Q2Total. If a wiki page is named Q2&Total, it is not found.

  With Oracle SES, the following special characters are not recognized:

  ```
  ! % ^ & ( ) + = [ ] { } | ; ' \ , < > / ? ` ~
  ```

  With WebCenter Portal live search, the following special characters are not recognized:

  ```
  ! # $ % ^ & ( ) + = [ ] { } | ; ' \ " , < > / ? ` ~ - *
  ```

  WebCenter Portal's live search adapter does not support wildcard searching.

  Because quotation marks are filtered out in WebCenter Portal live search, if you require exact term searches (such as "United Arab Emirates" as opposed to United + Arab + Emirates), then you must use Oracle SES.

- In WebCenter Portal: Spaces, not all fields in the User Profile are searched. For example, searching for profile information in the Expertise or Personal Status fields do return results, but searching for profile information in the Employee Type or Department fields do not return any results.
- When searching lists, WebCenter Portal live search only searches list names and descriptions. Use Oracle SES for more thorough search. It also searches list *column* names and contents.

58.2 Searching in Your Application

WebCenter Portal provides global (that is, application-wide) search. By default, the search field is at the top-right of the application.

This section contains the following subsections:

- Section 58.2.1, "Running a Global Search"
- Section 58.2.2, "Refining the Display of Search Results"
- Section 58.2.3, "Saving Searches"

58.2.1 Running a Global Search

To perform a global search:

1. Locate the global search field and enter a search term.

   For example, Figure 58–2 shows the search field at the top right of the application.

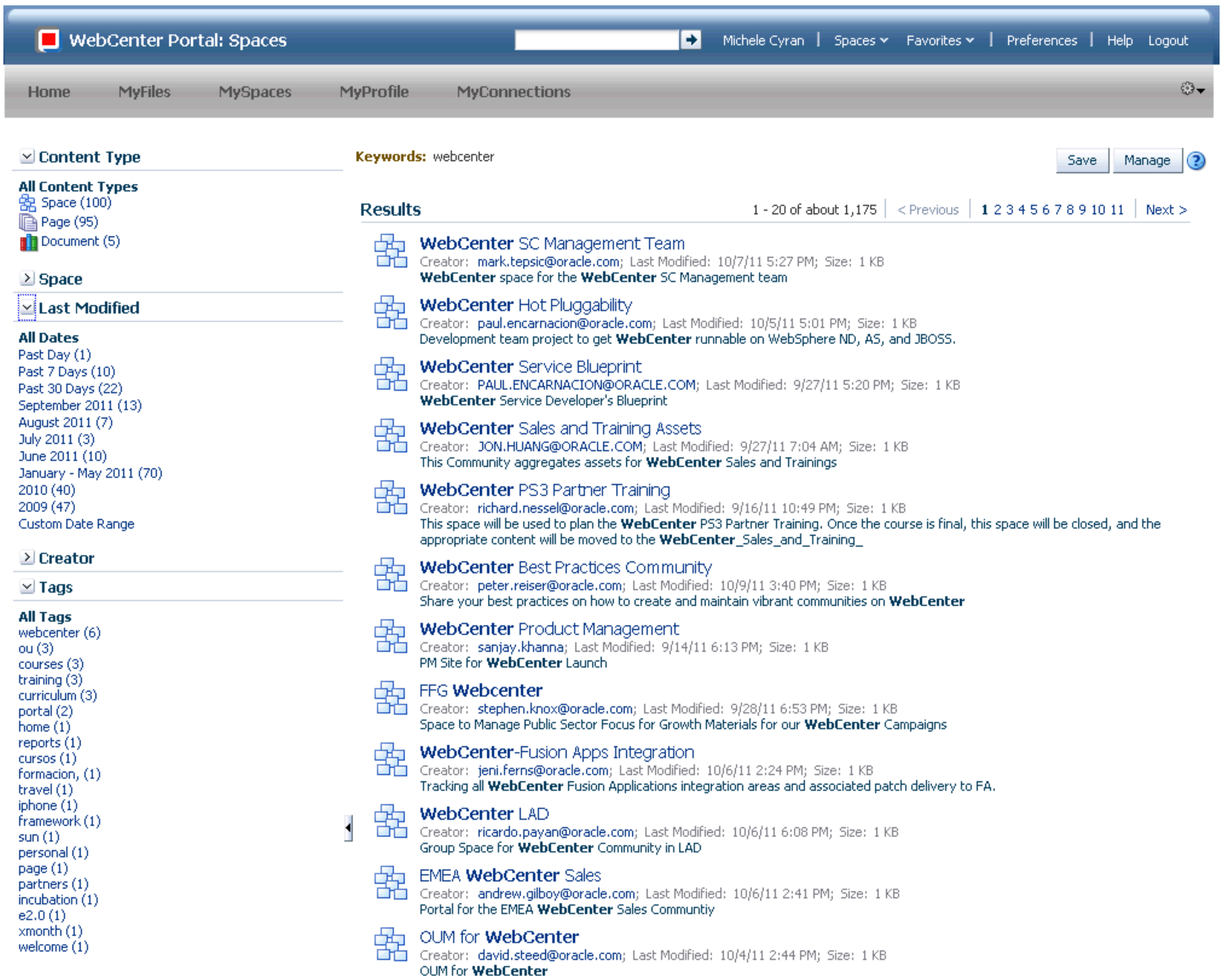
Figure 58–2 Global Search Field in Spaces

2. Press **Enter** or click the **Search** icon next to the global search field (Figure 58–3).

Figure 58–3 Search Icon

Results display in the search Results page (Figure 58–4).

Figure 58–4 Global Search Results



3. Click a link to open a result.

Administrators can configure the scope of searches to specific spaces, services, and document types. They also can add attributes to the list of standard attributes returned with each search result item, and they can hide standard refiners available to users with search results. For more information, see Section 58.4, "Narrowing the Scope of Search" and Section 58.6, "Customizing Search Results with Attributes and Refiners."

Additionally, users can individually configure how their search results are displayed. Specifically, each user can control which services are included in their search and the order in which those services are listed in the results. Set this in the Preferences dialog (for information see Section 58.5, "Setting Individual Preferences for Search Results").

58.2.2 Refining the Display of Search Results

You can narrow your results in the Refine Search section to produce a smaller set of results. For example, to see all documents that one particular person posted, rather than scrolling through pages of results to find them, simply click that person's name or profile picture, and the results are filtered to show only results from that person.

- With the Oracle SES adapter, you can narrow the search by Creator (uploader/modifier), Last Modified date, Content Type, Space, and Tags.
- With WebCenter Portal's live search adapters, you can narrow the search only by Creator (uploader/last modifier) or Last Modified date.

Notes: Oracle SES results for Creator include *all* user names that have modified a document/wiki/blog, while live results for Creator include only the name of the person who *last* modified a document/wiki/blog.

Some WebCenter Portal components, like tagged items and favorites, do not supply refiners for search, and do not appear in refined searches.

To refine the display of search results:

1. Perform a global search as described in Section 58.2.1, "Running a Global Search."

   The search results display on the Search results page.

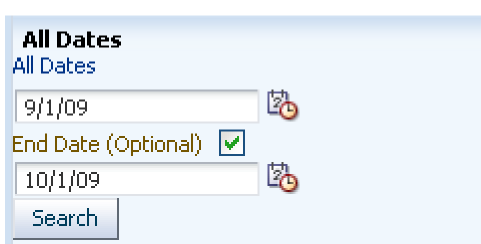
2. To refine the display of search results by date, select a time-range limitation from the **Last Modified** box.

   For example, click **Since Yesterday** to view results posted since the previous day, or click **Past 7 Days** to view results posted in the past week. The number next to each time range indicates the search's best guess at how many search results fall within the specified range.

   Some date selections, such as years or months, provide additional refinement options when you select them. For example, when you refine a search by all results occurring within 2007, your refined results display and additional refinements appear in the Last Modified box.

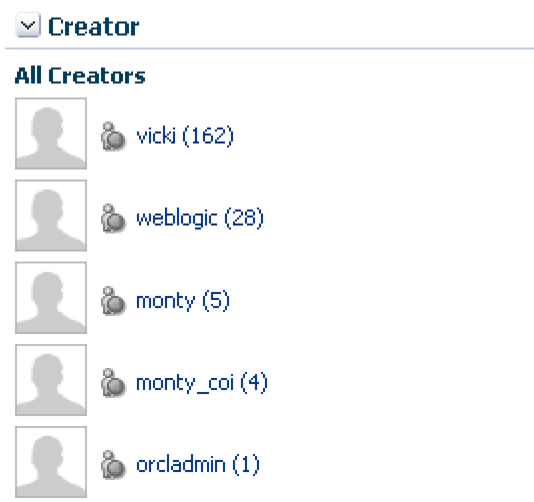
   Click **Custom Date Range** and enter a date in the field provided (optionally, with an end date also), or click the **Select Date** icon and select a date from a date picker (Figure 58–5).

Figure 58–5 Date Picker for Custom Date Range



3. To refine the display of search results to a person who authored, uploaded, or modified it, select someone from the **Creator** box (Figure 58–6).

Figure 58–6 The Creator Box on the Search Results Page



For example, click **vicki** to view all results contributed by the user Vicki.

The number next to each user name indicates the search's best guess at how many search results are associated with the specified user.

Click **More...** or **Less...** to see more or less authors listed in the Creator box.

4. Click the **Previous** and **Next** links to view any additional results (Figure 58–7).

Figure 58–7 Estimated Number of Search Results

Note: Oracle SES results show an estimated number of search results. Live results do not include an estimated number of results. Links may appear even if no additional results are available.

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5. When a refinement is selected, it appears above the Results list with a **Delete** icon, enabling you to remove the refinements you have applied to search results (Figure 58–8).

Figure 58–8 Delete Icon to Remove Refinement of Search Results

Click the **Delete** icon to remove that particular search results refinement and broaden the list of displayed results.

58.2.3 Saving Searches

After you have performed a search, you can save it so that you can run it again later without having to reenter the search terms. You can also share the saved search with spaces.

Note: You can save searches only if you are logged in to the application.

This section includes the following subsections:

- Section 58.2.3.1, "Saving a Search"
- Section 58.2.3.2, "Running a Saved Search"
- Section 58.2.3.3, "Sharing a Saved Search in Spaces"
- Section 58.2.3.4, "Customizing a Saved Search"
- Section 58.2.3.5, "Deleting a Saved Search"

58.2.3.1 Saving a Search

Saved searches are useful for the searches you run frequently. They assist in keeping you current as new information is added to the search pool.

To save a search:

1. Perform a global search as described in Section 58.2.1, "Running a Global Search."

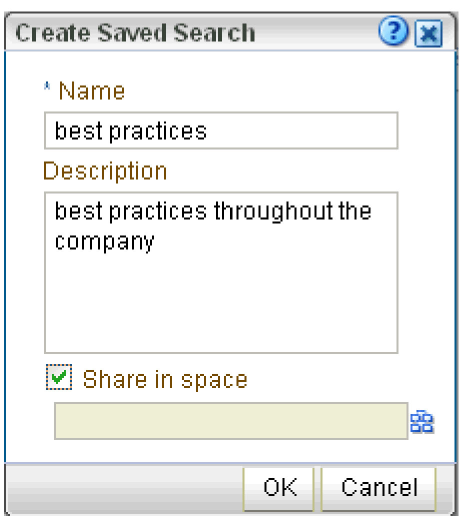
   The search results display on the Search results page.

2. Click **Save** below the search field (Figure 58–9).

Figure 58–9 Save and Manage Buttons

   The Create Saved Search dialog opens (Figure 58–10).

Figure 58–10 The Create Saved Search Dialog



3. In the **Name** field, enter a meaningful name for the search.

   The value you enter in the **Name** field is the value that appears on the dropdown list of saved searches.

The search that was in the **Search** field is saved, no matter what name you give it. For example, if the search term was *admin*, but you enter *jcr* in the **Name** field. The saved search searches for the term *admin* and not *jcr*.

4. Optionally, in the **Description** field, enter a description of the search.
5. Select the **Share in space** check box to enable other members of the space to see this search on the space's dropdown list of saved searches. Only one space can be specified.
6. Click the **Spaces** icon to select the spaces in which to share the saved search.
7. Click **OK** to save the search.

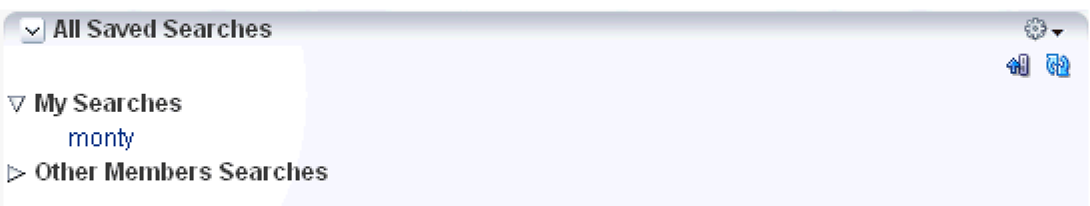
58.2.3.2 Running a Saved Search

The All Saved Searches task flow provides a quick and easy way to see all saved searches. The saved searches to which you have access depends on the location.

- Go to the Home space. After you have saved searches, there is a dropdown list for Saved Searches in the Home space.
- Go to any page containing the All Saved Searches task flow (Figure 58–11).

  In a space, the All Saved Searches task flow lists all your saved searches for the space and all shared saved searches for the space (made both by yourself and other users). It does not list your global saved searches or saved searches made against other spaces. In a Home space, the All Saved Searches task flow lists all your global saved searches.

Figure 58–11 The All Saved Searches Task Flow



- Go to any page where the saved search was placed.

  The Saved Search task flow shows the results of the particular search.

To run a saved search:

1. Log in and find the saved search:
   - Locate the page containing the All Saved Searches task flow.
   - Locate the page containing the saved search. In this case, the search results are immediately visible.
2. From the All Saved Searches task flow or the Saved Search panel in the Home space, click the link for the saved search you want to run.

   > **Tip:** The description is rendered as a tooltip when you move your cursor over the name of the saved search.

3. View the results on the dynamically-generated Search Results page.

58.2.3.3 Sharing a Saved Search in Spaces

In WebCenter Portal: Spaces, you can share a saved space search if you think the results of a search might be useful for other space members.

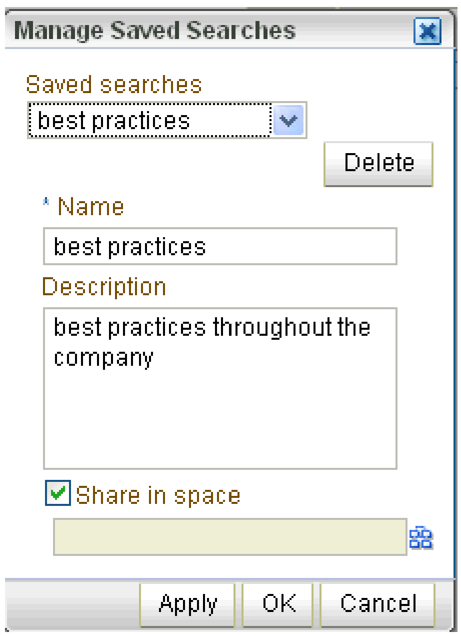
To share a saved search:

1. Go to the space where the search was performed and saved.
2. Click **Manage** (Figure 58–16).

Figure 58–12 Save and Manage Buttons

The **Manage Saved Searches** window opens (Figure 58–17).

Figure 58–13 The Manage Saved Searches Window



In the Saved searches dropdown list, select the saved search you want to share.

3. Select the **Share in space** check box, and click the **Spaces** icon to select the spaces in which you want to share this saved search.

   The saved search is now available for other members of the space to run. The search is listed in the Saved Searches list for all space members and in the All Saved Searches task flow, if one exists.

4. Click **Apply**, then **OK**.

58.2.3.4 Customizing a Saved Search

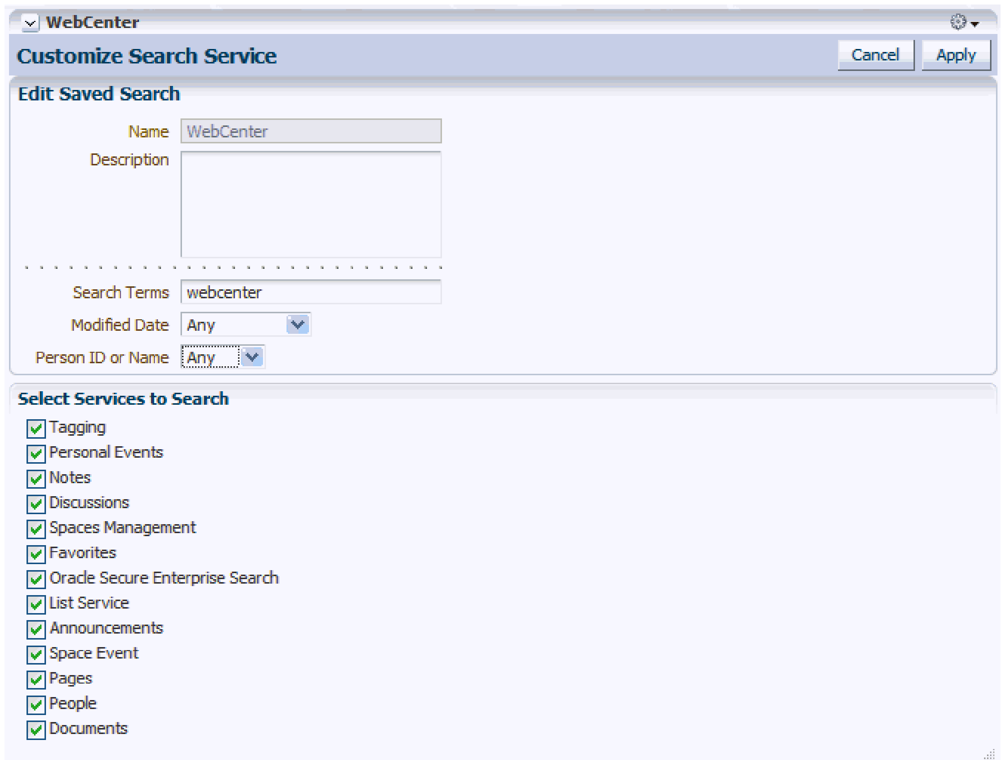
After you have added the saved search to a page, you can customize it.

Click the **Personalize** icon (Figure 58–14) to make changes to the saved search.

Figure 58–14 Personalize Icon

In the Customizing Saved Searches dialog, you can to change the search terms, add refiners, or select the services to search (Figure 58–15).

Figure 58–15 Customizing Saved Searches Dialog



58.2.3.5 Deleting a Saved Search

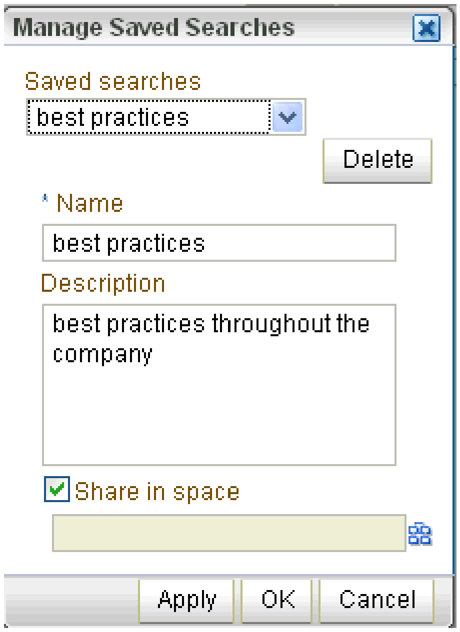
To delete a saved search:

1. Click **Manage** (Figure 58–16).

Figure 58–16 Save and Manage Buttons

The **Manage Saved Searches** window opens (Figure 58–17).

Figure 58–17 The Manage Saved Searches Window



2. In the Saved searches dropdown list, select the saved search you want to delete.
3. Click the **Delete** button, then **Apply** and **OK**.

58.3 Working with the Search Service Task Flows

Table 58–1 lists the Search service task flows.

Table 58–1 Search Service Task Flows

Task Flow	Definition
Search	This task flow provides a rich search experience with features for refining and saving search results.
All Saved Searches	This task flow enables you to create a simple launch pad for running saved searches within the application.
Search Preferences	This task flow enables users to select which WebCenter Portal services to search.
Search Toolbar	This task flow enables users to enter simple search criteria and run the search from the application. Search results are rendered as links.

For the steps to add a Search service task flow to a page, see Section 18.5, "Adding a Component to a Page."

Note: The Search, Search Preferences, and Search Toolbar task flows are not available in the default Resource Catalog provided out-of-the-box with Spaces, so you will only see entries for these task flows if the has been added to a custom Resource Catalog that has been made available to the page.

For more information, see Chapter 16, "Working with Resource Catalogs," specifically Section 16.3.1.2, "Adding Resources" (in the Add Resource Catalog Item dialog, select **Task Flows**, then scroll to **Search** for a list of all available content task flows).

58.4 Narrowing the Scope of Search

With the Search service task flow parameters, you can restrict search results to include only specific services, document types, and spaces. This section describes how to set these parameters. It includes the following subsections:

See Also: Section 58.7.2, "How to Set Parameters to Narrow Searches"

- Section 58.4.1, "Searching Specific Services"
- Section 58.4.2, "Searching Specific Document Types"
- Section 58.4.3, "Searching Specific Spaces"

58.4.1 Searching Specific Services

You can restrict search results to one or more WebCenter Portal services with the `Services to be Included` parameter.

For example, to display only profiles and documents in the Content Server, set this parameter to `oracle.webcenter.peopleconnections.profile, oracle.webcenter.doclib`. If nothing is specified, then all services are searched.

58.4.2 Searching Specific Document Types

You can restrict search results to one or more types of documents in the Oracle WebCenter Content Server (such as PDF, PPT, or DOC) with the `Mimetype` parameter.

Examples of common MIME type values are as follows:

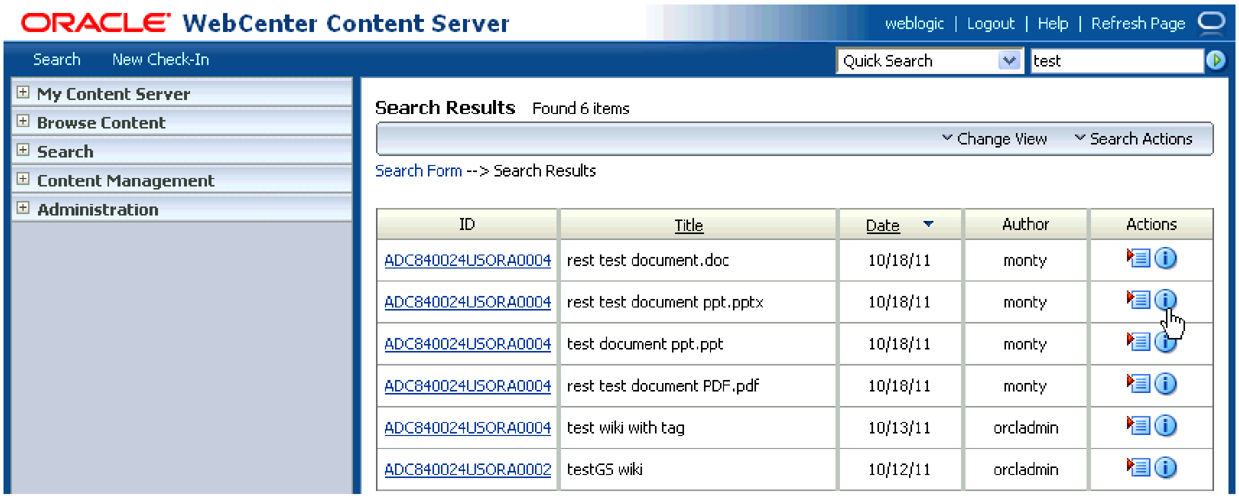
- application/excel
- application/msword
- application/pdf
- application/powerpoint
- text/html
- text/plain

The MIME types can be any standard MIME type value, such as those available from Microsoft Office.

For example, to search only web pages and Microsoft Word documents, set the `Mimetype` parameter to `text/html,application/msword`. If nothing is specified, then all document types are searched.

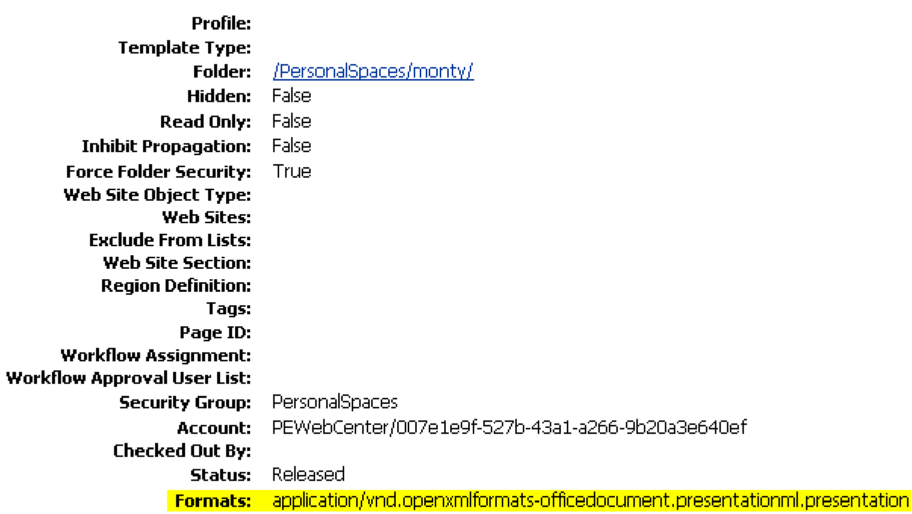
To see a MIME type value for a document, in the Content Server, select the **Info** icon in the **Actions** column.

Figure 58–18 Document Formats in the Content Server



The format is listed in the **Formats** field, as shown in Figure 58–19.

Figure 58–19 Document Format Value



Note: When searching for content stored in the connected Content Server repository, full-text search must be enabled in Content Server through either of the following methods:

- OracleTextSearch (preferred), as described in "Configuring OracleTextSearch for Content Server" in *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*
- `DATABASE.FULLTEXT`, as described in "Configuring the Full-Text Features in the WebCenter Content Repository" in *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*

Note: If the Content Server is configured for web rendition, then items in the Content Server are rendered in PDF format. The content item's native MIME type rendition is overwritten. For example, the MIME type of a Microsoft Office Word document is 'application/msword', but when the Content Server uses web rendition the MIME type becomes 'application/pdf'. A search query with the `Mimetype` parameter set to 'application/msword' does not return Word documents.

If your Content Server is configured to use web rendition, the WebCenter Portal administrator must configure the Content Server metadata list to include the `dFormat` value so that required MIME types are exported to Oracle SES. For steps, see "Managing Oracle SES Search in WebCenter Portal" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

58.4.3 Searching Specific Spaces

WebCenter Portal search performs global (that is, application-wide) searches. However, you can restrict search results to one or more spaces with the `Search Scope` parameter.

Set this parameter to the comma-separated list of GUIDs of the spaces to search. If nothing is specified in this parameter, then all spaces are searched.

For example:

```
#{spaceContext.currentSpaceGUID}
#{serviceCtx.scope.GUID}
#{spaceContext.space['Travel'].metadata.guid}
```

where Travel is the name of the space.

To search the current space as well as all subspaces, enter the following:

```
#{spaceContext.currentSpace.subspaceGuids}
```

58.5 Setting Individual Preferences for Search Results

In addition to the customizations the space administrator can make to the way search results are displayed, individual users also can customize the way they see their results.

When you search content, you may find that the results from one service are more relevant to you than results from other services. You may find it useful to be able to exclude some services from a search and specify the order in which the results from selected services are listed.

Use search preferences to select the services to search and specify the display order for search results. This section contains the following subsections:

- Section 58.5.1, "Selecting the Services to Search"
- Section 58.5.2, "Specifying a Display Order for Search Results"

> **See Also:** Section 43.31, "Searching for Documents"

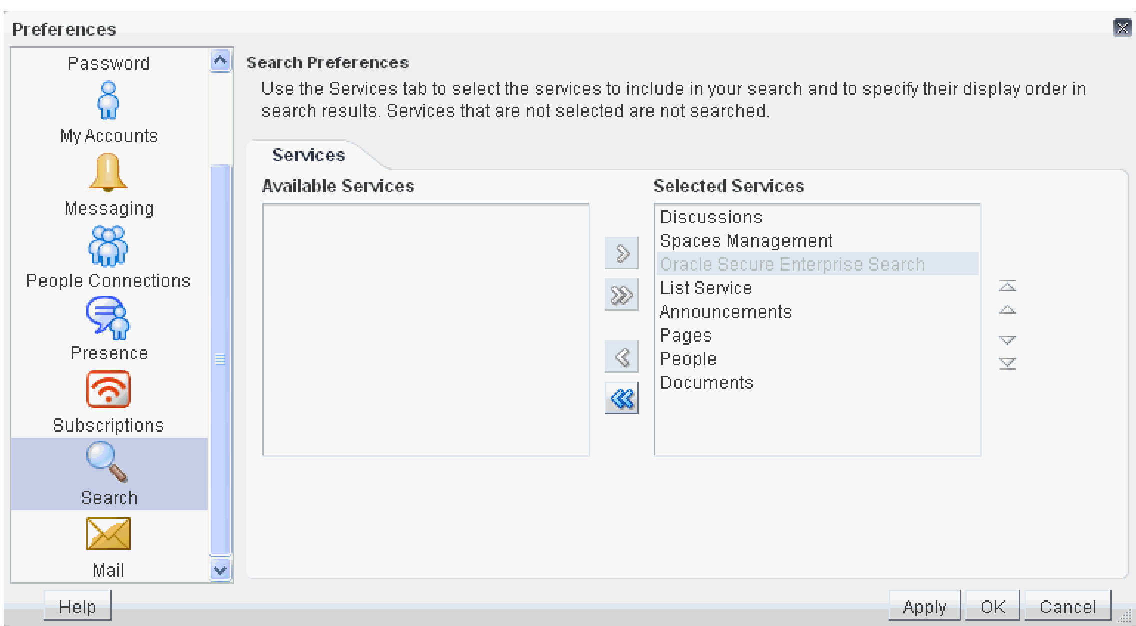
58.5.1 Selecting the Services to Search

Your WebCenter Portal administrator makes services available to the application. By default, all enabled services are selected to be searched. You can disable any service from which you do not want to see search results. For example, if you frequently search for a particular type of technology, including your personal contacts in the search is probably not useful.

To specify which services should be searched:

1. Click the **Preferences** link at the top of the application.
2. Click **Search** to open the **Search Preferences** pane (Figure 58–20).

Figure 58–20 The Search Preferences Pane



3. To add a service to a search, select one or more services on the **Available Services** list and click the **Move selected items to list** icon to move them to the **Selected Services** list.

   To remove services from search, select one or more services on the **Selected Services** list and click the **Remove selected items from list** icon to move them to the **Available Services** list.

Note: When Oracle SES is configured in the application, Oracle SES cannot be deselected, and services that do not support searching with Oracle SES (such as Notes) are not listed.

4. Click **OK** to save your changes and exit the Preferences dialog.

   Alternatively, click **Apply** to save your changes without exiting.

The services you add to the **Selected Services** list are included in future searches. The services on the **Available Services** list are not searched.

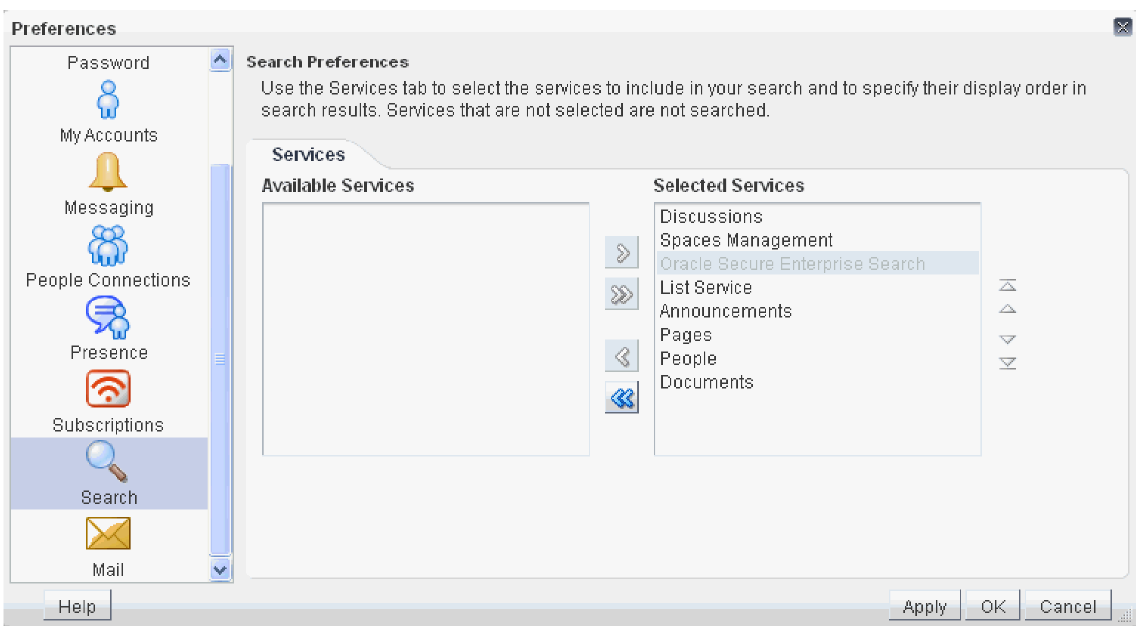
58.5.2 Specifying a Display Order for Search Results

Of all the services you include in a search, you may find that some services provide more relevant results than others. For example, you may find that search results from the Documents tool prove more useful that search results from other services. Preferences provide controls for specifying the order in which services are listed in search results.

To specify a display order for search results:

1. Click the **Preferences** link at the top of the application.
2. Click **Search** to open the **Search Preferences** panel (Figure 58–21).

Figure 58–21 Search Preferences



3. Select one or more services on the **Selected Services** list and click the **Move** icons to the right of the list to move your selections higher or lower on the list.

   The order you specify here determines the order each service is listed in search results.

4. Click **OK** to save your changes and exit the Preferences dialog.

   Alternatively, click **Apply** to save your changes without exiting.

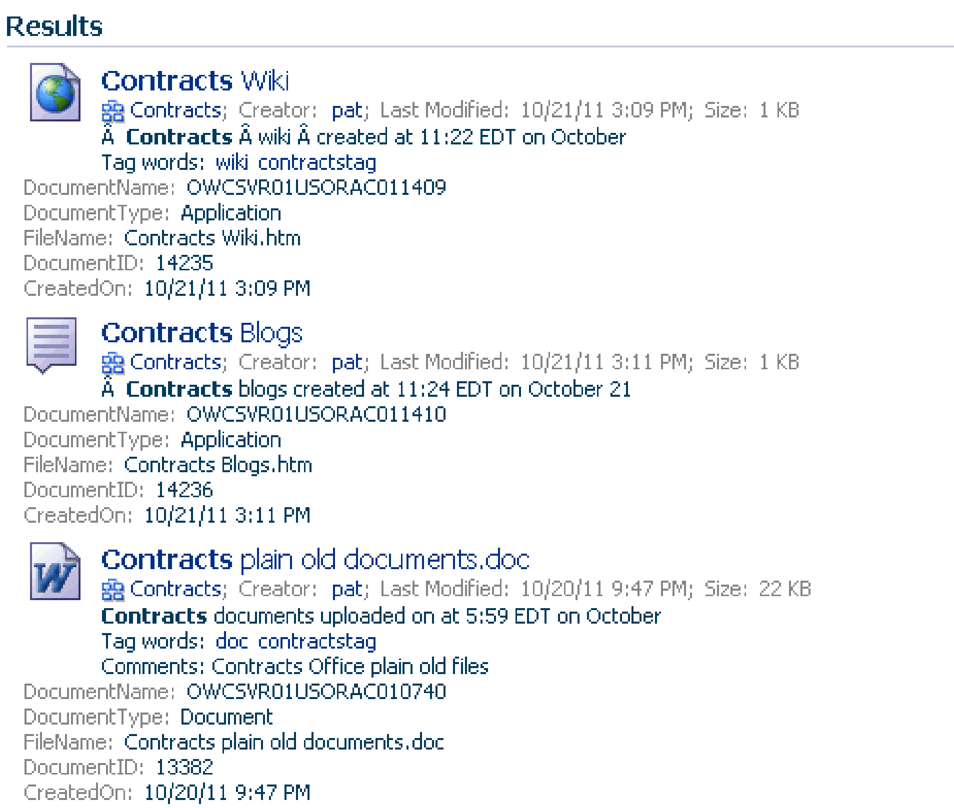
58.6 Customizing Search Results with Attributes and Refiners

A set of standard attributes (such as creator and size) is shown in each search result item. However, you can add additional attributes by specifying one or more attributes in the `Custom Attributes` parameter.

> **See Also:** Section 58.7.3, "Search Service Task Flow Parameters"

For example, Figure 58–22 shows search results with attributes added for `DocumentName`, `DocumentType`, `FileName`, `DocumentID`, and `CreatedDate`.

Figure 58–22 Search Results with Custom Attributes Added



An attribute is shown only if there is a value.

Note: All attributes must be added to the **Metadata List** parameter in the Content Server. For these attributes, the following list would need to be included in the **Metadata List** parameter:

```
DocumentName:dDocName,DocumentType:dDocType,FileName
:dOriginalName,DocumentID:dID,CreatedOn:dDocCreatedD
ate
```

For more information, see "Managing Oracle SES Search in WebCenter Portal" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Additionally, if you do not want users to see certain standard refiners in their search results, then set the `Refiners to hide` parameter to a list of one or more refiners you want hidden. For example, you might want to hide the space refiner to give the appearance that no other spaces exist.

The following predefined refiners can be hidden:

- Date
- Author
- Space
- Service
- Tag

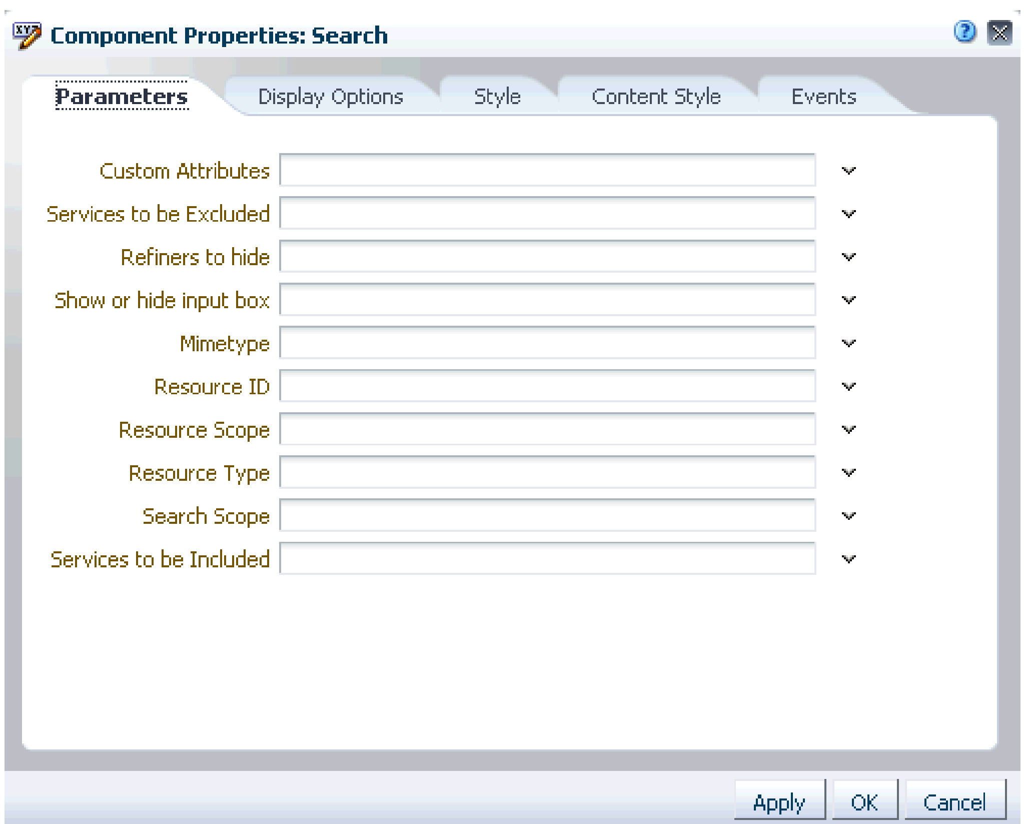
If nothing is specified, then all refiners are shown.

> **See Also:** Section 58.2.2, "Refining the Display of Search Results" and Section 58.7.3, "Search Service Task Flow Parameters"

58.7 Setting Search Service Task Flow Properties

The Search service task flows have associated properties, which users with sufficient privileges can access from the Component Properties dialog in Oracle Composer (Figure 58–23).

Figure 58–23 Search Task Flow Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Search service task flows and describe the properties on the **Parameters** tab.

- Section 58.7.1, "What You Should Know About the Search Service Task Flow Properties"
- Section 58.7.2, "How to Set Parameters to Narrow Searches"
- Section 58.7.3, "Search Service Task Flow Parameters."

58.7.1 What You Should Know About the Search Service Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 58.7.3, "Search Service Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So this tab may be omitted. For more information, see Section 18.6.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

58.7.2 How to Set Parameters to Narrow Searches

The parameters to scope your search results to specific spaces, services, and document types are available in the Search task flow.

The space administrator either can modify the space's page template to edit the Search task flow parameters, or the administrator can add the Search task flow to the space and edit its task flow parameters.

- Section 58.7.2.1, "Editing the Search Task Flow in a Page Template"
- Section 58.7.2.2, "Editing the Search Task Flow in a Space"

See Also:

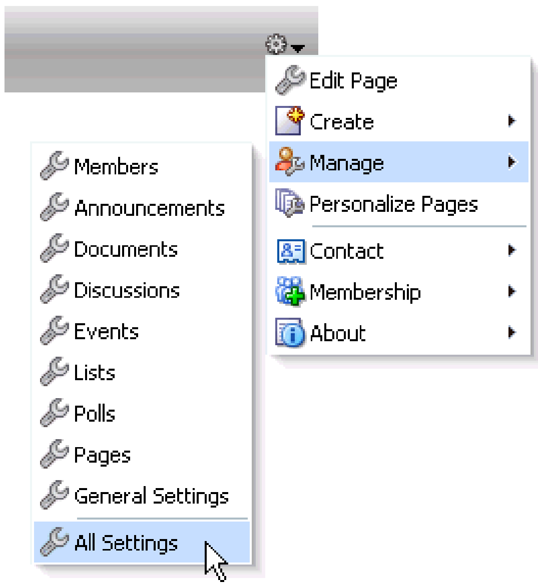
- Section 58.4, "Narrowing the Scope of Search"
- Section 13, "Working with Page Templates"

58.7.2.1 Editing the Search Task Flow in a Page Template

To edit the page template, first display the space administration page.

> **Tip:** The way you access the space administration pages depends on the page template in use. For example, in a top navigation template, you may access space administration pages through a **Manage** menu (Figure 58–24).
>
> You can also navigate to these pages using the direct URL provided in Section A.5, "User Interface URLs for Space Pages."

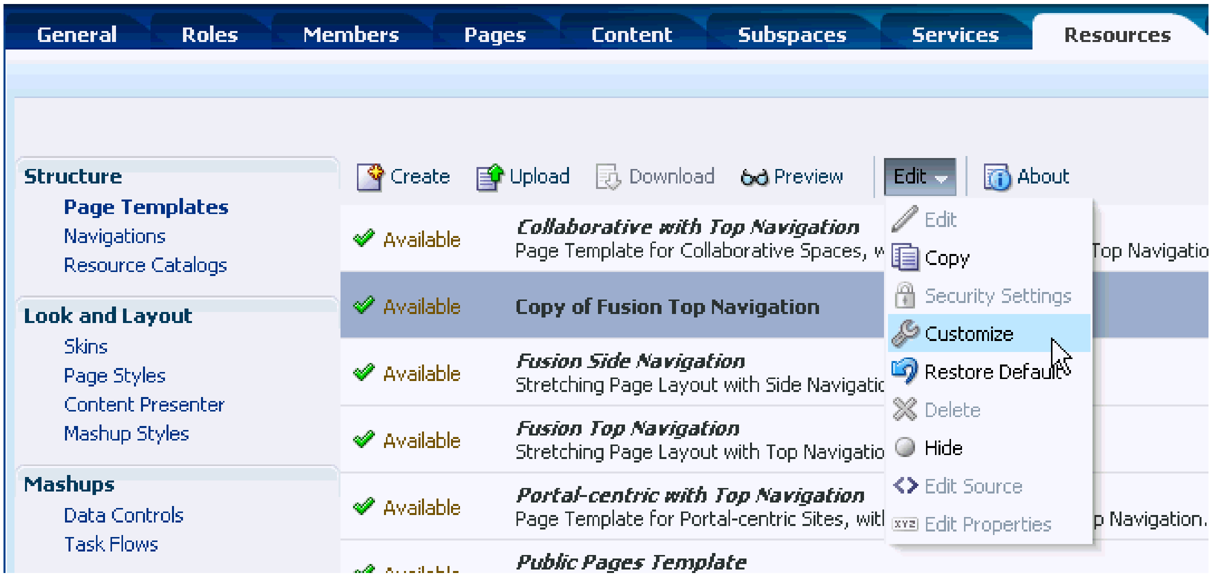
Figure 58–24 Manage Menu in the Top Navigation Template



Click the Resources tab to get to the Page Templates page. From the **Edit** menu, select **Copy** to copy the page template, and enter a name for this new template.

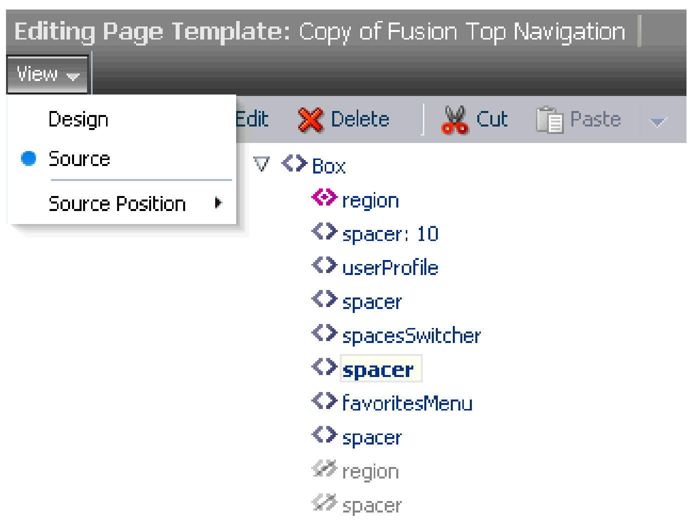
From the **Edit** menu, select **Show** to make this page template available, and then from the **Edit** menu, select **Copy** to edit the Search task flow parameters (Figure 58–25).

Figure 58–25 Customizing the Page Template



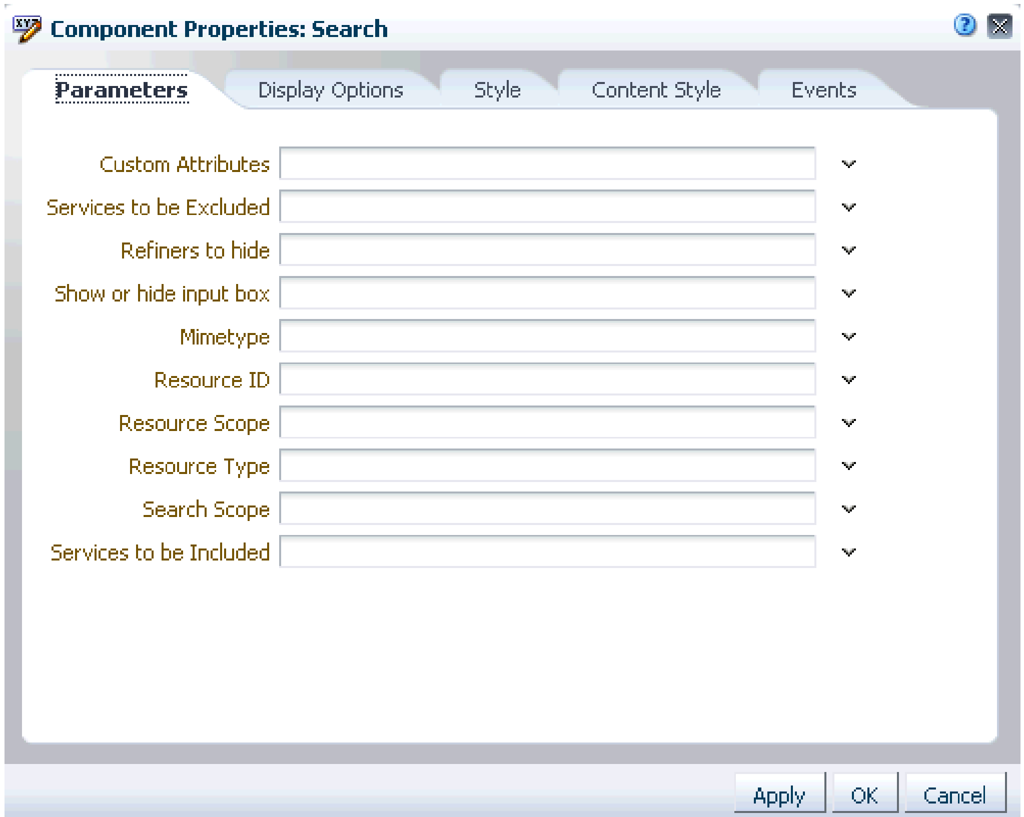
In the page template, click View - Source (Figure 58–26).

Figure 58–26 View - Source



Select the Search region, and click **Edit** to set any of the Search task flow parameters (Figure 58–27). For more information on the parameters, see Section 58.7.3, "Search Service Task Flow Parameters."

Figure 58–27 Editing Search Task Flow Parameters Dialog

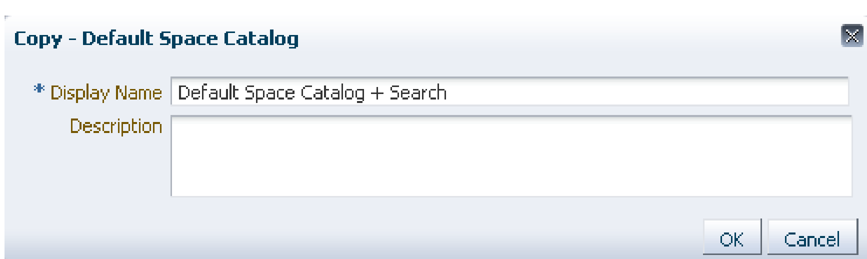


58.7.2.2 Editing the Search Task Flow in a Space

The Search task flow is not available in the default Resource Catalog, so editing the Search task flow in a space generally involves adding the Search task flow to the Resource Catalog, and then assigning this catalog to the space. For example:

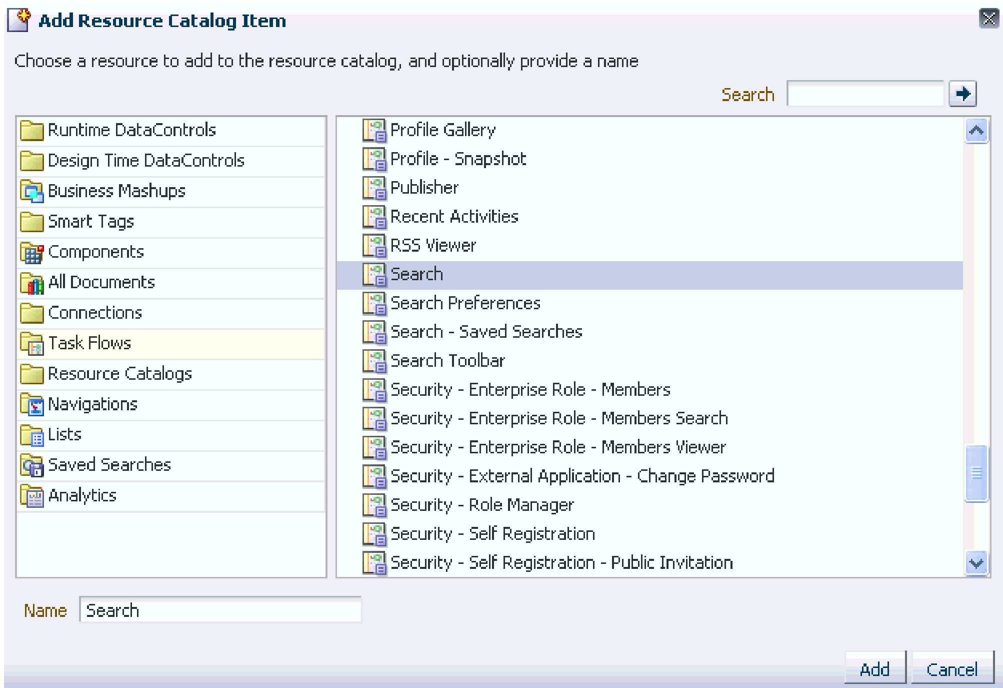
1. On the **Administration - Resources - Resource Catalogs** page, either create a new Resource Catalog or select an existing Resource Catalog and from the **Edit** menu, select **Copy**.
2. Enter a name for this new Resource Catalog (Figure 58–28).

Figure 58–28 Editing a Default Resource Catalog to Include Search



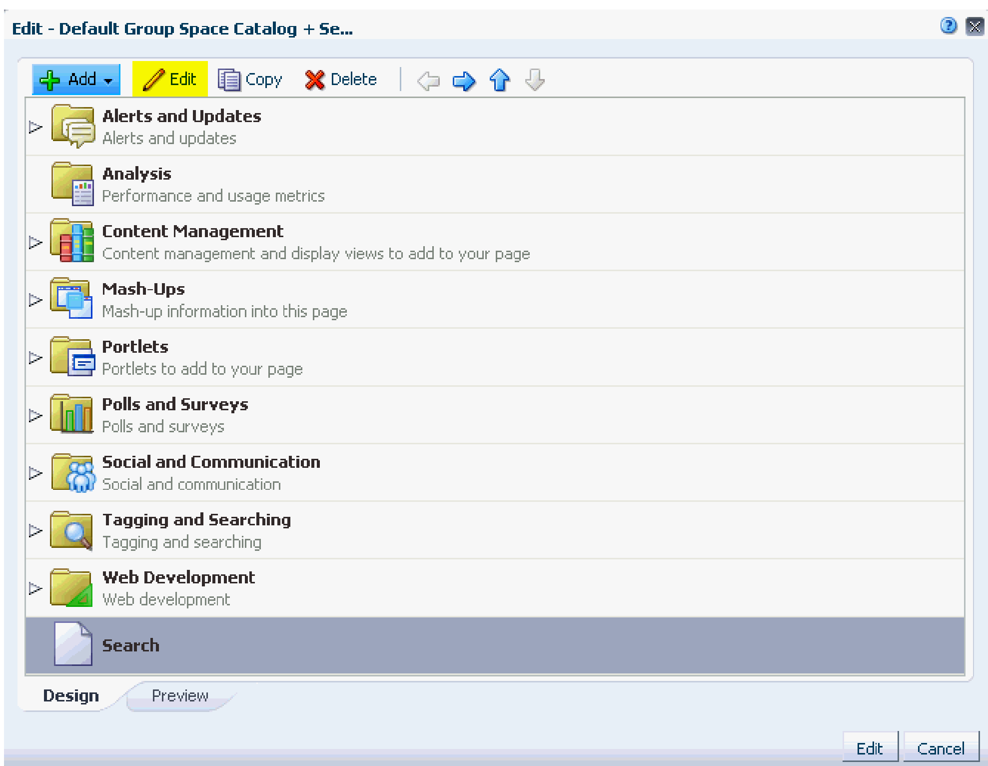
3. From the **Edit** menu, select **Edit**, **Add**, then **Add from Library**.
4. Select **Task Flows**, then scroll down to select the **Search** task flow, and click **Add** (Figure 58–29).

Figure 58–29 Add Resource Catalog Item Dialog



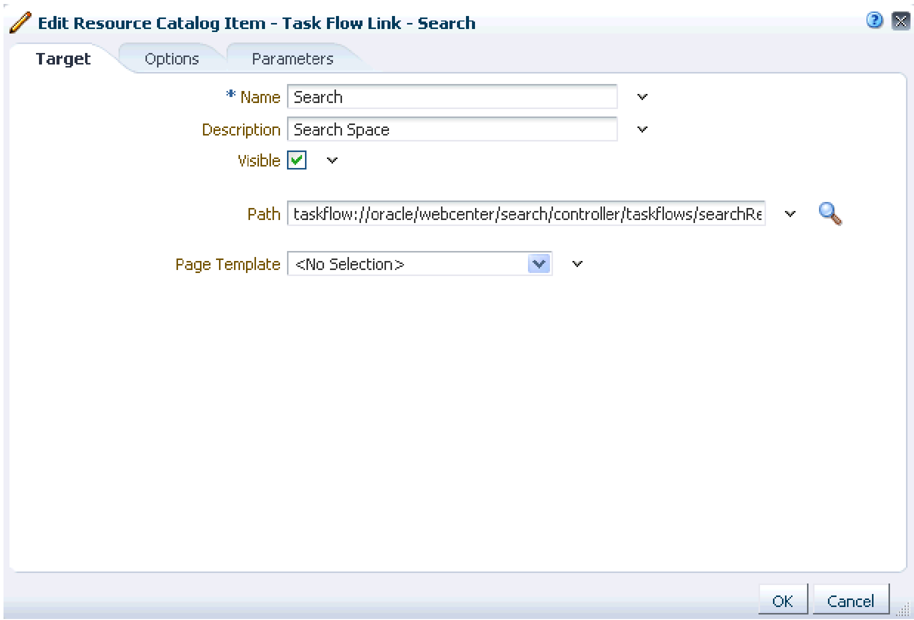
5. You see the Search task flow added to the Resource Catalog. Optionally, you can drag and drop the task flow into a folder. With the Search task flow selected, click Edit (pencil) to add a description for this new catalog item (Figure 58–30).

Figure 58–30 New Resource Catalog with the Search Task Flow Added



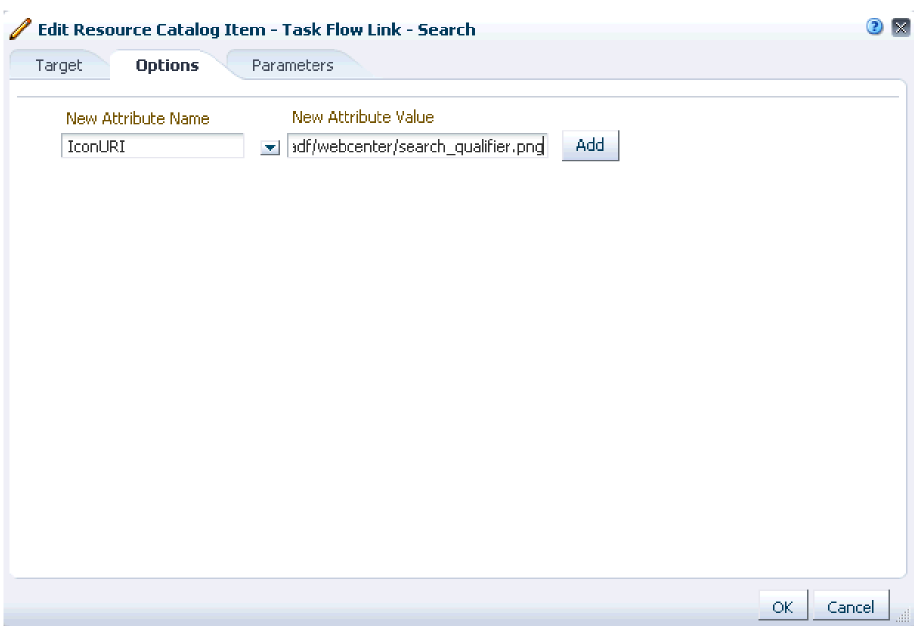
6. On the **Target** tab, add a description (Figure 58–31).

Figure 58–31 Edit Resource Catalog Item - Target Tab



7. On the **Options** tab, for **New Attribute Name** select `Icon URI`, and for **New Attribute Value**, enter `/adf/webcenter/search_qualifier.png` (Figure 58–32).

Figure 58–32 Edit Resource Catalog Item - Options Tab

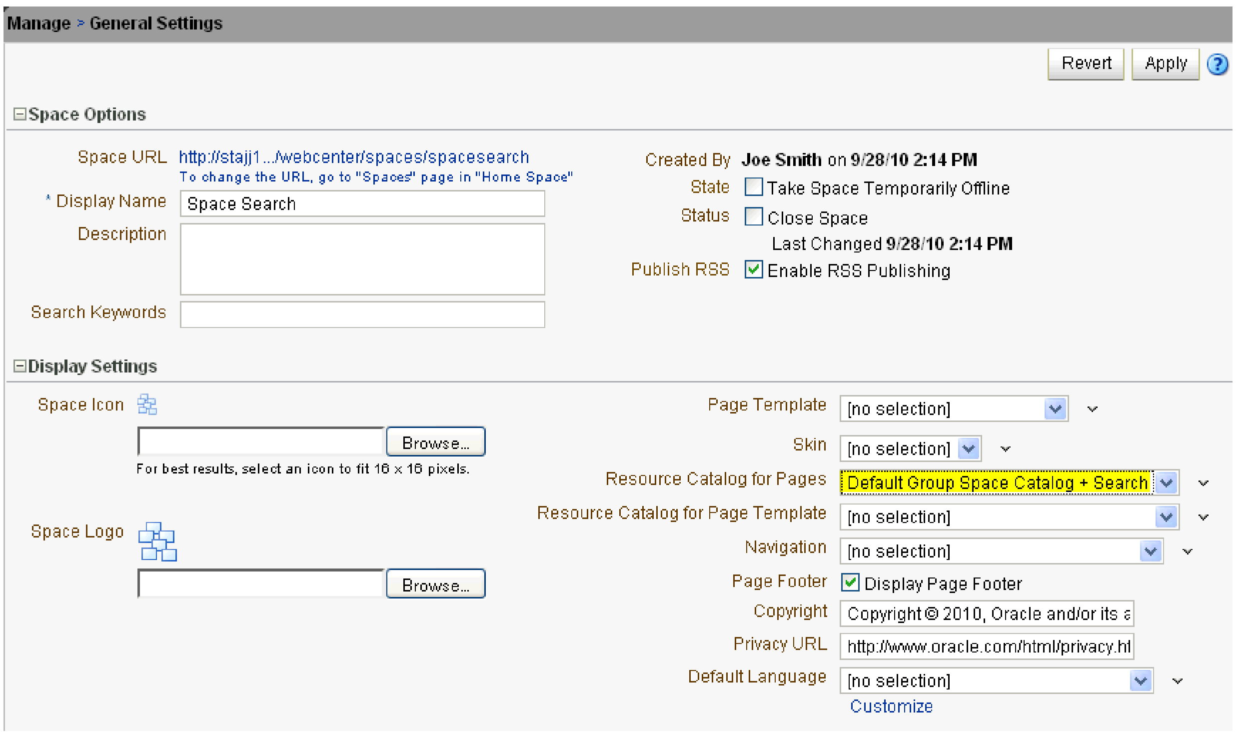


8. Click **Add**, then **OK** and **OK** again to close the Edit. You see the new icon and description appear in the Resource Catalog (Figure 58–33).

Figure 58–33 Search Task Flow Icon and Description

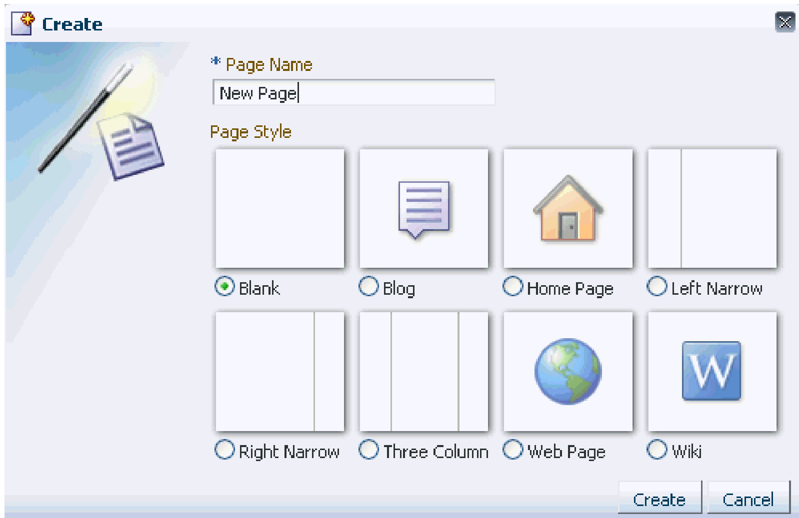
9. Back on the **Administration - Resources - Resource Catalogs** page, select this new Resource Catalog, and from the **Edit** menu, select **Copy** to make it available.
10. In your space, display the **General** page of the space administration settings.
11. For **Resource Catalog for Pages**, select the new Resource Catalog, and click **Apply** (Figure 58–34).

Figure 58–34 Space Administration Settings for New Resource Catalog



12. In the new space, create a new page (Figure 58–35).

Figure 58–35 Create New Page Dialog



13. On the new page, click **Add Content**, navigate to the Search task flow, and click **Add** to add the Search task flow to the page. Edit any parameters you choose, and click **Close**.
14. Click **Save**, then **Close**.
15. Run a search term in the **Search** field (Figure 58–36).

Figure 58–36 Search Task Flow in a Space

After the task flow has been added, you can edit the task flow parameters. For more information, see Section 58.7.3, "Search Service Task Flow Parameters."

58.7.3 Search Service Task Flow Parameters

Table 58–2 describes the parameters that are unique to Search service task flows.

Table 58–2 Search Service Task Flow Parameters

Parameter	Description	Task Flow
`Custom Attributes`	List of custom attributes to show when displaying search results. To include one or more custom attributes in the search results, set this to a list of custom attribute names, separated by commas. An optional label prefix may be provided with the custom attribute name to display instead of its associated custom attribute name. Use the format: *`label`*`:`*`name`*.	Search Search Toolbar
`Mimetype`	List of content types to limit the search. To limit the search to certain document types, set this to the list of MIME types of the documents (such as PDF, PPT, DOC), separated by commas. **Note**: To limit search to Microsoft Word documents and WebCenter Portal pages, set this parameter to application/msword, and set the `Services to be Included` parameter to oracle.webcenter.doclib,oracle.webcenter.page. For more information, see Section 58.4.2, "Searching Specific Document Types."	Search Search Toolbar
`Refiners to Hide`	List of refiners to hide when displaying search results. To hide one or more refiners, set this to a list of refiner names, separated by commas (choose from `creator`, `date`, `space`, `content`, and `tags`).	Search Search Toolbar
`Search Scope`	List of unique IDs to limit the search scope. To limit the search to a particular space, set this to the GUID of the space; for example, `#{spaceContext.currentSpaceGUID}`. If nothing is specified in this parameter, then all spaces are searched. For more information, see Section 58.4.3, "Searching Specific Spaces."	Search Search Toolbar
`Search Box Size`	Value to limit the size of the search box. The default value is 42. Enter a lower number (for example, 30) to shorten the length of the search box. This also changes the size of the search box in the Search task flow.	Search Toolbar
`Search Taskflow ID`	Task flow ID of global search; for example, `/oracle/webcenter/search/controller/taskflows/searchResults#search-view`	Search Toolbar
`Services to be Included`	List of IDs of services or executors to include when displaying search results. For example, to display only announcements, enter `oracle.webcenter.collab.announcement`. For a list of service IDs, see Table G-7 "Service IDs" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.	Search Search Toolbar

Table 58–2 (Cont.) Search Service Task Flow Parameters

Parameter	Description	Task Flow
`Show or hide input box`	Show or hide the input box. Set to true (default) to show the input box, or set to false to hide it.	Search
`Search Scope ID`	Select from the dropdown list to limit the search to all or certain spaces. **Note:** This parameter has been deprecated. Use the `Search Scope` parameter instead. (If a value is set for this parameter, then any value in `Search Scope` is ignored.)	Search Toolbar
`Resource Scope`	List of unique IDs to limit the search scope. **Note:** This parameter has been deprecated. Use the `Search Scope` parameter instead.	Search
`Resource ID`	Either search keywords or the saved search GUID. **Note:** This parameter is for internal use only. Do not change this value unless you want coded search main views. If you do change this value, then you must also specify `Resource Type`.	Search
`Resource Type`	Marker specifying whether the `Resource ID` parameter searches keywords or saved search GUID. **Note:** This value is set automatically and is for internal use only. Do not change it unless you want coded search main views.	Search
`Services to be Excluded`	List of IDs of services or executors to omit when displaying search results. **Note:** This parameter is for internal use only. Do not change this value.	Search

Note: The All Saved Searches and the Search Preferences task flows do not have any unique properties.

59 Working with the Tags Service

This chapter describes how to use the features provided through the Tags service. Tagging enables users to apply their own meaningful terms to application items, making those items more easily discoverable in search results and the Tag Center.

This chapter includes the following sections:

- Section 59.1, "What You Should Know About the Tags Service"
- Section 59.2, "Working with Tags Service Features and Task Flows"
- Section 59.3, "Setting Tags Service Task Flow Properties"

Audience

This chapter is intended for users who want to use and manage tags. Such users must be granted, minimally, the space-level permission `View Pages and Content` to view tags. They can view shared tags only for resources for which they have `view` permission.

Authenticated users who plan to create and manage tags require the space-level permission `Customize Pages and Edit Content`. They must have `view` permission on the resource.

WebCenter Portal: Spaces administrators with the `Application-Manage Configuration` permission and individual space moderators can add tags to a page template. Page creation permissions are required to add task flows to a page. For more information, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

> **Note:** Tasks discussed in this chapter may not be available if the Tags service is not enabled in the current space.

59.1 What You Should Know About the Tags Service

The Tags service provides a means of bookmarking application objects, making them easy to locate the next time you go looking for them. You can tag pages and documents in WebCenter Portal applications. This section provides an overview of the Tags service: what tags are and how to use tags. It contains the following subsections:

- Section 59.1.1, "Understanding Tags"
- Section 59.1.2, "Understanding the Tag Center"

59.1.1 Understanding Tags

A *tag* is a word you associate with application pages or documents, applying your own classification to improve search results. For example, you could apply the tag `jcr` to a page that provides useful insight into Java Content Repositories. When you search for information about JCRs, the tagged page appears in the results.

Tags are available for viewing in the Tags task flow, in search results, and in the Tag Center, where you can see what tags were used and what items were tagged. Tagging assists with building a knowledge network where each user can benefit from the assessments of all users.

Your tags help provide a higher level of relevance from search results for yourself and others by augmenting results with relevant items that you or others have tagged. Additionally, classifying an item with a tag enables you to gather disparate items into a cohesive body of knowledge and share it with others.

You have the option of sharing tags or keeping them to yourself. Share tags to enable other users to discover them in their searches. When you do not share a tag, users searching on an identical term do not discover the items you tagged with that term, unless some other user tagged the item with the same term and shared that tag.

Anywhere you see the **Tags** icon (Figure 59–1), you can apply a tag. Click the **Tags** icon to see tags applied to a selected item.

Figure 59–1 The Tags Icon

When looking at tags in search results, note the number of times the tag was applied to a particular object. This number indicates the tag's relevance to that object, and ultimately causes a collective classification scheme popularly known as a *folksonomy*. This can make information easier to search and navigate over time.

The scope of tags is both personal and application-wide. The tag data you view in the Tags task flow includes only the tags you apply; however, when you tag data through the Tag Center or through a Tags service task flow you see application-wide tag data.

Application-wide (global) searches look for tagged items wherever they might be. You can run global searches from the search field near the top-right of the application.

You can provide one or multiple tags to a given item. And multiple users can use the same tag term that you used and apply it to the same item. Duplicates of tags across users are tabulated and provide extra weight to the relevance of the tag term.

59.1.2 Understanding the Tag Center

The Tag Center is a dynamically-generated page that displays all the tags you and other users have applied to application pages and documents (Figure 59–2).

Figure 59–2 The Tag Center

The Tag Center offers the most complete use of tag data by providing access not only to your tags, but to the tags applied by other users. Additionally it provides a visual depiction of tag popularity, which enables you to refine tag results using filters. Filter for multiple tags simultaneously or filter by other users who have applied the same tags. A sorting feature provides an additional means of controlling your view of tagged items.

The Tag Center has three sections:

- The Tag Cloud section, which you can use to view a cloud or list of the tags currently applied to items in your application.
- The Refine Tag Results section with two types of list: a list of all other tags used on items that also use the currently-selected tag and a list of other users who have applied the selected tag.
- The Selected *tag* section, which provides a list of all items to which you have access that use the currently-selected tag and options to edit, sort, and filter the items.

The Tag Cloud is a visual depiction of currently-applied tags (Figure 59–3).

Figure 59–3 The Tag Cloud

Tags are presented according to the frequency of their use. More frequently used tags display in bold fonts and varying font sizes—the larger the font, the more the tag has been applied. Click a tag in the tag cloud to execute a search that returns a list of all items to which you have access that use the tag.

To learn how to work with tags in the Tag Center see Section 59.2.7, "Working with Tags and Tagged Items in the Tag Center."

59.2 Working with Tags Service Features and Task Flows

This section provides information about tagging and describes how to make best use of tags. It includes the following subsections:

- Section 59.2.1, "Adding a Tags Service Task Flow to a Page"
- Section 59.2.2, "Adding the Tags Icon to Pages"
- Section 59.2.3, "Tagging Application Pages"
- Section 59.2.4, "Tagging Application Documents"
- Section 59.2.5, "Working with Tags and Tagged Items in the Tags Task Flow"
- Section 59.2.6, "Viewing Tags and Tagged Items in Search Results"
- Section 59.2.7, "Working with Tags and Tagged Items in the Tag Center"
- Section 59.2.8, "Understanding the Tag Cloud and the Tag Selection Task Flows"
- Section 59.2.9, "Understanding the Similarly Tagged Items Task Flow"

59.2.1 Adding a Tags Service Task Flow to a Page

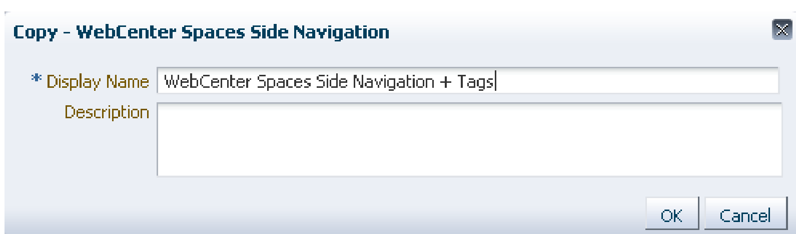
For the steps to add a Tags service task flow to a page, see Section 18.5, "Adding a Component to a Page."

59.2.2 Adding the Tags Icon to Pages

If you do not see the **Tags** icon on pages, then a WebCenter Portal administrator or space moderator can follow these steps to add the **Tags** icon to pages.

1. On the **Administration - Resources** page, edit the page template. From the **Edit** menu, select **Copy**, and enter a meaningful name for this new page template (Figure 59–4).

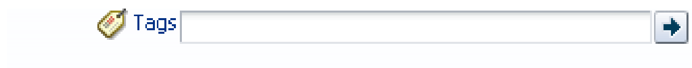
Figure 59–4 Copying Page Templates



2. From the **Edit** menu, select **Edit**, and add the **Tags** icon to the template page. For example, at the top of the page, click **Add Content**, click to open the Template Development folder, and then click to add Tags.
3. Click **Save**, then **Close** to stop editing the template.
4. On the **Administration - Resources - Page Templates** page, select this template. From the **Edit** menu, select **Show** to make the template available.
5. On the **Administration - Configuration - General** page, set this new template as the **Default Page Template**, and click **Apply**.

   The Tags icon displays on the page (Figure 59–5).

Figure 59–5 Tags Icon on a Page



59.2.3 Tagging Application Pages

This section steps you through the process of applying tags to application pages. You can apply a tag to any application page on which you see the **Tags** icon and link (Figure 59–6).

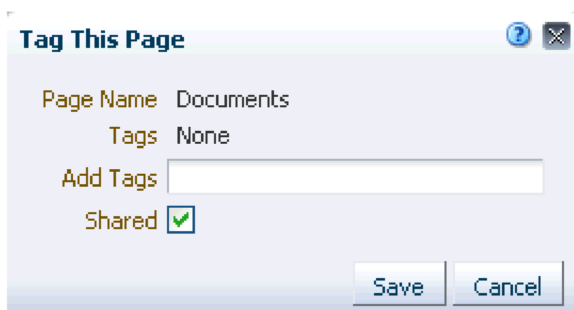
Figure 59–6 A Page's Tags Icon and Link

To tag a page in your application:

1. Go to the page you want to tag.
2. Click the page's **Tags** icon or link.

   The Tag this Page dialog opens (Figure 59–7).

Figure 59–7 Tag This Page Dialog



3. Enter tag values:
   - **Page Name**—The page's display name, a read-only value.
   - **Tags**—List of tags already applied to this page.
   - **Add Tags**—Enter one or more tags, separated with a space. Use underscores or hyphens in multi-word tag entries.
   - **Shared**—Imagine that you have tagged a page with the term *essential* and selected the **Shared** check box. When other users search using the term *essential*, the page you tagged appears in their search results. If you deselect the **Shared** check box, then other users' search on the term *essential* does not include this page in their results (unless others, too, have tagged it *essential* or another user tagged it *essential* and shared the tag). Regardless of whether you select or deselect **Shared**, when you search on the term *essential*, the page you tagged with that term appears in your search results.

     If your administrator disabled the **Shared** check box, then it does not appear.

4. Click **Save** to apply the tag and close the dialog.

Note: For information about tags and searches, see Section 59.2.6, "Viewing Tags and Tagged Items in Search Results."

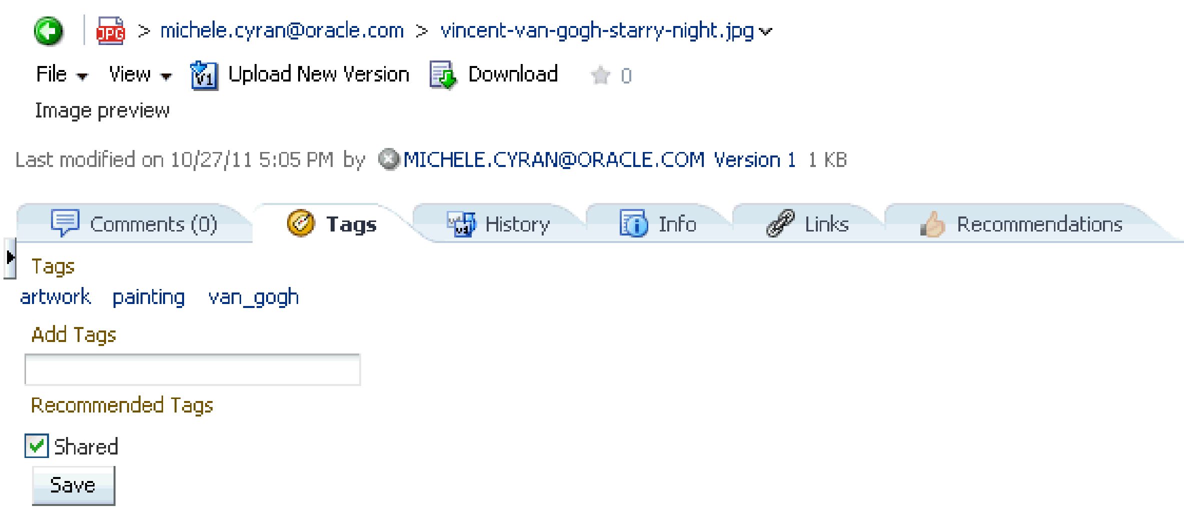
59.2.4 Tagging Application Documents

The section steps you through the process of applying tags to documents. You can apply tags to any documents you can view.

To tag a document in your application:

1. Go to a Document Library main view, either the task flow or the **Documents** page, and locate the document you want to tag.
2. Click the document to open it, then click **Tags** icon. The Tags tab displays the tags you have put on the document. It also lets you update these tags and add new tags. (Figure 59–8).

Figure 59–8 Tags Tab



3. Enter tag values:
   - **Tags**—List of tags already applied to this page.
   - **Add Tags**—Enter one or more tags, separated with a space. Use underscores or hyphens in multi-word tag entries.
   - **Recommended Tags**—Recommended tags are automatically generated using a ranking algorithm. They indicate the system's best estimation of tags that suit the document you are currently tagging. Click a recommended tag to add it to the **Tags** field.
   - **Shared**—Imagine that you have tagged a document with the term *essential* and selected the **Shared** check box. When other users search using the term *essential*, the document you tagged appears in their search results. If you deselect the **Shared** check box, then other users' search on the term *essential* does not include this document in their results (unless they, too, have tagged it *essential*). Regardless of whether you select or deselect **Shared**, when you

search on the term *essential*, the document you tagged with that term appears in your search results.

If your administrator disabled the **Shared** check box, then it does not appear.

4. Click **Save** to apply the tag.

> **Note:** For information about tags and searches, see Section 59.2.6, "Viewing Tags and Tagged Items in Search Results."

59.2.5 Working with Tags and Tagged Items in the Tags Task Flow

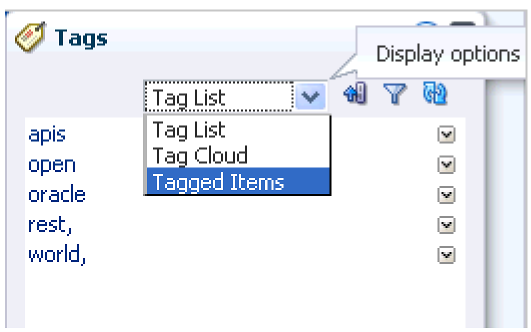
This section describes how to work with tags in the Tags task flow. It contains the following subsections:

- Section 59.2.5.1, "Viewing Tags and Tagged Items in the Tags Task Flow"
- Section 59.2.5.2, "Sorting Tags and Tagged Items"
- Section 59.2.5.3, "Filtering Tags and Tagged Items"
- Section 59.2.5.4, "Renaming a Tag from the Tags Task Flow"
- Section 59.2.5.5, "Deleting a Tag from the Tags Task Flow"

59.2.5.1 Viewing Tags and Tagged Items in the Tags Task Flow

The Tags task flow (available in the Composer Catalog) provides a view of the tags you have added to your application and the items you have tagged (Figure 59–9).

Figure 59–9 Tags Task Flow



You can use the Tags task flow to navigate to a tag's associated resources or to open the Tag Center and further refine your resource selection (see Section 59.2.7, "Working with Tags and Tagged Items in the Tag Center"). You can also use it to display a tag cloud or the items you have tagged in your application.

To view a tag cloud depiction of your tags, select **Tag Cloud**.

To view tagged items, select **Tagged Items** from the display options menu. The task flow redraws to display all the items that you have tagged in your application.

59.2.5.2 Sorting Tags and Tagged Items

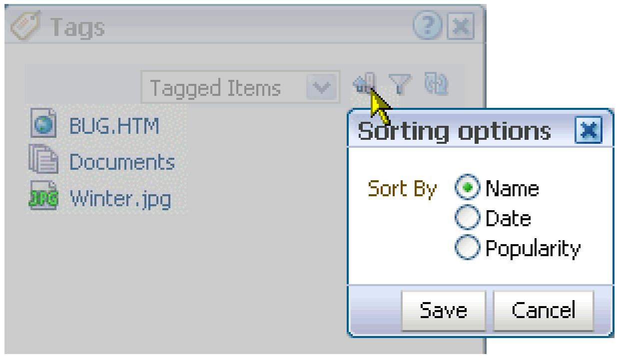
When your tag list is long, sorting the list makes it easier to find specific tags. Sort the tag list by name, date, or popularity. This section describes how.

To sort the tags in the Tags task flow:

1. Click the **Sorting options** icon at the top of the Tags task flow.

The Sorting options dialog opens (Figure 59–10).

Figure 59–10 The Sorting Options Dialog



2. From the Sorting options dialog, select a sorting criteria:
   - **Name**—Sorts the list alphabetically from 1 to 9 and a to z.
   - **Date**—When tags are shown, **Date** sorts the list from the tags you applied most recently to the oldest tags you applied. When tagged items are shown, **Date** sorts the list from the items you tagged most recently to the items with the oldest tags you applied.
   - **Popularity**—When tags are shown, **Popularity** sorts the list from the tags you have applied most frequently to those you have applied least frequently. When tagged items are shown, **Popularity** sorts the list from the items that have been tagged by the most people to the items tagged by the fewest.
3. Click **Save** to apply your selection and close the dialog.

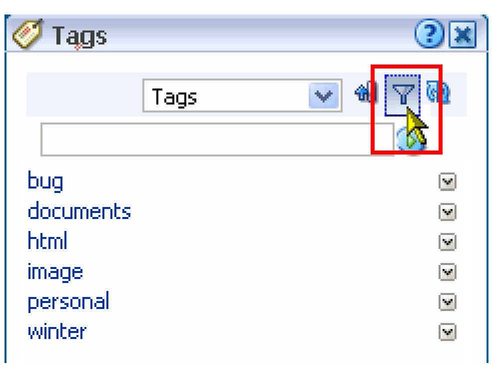
59.2.5.3 Filtering Tags and Tagged Items

Filtering provides a way to eliminate all tags on the list except for those that meet the filtering criteria. This section describes how to apply a filter to the Tags list in the Tags task flow:

To filter the Tags list in the Tags task flow:

1. Click the **Filter** icon to open a filtering term field (Figure 59–11).

Figure 59–11 The Filter Icon



   Filtering works for both Tags and Tagged Items views of the task flow.

2. Enter a filtering term, and click the **Search** icon.

The Tags list refreshes, showing only those tags that match or include the filtering term.

3. Clear the filtering term, and click the **Search** icon to restore all of your tags to view.
4. Click the **Filter** icon to exit filtering.

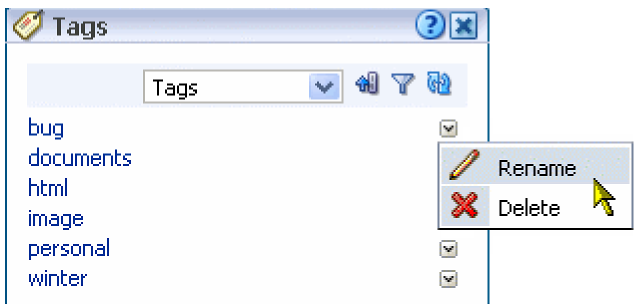
59.2.5.4 Renaming a Tag from the Tags Task Flow

When you rename a tag, you rename all instances of the tag that you applied. If other users applied the same tag, their instances are not renamed.

To rename tags from the Tags task flow:

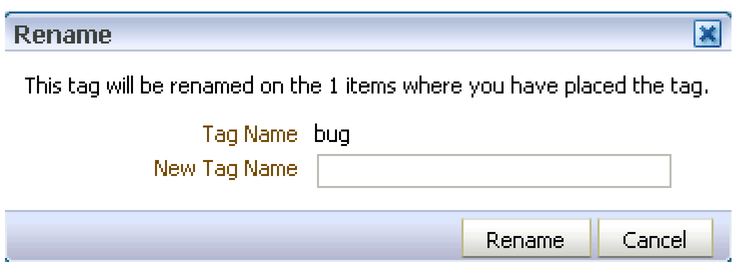
1. Select **Rename** from the menu next to the tag you want to rename (Figure 59–12).

Figure 59–12 The Rename Command on a Tag Menu



2. In the Rename dialog, enter a new name for the selected tag, and click **Rename** (Figure 59–13).

Figure 59–13 The Rename Dialog



All of the tags you created using the original tag name, are renamed.

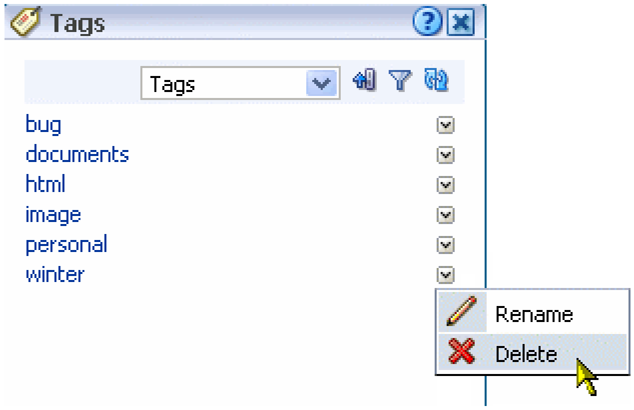
59.2.5.5 Deleting a Tag from the Tags Task Flow

When you delete a tag, it is deleted wherever you applied it. If others applied the same tag, their tags are left as is.

To delete a tag from the Tags task flow:

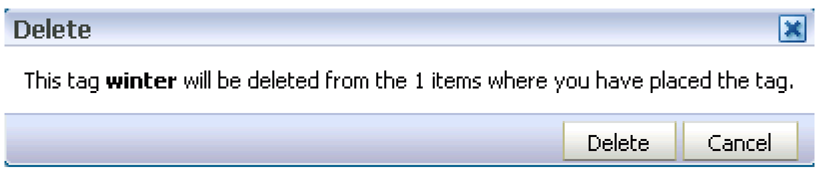
1. Select **Delete** from the menu next to the tag you want to delete (Figure 59–14).

Figure 59–14 The Delete Command on a Tag Menu



2. Click **Delete** in the Delete dialog (Figure 59–15).

Figure 59–15 The Delete Dialog



The tag is removed from the Tags task flow and from any items to which you applied it.

59.2.6 Viewing Tags and Tagged Items in Search Results

Tag search results appear under two headings:

- **Tags**, which shows tags that at least partially match the search criteria; for example, if you search for *page*, the following tags are returned: *page*, *pages*, or *pager*.
- **Tagged Items**, which shows items that are associated with a tag that matches the search criteria exactly; for example, if you search for *page*, only items associated with the tag *page* are returned; items associated with the following tags are not returned: *pages* or *pager*.

Under these headings, tag search results appear like any other search results; however, tags in tag search results behave a little differently. When you click tagged items in tag search results or when you click other types of search results, their associated content is shown. When you click a tag in tag search results, the Tag Center opens with that tag preselected.

To view tags and tagged items in search results:

1. Run a search as described in Section 58.2, "Searching in Your Application."
2. The search results open in the **Search** page (Figure 59–16). The Tags section shows the number of items to which a tag has been applied. The Tagged Items section shows the number of users who have applied a tag to an item.

Figure 59–16 Search Page with Tag Results

Note: Results appear different if you are using WebCenter Portal's live search adapters or Oracle SES for the search engine. For more information, see Section 58.1.1, "Using the Oracle Secure Enterprise Search Adapter."

59.2.7 Working with Tags and Tagged Items in the Tag Center

This section describes how to work with tags in the Tag Center. It contains the following subsections:

- Opening the Tag Center
- Selecting Different Views and Arrangements of Tags in the Tag Cloud
- Selecting Different Views and Arrangements of Tagged Items
- Refining the Display of Information in the Tag Center
- Discovering Who Has Used a Tag in the Tag Center

59.2.7.1 Opening the Tag Center

There are several ways to open the Tag Center (Figure 59–17):

Figure 59–17 The Tag Center

- Click a tag displayed in the Tags task flow
- Click a tag returned as a search result
- Click a tag that appears when you hover over the **Tags** icon

Additionally, the administrator can add a page for the Tag Center in the Home space.

The selected tag determines all the other tag-related information that appears in the Tag Center. For example:

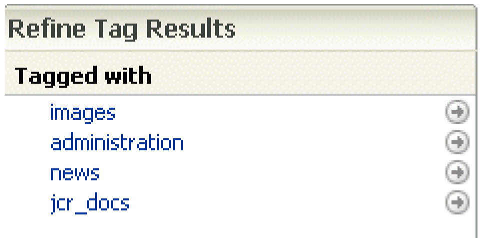
- The selected tag is highlighted in the tag cloud (Figure 59–18).

Figure 59–18 A Tag Cloud

You can select another tag in the tag cloud to change the information that is displayed in the Tag Center. Additionally, you can use the controls above the tag cloud to rearrange your tag-cloud view (see Section 59.2.7.2, "Selecting Different Views and Arrangements of Tags in the Tag Cloud").

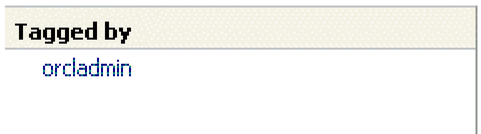
- Other tags used on items that also use the currently-selected tag display in the **Tagged with** panel (Figure 59–19).

Figure 59–19 Tagged with Panel in the Tag Center



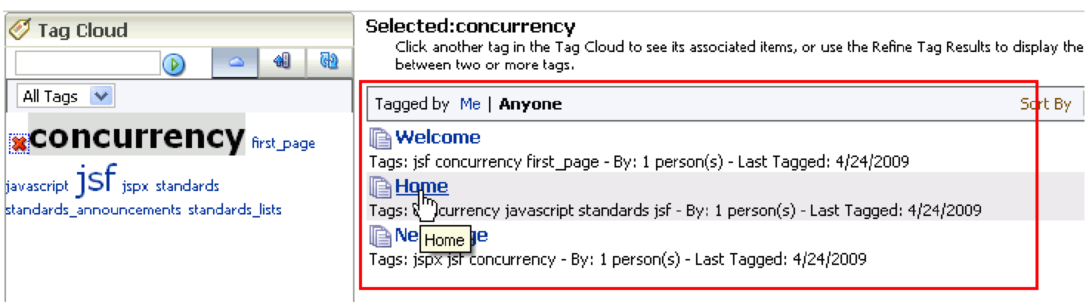
- Other users who applied the selected tag are listed in the **Tagged by** panel (Figure 59–20).

Figure 59–20 Tagged by Panel in the Tag Center



- Items tagged with the currently-selected tag appear in the right panel of the Tag Center (Figure 59–21). Click an item link to display the item.

Figure 59–21 Items Tagged with "Concurrency" in the Tag Center



59.2.7.2 Selecting Different Views and Arrangements of Tags in the Tag Cloud

The Tag Center's Tag Cloud displays the tags currently applied to items. You can adjust your view of the Tag Cloud using its sorting and filtering features.

To display the tag cloud:

1. Open the Tag Center as described in Section 59.2.7.1, "Opening the Tag Center."

   The Tag Center opens with the tag cloud displayed in the top left corner (Figure 59–22).

Figure 59–22 The Tag Cloud

To adjust your view of the tag cloud:

- To search for tags, enter a search term in the text box on the tag cloud toolbar, and click the **Search** icon to the right of the text box.

  The tag display refreshes showing only those tags that meet the search criteria. To show just your matching tags or to remove the search criteria, select an option from the menu above the tag cloud:

  – **All Tags**—Removes the search criteria, showing every tag used in your application

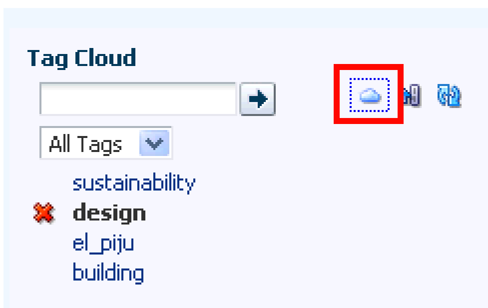
  – **My Tags**—Removes the search criteria, showing just the tags you have applied

  – **All tags containing '<search term>'**—Shows all tags in your application that meet the search criteria

  – **My tags containing '<search term>'**—Shows just the tags which you have applied that meet the search criteria

- To switch between displaying the tags in cloud view or list view, click the cloud icon (Figure 59–23).

Figure 59–23 Tags Displayed in a List

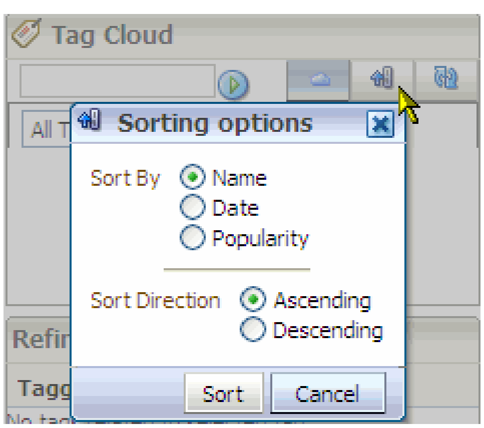


- To sort the tags:

  1. Click the **Sorting options** icon on the tag cloud toolbar.

     The Sorting options dialog opens (Figure 59–24).

Figure 59–24 The Sorting Options Dialog



  2. From the Sorting options dialog, select sorting criteria:

  - **Name**—Sorts the list alphabetically. If you select **Ascending**, the list is sorted from 1 to 9 and a to z. If you select **Descending**, the list is sorted from z to a and 9 to 1.
  - **Date**—Sorts the list based on when you applied the tags. If you select **Ascending**, the tags are sorted from the ones you applied most recently to the ones applied longest ago. If you select **Descending**, the tags are sorted from the ones applied longest ago to the ones applied most recently.
  - **Popularity**—Sorts the list based on how frequently the tag has been applied. If you select **Ascending**, the tags are sorted from the ones that have been applied most frequently to the one that have been applied least frequently. If you select **Descending**, the tags are sorted from the ones applied least frequently to the ones applied most frequently.

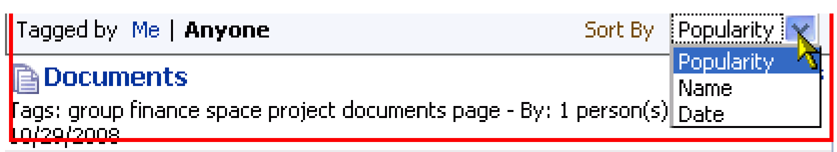
3. Click **Sort** to apply your selection and close the Sorting options dialog.

- To refresh the list of tags, click the **Refresh tags** icon.
- To show all tags or just your tags, select an option from the menu above the tag cloud:
  - **All Tags**—Shows every tag used in your application
  - **My Tags**—Shows just the tags you have applied

59.2.7.3 Selecting Different Views and Arrangements of Tagged Items

The Tag Center provides a selection of sorting criteria to enable you to display tagged items in the way that you prefer. Using the **Tagged by** and **Sort By** options above the list of tagged items (Figure 59–25), you can select which tags to show and the order in which to show them.

Figure 59–25 Tagged by and Sort By Options for Tagged Items in the Tag Center



Select the tagged items to view:

- **Tagged by Me**—Click to show only the items that use the selected tag that you have tagged yourself.
- **Tagged by Anyone**—Click to show all items that use the selected tags.

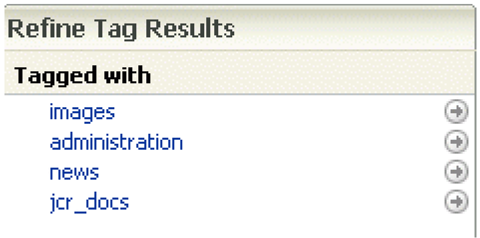
To arrange the order of displayed tagged items, select from:

- **Popularity**—To sort the list from items that have been tagged most frequently with the current tag to those tagged least frequently
- **Name**—To sort the list alphabetically from 1 to 9 and a to z
- **Date**—To sort the list from items that have been tagged most recently to the ones tagged longest ago

59.2.7.4 Refining the Display of Information in the Tag Center

You can further refine your view of information in the Tag Center by selecting additional tags in the **Tagged with** panel (Figure 59–26).

Figure 59–26 Tagged with Panel in the Tag Center



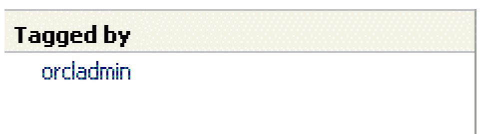
The **Tagged with** panel displays all the other tags used on objects that also use the currently-selected tag. Click a tag in the **Tagged with** panel to further restrict the information in the Tag Center to information associated with both the selected tag and the related tag you clicked.

For example, imagine that the Tag Center displays all items tagged with the term *help*. Click *jcr_docs* in the **Tagged with** panel to further refine the information in the Tag Center to information that is associated with both *help* and *jcr_docs*.

59.2.7.5 Discovering Who Has Used a Tag in the Tag Center

You can further refine your view of information in the Tag Center by selecting other users in the **Tagged by** panel (Figure 59–27).

Figure 59–27 Tagged by Panel in the Tag Center



The **Tagged by** panel lists all other users who have applied the selected tag or tags. Click a user in the **Tagged by** panel to limit the information in the Tag Center to information tagged with the selected tag and also tagged by the user you clicked.

Using Figure 59–27 as an example, and assuming the currently-selected tag is *help*, clicking *orcladmin* shows information associated with the tag *help*, applied by *orcladmin*.

59.2.8 Understanding the Tag Cloud and the Tag Selection Task Flows

The Tag Cloud task flow and Tag Selection task flow are similar in that they both display a tag cloud, which is a visual depiction of all the tags used. Tags are presented according to the frequency of their use. More frequently used tags display in bold fonts and varying font sizes—the larger the font, the more the tag has been applied.

With the Tag Cloud task flow (Figure 59–28), when you click a tag in the tag cloud, you are redirected to Tag Center, where that tag is selected (Figure 59–29).

Figure 59–28 Tag Cloud Task Flow

Figure 59–29 Clicking a Tag in the Tag Cloud Task Flow

See Also: Section 59.1.2, "Understanding the Tag Center"

With the Tag Selection task flow (Figure 59–30), when you click a tag, it marks the tag as selected and you see the results in the Tag Cloud Related Resources task flow (Figure 59–31). You are not redirected to the Tag Center.

Figure 59–30 Tag Selection Task Flow

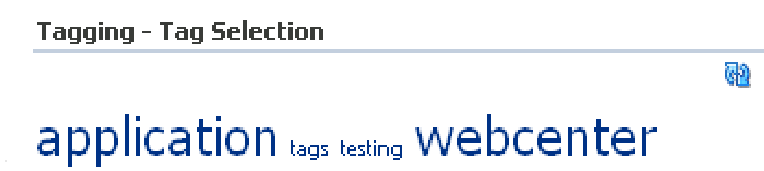
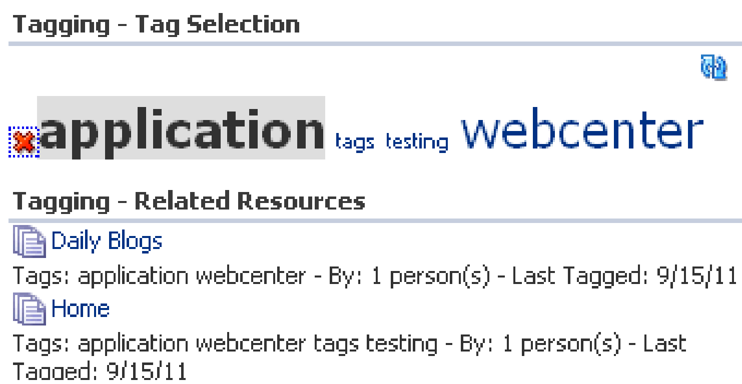


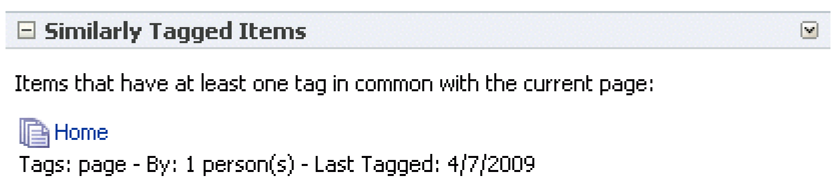
Figure 59–31 Clicking a Tag in the Tag Selection Task Flow



59.2.9 Understanding the Similarly Tagged Items Task Flow

The Similarly Tagged Items task flow (Figure 59–32) provides a list of links to other pages or documents that have at least one tag in common with the currently-displayed page.

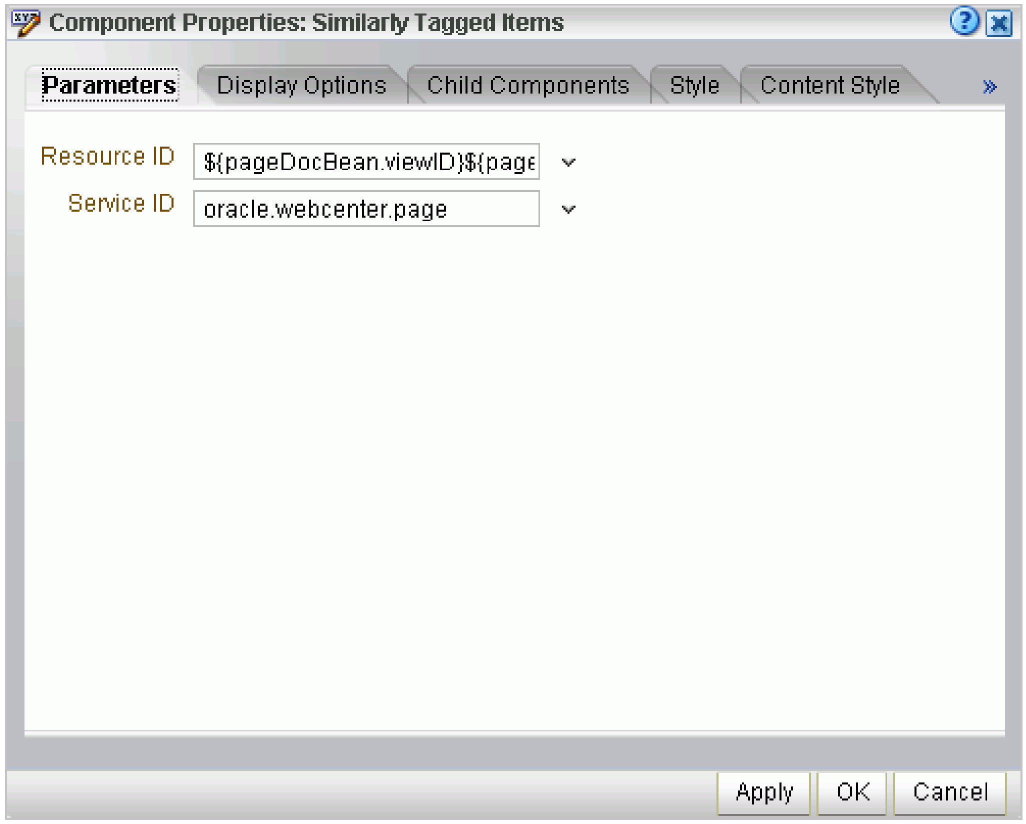
Figure 59–32 The Similarly Tagged Items Task Flow



59.3 Setting Tags Service Task Flow Properties

The Tags service task flow has associated properties, which users with sufficient privileges can access from the Component Properties dialog in Oracle Composer (Figure 59–33).

Figure 59–33 Similarly Tagged Items Task Flow Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Tags service task flows and describe the properties on the **Parameters** tab.

- Section 59.3.1, "What You Should Know About the Tags Service Task Flow Properties"
- Section 59.3.2, "Tags Service Task Flow Parameters"

59.3.1 What You Should Know About the Tags Service Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 59.3.2, "Tags Service Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So this tab may be omitted. For more information, see Section 18.6.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about ELs in Spaces, see Appendix B, "Expression Language (EL) Expressions."

> **Note:** Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.
>
> EL validation is not performed on non-generic display options.

59.3.2 Tags Service Task Flow Parameters

Table 59–1 describes the parameters that are unique to the Tags service task flows.

Table 59–1 Tags Service Task Flow Parameters

Parameter	Description	Task Flow
`Resource ID`	Unique ID of the item or resource within a given service that is used to find similarly tagged items. This value is set automatically. Do not change this value unless you want to show items similar to a different resource.	Tagging - Related Links Similarly Tagged Items
`Service ID`	This parameter has a different meaning for the Similarly Tagged Items task flow and the Tags task flow. ■ In Tagging - Related Links, it is a `resourceId/serviceId` pair that describes what item the listed objects are similar to. This value is set automatically. Do not change this value unless you want to show items similar to a different resource belonging to a different service. ■ In Tags, it limits the tags and tagged items to this service; for example, `oracle.webcenter.page`.	Tagging - Related Links Similarly Tagged Items Tagging - Personal View Tags
`Scope of Tags`	Scope of tags. This value is set automatically. Do not change this value.	Tag Cloud Tag Selection Tagging - Tagged Items Tag Cloud Related Resources
`Redirect URL`	Redirection URL for anonymous page login. This must include the `/faces` prefix; for example, `/faces#{facesContext.viewRoot.viewId}` If null or empty, then no login is displayed.	Tagging Dialog

> **Note:** You should not change the Tags service task flow properties unless you want to show items from a different resource or different service.

Part XIV

Gathering Intelligence Based on Activities

Part XIV of the User's Guide provides information about accumulating portal and community usage intelligence from the actions of your users.

Part XIV includes Chapter 60, "Working with the Activity Graph Service."

60

Working with the Activity Graph Service

The Activity Graph service provides a means of enlarging your sphere of interest in Oracle WebCenter Portal: Spaces by offering recommendations for new connections, suitable items, and relevant spaces, and by returning more relevant search results. It does this by tracking application activities across users for a period of time. Based on these activities the Activity Graph engine starts to provide recommendations.

This chapter provides an overview of Activity Graph service features and describes how to use them. It includes the following sections:

- Section 60.1, "What You Should Know About the Activity Graph Service"
- Section 60.2, "Working with Activity Graph Service Task Flows"
- Section 60.3, "Setting Activity Graph Service Task Flow Properties"

For Activity Graph task flows to work, the Analytics schema (activities) must be installed and configured, and a connection set up between your application and the Analytics Collector.

> **See Also:** For more information, see the chapter "Managing the Analytics Service" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

60.1 What You Should Know About the Activity Graph Service

The advent of Enterprise 2.0 has enabled users to contribute content at unprecedented rates. In view of this, there is now a need for better information retrieval technologies that are seamlessly integrated with Enterprise 2.0 products, such as Spaces. The Activity Graph service provides the solution by leveraging collective intelligence, gathered by the underlying Activity Graph engine, to benefit search and social applications.

The Activity Graph service provides suggestions of people that a user may be interested in connecting with, based on existing connections and shared interaction with objects in the application. It also directs users to spaces or items that may be of interest, based on similar interactions with those spaces or items the user is currently viewing.

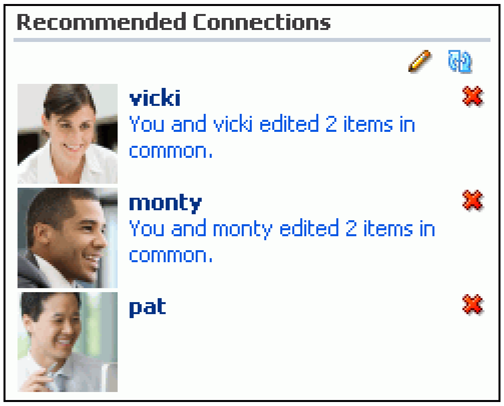
The Activity Graph service presents these suggestions based on data gathered and analyzed by the Activity Graph engine. The Activity Graph engine provides a central repository for actions that are collected by enterprise applications.

The Activity Graph service serves up its recommendations in the following three out-of-the-box task flows:

- **Recommended Connections**

Use the Recommended Connections task flow (Figure 60–1) to view and connect with users similar to you.

Figure 60–1 The Recommended Connections Task Flow



See Also: For more information about this task flow, see Section 60.2.2, "Working with the Recommended Connections Task Flow."

- **Similar Spaces**

  Use the Similar Spaces task flow (Figure 60–2) to identify and interact with spaces that may be of interest to you.

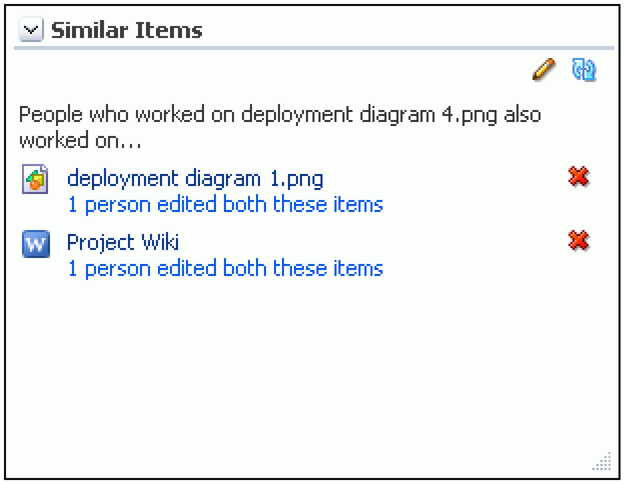
Figure 60–2 The Similar Spaces Task Flow

See Also: For more information about this task flow, see Section 60.2.3, "Working with the Similar Spaces Task Flow."

- **Similar Items**

  Use the Similar Items task flow (Figure 60–3) to identify and interact with WebCenter Portal content that may be of interest to you.

Figure 60–3 The Similar Items Task Flow



See Also: For more information about this task flow, see Section 60.2.4, "Working with the Similar Items Task Flow."

Note: The Activity Graph service task flows display recommendations only if the Activity Graph service is configured in your application. For more information, see the section "Activity Graph Service Prerequisites" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

Out of the box, the Activity Graph service tracks certain WebCenter Portal objects and actions. However, you can extend the service to track other WebCenter Portal objects or actions, or objects and actions from other applications.

See Also: For more information, see the section "Extending the Activity Graph Service" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

60.2 Working with Activity Graph Service Task Flows

The Activity Graph service task flows expose the functionality available from the Activity Graph service.

This section includes the following subsections:

- Section 60.2.1, "Adding an Activity Graph Service Task Flow to a Page"
- Section 60.2.2, "Working with the Recommended Connections Task Flow"
- Section 60.2.3, "Working with the Similar Spaces Task Flow"
- Section 60.2.4, "Working with the Similar Items Task Flow"

60.2.1 Adding an Activity Graph Service Task Flow to a Page

By default, the Recommended Connections task flow is included in each user's Profile Gallery, available through the Home space. The Similar Items task flow is included, by default, in the Document Viewer Related Items pane for files, to show items similar to the currently viewed file.

To include any of the Activity Graph service task flows anywhere else, you must add the task flow to the appropriate page.

To add an Activity Graph service task flow to a page:

1. Open the page in edit mode.

   See Also: For more information, see Section 18.1, "Entering and Exiting Composer."

2. Click **Add Content** in the target region to open the Resource Catalog.
3. Navigate to the section of the Resource Catalog that contains the Activity Graph service task flows or search for the task flow.

   Tip: The presence or location of this component depends on how the Resource Catalog is configured. For example, in the default Resource Catalog, next to **Social and Communication**, click **Open** to expose a list that includes the Activity Graph service task flows.

4. Click **Add** next to the task flow that you want to add to your page.

60.2.2 Working with the Recommended Connections Task Flow

The Recommended Connections task flow enables viewing and connecting to people considered to be similar to you.

Note: The recommendations provided in the task flow reflect the contents of the activity graph when the Activity Graph Engines were last run. Activities that occurred after the last run are not included. For more information, see the section "Preparing Data for the Activity Graph Service" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

This section includes the following subsections:

- Section 60.2.2.1, "Learning More About a Recommended Connection"
- Section 60.2.2.2, "Inviting a Recommended Connection to Connect with You"
- Section 60.2.2.3, "Removing a User from Your Recommended Connections"

See Also: For general information about connections, see Chapter 34, "Creating Your Social Network."

60.2.2.1 Learning More About a Recommended Connection

Before you connect with someone new, you probably want to find out a bit more about that person to determine whether it is really a connection that you want to make. The Recommended Connections task flow enables this by providing access to the user profile information and by including reasons why the recommendation has been made.

To view information about a recommended connection:

1. Go to a Recommended Connections task flow.

   Tip: By default, you can find a Recommended Connections task flow on the **Profile** page in your Home space.

2. For each of your recommended connections, the task flow includes the name, title, and profile icon of the user. This provides a snapshot to help you decide quickly if you want to connect to this person.
3. To find out more information about the user, click name of the user to display the User Detail popup.

Note: Alternatively, you can click the user icon to display the user's Profile Gallery.

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4. In the User Detail popup (Figure 60–4), you can view additional information about the user, such as his or her location and current status. You can also choose to view the full profile or contact the user by email or instant message.

Figure 60–4 The User Detail Popup

Note: The information in the User Detail popup depends on the information that the user has provided in their profile, and the services that are enabled in the space.

---

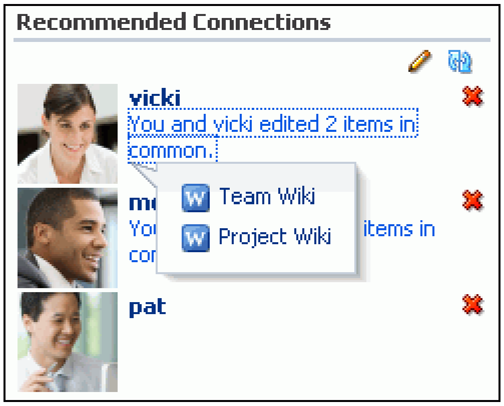
5. Click anywhere away from the popup to close it.
6. The task flow may also provide a reason why each person was recommended as a potential connection. For example, you may be connected to some of the same people or you may have worked on the same documents or wikis.

   Reasons for recommending a connection are:

   - You share connections with the user
   - You and the user edited one or more of the same items
   - You and the user worked in one or more of the same spaces
   - You and the user tagged one or more of the same items

   Click the reason to find out more details. For example, a list of the connections you have in common, or a list of the objects that you have both worked on (Figure 60–5).

Figure 60–5 Details for Reasons for Recommended Connections



7. Click anywhere away from the popup to close it.
8. After examining this information you can decide whether to connect to this person, or remove him or her from the list of recommended connections.

60.2.2.2 Inviting a Recommended Connection to Connect with You

If you find a person in the list of recommended connections that you want to connect with, you can do so quickly from the User Detail popup or the user's Profile Gallery.

To invite a recommended connection to connect with you:

1. Go to a Recommended Connections task flow.

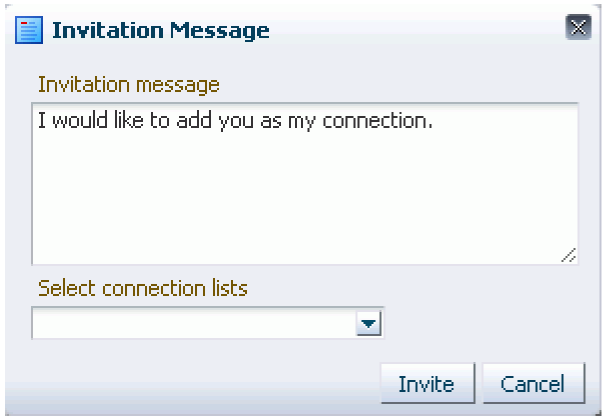
   > **Tip:** By default, you can find a Recommended Connections task flow on the **Profile** page in your Home space.

2. Find the person in the list of recommended connections.
3. Click the name of the user to display the User Detail popup, or the user icon to display the user's Profile Gallery.
4. Click **Get Connected** (Figure 60–6).

Figure 60–6 The Get Connected Link

5. In the Invitation Message dialog (Figure 60–7), enter your own message or keep the default.

Figure 60–7 The Invitation Message Dialog



6. From the **Select connection lists** dropdown list, select the connection list to which you want to add this user.

   > **See Also:** For more information about connections lists, see Section 34.4.5, "Creating and Managing Connections Lists."

7. Click **Invite**.

   If the person you have invited set Preferences to automatically accept all invitations, you are connected immediately. Otherwise, the invitation becomes available in the recipient's Connections page.

   > **See Also:** For more information, see Section 34.4.3, "Viewing Invitations to Connect."

60.2.2.3 Removing a User from Your Recommended Connections

If the list of recommended connections includes people that you do not want to connect with, you can remove them, making space for more recommendations. You might also choose to remove someone after you have issued them an invitation to connect. If you do so, the recommendation is removed from the list, but the invitation is not canceled.

To remove a recommended connection:

1. Go to a Recommended Connections task flow.

   > **Tip:** By default, you can find a Recommended Connections task flow on the **Profile** page in your Home space.

2. Find the person in the list of recommended connections.
3. Click the **Do not show this person** icon next to the user in the list (Figure 60–8).

Figure 60–8 The Do Not Show This Person Icon

4. The task flow is refreshed with a new recommended connection taking the place of the one you removed.

60.2.2.4 Setting the Number of Users to Display in the Recommended Connections Task Flow

You can control the number of users that are displayed in the Recommended Connections task flow.

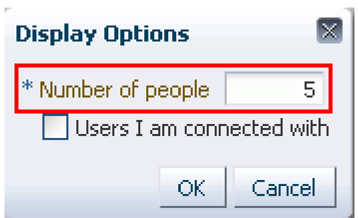
To set the number of recommended connections to display:

1. Go to a Recommended Connections task flow.

   > **Tip:** By default, you can find a Recommended Connections task flow on the **Profile** page in your Home space.

2. Click the **Display Options** icon.
3. In the Display Options dialog, in the **Number of People** field (Figure 60–9), enter how many recommended connections you want to list in the task flow. The default value is 5.

Figure 60–9 The Number of People Field



4. Click **OK**.

60.2.2.5 Controlling Which Users to Include in the Recommended Connections Task Flow

By default, the Recommended Connections task flow includes all recommended connections except those with whom you are already connected. You can change this setting by editing the task flow's display options. For example, you could use the task flow to show users who are similar to you, rather than to show recommended connections. In this case, you might want to include existing connections.

To control which users to include in the task flow:

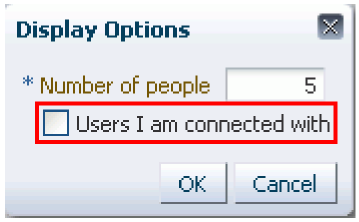
1. Go to a Recommended Connections task flow.

   > **Tip:** By default, you can find a Recommended Connections task flow on the **Profile** page in your Home space.

2. Click the **Display Options** icon.
3. In the Display Options dialog, select the **Users I am connected with** check box (Figure 60–10) to include users in the list of recommended connections even if you are already connected with them.

   Deselect the check box to remove users from the list if you are already connected with them.

Figure 60–10 The Users I Am Connected With Option



Note: This check box is *not* selected by default.

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4. Click **OK**.

60.2.3 Working with the Similar Spaces Task Flow

The Similar Spaces task flow can be placed on any page in a space. It provides you with suggestions of other spaces that are similar to the one you are currently viewing. A space is considered similar to another space if the same people interact with it, especially if they edit the content.

Only spaces that you are permitted to view are listed in the Similar Spaces task flow.

Note: The suggestions made in the Similar Spaces task flow are determined based on the currently viewed space only; they are not specific to the current user.

Note: The recommendations provided in the task flow reflect the contents of the activity graph when the Activity Graph Engines were last run. Activities that occurred after the last run are not included. For more information, see the section "Preparing Data for the Activity Graph Service" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

This section includes the following subsections:

- Section 60.2.3.1, "Learning More About a Suggested Space"
- Section 60.2.3.2, "Joining a Suggested Space"
- Section 60.2.3.3, "Removing a Space from the Task Flow"
- Section 60.2.3.4, "Setting the Number of Spaces to Display in the Similar Spaces Task Flow"
- Section 60.2.3.5, "Controlling Which Spaces to Include in the Similar Spaces Task Flow"

60.2.3.1 Learning More About a Suggested Space

When looking at a space in the Similar Spaces task flow, one of the first things you will probably want to do is find out more about that space. This will help you determine whether the space is one that you are interested in joining or not.

To learn more about a suggested space:

1. Go to the Similar Spaces task flow that includes the space about which you want to learn more.
2. For each of the suggested spaces, the task flow includes the name and description of the space. This provides a snapshot to help you decide quickly if the space is one that you might be interested in.
3. To go to the space to find out more about it, click the name.
4. After examining the space, you can decide whether to join the space, or remove it from the task flow.

60.2.3.2 Joining a Suggested Space

If you find a space in Similar Spaces task flow that you want to join, you can do so by visiting the space.

To join a suggested space:

1. In the Similar Spaces task flow, click the space name to open the space.
2. Join the space (see Section 51.9, "Joining a Space"). Some membership requests require approval from the space moderator so you may not gain access immediately.

60.2.3.3 Removing a Space from the Task Flow

If you decide that you are not particularly interested in a space listed in the Similar Spaces task flow, you can remove it, making space for more suggestions. The space is removed only from your view of the task flow; the space will continue to be listed for other users, as long as they have permission to view it.

To remove a space from the task flow:

1. Go to the Similar Spaces task flow that includes the space that you want to remove.
2. Find the space that you want to remove.
3. Click the **Do no show this space** icon next to the space (Figure 60–11).

Figure 60–11 The Do Not Show This Space Icon

4. The task flow is refreshed with a new similar space taking the place of the one you removed.

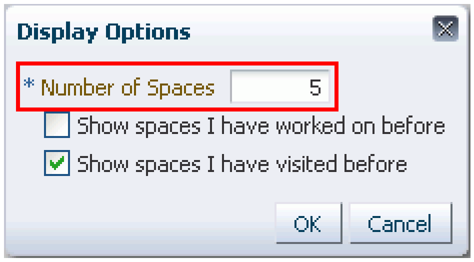
60.2.3.4 Setting the Number of Spaces to Display in the Similar Spaces Task Flow

You can control the number of spaces that are displayed in the Similar Spaces task flow.

To set the number of similar spaces to display:

1. Go to the Similar Spaces task flow that you want to edit.
2. Click the **Display Options** icon.
3. In the Display Options dialog, in the **Number of Spaces** field (Figure 60–12), enter how many similar spaces you want to list in the task flow. The default value is 5.

Figure 60–12 The Number of Spaces Field



4. Click **OK**.

60.2.3.5 Controlling Which Spaces to Include in the Similar Spaces Task Flow

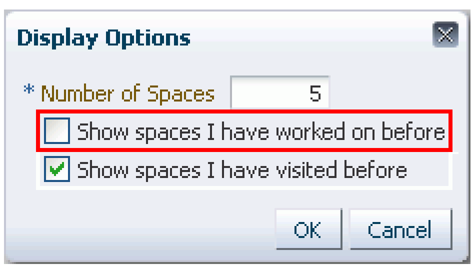
By default, the Similar Spaces task flow does not include spaces that you are already a member of, but it does include spaces that you have already viewed. You can change these settings by editing the task flow's display options.

To which spaces to include in the task flow:

1. Go to the Similar Spaces task flow that you want to edit.
2. Click the **Display Options** icon.
3. In the Display Options dialog, select the **Show spaces I have worked on before** check box (Figure 60–13) to display spaces in which you have performed an action (excluding viewing) in the list of similar spaces.

   Deselect the check box if you do not want to include spaces that you have worked on.

Figure 60–13 The Show Spaces I Have Worked on Before Option

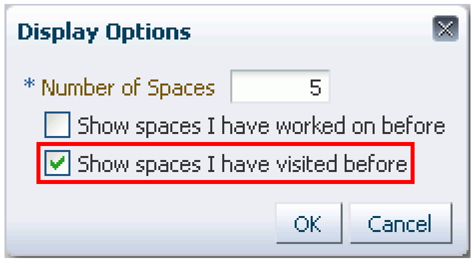


> **Note:** This check box is *not* selected by default.

4. Select the **Show spaces I have visited before** check box (Figure 60–14) to include spaces in the list of similar spaces even if you have already viewed them.

   Deselect the check box to remove spaces from the list if you have already viewed them.

Figure 60–14 The Show Spaces I Have Visited Before Option



Note: This check box is selected by default.

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5. Click **OK**.

60.2.4 Working with the Similar Items Task Flow

The Similar Items task flow provides you with suggestions of other items you might want to view, based on the item you have currently selected on the page.

Note: The suggestions made in the Similar Items task flow are determined based on the currently selected item only; they are not specific to the current user.

Note: The recommendations provided in the task flow reflect the contents of the activity graph when the Activity Graph Engines were last run. Activities that occurred after the last run are not included. For more information, see the section "Preparing Data for the Activity Graph Service" in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

This section includes the following subsections:

- Section 60.2.4.1, "Populating the Similar Items Task Flow"
- Section 60.2.4.2, "Viewing a Suggested Item"
- Section 60.2.4.3, "Removing an Item from the Similar Items Task Flow"
- Section 60.2.4.4, "Setting the Number of Items to Display in the Similar Items Task Flow"
- Section 60.2.4.5, "Controlling Which Items to Include in the Similar Items Task Flow"

60.2.4.1 Populating the Similar Items Task Flow

The Similar Items task flow lists items that are similar to the currently selected item on the page. When you initially display a page that contains the Similar Items task flow, the task flow will probably be empty. To populate the task flow, you need to select an item for which you want to see similar items.

Note: If the page containing the Similar Items task flow also contains the Document Viewer, the document currently displayed in the Document Viewer drives the content of the Similar Items task flow and you do not need to explicitly select an item.

To populate the Similar Items task flow:

1. Go to the page containing the Similar Items task flow.
2. In one of the other task flows on the page, select the item for which you want to see similar items.

   The Similar Items task flow works in conjunction with the following task flows:

   - Documents service task flows:
     - Recent Documents
     - Document List Viewer
     - Document Navigator
     - Document Explorer
     - Folder Viewer
     - Document Manager
     - Document Browser
   - Discussions Manager task flow
3. The Similar Items task flow refreshes to display items that are similar to the one you selected.

60.2.4.2 Viewing a Suggested Item

If you see an item in the Similar Items task flow that you think might be useful, you can go ahead and view it.

To view a suggested item:

1. Go to the Similar Items task flow that includes the item that you want to view.
2. Click the item's name to display the item.

   The way the item is displayed depends on the type of item. For example, documents are displayed in the Document Viewer task flow.

60.2.4.3 Removing an Item from the Similar Items Task Flow

If you decide that you are not particularly interested in an item listed in the Similar Items task flow, you can remove it, making space for more suggestions. The item is removed only from your view of the task flow; the item will continue to be listed for other users, as long as they have permission to view it.

To remove an item from the task flow:

1. Go to the Similar Items task flow that includes the item that you want to remove.
2. Find the item that you want to remove.
3. Click the Do not show this item icon next to the item (Figure 60–15).

Figure 60–15 The Do Not Show This Item Icon

4. The task flow is refreshed with a new similar item taking the place of the one you removed.

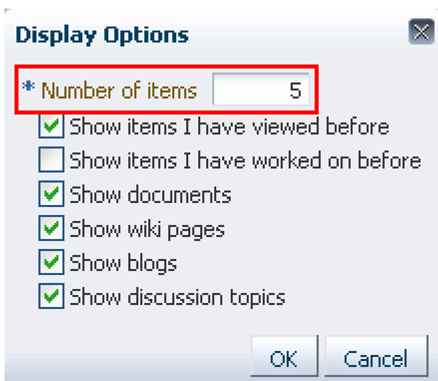
60.2.4.4 Setting the Number of Items to Display in the Similar Items Task Flow

You can control the number of items that are displayed in the Similar Items task flow.

To set the number of items to display in the task flow:

1. Go to the Similar Items task flow that you want to edit.
2. Click the **Display Options** icon.
3. In the Display Options dialog, in the **Number of items** field (Figure 60–16), enter how many similar items you want to list in the task flow. The default value is 5.

Figure 60–16 The Number of Items Field



4. Click **OK**.

60.2.4.5 Controlling Which Items to Include in the Similar Items Task Flow

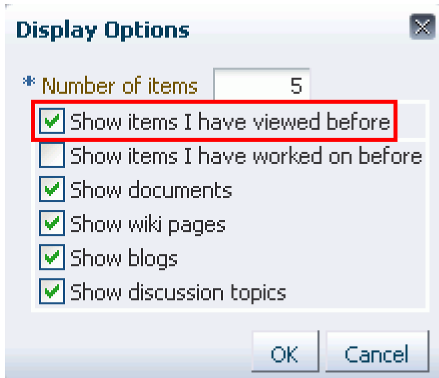
By default, the Similar Items task flow include items that you have already viewed. It also includes all types of supported items (documents, wiki pages, blogs, and discussion topics). You can change these settings by editing the task flow's display options. For example, you could use the task flow to show only discussion topics that are similar to the selected item.

To control which items to include in the task flow:

1. Go to the Similar Items task flow that you want to edit.
2. Click the **Display Options** icon.
3. In the Display Options dialog, select the **Show items I have viewed before** check box (Figure 60–17) to include items in the list of similar items even if you have already viewed them.

   Deselect the check box to remove items from the list of similar items if you have already viewed them.

Figure 60–17 The Show Items I Have Viewed Before Option



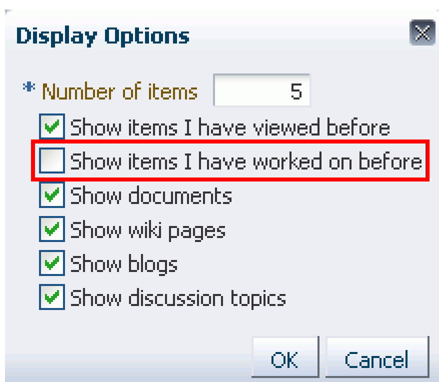
Note: This check box is selected by default.

---

4. Select the **Show items I have worked on before** check box () to include items in the list of similar items even if you have already interacted with them in some way (other than viewing).

   Deselect the check box to remove items from the list of similar items if you have interacted with them already.

Figure 60–18 The Show Items I Have Worked on Before Option



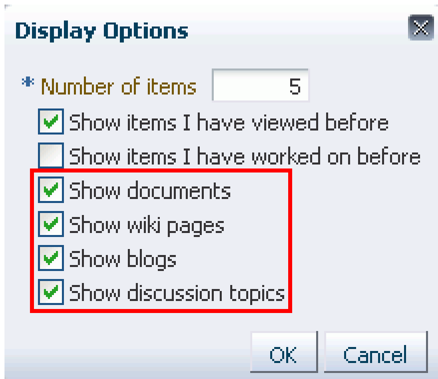
Note: This check box is *not* selected by default.

---

5. Select or deselect the following check boxes as required to determine which types of items to display in the task flow (Figure 60–19):

   - **Show documents**
   - **Show wiki pages**
   - **Show blogs**
   - **Show discussion topics**

Figure 60–19 Options for Displaying Different Types of Items



Note: These check boxes are selected by default.

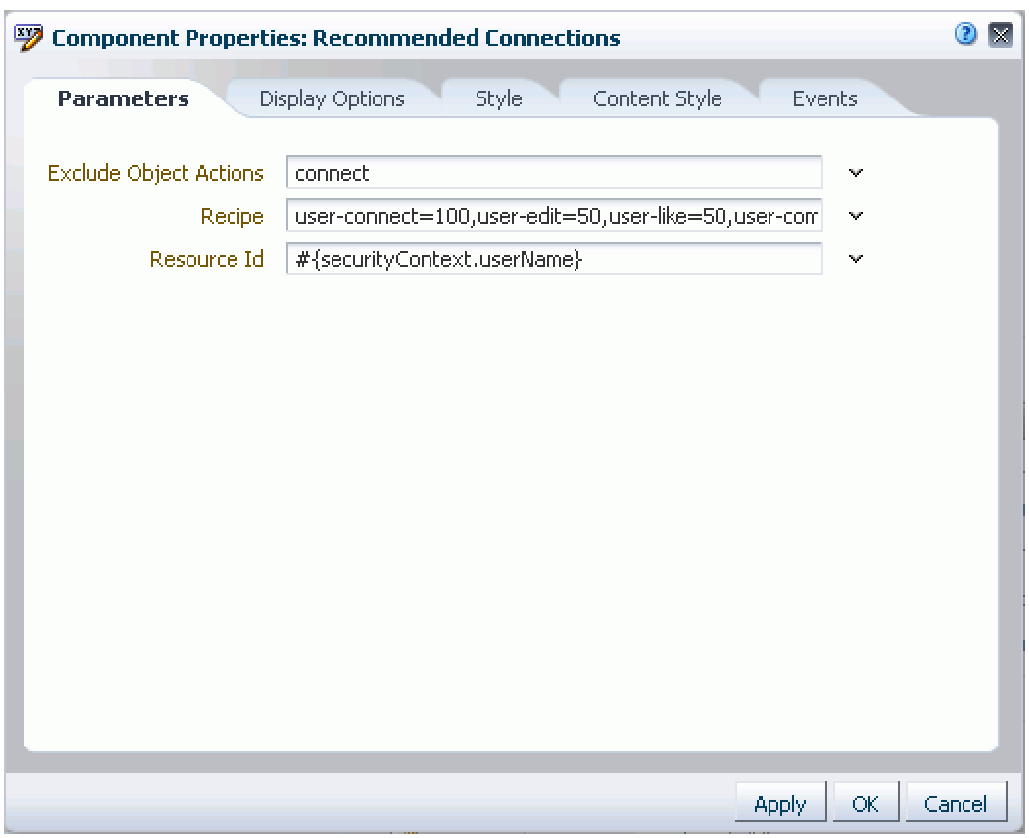
---

6. Click **OK**.

60.3 Setting Activity Graph Service Task Flow Properties

The Activity Graph service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 60–20).

Figure 60–20 Recommended Connections Task Flow - Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Activity Graph service task flows and describe the properties on the Parameters tab:

- Section 60.3.1, "What You Should Know About the Activity Graph Service Task Flow Properties"
- Section 60.3.2, "Activity Graph Service Task Flow Parameters"

60.3.1 What You Should Know About the Activity Graph Service Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 60.3.2, "Activity Graph Service Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

> **Note:** Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.
>
> EL validation is not performed on non-generic display options.

60.3.2 Activity Graph Service Task Flow Parameters

Table 60–1 describes the parameters that are unique to the Activity Graph service task flows.

Table 60–1 Activity Graph Service Task Flow Parameters

Parameter	Description	Task Flow
`Resource Id`	The ID of the person, space, or item to use as a context for recommendations. For connections, the default value is the expression language token for the logged in user. For spaces, the default value is the expression language token for the resource ID of the space containing the task flow. For items, the value is derived from the selection event using the EL expression `#{wcEventContext.events.WebCenterResourceSelected}`	Recommended Connections Similar Spaces Similar Items
`Class URN`	The class of the context. By default the information is derived from the selection event.	Similar Items
`Object Name`	The name of the space or item to use as a context for recommendations. For spaces, the default value is the expression language token for the resource ID of the space containing the task flow. For items, the default value is derived from the selection event.	Similar Spaces Similar Items
`Recipe`	A comma-separated list of registered similarity calculation = weight pairs. The list determines what recommendations appear and how they are ordered. For more information about the default recipes for Activity Graph task flows, see the section "Activity Graph Service Task Flows" in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.	Recommended Connections Similar Spaces Similar Items
`Class URN Restrictions`	A comma-separated list of the node classes to include in the recommendations. If non-null, then only objects from the given node classes are included in the recommendations.	Similar Items

Table 60–1 (Cont.) Activity Graph Service Task Flow Parameters

Parameter	Description	Task Flow
`Exclude Object Actions`	A comma-separated list of registered actions. The task flow will not show people, spaces, or items on which the logged in user took any of the listed actions.	Recommended Connections Similar Spaces Similar Items
`Service Id`	Used in conjunction with `resourceId`, and optionally `resourceType`, as an alternative to `classURN` for identifying the node class of an object.	Similar Items
`Resource Type`	Used in conjunction with `resourceId` and `serviceId`, as an alternative to classURN for identifying the node class of a WebCenter Portal object. For example `resourceType` is used by the Documents service to identify whether an object is a wiki, blog, or document.	Similar Items
`Suppress Popup`	Determines whether links in the task flow launch content in inline popups (`false`) or in browser windows (`true`). The default value is `false`.	Similar Items

Part XV

Services: Announcements through Links

Part XV of the User's Guide provides overview and usage information about services from Announcements through Links.

Part XV includes the following chapters:

- Chapter 61, "Working with the Announcements Service"
- Chapter 62, "Working with the Discussions Service"
- Chapter 63, "Working with the Events Service"
- Chapter 64, "Working with the Instant Messaging and Presence Service (IMP)"
- Chapter 65, "Working with the Links Service"

61

Working with the Announcements Service

This chapter describes how to use the features provided with the Announcements service. Announcements offer a quick, convenient way to create and distribute messages instantly or at a time you specify.

This chapter includes the following sections:

- Section 61.1, "What You Should Know About the Announcements Service"
- Section 61.2, "Working with Announcements Service Task Flows"
- Section 61.3, "Setting Announcements Service Task Flow Properties"

Audience

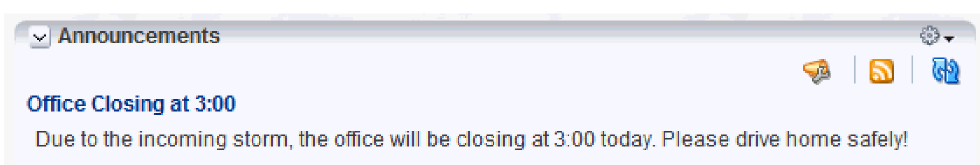
This chapter is intended for users who want to view, create, and manage space announcements. To perform announcement-related tasks, you must have appropriate permissions: `Create`, `Edit`, and `Delete Announcements`, `Create` and `Edit Announcements`, or `View Announcements`. For more information, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

> **Note:** Tasks discussed in this chapter are not available if the Announcements service is not enabled in the current space.

61.1 What You Should Know About the Announcements Service

The Announcements service provides the ability to post announcements about important activities and events to all authenticated users. For example, an application administrator can use this service to announce the availability of a new feature or the plan to shut down the application temporarily for maintenance (Figure 61–1).

Figure 61–1 Sample Announcement in the Announcements - Quick View Task Flow

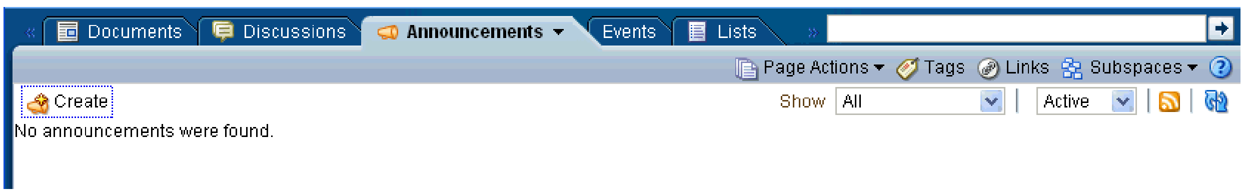


The Announcements service is integrated with many other services, such as Activity Stream, RSS, and Instant Messaging and Presence, and you can link announcements to other services, such as Events and Discussions. For example, suppose your company is announcing a new product. You can link from the announcement directly to a discussion forum, where potential customers can ask other customers about the product, or link to an instant messenger where customers can chat with a customer service representative about the product. With Oracle WebCenter Portal live search, announcement titles are searchable, and with Oracle Secure Enterprise Search, announcement titles and text *are* searchable.

In Spaces, announcements are scoped to the space where you create them. In Home space pages, announcements are scoped application-wide, to all logged-in (authenticated) users.

The **Announcements** page is added to spaces created with certain templates (Figure 61–2). The **Announcements** page is available in every space, provided the space is configured to display announcements. For information about enabling services in a space, see Section 53.10.1, "Enabling and Disabling Services Available to a Space."

Figure 61–2 The Announcements Page in a Space



61.2 Working with Announcements Service Task Flows

Both the Announcements and the Announcements - Quick View task flows display current announcements. The Announcements task flow additionally offers tools for managing announcements within the task flow. With the Announcements - Quick View task flow, you must click the **Open Announcement Manager** icon to manage announcements.

The Announcements - Quick View task flow includes numerous parameters to customize your view. For example, administrators can remove the link to the Announcement Manager. This lets you present announcements to end users where manage controls are not needed. The task flow lists 10 announcements by default, but you can change this number and change how much of the announcement is displayed. The **More Announcements** link launches a popup containing the complete list of all announcements with pagination behavior. This is called the Extended Quick View (or Extended Mini View).

Depending on the privileges you have on the page, you can perform some or all tasks described in this section:

- View announcements in the Announcements task flow—All participants in Home spaces and space moderators
- Create announcements—All participants
- Edit announcements—Creator of the announcement, discussions server administrators in Home spaces, and space moderators
- Delete announcements—Discussions server system administrators in Home spaces and space moderators

This section contains the following subsections:

- Section 61.2.1, "Adding an Announcements Service Task Flow to a Page"
- Section 61.2.2, "Working with the Announcements Task Flow"

- Section 61.2.3, "Working with the Announcements - Quick View Task Flow"
- Section 61.2.4, "Sending Mail from an Announcement"
- Section 61.2.5, "Linking Announcements"

61.2.1 Adding an Announcements Service Task Flow to a Page

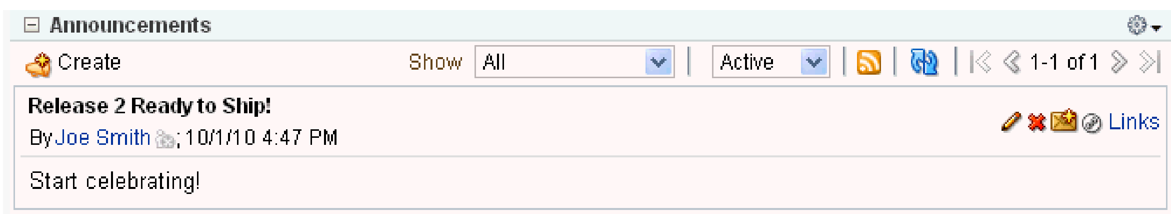
For the steps to add an Announcements service task flow to a page, see Section 18.5, "Adding a Component to a Page."

Notes:

- You cannot add an Announcements task flow to the Home space page. The Announcements task flow only displays in the component catalog if you have `manage` privilege and if you are adding content in a space page. By default, this privilege is available to a space moderator.
- All instances of the Announcements task flow in an application run against the same back-end server and therefore, it serves no purpose to add multiple Announcements task flow instances.

The Announcements task flow is displayed on your page, as shown in Figure 61–3.

Figure 61–3 Announcements Task Flow



Users with Edit privileges can access the task flow's region parameter through the Component Properties dialog in Composer to specify the ID of the discussion forum under which announcements must be created.

For information about accessing the Component Properties dialog and editing properties, see Section 61.3, "Setting Announcements Service Task Flow Properties."

Note: The Announcements - Quick View task flow opens in a space, regardless of the discussion forum ID specified.

For more information about setting task flow properties, see Section 61.3, "Setting Announcements Service Task Flow Properties."

61.2.2 Working with the Announcements Task Flow

The Announcements task flow not only provides the tools to create, edit, and delete announcements, it also provides controls for determining when an announcement is published and when it expires and is consequently removed from the task flow. It provides **Show** lists, which you can use to personalize your view of announcements. After you create an announcement, you are offered the option to mail or link the announcement.

Depending on the privileges you have on the page and whether the required services are configured in your application, you may see only a subset of these options in the Announcement Manager. For example, the **Delete** icon is displayed only to users with `manage` privilege.

This section provides information about viewing, creating, and managing announcements through the Announcements task flow. Discussions server administrators in Home spaces and space moderators can access the Announcements task flow.

This section contains the following subsections:

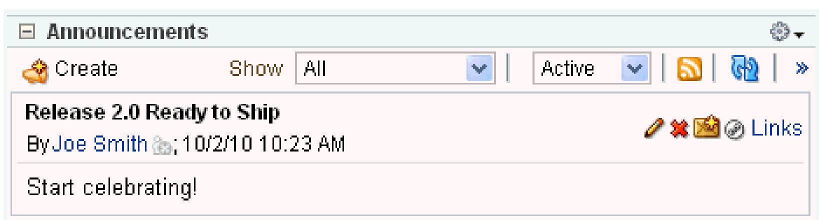
- Section 61.2.2.1, "Viewing Announcements in the Announcements Task Flow"
- Section 61.2.2.2, "Adjusting Your View of the Announcements"
- Section 61.2.2.3, "Creating an Announcement"
- Section 61.2.2.4, "Editing Announcements"
- Section 61.2.2.5, "Deleting an Announcement"

61.2.2.1 Viewing Announcements in the Announcements Task Flow

To view announcements in the Announcements task flow, either select the Announcements task flow on a page, or select the **Announcements** page.

Figure 61–4 shows an announcement in the Announcements task flow.

Figure 61–4 An Announcement in the Announcements Task Flow



If **Announcements** is not available, then in the space administration settings, display the **Services** page. On the **Services** page, select **Announcements**. For more information, see Chapter 53, "Managing a Space."

> **Tip:** The way you access this page depends on the page template in use. For example, in a side navigation template, you may access it through a **Manage** menu.
>
> You can also navigate to this page using the direct URL provided in Section A.5, "User Interface URLs for Space Pages."

61.2.2.2 Adjusting Your View of the Announcements

You can customize your own view of the Announcements task flow, which does not affect other users' view of announcements. All users who can view the Announcements task flow can customize it.

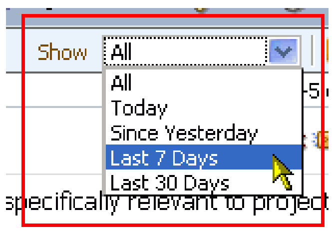
A **Show** list provides options for displaying only those announcements that were created within a selected time range. Choose from displaying all announcements to displaying only those created today, since yesterday, and so on—up to 30 days. For example, you may select the option **Today** from the **Show** menu, and only those announcements posted today display in the task flow.

Another **Show** list provides options to display current, future or expired announcements.

To adjust your view of the Announcement Manager:

1. Go to the application page that contains the Announcements task flow.
2. In the task flow, expand the **Show** menu and select from the listed display options (Figure 61–5).

Figure 61–5 Show Menu on Announcements



Select:

- **All**— To display all available announcements.
- **Today**—To display only today's announcements.
- **Since Yesterday**—To display today and yesterday's announcements.
- **Last 7 Days**—To display all announcements made in the last seven days.
- **Last 30 Days**—To display all announcements made in the last 30 days.

The Announcements task flow refreshes and displays the announcements that match your selection.

3. Expand the other dropdown list to show active, future or expired announcements (Figure 61–6).

Figure 61–6 Active, Future or Expired Announcements

Table 61–1 shows what different combinations of these **Show** lists display.

Table 61–1 Announcements Displayed Based on Show Lists

Days Range	Announcement Type	Display Result
All	Active	All announcements as of today
Today	Active	All announcements with a start date of today.
Since Yesterday	Active	All announcements with a start date as of yesterday.
Last 7 Days	Active	All announcements for the last seven days.
Last 30 Days	Active	All announcements for the last 30 days.
All	Future	All announcements scheduled for a later date.
Today	Future	All announcements scheduled for a later date.
Since Yesterday	Future	All announcements scheduled for a later date.

Table 61–1 (Cont.) Announcements Displayed Based on Show Lists

Days Range	Announcement Type	Display Result
Last 7 Days	Future	All announcements scheduled for a later date.
Last 30 Days	Future	All announcements scheduled for a later date.
All	Expired	All expired announcements.
Today	Expired	No announcements.
Since Yesterday	Expired	All expired announcements as of yesterday.
Last 7 Days	Expired	All expired announcements for the last seven days.
Last 30 Days	Expired	All expired announcements for the last 30 days.

61.2.2.3 Creating an Announcement

Create an announcement to distribute information to all members of an application or a space in one operation. For example, if you are an administrator and want to shut down the application for maintenance, you can create an announcement to inform all application users about the down time. On the publication date you specify while creating the announcement, the announcement appears in the Announcements and Announcements - Quick View task flows, and on the Activity Stream.

In WebCenter Portal: Spaces, all participants can create announcements.

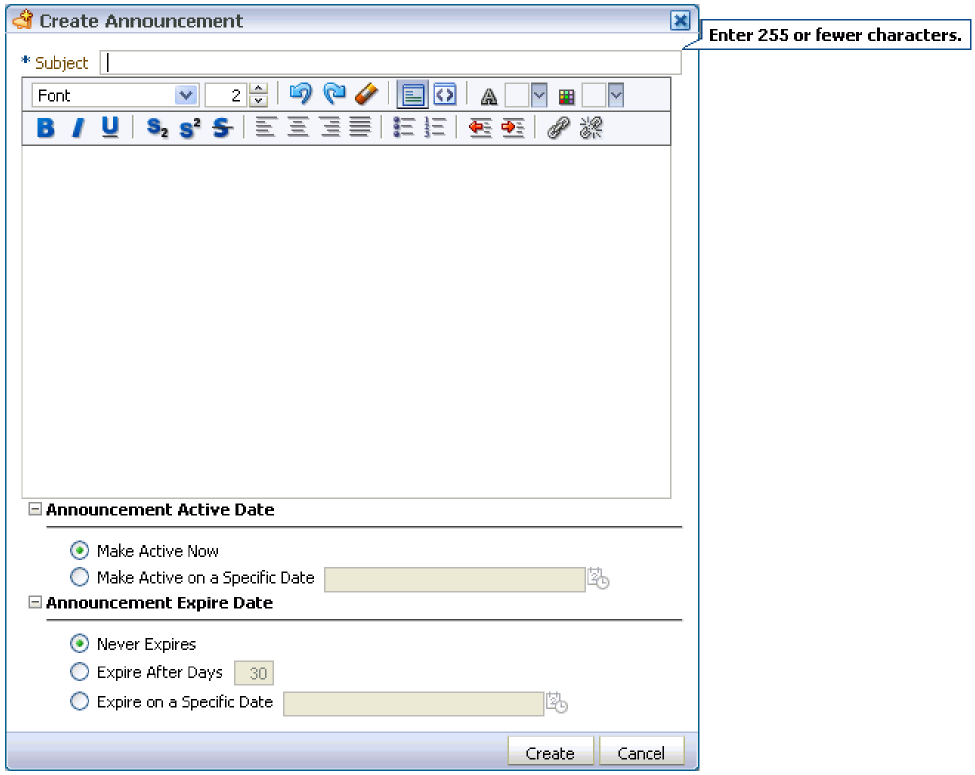
To create a new announcement:

1. Access the Announcements task flow, access the **Announcements** page, or open the Announcement Manager from the Announcements - Quick View task flow. For more information, see Section 61.2.2.1, "Viewing Announcements in the Announcements Task Flow."
2. Click **Create** (Figure 61–7).

Figure 61–7 Create an Announcement

The Create Announcement dialog opens (Figure 61–8).

Figure 61–8 The Create Announcement Dialog



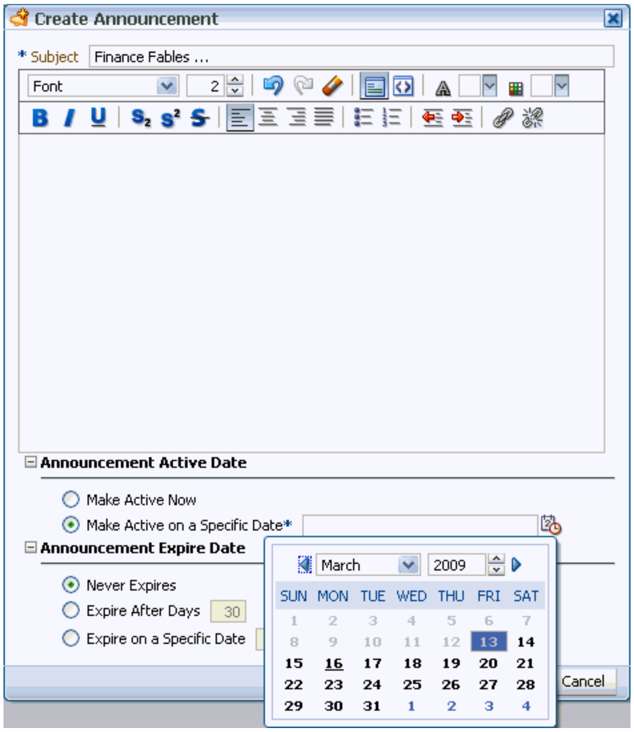
3. In the **Subject** field, enter a heading for the announcement.
4. In the message body text box, enter the text of the announcement.

   The message body is provided through the rich text editor. You can style the announcement with colors, special fonts, and images. For information about rich text editor controls, see the online help.

   Styling information is applied when the announcement is configured with the `Content View Only` region parameter set to `true`. For more information, see Section 61.3, "Setting Announcements Service Task Flow Properties."
5. Under **Announcement Active Date**, select:
   - **Make Active Now** — To post the announcement immediately (the default option)
   - **Make Active on Specific Date** — To select a date and time to post the announcement

     Click the **Select Date** icon to the right of the text field to open the **Select Date** pop-up calendar (Figure 61–9).

Figure 61–9 The Select Date Pop-Up Calendar



In the calendar, click a date to select it. The current date is marked by a solid box.

Alternatively, use the controls at the top of the calendar to select a month and year for publication.

After you select a date, the calendar closes.

6. Under **Announcement Expire Date**, select:

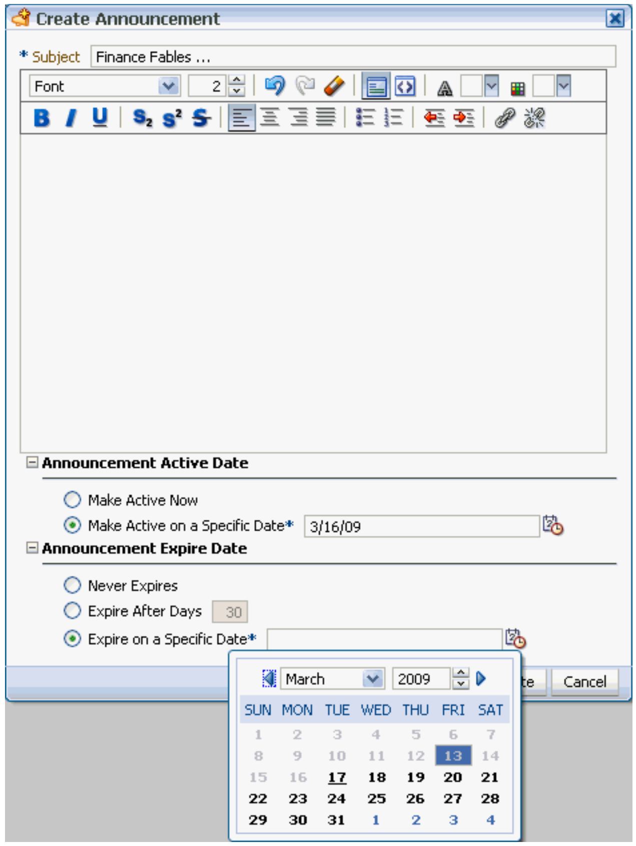
   - **Never Expires** — To post the announcement indefinitely (the default option)
   - **Expire After Days** — To specify the number of days the announcement is active

     Enter the number of days to display the announcement.

   - **Expire on a Specific Date** — To set the date and time to expire and remove the announcement

     Click the **Select Date** icon next to the text field to open the **Select Date** pop-up calendar (Figure 61–10).

Figure 61–10 The Select Date and Time Icon



In the calendar, only those dates after the publication date are enabled for selection.

7. Click **Create** to create the announcement.

   If you chose to post the announcement immediately, then the new announcement appears in following locations: in any Announcements task flow included on a page, on the Activity Stream, and at the top of the list of announcements in the Announcements - Quick View task flow.

61.2.2.4 Editing Announcements

After you have created an announcement, you easily can modify it. For example, if the details of an announcement change, or you want to change the font or color of the announcement text, you can quickly make these changes using the Announcement Manager. You can change an announcement's title, content and expiration date. However, you cannot change its publication date, which is the date on which the announcement is made active (Announcement Active Date).

Note: To change an announcement's publication date, you must delete the announcement, and re-create it with the correct publication date. For information about deleting an announcement, see Section 61.2.2.5, "Deleting an Announcement." For information about creating an announcement, see Section 61.2.2.3, "Creating an Announcement."

You can edit an announcement only if you created that announcement or have been granted privileges to do so. Typically, space moderators have privileges to edit all announcements in the Announcements task flow.

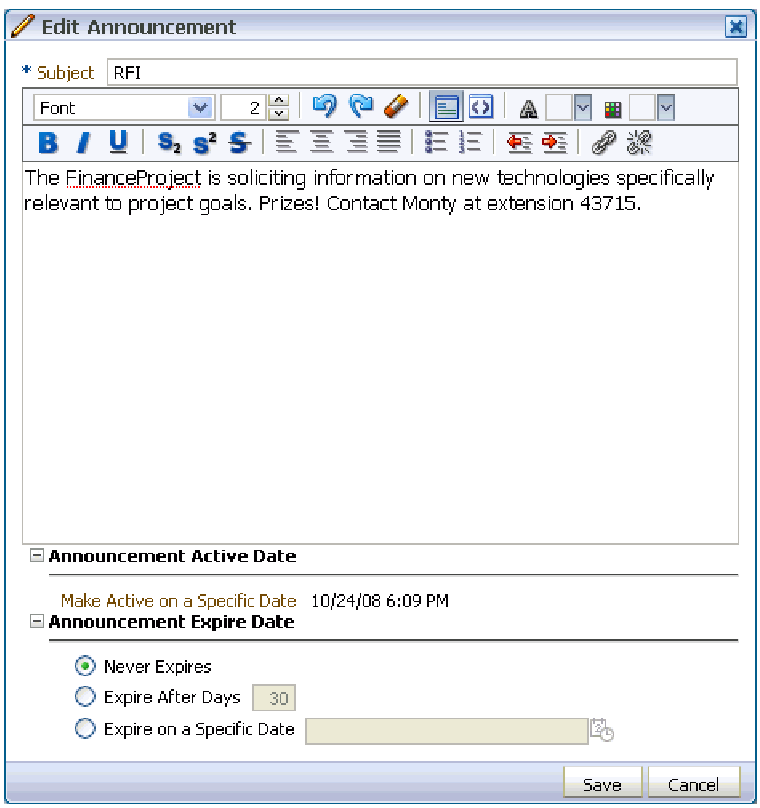
To edit an announcement:

1. Open the Announcements task flow. For information, see Section 61.2.2.1, "Viewing Announcements in the Announcements Task Flow."
2. Click the **Edit Announcement** icon (Figure 61–11) on the announcement you want to edit.

Figure 61–11 Edit Announcement Icon

The Edit Announcement dialog opens (Figure 61–12).

Figure 61–12 The Edit Announcement Dialog



3. Make the changes you want to the announcement. For example, you can change the text of the announcement, or modify its look and feel.

   The Edit Announcement dialog provides rich text editor controls for styling announcement text. For information on rich text editor controls, see the online help.

You can change an announcement's title and content and, also its expiration date. However, you cannot change its publication date.

4. Click **Save** to save your changes and close the dialog.

61.2.2.5 Deleting an Announcement

After you've created an announcement, you can delete it if you are a space moderator. Other users do not have privileges to delete announcements.

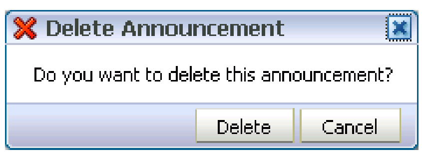
To delete an announcement:

1. Open the Announcements task flow. For information, see Section 61.2.2.1, "Viewing Announcements in the Announcements Task Flow."
2. Click the **Delete Announcement** icon on the announcement you want to delete (Figure 61–13). This icon only displays if you have the appropriate privileges.

Figure 61–13 The Delete Announcement Icon on an Announcement

3. In the Delete Announcement dialog (Figure 61–14), click **Delete** to delete the announcement and close the dialog.

Figure 61–14 Delete Announcement Dialog



The selected announcement is removed from the Announcements task flow, the Announcements - Quick View task flow, and the Activity Stream.

61.2.3 Working with the Announcements - Quick View Task Flow

The Announcements - Quick View task flow is essentially a viewer for convenient access to current announcements. More robust features, for such actions as creating and editing announcements, are offered in the Announcements task flow (see Section 61.2.2).

By default, announcements in the Announcements - Quick View task flow show announcement titles as links. But you can configure the task flow to display only announcement titles, titles with some amount of content, or only content.

This section contains the following subsections:

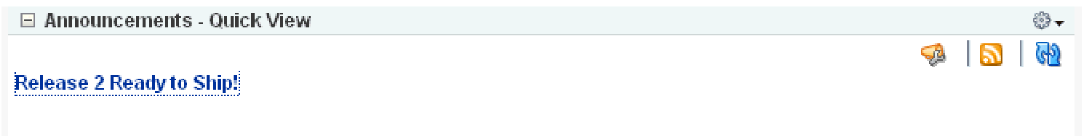
- Section 61.2.3.1, "Viewing Announcements in the Quick View Task Flow"
- Section 61.2.3.2, "Managing Announcements in the Quick View Task Flow"

61.2.3.1 Viewing Announcements in the Quick View Task Flow

The Announcements - Quick View task flow provides a read-only view of announcements. To view announcements in an Announcements - Quick View task flow:

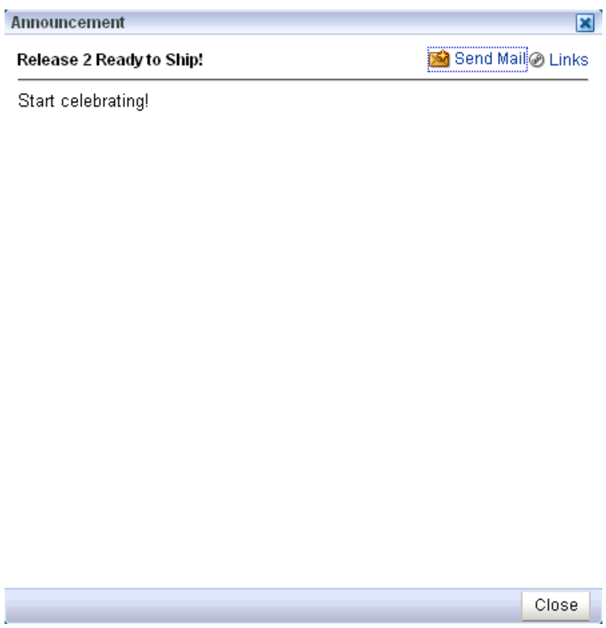
1. In the **Announcements - Quick View** task flow, click the announcement you want to view (Figure 61–15).

Figure 61–15 The Announcements - Quick View Task Flow



The announcement details display in the Announcement dialog (Figure 61–16). Similar to the announcement content displayed in the Announcements task flow, this dialog displays content with all the formatting that was applied to it

Figure 61–16 Announcement Accessed from Quick View Task Flow



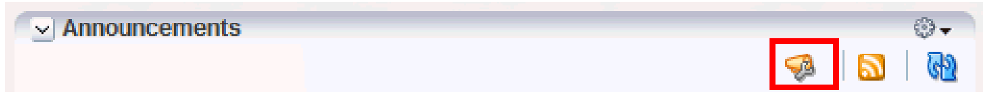
2. Click **Close** to exit the dialog.

61.2.3.2 Managing Announcements in the Quick View Task Flow

You can manage announcements in the Announcements - Quick View task flow with the Announcement Manager. The Announcement Manager provides the functionality in the Announcements task flow.

Administrators can remove the link to the Announcement Manager. If your administrator allows this functionality, then you see the **Open Announcement Manager** icon (Figure 61–17). The Announcement Manager lets you create, edit, delete, mail, and link announcements.

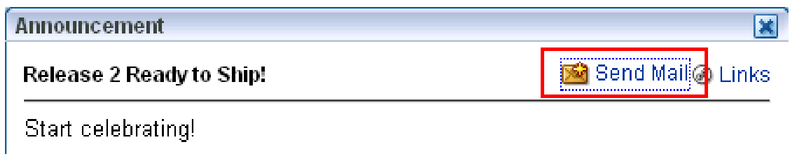
Figure 61–17 Open Announcement Manager Icon



61.2.4 Sending Mail from an Announcement

Each announcement in the Announcements or Announcements - Quick View task flow has an associated **Send Mail** icon in its toolbar (Figure 61–18). Click the **Send Mail** icon to initiate a mail message containing the announcement text, location, author, and date it was created. This feature makes it easy for you to communicate interesting announcements to others.

Figure 61–18 Send Mail Icons on Announcement Headers



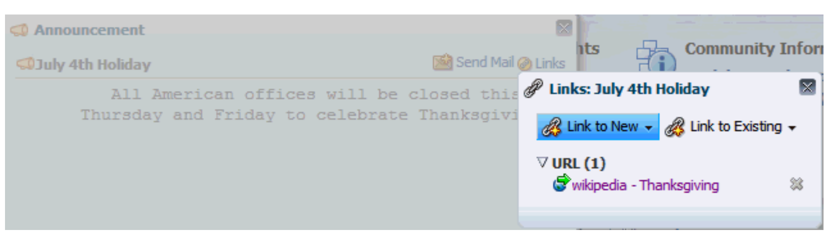
The WebCenter Portal administrator determines the mail client to use with the **Send Mail** icon. If a local mail client was set, then a plain text message opens. If WebCenter Portal's Mail service was set as the mail client, then the HTML Mail Compose dialog opens. With either mail client, you can add or edit the standard, prepopulated message before sending.

61.2.5 Linking Announcements

Each announcement in the Announcement Manager or Announcements task flow has an associated **Links** icon in its toolbar to link other objects to the announcement. For example, you can link an announcement to a *new* discussion, document, event, note or URL, or you can link an announcement to an *existing* announcement, discussion, document, or event.

The **Links** icon displays to all users accessing the Announcements and Announcement Manager task flows, if the Links service is configured in the application (Figure 61–19).

Figure 61–19 Links Icon with Announcements

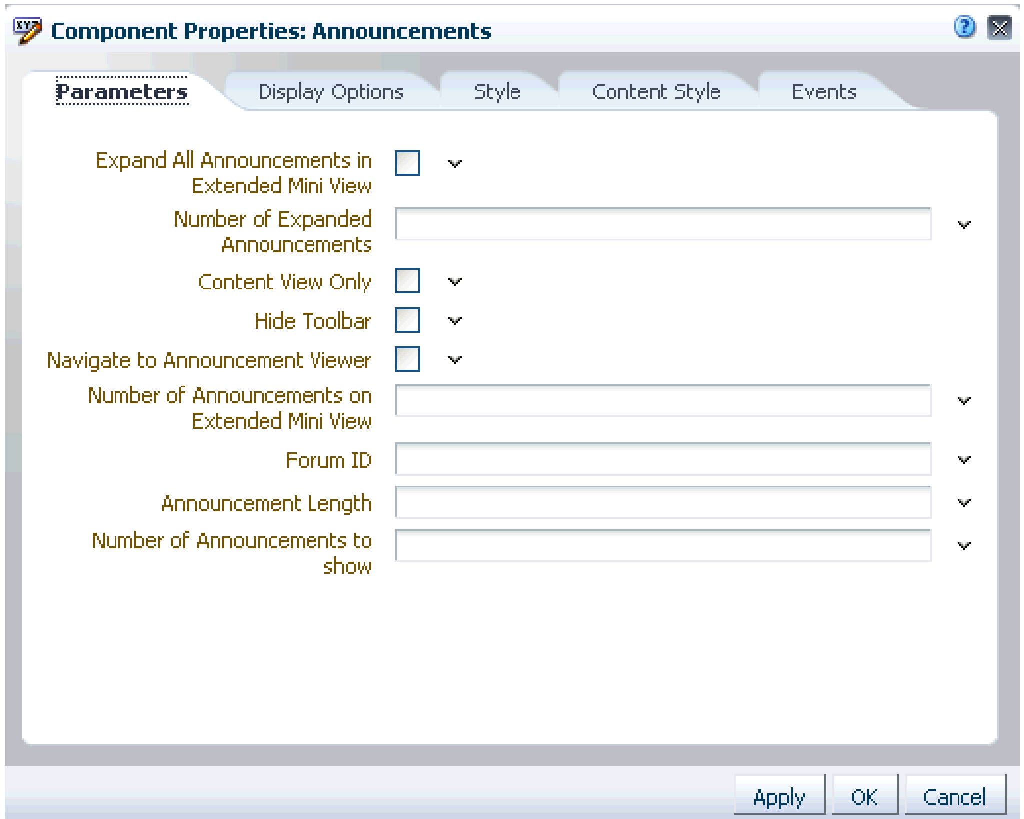


For more information, see Chapter 65, "Working with the Links Service."

61.3 Setting Announcements Service Task Flow Properties

The Announcements service task flows have associated properties, which users with sufficient privileges can access from the Component Properties dialog in Oracle Composer (Figure 61–20).

Figure 61–20 Announcements Task Flow Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Announcements service task flows and describe the properties on the **Parameters** tab.

- Section 61.3.1, "What You Should Know About the Announcements Service Task Flow Properties"
- Section 61.3.2, "Announcements Service Task Flow Parameters"

61.3.1 What You Should Know About the Announcements Service Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 61.3.2, "Announcements Service Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So this tab may be omitted. For more information, see Section 18.6.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

61.3.2 Announcements Service Task Flow Parameters

Table 61–2 describes the properties that are unique to the Announcements task flows.

Table 61–2 Announcements Service Task Flow Parameters

Parameter	Description	Task Flow
`Expand All Announcements in Extended Mini View`	Select to display details for all announcements in the extended quick view. The default value is deselected, in which case announcements display the announcement title only.	Announcements - Quick View
`Number of Expanded Announcements`	The number of announcements to display announcement details. Announcements exceeding this value display the announcement title only. Use only when `Content View Only` is deselected. Express values using the following formats: ■ **Constant**—Express a constant value, such as `2` or `5`. ■ **Page parameter**—Enter a page parameter to grab the value from the page on which the task flow is placed. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components." ■ **EL expression**—The default. Enter an Expression Language (EL) expression.	Announcements - Quick View
`Content View Only`	Select to remove the announcement title and display just the announcement content. Leave unchecked to render the title. When selected, the values for `Announcement Length` and `Number of Expanded Announcements` are ignored.	Announcements - Quick View
`Hide Toolbar`	Hides the Announcements toolbar.	Announcements - Quick View
`Navigate to Announcement Viewer`	Select to navigate to the announcement resource. Default behavior (deselected) is to launch in a popup.	Announcements - Quick View
`Number of Announcements on Extended Mini View`	The number of announcements to show in a page on extended mini view.	Announcements - Quick View

Table 61–2 (Cont.) Announcements Service Task Flow Parameters

Parameter	Description	Task Flow
`Forum ID`	The ID of the forum under which announcements are created in the back-end discussions server.	Announcements - Quick View
	In WebCenter Portal: Spaces, this property is blank by default. However, internally it maps to the forum ID associated with the current space. For Home spaces, global (system) announcements are returned. You can edit this property to specify a different forum ID.	Announcements
`Announcement Length`	The number of characters to show in announcement details. Use only when `Content View Only` is deselected. If no value is specified, then WebCenter Portal displays 200 characters. This parameter takes effect with `Number of Expanded Announcements`. Express values using the following formats: ■ **Constant**—Express a constant value, such as `200` or `500`. ■ **Page parameter**—Enter a page parameter to grab the value from the page on which the task flow is placed. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components." ■ **EL expression**—The default. Enter an Expression Language (EL) expression. The value you enter for `Announcement Length` is ignored if `Content View Only` is selected.	Announcements - Quick View
`Number of Announcements to Show`	The number of announcements to show on the quick view.	Announcements - Quick View

62

Working with the Discussions Service

This chapter describes how to use the features provided through the Discussions service. The Discussions service provides a means of creating and participating in text-based discussions with other members of a space. Use Discussions service task flows to create forums, post questions, and search for answers. Discussion forums additionally provide the means to preserve and revisit discussions.

This chapter includes the following sections:

- Section 62.1, "What You Should Know About the Discussions Service"
- Section 62.2, "Working with Discussions Service Task Flows"
- Section 62.3, "Setting Discussions Service Task Flow Properties"

Audience

This chapter is intended for users who want to view, create, and manage space discussion forums and topics. To perform discussion-related tasks, you must have appropriate permissions: `Create`, `Edit`, and `Delete Discussions`, `Create` and `Edit Discussions`, or `View Discussions`. For more information, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

Note: Tasks discussed in this chapter are not available if the Discussions service is not enabled in the current space.

62.1 What You Should Know About the Discussions Service

You can use the Discussions service to post, respond to, and preserve topical information in discussion forums scoped to spaces or to entire applications. Users post topics to a discussion forum, and other users post information relevant to those topics. All of this information is preserved within the forum.

The back-end server that provides the Discussion service (Oracle WebCenter Portal's Discussion Server) manages content in a hierarchy. At the top of the hierarchy are *categories*, below that are *forums*, and then *topics*. Where categories are exposed in your application, authorized users can create multiple forums within a given scope and multiple topics under those forums. Where categories are not exposed, authorized users can create multiple topics under one forum within a given scope.

A new space is assigned a single discussion forum by default. Space moderators can allocate multiple forums to a space if required, as described in Section 6.2, "Configuring Discussion Forum Options for the Spaces Application." However, only users who are system administrators on Oracle WebCenter Portal's Discussion Server can switch from a single forum to multiple forums in a space.

The Discussions service is scoped to spaces. That is, you can create forums and topics only within the context of a space. You can view and participate in discussions in both spaces and Home spaces, depending on your application permissions.

Access to discussions is influenced by application security. The Spaces application is, by default, a secure application. Users can access discussions according to the permissions they are granted by their specific user roles within a given space.

Scoping additionally limits the users who can view and participate in discussions. For example, only members of the *Finance* space can view discussions that transpire in *Finance* space forums.

To expose a discussion forum to a specific set of users, you must add just those users as members of the space where you hold the forum (for more information, see Section 53.14.4, "Granting Spaces Users Access to a Space"). To open a discussion to all users, you must create a publicly-accessible space (for more information, see Section 53.14.5, "Granting Public Access to a Space").

Most Discussions service task flows provide configuration settings for specifying which forum content to show. This is of particular use in Home spaces, which exist outside a specific space scope (for more information, see Section 62.3, "Setting Discussions Service Task Flow Properties").

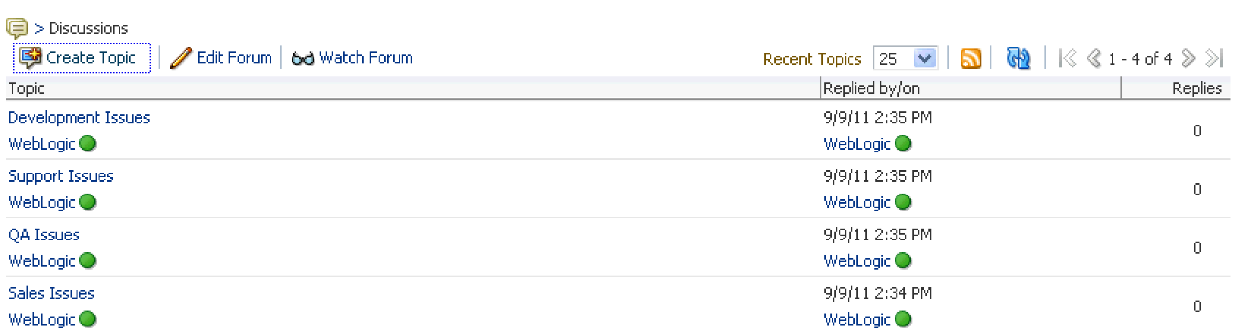
Note: You can add a Discussions task flow to your page from the Catalog dialog in Oracle Composer. For information about adding a task flow, see Section 18.5, "Adding a Component to a Page."

However, all instances of the Discussions task flow in an application run against the same back end and it serves no purpose to add multiple Discussions task flow instances. This is true for all service task flows that require connections to back-end servers, for example, task flows from IMP, Announcements, and Mail services.

The Discussions service provides a wide variety of task flows for viewing and participating in discussions. These include:

- **Discussion Forums** provides controls for creating discussion forums; creating, replying to, and managing discussion forum topics; and selecting watched forums and watched topics (Figure 62–1).

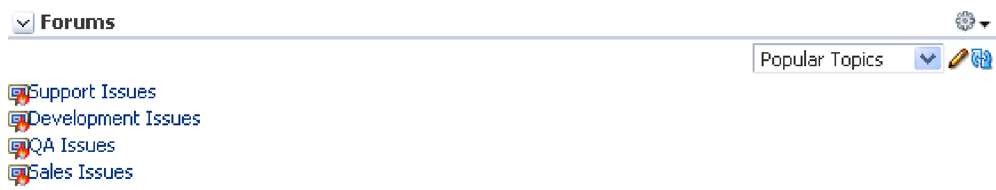
Figure 62–1 Discussion Forums Task Flow



In WebCenter Portal: Spaces, the Discussion Forums task flow is additionally exposed on a **Discussions** page. You cannot add Discussion Forums to a Home space.

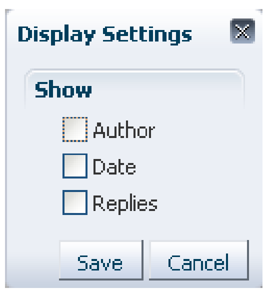
- **Forums - Quick View** provides a means of accessing all possible views of a particular space's discussions: Recent Topics, Popular Topics, Watched Topics, and Watched Forums (Figure 62–2).

Figure 62–2 Forums - Quick View



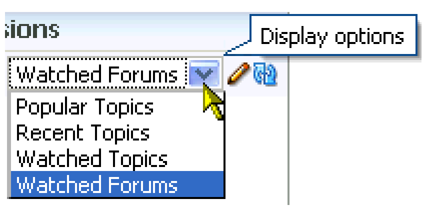
The Forums - Quick View task flow also provides controls for determining the data to show in addition to the forum or topic title. Click the **Personalize** icon (pencil) in the task flow toolbar to open the Display Settings (Figure 62–3).

Figure 62–3 Display Settings Dialog



The available display settings vary according to the option currently selected on the task flow **Display Options** menu (Figure 62–4).

Figure 62–4 Display Options Menu (Forums - Quick View)



For example, when Recent Topics is selected on the menu, the Display Settings dialog offers the options **Author**, **Date**, and **Replies**. When the task flow displays Watched Forums, the Display Settings dialog offers the options **Date** and **Topics**.

The Forums - Quick View task flow is available for placement on any application page, regardless of whether the page is scoped to a Home space or space.

- **Popular Topics** (Figure 62–5) provides a look at the most frequently viewed discussion topics in all the discussion forums in a given space.

Figure 62–5 Popular Topics Task Flow

The Popular Topics task flow also provides controls for determining the data to show in addition to the topic title. Click the **Personalize** icon in the task flow header to open a panel with controls for selecting the type of additional data to show (Figure 62–6).

Figure 62–6 Show Panel in a Popular Topics Task Flow

The Popular Topics task flow is available for placement on any application page, regardless of whether the page is scoped to a Home space or space.

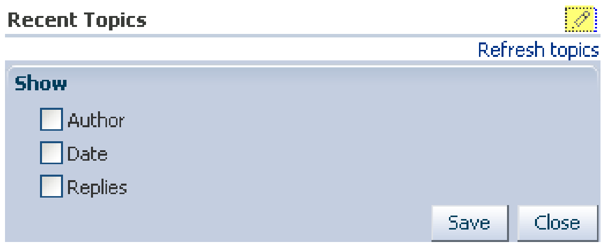
- **Recent Topics** (Figure 62–7) provides a look at the most recently accessed discussion topics in all the discussion forums in a given space.

Figure 62–7 Recent Topics Task Flow

Access to space discussion topics is restricted to those spaces of which you are a member.

The Recent Topics task flow also provides controls for determining the data to show in addition to the topic title. Click the **Personalize** (pencil) icon in the task flow header (Figure 62–8) to open a panel with controls for selecting the type of additional data to show.

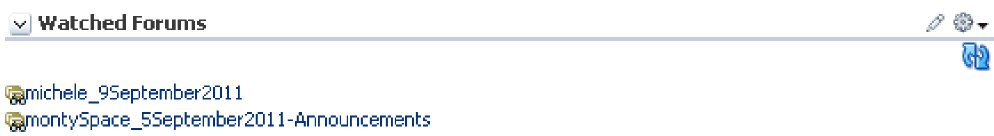
Figure 62–8 Show Panel in a Recent Topics Task Flow



The Recent Topics task flow is available for placement on any application page, regardless of whether the page is scoped to a Home space or space.

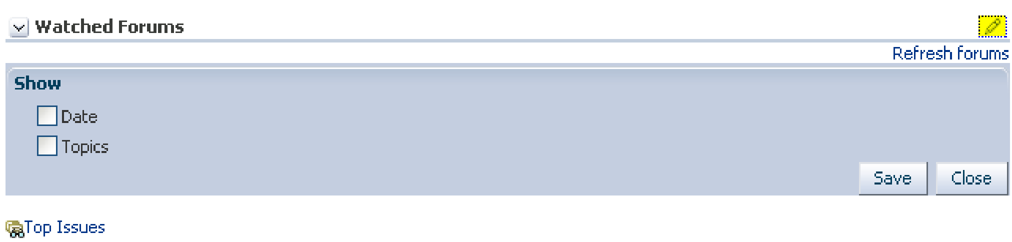
- **Watched Forums** (Figure 62–9) provides a means of viewing all discussion forums you have selected to watch from a particular space or from all spaces.

Figure 62–9 Watched Forums Task Flow



The Watched Forums task flow also provides controls for determining the data to show with the topic title. Click the **Personalize** icon in the task flow header (Figure 62–10) to open a panel with controls for specifying the type of additional data to show. See Section 62.2.4, "Watching Forums and Topics."

Figure 62–10 Show Panel in a Watched Forums Task Flow



The Watched Forums task flow is available for placement on any application page, regardless of whether the page is scoped to a Home space or space.

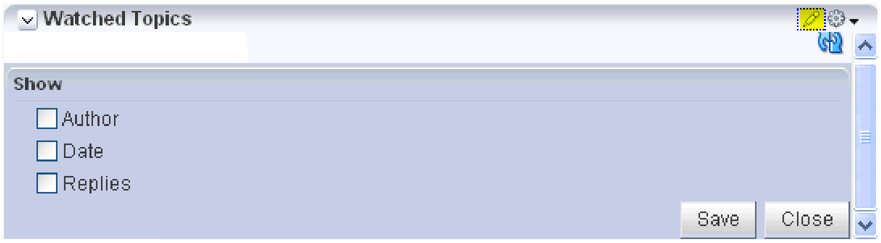
- **Watched Topics** (Figure 62–11) provides a cohesive view of all the topics you have selected to watch from a particular space or from all spaces.

Figure 62–11 Watched Topics Task Flow

The Watched Topics task flow also provides controls for determining the data to show with the topic title. Click the **Personalize** icon in the task flow header

(Figure 62–12) to open a panel with controls for specifying the type of additional data to show. See Section 62.2.4, "Watching Forums and Topics."

Figure 62–12 Show Panel in a Watched Topics Task Flow



The Watched Topics task flow is available for placement on any application page, regardless of whether the page is scoped to a Home space or space.

Note: All instances of the Mail task flow in an application run against the same mail server and it serves no purpose to add multiple Mail task flow instances. This is true for all service task flows that require connections to back-end servers, for example, task flows from Announcements, Mail, and IMP services.

The Discussions service is tightly integrated with other services, such as Links and Mail. For example, all mail sent to a space distribution list can additionally be posted to that space's default discussion forum. The space moderator must select **Monitor Incoming Mail** in the space settings for the Discussions service (see Section 53.10.4, "Publishing Space Mail in a Discussion Forum"). Every discussion topic provides the opportunity to link from the topic to another space item, such as a document or an announcement. (For information about the Mail service, see Chapter 67, "Working with the Mail Service." For information about the Links service, see Chapter 65, "Working with the Links Service.")

62.2 Working with Discussions Service Task Flows

The Discussions service task flows expose all of the functionality available from the Discussions service. The Discussion Forums is the most feature-rich task flow, providing controls for creating and managing discussion forums and posting and managing discussion topics and replies. The other task flows are useful windows into discussion forum content. They provide different views of the discussion forums and topics available to a particular space or all spaces.

Note: For information about configuring a Discussions service task flow to display the discussions from a particular space or from all spaces, see Section 62.3, "Setting Discussions Service Task Flow Properties."

Most of the subsections in this section describe tasks you can accomplish through the Discussion Forums task flow. When you can use other task flows to perform the described actions, this is noted.

This section contains the following subsections:

- Section 62.2.1, "Adding a Discussions Service Task Flow to a Page"

- Section 62.2.2, "Creating and Managing Forum Topics and Replies"
- Section 62.2.3, "Showing and Hiding Additional Discussion Forum Information"
- Section 62.2.4, "Watching Forums and Topics"
- Section 62.2.5, "Sending Mail from Discussion Topics"
- Section 62.2.6, "Creating a Discussion Forum"
- Section 62.2.7, "Editing the Forum Name and Description"

62.2.1 Adding a Discussions Service Task Flow to a Page

To add a Discussions service task flow to a page in a Spaces application:

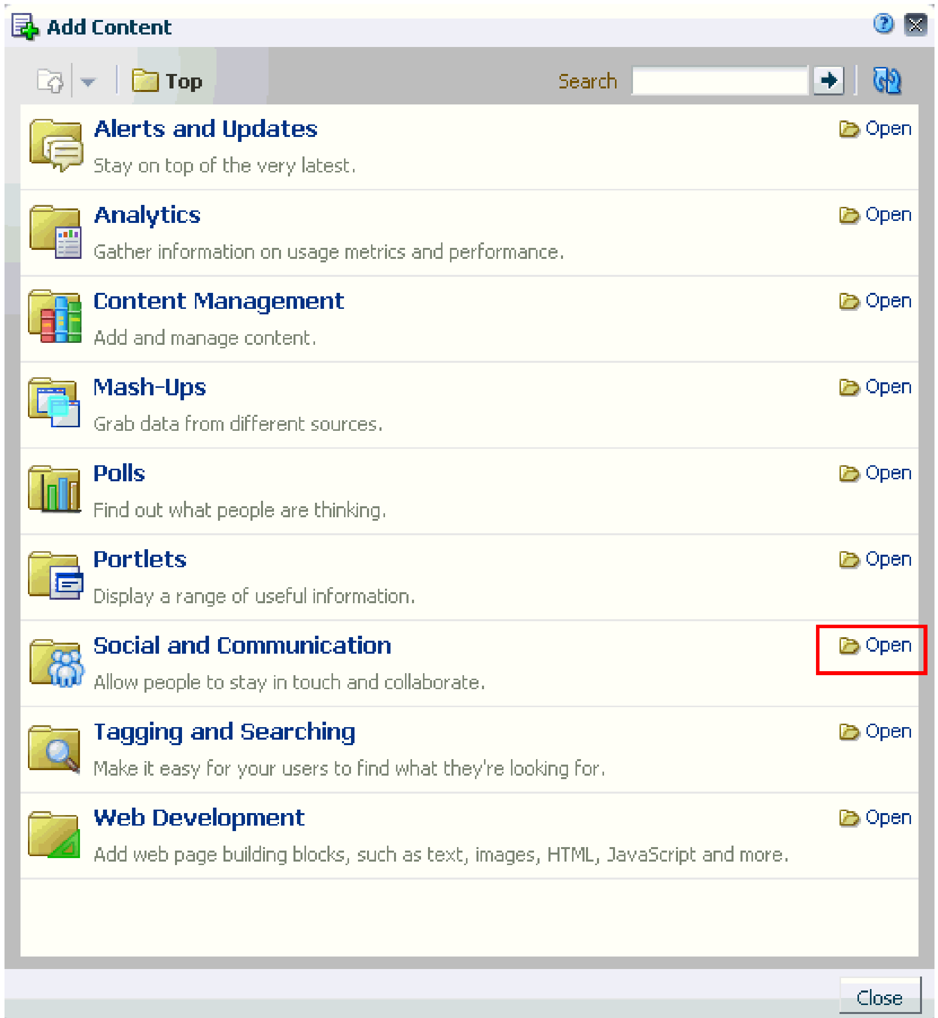
1. Open the page in edit mode.

   See Also: For more information, see Section 18.1, "Entering and Exiting Composer."

2. Click **Add Content** in the target region to open the Resource Catalog.
3. Navigate to the section of the Resource Catalog that provides access to the discussions task flows.

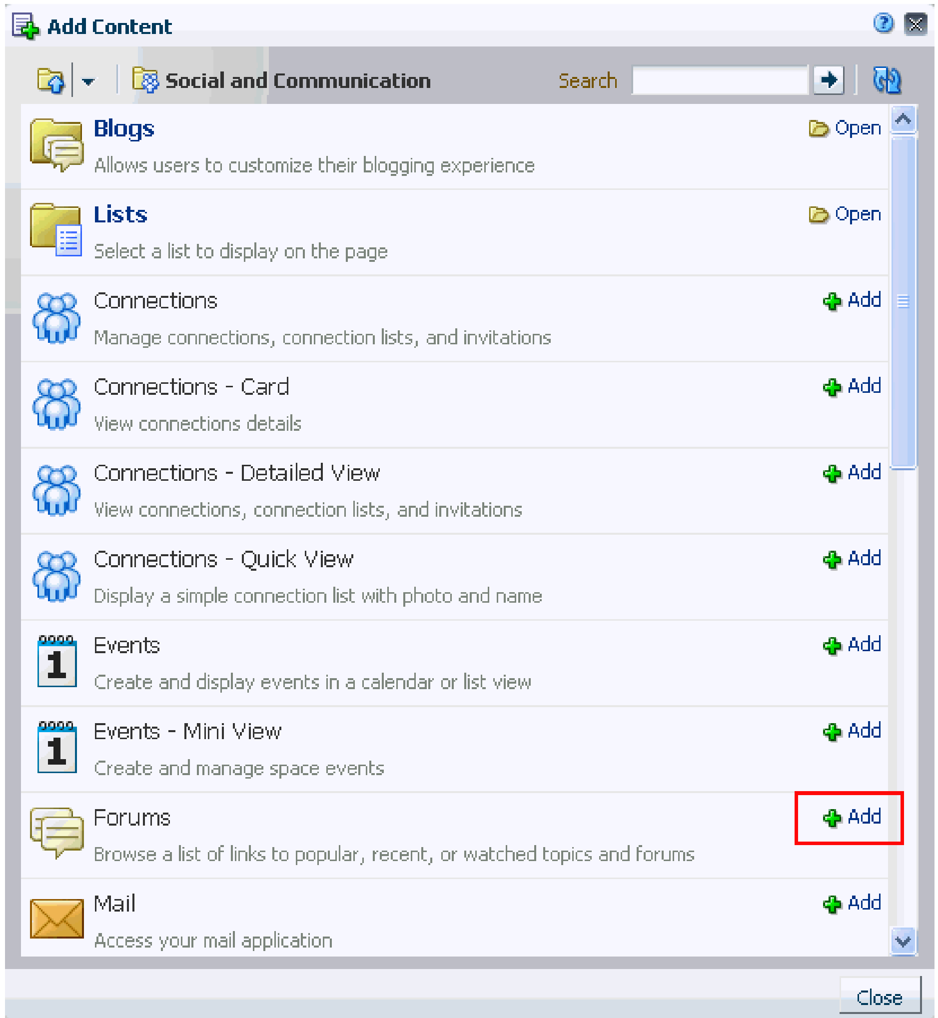
   Tip: The presence or location of this section depends on how the Resource Catalog is configured. In the default Resource Catalog, next to **Social and Communication**, click **Open**.

Figure 62–13 Opening the Discussions Section in the Resource Catalog



4. Click **Add** next to the task flow that you want to add to your page (Figure 62–14).

Figure 62–14 Adding the Forums Task Flow



Note: Not all discussions task flows are available in the default Resource Catalog provided out-of-the-box with Spaces, so you will only see entries for these task flows if they have been added to a custom Resource Catalog that has been made available to the page.

For more information, see Chapter 16, "Working with Resource Catalogs," specifically Section 16.3.1.2, "Adding Resources" (in the Add Resource Catalog Item dialog, select **Task Flows**, then scroll to **Discussions** for a list of all available task flows).

62.2.2 Creating and Managing Forum Topics and Replies

The life of a discussion forum takes place in its topics and replies. There users can ask questions, post information, exchange ideas, and otherwise communicate in interesting and useful ways.

This section describes how to work with discussion forum topics and replies. It contains the following subsections:

- Section 62.2.2.1, "Posting a New Forum Topic"
- Section 62.2.2.2, "Replying to Topic Posts"

- Section 62.2.2.3, "Viewing Topic Posts and Replies"
- Section 62.2.2.4, "Editing Topics and Replies"
- Section 62.2.2.5, "Deleting Topic Posts and Replies"
- Section 62.2.2.6, "Selecting the Number of Topics or Forums to Display"
- Section 62.2.2.7, "Switching Between Topic View Modes"

62.2.2.1 Posting a New Forum Topic

When you consider discussion forums hierarchically, the forum is the top container and topics are the next level down. Each posted topic can have subordinate replies, and the replies themselves may have replies (Figure 62–15).

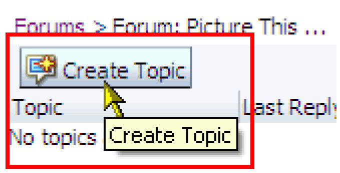
Figure 62–15 A Posted Topic and a Reply to the Topic

This section describes how to post topics using the Discussion Forums task flow. For information about replying to a posted topic, see Section 62.2.2.2, "Replying to Topic Posts."

To post a topic under a discussion forum:

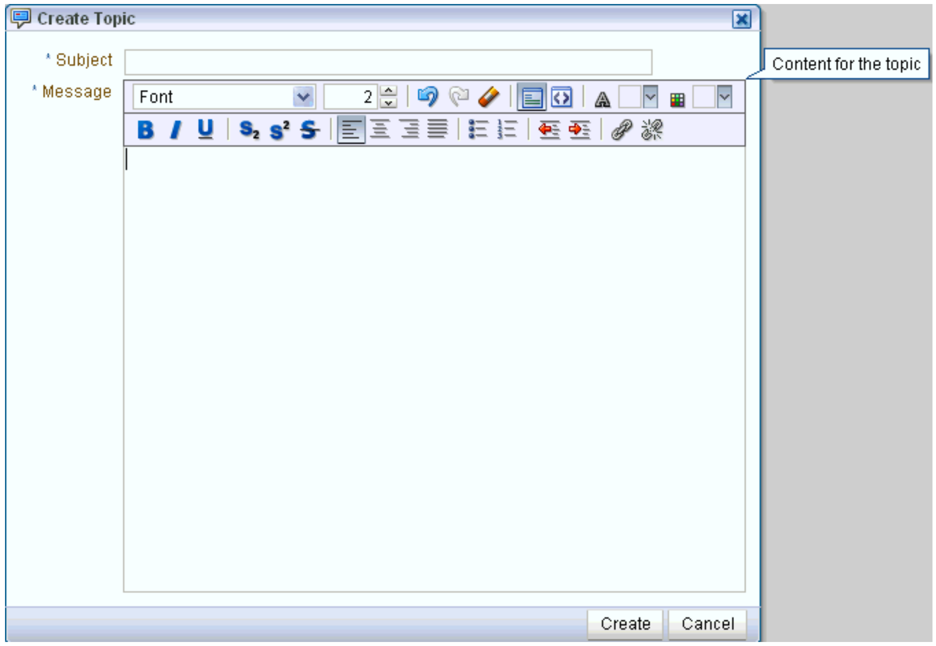
1. Go to the Discussion Forums task flow in which to post a topic, and click **Create Topic** (Figure 62–16).

Figure 62–16 Create Topic



The Create Topic dialog opens (Figure 62–17).

Figure 62–17 The Create Topic Dialog



2. In the **Subject** field, enter the topic subject.

   Enter up to 255 characters.

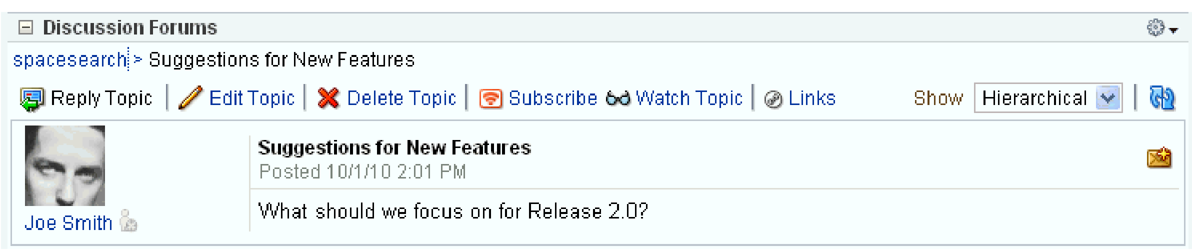
3. In the **Message** field, enter your post about the topic.

   Enter up to 4000 characters.

4. Click **Create**.

   The newly-posted topic appears under the selected forum in Discussion Forums. Click the topic subject to view the message (Figure 62–18).

Figure 62–18 A New Discussion Forum Topic



62.2.2.2 Replying to Topic Posts

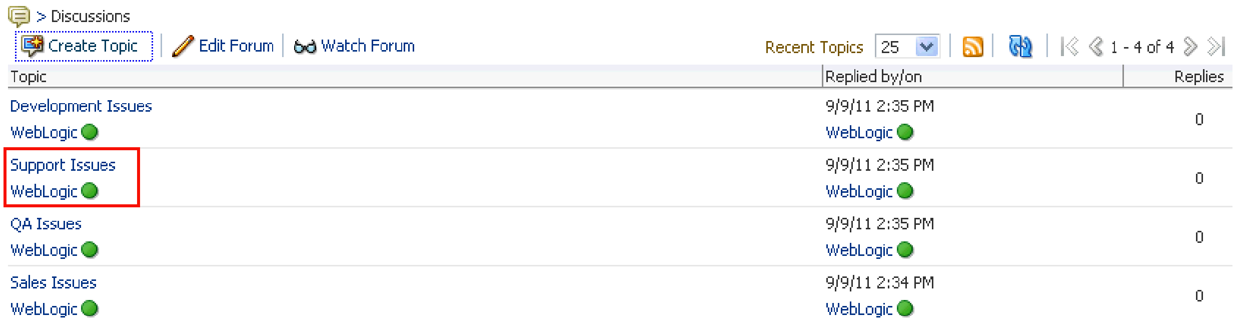
This section describes how to reply to topic posts through the Discussion Forums, though you can reply to a topic post through any other Discussions service task flow.

By default, the Discussion Forums task flow is exposed as the **Discussions** page.

To reply to topic posts:

1. Go to the Discussions task flow in which to read and reply to topic posts, and click the relevant topic (Figure 62–19).

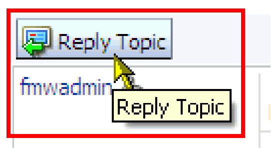
Figure 62–19 Discussion Forums Topic



The selected topic opens.

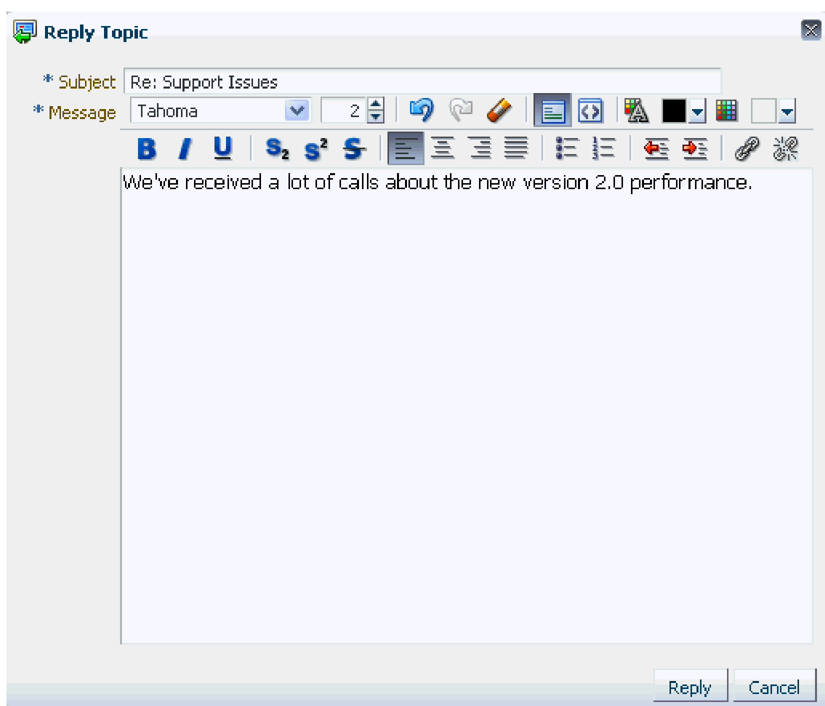
2. Click **Reply Topic** (Figure 62–20).

Figure 62–20 Reply Topic



The Reply Topic dialog opens (Figure 62–21).

Figure 62–21 The Reply Topic Dialog



3. In the **Subject** field, either leave the text as is or revise it.

   Enter up to 255 characters.

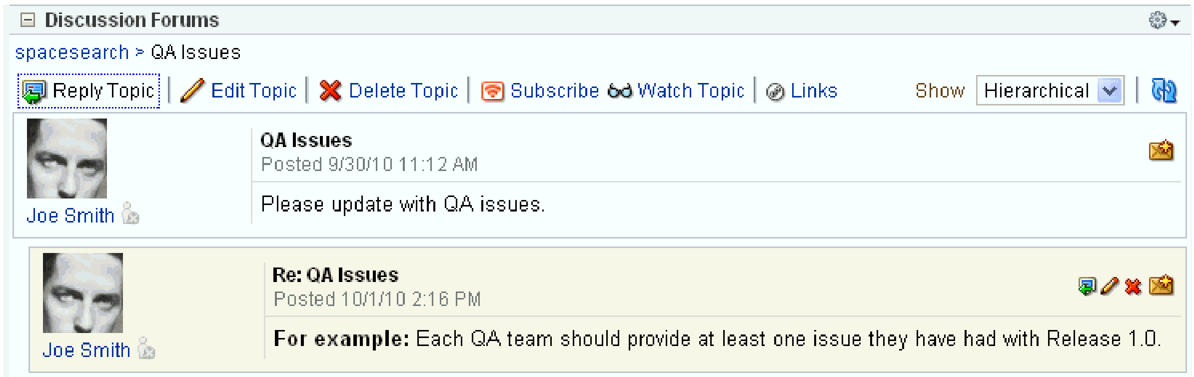
4. In the **Message** text box, enter your reply to the topic.

Enter up to 4000 characters.

5. Click **Reply**.

   Your reply appears below the main topic post (Figure 62–22).

Figure 62–22 A Topic Post and a Reply



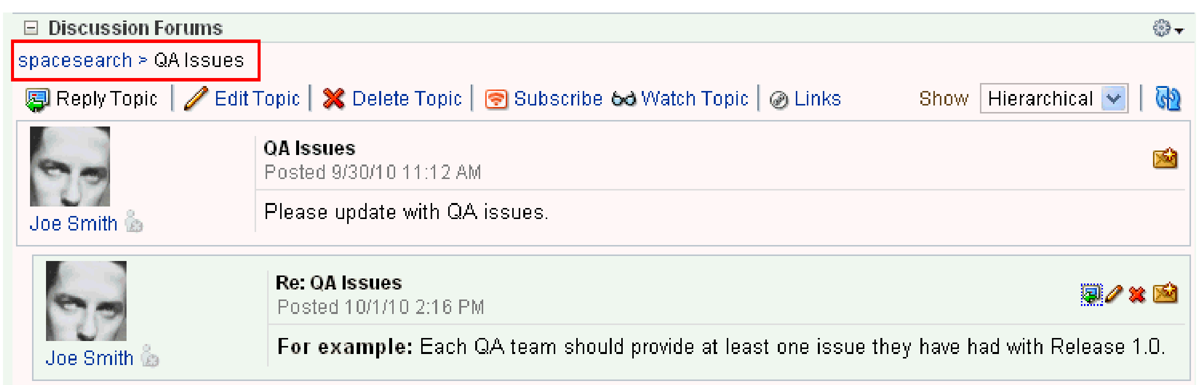
To post a reply to a reply, click the **Reply to message** icon (Figure 62–23) and follow the steps described in this section (starting with step 5).

Figure 62–23 Reply to message Icon

62.2.2.3 Viewing Topic Posts and Replies

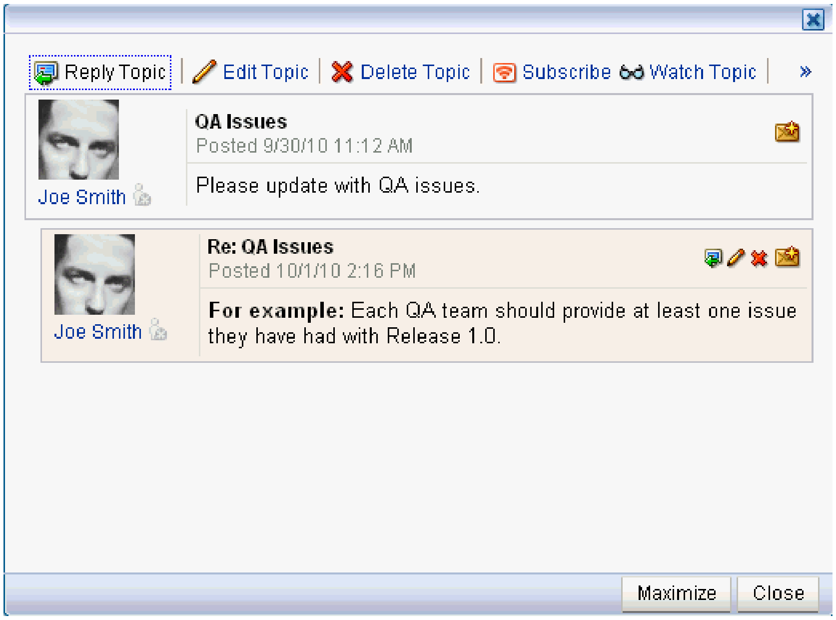
With the Discussion Forums task flow, topics and replies to the topic open directly in the Discussions Forums task flow. To navigate back up the forum hierarchy, click the breadcrumbs that display above the topic reply area (Figure 62–24).

Figure 62–24 Forum Breadcrumbs



With all the other Discussions service task flows, topics open in a separate window (Figure 62–25).

Figure 62–25 Viewing a Topic in the Discussions - Popular Topics Task Flow



To return to the task flow main view, click **Close** button in the window.

62.2.2.4 Editing Topics and Replies

After you post a topic or a reply, you retain the option of returning to it and revising its content. Only you and space moderators can edit your replies. This section describes how.

To edit a topic or a reply:

1. Go the Discussion Forums task flow that displays the topic or reply you want to edit, and click the relevant topic.

   The selected topic opens.

2. Your next step depends on whether you want to edit a topic or a reply:

   - To edit the topic, click the **Edit Topic** link at the top of the topic screen (Figure 62–26).

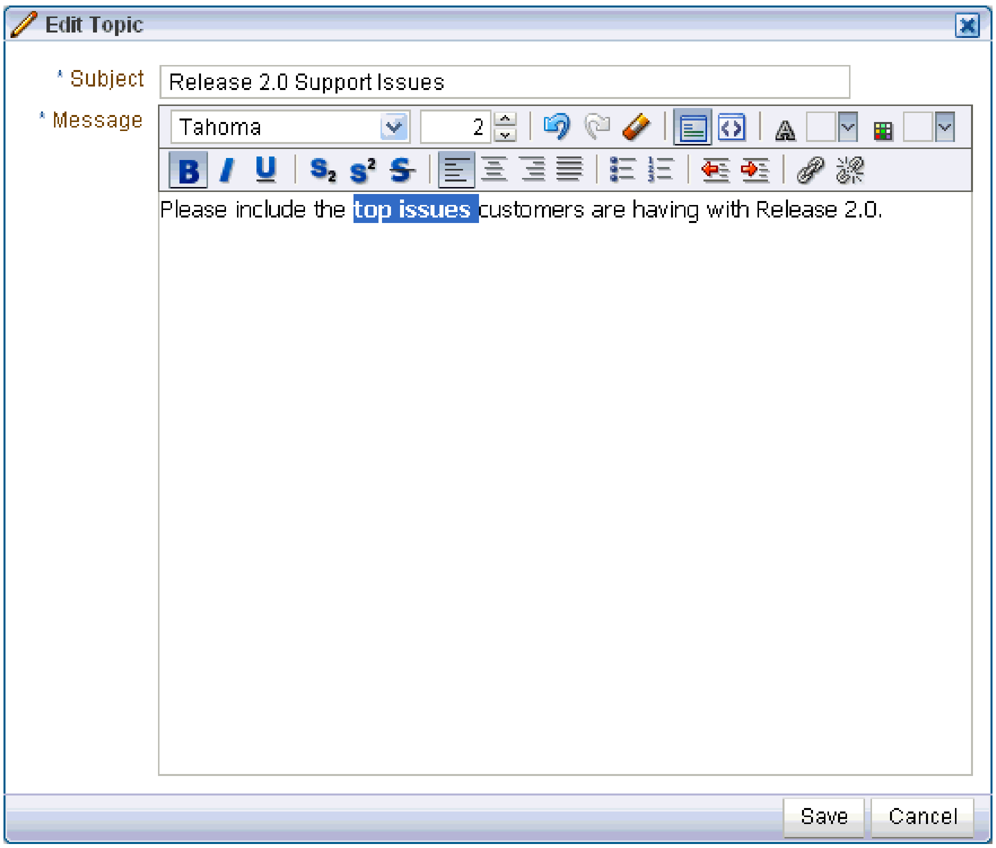
Figure 62–26 Edit Topic Link

   - To edit a reply, click the **Edit message** icon (pencil) associated with the reply (Figure 62–27).

Figure 62–27 Edit message Icon

The Edit Topic (or Edit Message) dialog opens (Figure 62–28).

Figure 62–28 The Edit Topic Dialog



3. Revise the topic (up to 255 characters) or reply (up to 4000 characters).
4. Click **Edit** in the Edit Topic dialog, or click **Reply** in the Edit Reply dialog.

   Your changes are posted to the forum.

62.2.2.5 Deleting Topic Posts and Replies

When you delete a topic, the original topic post and all of its subordinate replies are deleted. When you delete a reply, you can select to delete the original reply as well as all of its subordinate replies or to delete only this message and keep its replies.

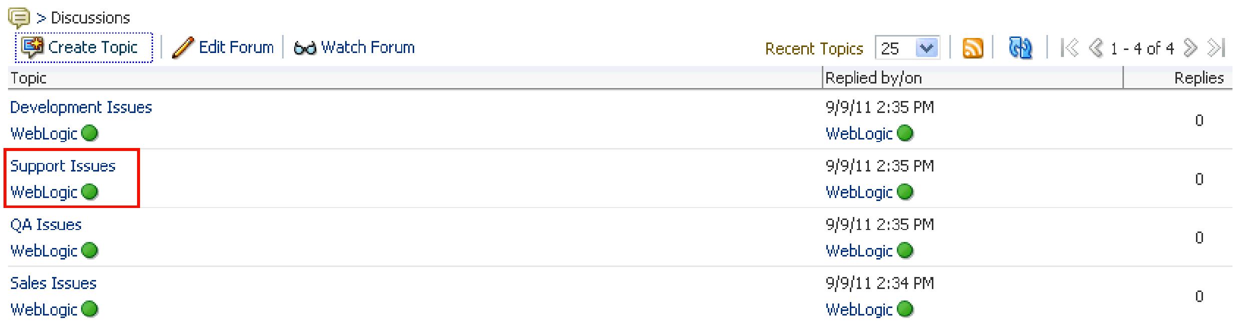
The steps to delete topics and replies are similar.

Note: To delete a topic post or reply, you must have created it or you must have access equivalent to space moderator.

To delete a topic or a reply:

1. Go to the Discussion Forums task flow that displays the topic or reply you want to delete, and click the relevant topic (Figure 62–29).

Figure 62–29 Discussion Forum Topic



The selected topic opens.

2. Your next step depends on whether you want to delete a topic or a reply:

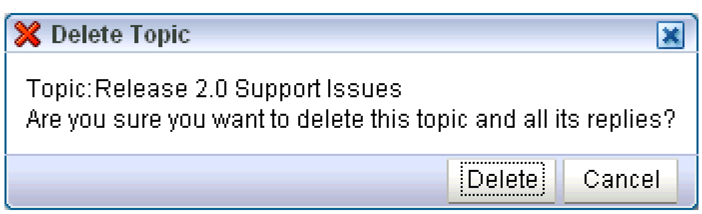
   - To delete a topic, click the **Delete Topic** link at the top of the topic screen (Figure 62–30).

     Figure 62–30 Delete Topic Link

     A Delete Topic confirmation dialog opens (Figure 62–31).

     Figure 62–31 Delete Confirmation Dialog for Topics

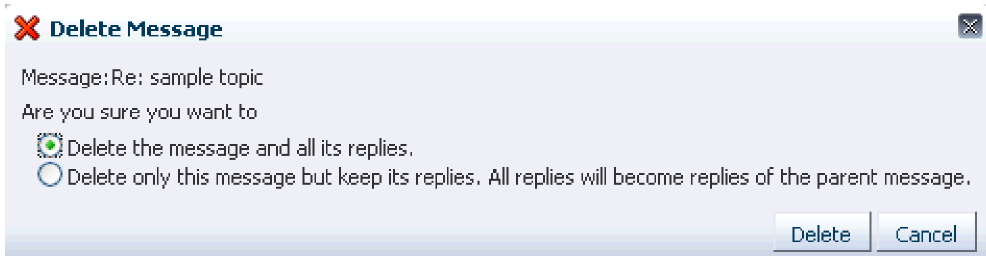
   - To delete a reply, click the **Delete message** icon associated with the reply (Figure 62–32).

     Figure 62–32 Delete Message Icon

A Delete Message confirmation dialog opens, letting you select if you want to delete this message and all its replies or delete only this message. (Figure 62–33).

Figure 62–33 Delete Confirmation Dialog for Topic Replies

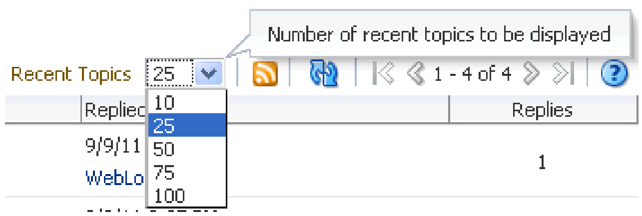


3. Click **Delete** to delete your selection.

62.2.2.6 Selecting the Number of Topics or Forums to Display

You can decide how many topics or forums to display; for example, 10, 25, 50, 75, or 100 (Figure 62–34).

Figure 62–34 Number of Topics to Display



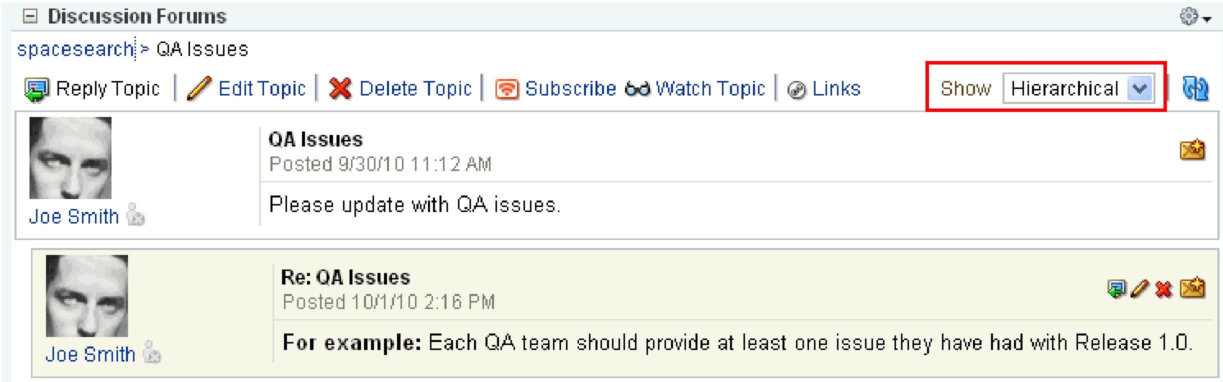
For example, if you choose to display 10 topics, and if there are more than 10 topics available, then you click the **More** link to see the next 10 topics, and so on.

When the `Do Not Show More Link` task flow parameter is set to true, the **More** link does not appear. For more information, see Section 62.3, "Setting Discussions Service Task Flow Properties."

62.2.2.7 Switching Between Topic View Modes

You have the option of viewing a topic and all of its replies in a hierarchical, indented mode or a flat, unindented mode. The hierarchical mode (Figure 62–35) uses indenting to indicate whether a reply is to the topic or to another reply.

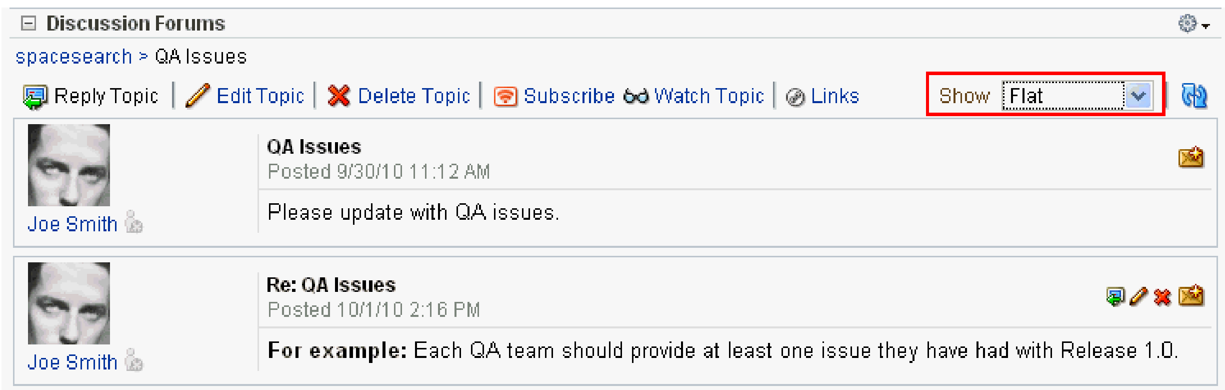
Figure 62–35 Hierarchical View Mode



For example, in Figure 62–35 the first entry is the main topic, the second is a reply to the topic, and so on.

The flat mode (Figure 62–36) makes no such distinctions.

Figure 62–36 Flat View Mode



All Discussion task flows that show topics and replies in the same screen provide view mode options.

To switch between topic view modes:

1. Go to the Discussions task flow that contains the topic you want to view, and click the topic.
2. From the **Show** dropdown list, select either **Flat** or **Hierarchical**.

   The topic view rerenders according to your selection.

62.2.3 Showing and Hiding Additional Discussion Forum Information

Most discussions task flows provide personalization settings for determining information to show in addition to the forum or topic title (the Discussion Forums task flow does not provide such settings). Additional information can include forum or topic author, creation date, and replies or topics.

How you set these display settings is personal, affecting only your view of a task flow instance. How you access these display settings varies slightly from task flow to task flow.

This section describes how to configure display settings for Discussions service task flows. It contains the following subsections:

- Section 62.2.3.1, "Showing or Hiding Information in the Forums - Quick View Task Flow"
- Section 62.2.3.2, "Showing or Hiding Information in the Popular Topics Task Flow"
- Section 62.2.3.3, "Showing or Hiding Information in the Recent Topics Task Flow"
- Section 62.2.3.4, "Showing or Hiding Information in the Watched Forums Task Flow"
- Section 62.2.3.5, "Showing or Hiding Information in the Watched Topics Task Flow"

62.2.3.1 Showing or Hiding Information in the Forums - Quick View Task Flow

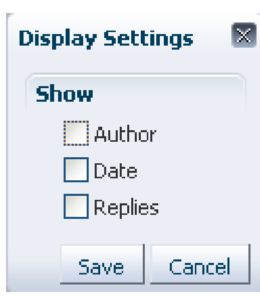
To show or hide additional information in the Discussions - Quick View task flow:

1. Go to the Discussions - Quick View task flow where you want to configure display settings.
2. Click the **Select the data to display** icon in the task flow toolbar (Figure 62–37).

Figure 62–37 Select the data to display Icon in the Forums - Quick View Task Flow

The Display Settings dialog opens (Figure 62–38).

Figure 62–38 Display Settings Dialog



3. Select the data you want to show, or deselect the check box of data you want to hide. Select or deselect one or more from:
   - **Author**—The user name of the person who created the forum or topic
   - **Date**—The date the forum or topic was last updated
   - **Replies**—The replies associated with the topic (for Watched Forums, this displays forums)
4. Click **Save** to save your changes and close the dialog.

62.2.3.2 Showing or Hiding Information in the Popular Topics Task Flow

To show or hide additional information in the Popular Topics task flow:

1. Go to the Popular Topics task flow where you want to show or hide additional information.
2. Click the **Personalize** icon in the task flow header.

   This opens a panel where you can select or deselect additional data (Figure 62–39).

Figure 62–39 Show Panel in a Popular Topics Task Flow

3. Select the data you want to show, or deselect the check box of data you want to hide. Select or deselect one or more from:
   - **Author**—The user name of the person who posted the topic
   - **Date**—The date the topic was last updated
   - **Replies**—The replies associated with the topic
4. Click **Save** to save your changes and close the panel.

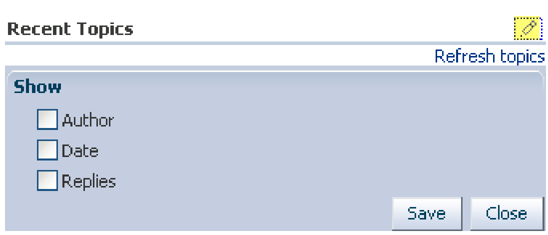
62.2.3.3 Showing or Hiding Information in the Recent Topics Task Flow

To show or hide additional information in the Recent Topics task flow:

1. Go to the Recent Topics task flow where you want to show or hide additional information.
2. Click the **Personalize** icon in the task flow header.

   This opens a panel where you can select or deselect additional data (Figure 62–40).

Figure 62–40 Show Panel in a Recent Topics Task Flow



3. Select the data you want to show, or deselect the check box of data you want to hide. Select or deselect one or more from:
   - **Author**—The user name of the person who posted the topic
   - **Date**—The date the topic was last updated
   - **Replies**—The replies associated with the topic
4. Click **Save** to save your changes and close the panel.

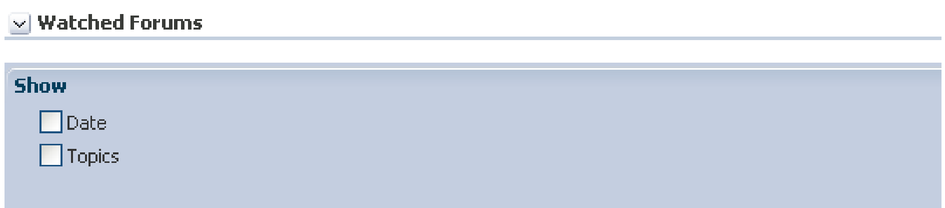
62.2.3.4 Showing or Hiding Information in the Watched Forums Task Flow

To show or hide additional information in the Watched Forums task flow:

1. Go to the Watched Forums task flow where you want to show or hide additional information.
2. Click the **Personalize** (pencil) icon in the task flow header.

   This opens a panel where you can select or deselect additional data (Figure 62–41).

Figure 62–41 Show Panel in a Watched Forums Task Flow



3. Select the data you want to show, or deselect the check box of the data you want to hide. Select or deselect one or more from:
   - **Date**—The date the forum was last updated
   - **Topics**—The topics associated with the forum
4. Click **Save** to save your changes and close the panel.

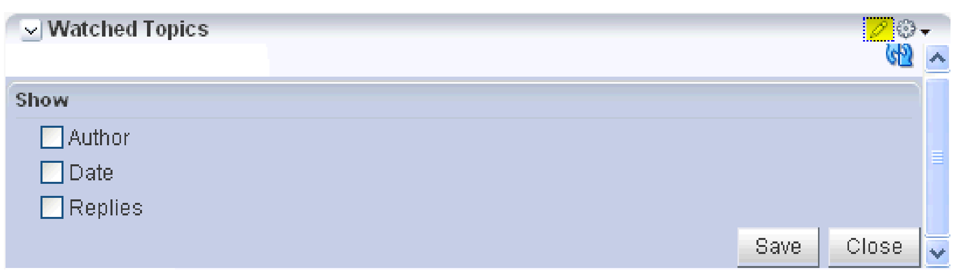
62.2.3.5 Showing or Hiding Information in the Watched Topics Task Flow

To show or hide additional information in the Watched Topics task flow:

1. Go to the Watched Topics task flow where you want to show or hide additional information.
2. Click the **Personalize** icon in the task flow header.

   This opens a panel where you can select or deselect additional data (Figure 62–42).

Figure 62–42 Show Panel in a Watched Topics Task Flow



3. Select the data you want to show, or deselect the check box of the data you want to hide. Select or deselect one or more from:
   - **Author**—The user name of the person who posted the topic
   - **Date**—The date the topic was last updated
   - **Replies**—The replies associated with the topic
4. Click **Save** to save your changes and close the panel.

62.2.4 Watching Forums and Topics

Watching discussion forums and topics provides a convenient means of keeping a close eye on the information most current and relevant to your efforts. The forums and topics you choose to watch are personal, in that your selections appear on your view of watch lists. No other user is affected by the forums and topics you choose to watch.

When a user places a watch on a forum or a topic, whenever users add to that forum or topic, in addition to it appearing in the user's watched forums or topics list, the user receives a mail notification.

In Spaces, all watched forums and topics are accessible from the Discussions panel in the quick view. All watched forums and topics are accessible from the Forums task flow. The Watched Forums and Watched Topics task flows provide more focussed views of watched forums or watched topics.

This section includes information about how to add, view, and manage watched topics and forums. It contains the following subsections:

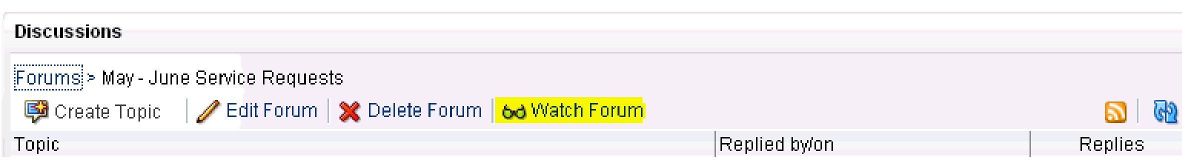
- Section 62.2.4.1, "Adding a Discussion Forum or Topic to Your Watch List"
- Section 62.2.4.2, "Removing a Discussion Forum or Topic from a Watch List"
- Section 62.2.4.3, "Viewing Watched Forums and Topics from the Quick View"

62.2.4.1 Adding a Discussion Forum or Topic to Your Watch List

To add a discussion forum or topic to your watch list:

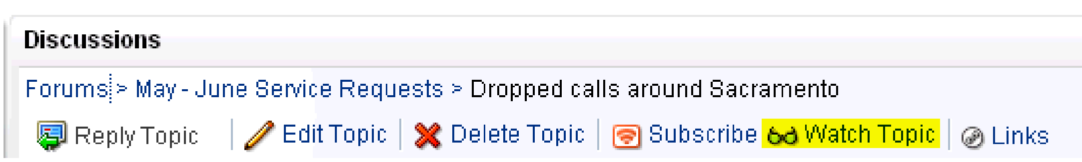
1. Go to the discussion forum or topic you want to add to your watch list.
2. The next step depends on whether you want to watch a forum or a topic:
   - To watch a forum, click the **Watch Forum** link at the top of the forum (Figure 62–43).

Figure 62–43 Watch Forum Link on the May - June Service Requests Forum



   - To watch a topic, click the **Watch Topic** link at the top of the topic (Figure 62–44).

Figure 62–44 Watch Topic Link on the Topic Dropped calls around Sacramento



The watched forum or topic is listed on all Watched Forums or Watched Topics lists, for example, on the Discussions panel in the quick view (Figure 62–45) and in Watched Forums and Watched Topics task flows.

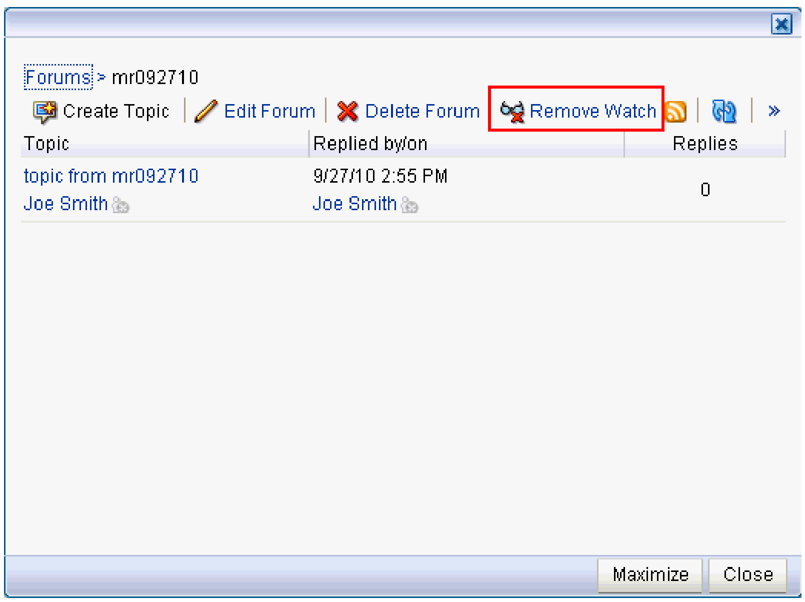
Figure 62–45 Watched Forums on the Discussions Panel in the Quick View

62.2.4.2 Removing a Discussion Forum or Topic from a Watch List

To remove a discussion forum or a discussion topic from your watch list:

1. Go to the discussion forum or topic you want to remove from your watch list.
2. Click the **Remove Watch** icon on the forum or topic (Figure 62–46).

Figure 62–46 The Remove Watch Icon



The selected item is removed from your forum or topic watch list.

62.2.4.3 Viewing Watched Forums and Topics from the Quick View

To view a watched forum or topic from the Quick View:

1. From the Forums - Quick View task flow, set the panel display option to Watched Forums or Watched Topics (Figure 62–47).

Figure 62–47 Watched Forums on the Forums - Quick View

2. Click the link to the discussion forum or forum topic you want to view.

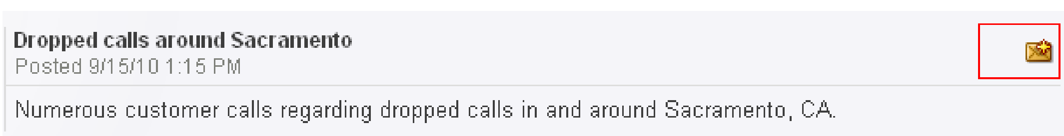
   The forum or topic opens (Figure 62–48).

Figure 62–48 A Watched Forum Opened from the Quick View

62.2.5 Sending Mail from Discussion Topics

Each discussion topic in has an associated **Send Mail** icon in its toolbar (Figure 62–49). Click the **Send Mail** icon to initiate a mail message containing the discussion text, location, author, and date it was created. This feature makes it easy for you to communicate interesting discussions to others.

Figure 62–49 Send Mail Icons on Discussion Topics



The WebCenter Portal administrator determines the mail client to use with the **Send Mail** icon. If a local mail client was set, then a plain text message opens. If WebCenter Portal's Mail service was set as the mail client, then the HTML Mail Compose dialog opens. With either mail client, you can add or edit the standard, perpetuated message before sending.

62.2.6 Creating a Discussion Forum

Create discussion forums on the **Discussions** page or with the Discussion Forums task flow.

To create forums, you must be the space moderator.

Note: A new space is assigned a single discussion forum by default. Space moderators can allocate multiple forums to a space if required, as described in Section 6.2, "Configuring Discussion Forum Options for the Spaces Application."

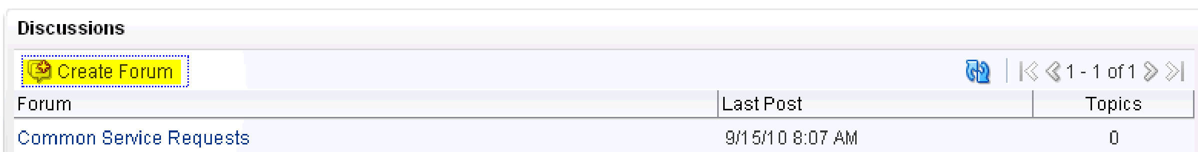
To create a discussion forum:

1. Go to the **Discussions** page. If multiple forums have been enabled, then you see a Forums link pointing to the default forum (Figure 62–50).

Figure 62–50 Discussions Page with Multiple Forums Enabled

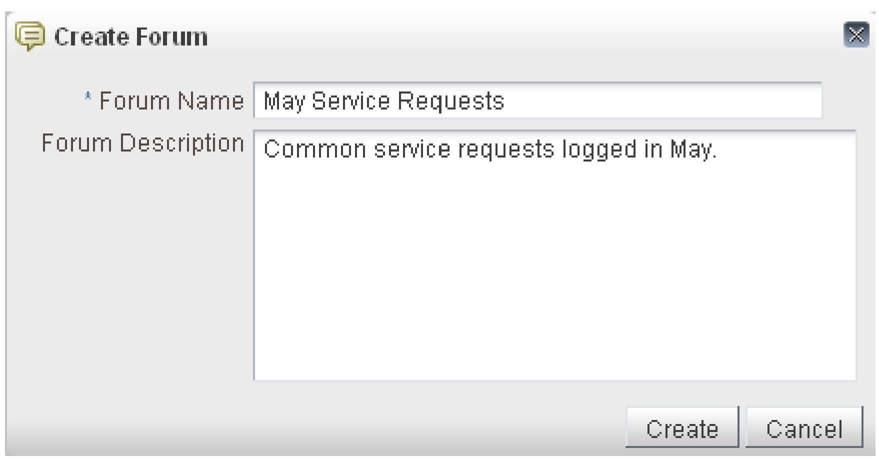
2. Click the **Forum** link, and then the **Create Forum** button (Figure 62–51).

Figure 62–51 Create Forum



   The Create Forum dialog opens (Figure 62–52).

Figure 62–52 The Create Forum Dialog



3. In the **Forum Name** field, enter a name for the discussion forum.

   Enter up to 255 characters.

4. Optionally, in the **Forum Description** text box, enter a description of the discussion forum.

   Enter up to 4000 characters.

5. Click **Create**.

The new forum appears on the list of forums (Figure 62–53). Click a forum name to view forum content.

Figure 62–53 New Discussion Forum (May Service Requests)

62.2.7 Editing the Forum Name and Description

To rename a discussion forum or revise its description:

1. Go to the Discussions page or the Discussions Forums task flow, and click the forum you want to edit (Figure 62–54).

Figure 62–54 Edit Forum Link

The Edit Forum dialog opens (Figure 62–55).

Figure 62–55 The Edit Forum Dialog

2. Optionally, in the **Forum Name** field enter a new name for the discussion forum.

   Enter up to 255 characters.

3. Optionally, in the **Forum Description** text box, revise the description of the discussion forum.

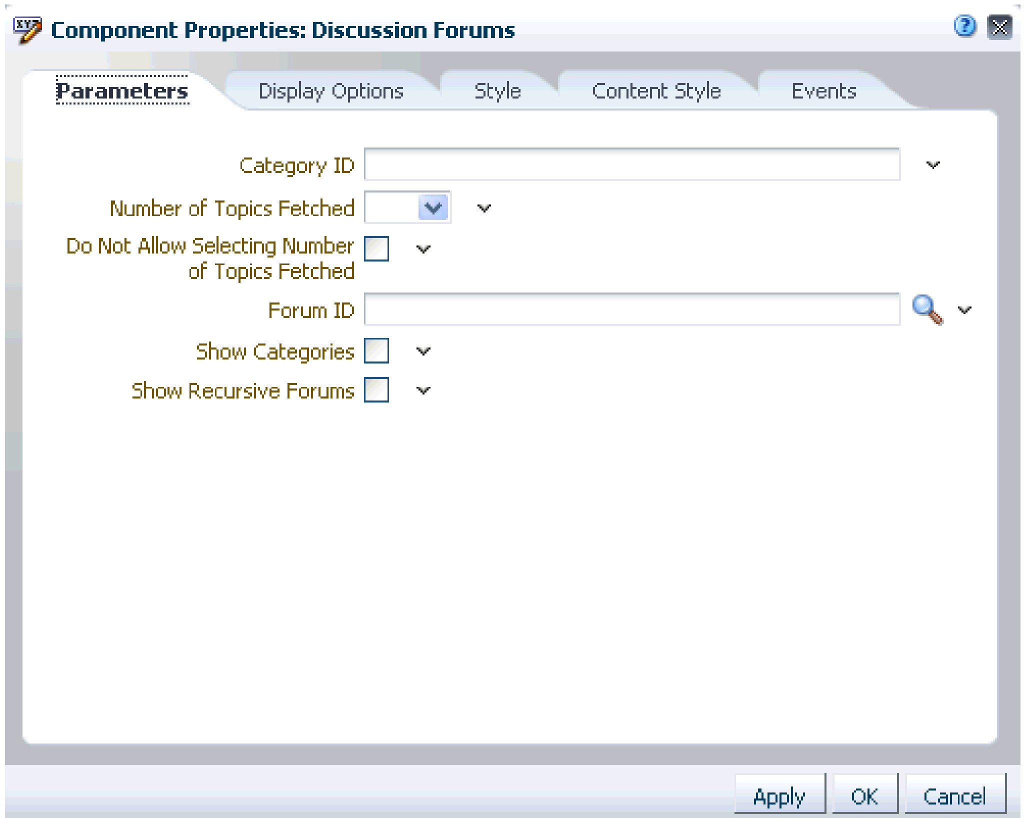
   Enter up to 4000 characters.

4. Click **Save**.

62.3 Setting Discussions Service Task Flow Properties

The Discussions service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 62–56).

Figure 62–56 Discussion Forums Task Flow Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Discussions service task flows and describe the properties on the **Parameters** tab.

- Section 62.3.1, "What You Should Know About the Discussions Service Task Flow Properties"
- Section 62.3.2, "Discussions Service Task Flow Parameters"

62.3.1 What You Should Know About the Discussions Service Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 62.3.2, "Discussions Service Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So this tab may be omitted. For more information, see Section 18.6.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

62.3.2 Discussions Service Task Flow Parameters

Table 62–1 describes the properties that are unique to the Discussions task flows.

Table 62–1 Discussions Service Task Flow Parameters

Parameter	Description	Task Flow
`Category ID`	On the discussions server, the category ID under which a given set of forums is managed For the Forums task flow, use this parameter to specify the set of forums to present. For all other discussions task flows, use this parameter to specify the parent ID of the topics to show by default. If omitted, the value defaults to the Category ID associated with the current space. In Home spaces, it takes the root Category ID. Use the following EL expression to return the Category ID of a named space: `#{sessionContext['oracle.webcenter.collab.forum'].groupInfo['`*`SpaceName`*`'].categoryId}` Enter the space internal name (not the space display name) for the variable *`SpaceName`*. The space internal name is the name specified by the space URL on the **General** page of a space's administration settings. The space display name is specified by **Display Name**, and is the name that appears in the space banner at the top of the space.	▪ Discussion Forums ▪ Forums - Quick View ▪ Popular Topics ▪ Recent Topics ▪ Watched Forums ▪ Watched Topics
`Forum ID`	On the discussions server, the identifier under which topics are managed Use this parameter to identify the default forum to show in the task flow. Use the following EL expression to return the forum ID of a named space: `#{sessionContext['oracle.webcenter.collab.forum'].groupInfo['`*`SpaceName`*`'].forumId}` Enter the space internal name (not the space display name) for the variable *`SpaceName`*. The space internal name is the name specified by the space URL on the **General** page of a space's administration settings. The space display name is specified by **Display Name**, and is the name that appears in the space banner at the top of the space.	▪ Discussion Forums ▪ Popular Topics ▪ Recent Topics ▪ Watched Topics
`Hide Toolbar`	A means of showing or hiding the task flow personalization feature (see Section 62.2.3, "Showing and Hiding Additional Discussion Forum Information") ▪ If selected, then the task flow personalization feature is hiden. ▪ If not selected, then the task flow personalization feature is shown. This is the default value.	▪ Popular Topics ▪ Recent Topics ▪ Watched Forums ▪ Watched Topics
`Show Recursive Forums`	Determines if you show forums either in a category only or in subcategories. ▪ If selected, then all forums under a given category/subcategory are shown. This can impact performance. ▪ If not selected, then only the category's direct child forums are shown. This is the default value.	Forums

Table 62–1 (Cont.) Discussions Service Task Flow Parameters

Parameter	Description	Task Flow
`Show Categories`	A means of showing the forums grouped under the Category ID or the topics specified under the Forum ID. ■ If selected, then the task flow displays the forums classified under `Category ID`. ■ If not selected, then the task flow displays the topics associated with the specified `Forum ID`. This is the default value. This parameter value works in combination with other parameters.	Forums
`Do Not Allow Selecting Number of Topics Fetched`	If selected, then users are not allowed to change the number of visible topics.	Discussion Forums
`Number of Topics Fetched`	Sets the number of visible topics.	■ Discussion Forums ■ Forums - Quick View
`Number of Recent Topics Fetched`	Sets the number of visible recent topics.	Recent Topics
`Number of Watched Forums Fetched`	Sets the number of visible watched forums.	Watched Forums
`Number of Watched Topics Fetched`	Sets the number of visible watched topics.	Watched Topics
`Do Not Show More Link`	If selected, then the **More** link (to see more topics or forums) is not visible.	■ Forums - Quick View ■ Recent Topics ■ Watched Forums ■ Watched Topics

63

Working with the Events Service

The Events service provides calendars that you can use in Oracle WebCenter Portal: Spaces to schedule meetings, appointments, and any other type of occasion. A dedicated **Events** page is available to every space where the space moderator has enabled the Events service.

The Events service also enables you to view your own personal Microsoft Exchange calendar within the Home space. In addition, you can overlay space calendars on top of the Home space calendar, so that you can view your entire schedule in a single place.

> **Framework applications:** The Events service is also available in applications built using Oracle WebCenter Portal: Framework to provide access to users' personal calendars.

This chapter explores the features offered through the Events service. It contains the following sections:

- Section 63.1, "What You Should Know About the Events Service"
- Section 63.2, "Working with Events Service Task Flows"
- Section 63.3, "Setting Events Service Task Flow Properties"

Audience

This chapter is intended for Spaces users who want to use the Events service to schedule and track events. Users with a space role that includes the permissions `Create, Edit, and Delete Events` or `Create Events` (for event-related tasks), `Edit Pages` (to add the Events task flow to a page), and `Edit Task Flows` (to enable calendar overlays). For more information, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

> **Note:** Tasks discussed in this chapter are not available if the Events service is not enabled in the current space.

63.1 What You Should Know About the Events Service

Events include appointments, meetings, presentations, and so on. Within Spaces, there are two kinds of events:

- **Personal events** are those that are not related to a specific space. They could include personal appointments with a doctor or dentist, or lunch with a friend.

Personal events come from your Microsoft Exchange calendar and display only to you and only in Events task flows that are located on pages in the Home space.

> **Framework applications:** Personal events are also available in Framework applications.

- **Space events** are those that are related to a specific space. They could include weekly meetings, presentations, or a customer visit.

  Space events display to all members of the space on the space's dedicated **Events** page or in any Events task flow that is located on a page in the space. Members with the required level of permission can schedule or update events.

  > **Framework applications:** Space events are not available in Framework applications.

Note: If your application uses WebCenter Portal's default user roles, then the required permissions to create an event are included in both the `Participant` and `Moderator` roles. Participants and moderators can manage all events.

63.1.1 Calendar Overlaying

In addition to displaying your personal events in the Events task flow in the Home space, you can also display space events from select spaces in the same task flows. This is referred to as *calendar overlaying*. In this way, you can have all your important events available in one location, the Home space, rather than having to go to multiple spaces to manage your daily schedule.

In a space, if you can create a page and add an Events task flow to it, you can also extend that task flow to display events from other spaces. This is useful if some spaces are very closely connected with similar membership lists.

Note: Calendar overlaying is available only in Events task flows. A space's **Events** page displays events from the current space only.

63.1.2 Where to View Events

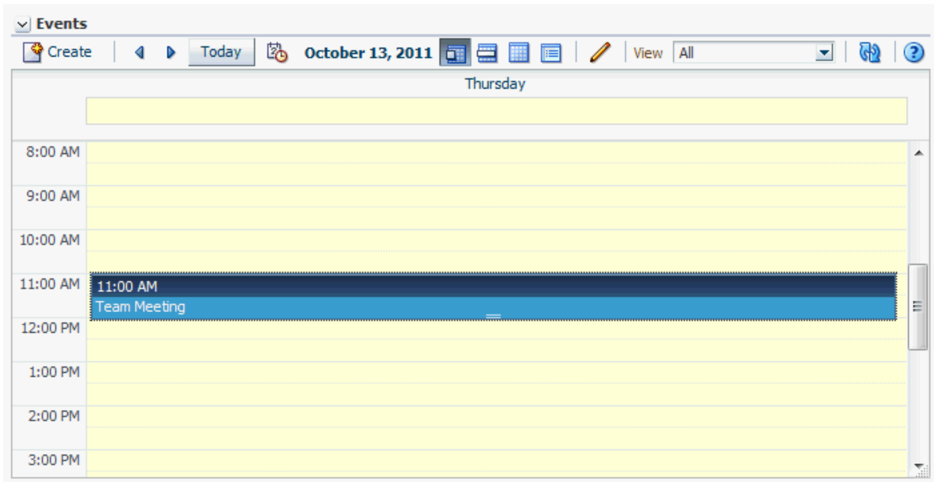
Your application may provide a variety of locations from which to view events.

- Every space in which the Events service is enabled includes an **Events** page (a special page containing an Events task flow) that can be displayed or hidden. If you cannot see the **Events** page, it could be hidden.

  > **See Also:** For information about how to show the **Events** page, see Section 63.2.3.1, "Displaying the Events Page for a Space."

- If you have the appropriate permissions, you can add an Events task flow to any page in a space (Figure 63–1).

Figure 63–1 An Events Task Flow on a Space Page



- You can also add the Events task flow to a page in the Home space. In the Home space, the task flow does not initially display the calendar of events. Instead it displays a link prompting you to **Login to Personal Calendar** (Figure 63–2).

Figure 63–2 Events Task Flow in Home Space Before Logging In

> **See Also:** For information about logging in to your Microsoft Exchange calendar, see Section 63.2.2, "Accessing Your Personal Events."

If you do not have a Microsoft Exchange calendar, or do not want to display personal events, but still want to view space events in the Home space, enable calendar overlaying and then click **Continue** (Figure 63–3).

Figure 63–3 Events Task Flow in Home Space with Calendar Overlay Enabled

> **See Also:** For information about calendar overlaying, see Section 63.2.7, "Displaying Multiple Calendars in a Single Task Flow."

63.1.3 Integration with Other Services

Through its tight integration with the Links service, the Events service provides the opportunity to associate events with other Spaces items. Linking enables you to associate documents, notes, announcements, discussions, and URLs with an event. You can create links from an event by editing the event and clicking the **Links** icon. For more information, see Chapter 65, "Working with the Links Service."

The Events service also enables you to send email messages about space events to members of the space. You can send mail from an event by editing the event and clicking the **Send Mail** icon. For more information, see Chapter 6.3, "Configuring Send Mail Notifications for the Spaces Application."

63.2 Working with Events Service Task Flows

Meetings are a fact of life. The art is in keeping on top of all those meetings, making sure you can attend the ones that matter and keep abreast of what is going on.

The Events service provides two task flows for displaying personal and space events:

- **The Events task flow** provides a fully featured calendar where as well as viewing events in a variety of layouts, you can also create and manage events and display events from multiple calendars.
- **The Events - Mini View task flow** provides a more compact view of events as a list. You can view upcoming events and edit existing events. You cannot create new events in this task flow. This is useful if you want to provide information about events but do not have enough space on the page for a full calendar.

Note: The steps in the following sections apply to both personal events and space events. Where there are any differences, these are noted.

This section includes the following subsections:

- Section 63.2.1, "Adding an Events Service Task Flow to a Page"
- Section 63.2.2, "Accessing Your Personal Events"
- Section 63.2.3, "Viewing Events"
- Section 63.2.4, "Scheduling Events"
- Section 63.2.5, "Revising Scheduled Events"
- Section 63.2.6, "Cancelling Scheduled Events"
- Section 63.2.7, "Displaying Multiple Calendars in a Single Task Flow"
- Section 63.2.8, "Subscribing to Events"

63.2.1 Adding an Events Service Task Flow to a Page

For the steps to add an Events service task flow to a page, see Section 18.5, "Adding a Component to a Page."

Tip: The presence or location of the Events service task flows depends on how the Resource Catalog is configured. In the default Resource Catalog, the Events task flows are listed under **Social and Communication**.

See Also: For information about setting task flow properties, see Section 63.3, "Setting Events Service Task Flow Properties."

63.2.2 Accessing Your Personal Events

You may maintain a calendar of personal events outside of Spaces that does not relate to specific spaces. If you use Microsoft Exchange 2003 or 2007 for this calendar, you can include your personal events in the Home space. This keeps all your calendar information in a single place, making it much easier for you to organize your day.

You can view personal events in the Home space. You can also edit or delete personal events or create new personal events that are pushed to your Exchange calendar.

Note: You can use calendar overlaying to display space events alongside personal events in the Home space, but you cannot push space events into your Exchange calendar.

For more information about calendar overlaying, see Section 63.2.7, "Displaying Multiple Calendars in a Single Task Flow."

Before You Begin

Before you can access your personal events in Spaces, your administrator must have created a connection to the Microsoft Exchange Server. For more information, see the "Managing the Events Service" chapter in the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

To access your personal events:

1. In the Home space, locate the page where you want to add your personal events.
2. Add the Events task flow to the appropriate region on the page.

   See Also: For more detailed information, see Section 18.5, "Adding a Component to a Page."

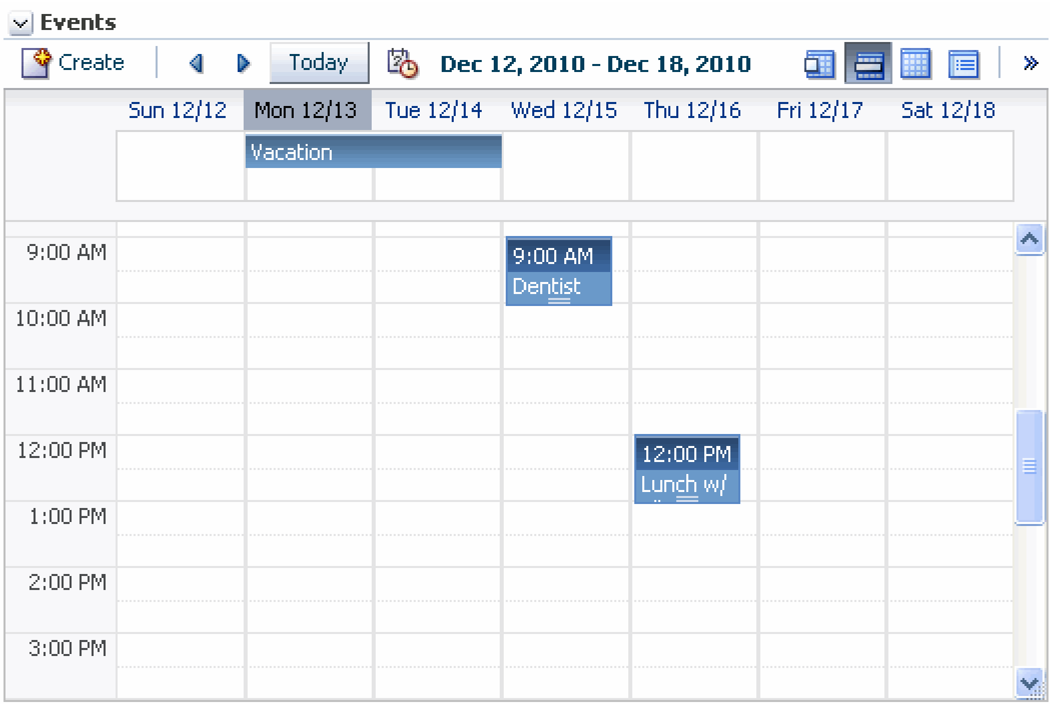
3. In the Events task flow, click **Login to Personal Calendar.**

   Note: If you see the link **Try Again** instead of **Login to Personal Calendar**, there is a problem with the connection to the Microsoft Exchange Server. Contact your administrator.

   ---

4. Enter your Microsoft Exchange login credentials and click **OK.**

Figure 63–4 Personal Calendar



63.2.3 Viewing Events

You can view events as a grid or a list; choose to display events a day, a week, or a month at a time; filter events by category; select the range of hours displayed per day; and include a second time zone in the display.

This section includes the following subsections:

- Section 63.2.3.1, "Displaying the Events Page for a Space"
- Section 63.2.3.2, "Using the Calendar Interface"
- Section 63.2.3.3, "Viewing Event Details"
- Section 63.2.3.4, "Filtering Events by Category"
- Section 63.2.3.5, "Setting Display Preferences"

63.2.3.1 Displaying the Events Page for a Space

In every space where the Events service is available, space events display on the **Events** page. However, the **Events** page may not display by default. If so, it is easy to display the **Events** page using the Manage Pages dialog.

> **Note:** The Home space does not have an **Events** page.

To display the **Events** page:

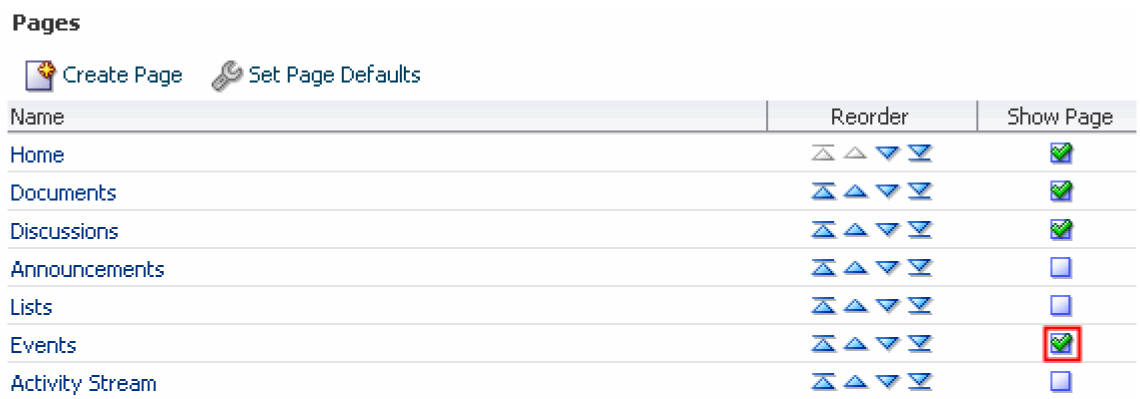
1. Go to the space where you want to display the **Events** page.
2. In the space administration settings, display the **Pages** page.

Tip: The way you access this page depends on the page template in use. For example, in a side navigation template, you may access it through a **Manage** menu.

You can also navigate to this page using the direct URL provided in Section A.5, "User Interface URLs for Space Pages."

3. Select the **Show Page** check box for the **Events** page. (Figure 63–5).

Figure 63–5 Showing the Events Page through the Pages Page



If you later decide that you no longer want to display the **Events** page, in the **Pages** page, deselect the **Show Page** check box for the **Events** page.

63.2.3.2 Using the Calendar Interface

You can use icons on the **Events** page or Events task flow toolbar to display events in grid form or as a list. When you display events as a grid, you can show them by day, week, or month. When you display events as a list, the number of upcoming events listed depends on the display options for the task flow.

See Also: For information about changing List view display options, see Section 63.2.3.5, "Setting Display Preferences."

Usually, in grid mode, the **Events** page or Events task flow displays events for the current day, week, or month. To view events for a specific point in time, you can use the previous or next icons or select a date so that the calendar displays events for a specific date.

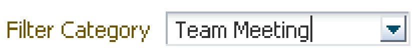
Table 63–1 lists the different icons available in the **Events** page and Events task flow toolbar and describes what they do.

Note: The following options are not available in the Events - Mini View task flow.

Table 63–1 Calendar Icons

Icon	Description
	Click to display the previous day's, week's, month's, or set of events.

Table 63–1 (Cont.) Calendar Icons

Icon	Description
	Click to display next day's, week's, month's, or set of events.
	Click to display events for the current date (today).
	Click to display events for a specific date. In the date picker, the current date (today) is displayed in a box and the currently selected date (which may also be the current date), is highlighted. Use the date picker to select the month, year, and day. **Note:** If the calendar overlay feature is enabled in Full mode for the task flow, the Date Picker is always visible to the left of the calendar.
	Click to display events one day at a time.
	Click to display events for the whole week.
	Click to display events for the whole month.
	Click to display a list of upcoming events. The number of events listed depends on the task flow settings (for more information, see Section 63.2.3.5, "Setting Display Preferences").
	Select one or more event categories by which to filter the events in the calendar. Only events belonging to the selected categories are displayed in the calendar (for more information, see Section 63.2.3.4, "Filtering Events by Category").
	Click to refresh the page or task flow with any recent changes.

63.2.3.3 Viewing Event Details

The **Events** page or Events task flow displays basic information about events. To view more information, such as the location, start and end times, priority, category, or links, simply hover your mouse over an event.

To view event details:

1. Go to the Events task flow, Events - Mini View task flow, or **Events** page where you want to view event details.

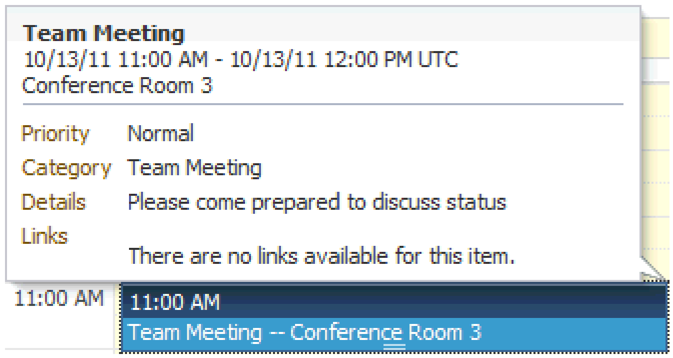
   Tip: If the **Events** page is not available, see Section 63.2.3.1, "Displaying the Events Page for a Space."

2. Hover the mouse over an event to display the event details.

   The resulting popup (Figure 63–6), displays the following information:

- The title of the event
- Details of the date and time of the event, including the secondary time zone if one has been specified
- The priority of the event
- The category to which the event belongs
- The location of the event, if specified
- Any links associated with the event

Figure 63–6 An Event with Details Popup



To view any specific details of the event you must edit the event. For more information, see Section 63.2.5, "Revising Scheduled Events."

63.2.3.4 Filtering Events by Category

You can filter the events displayed in the calendar to those that belong to one or more particular categories, for example Team Meeting, Customer Meeting, Vacation, and so on.

> **See Also:** Event categories are created by the space moderator in the space administration settings. For more information, see Section 53.10.6, "Creating and Managing Space Event Categories." After they are created, you can use them to assign categories to your events, which enables you to then filter events by category.

To filter events by category:

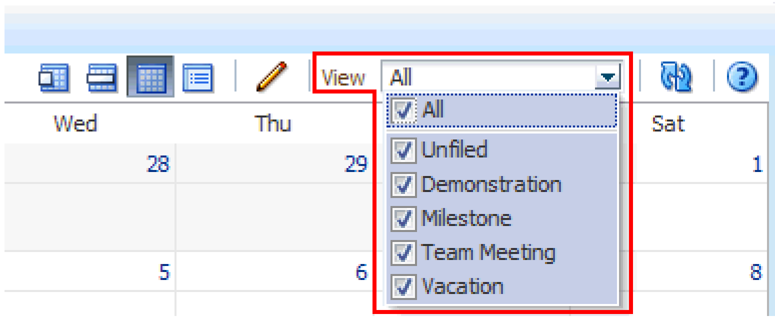
1. Go to the Events task flow or **Events** page where you want to filter events.

   > **Tip:** If the **Events** page is not available, see Section 63.2.3.1, "Displaying the Events Page for a Space."

   > **Note:** You cannot filter events in the Events - Mini View task flow.

2. In the toolbar, from the **View** dropdown list (Figure 63–7), select one or more categories by which you want to filter the events displayed in the calendar.

Figure 63–7 The View Dropdown List for Filtering by Event Category



When you close the dropdown list, only those events that belong to the selected category or categories are displayed in the calendar.

> **Tip:** To remove event filtering, deselect any categories in the **Filter Category** dropdown list.

63.2.3.5 Setting Display Preferences

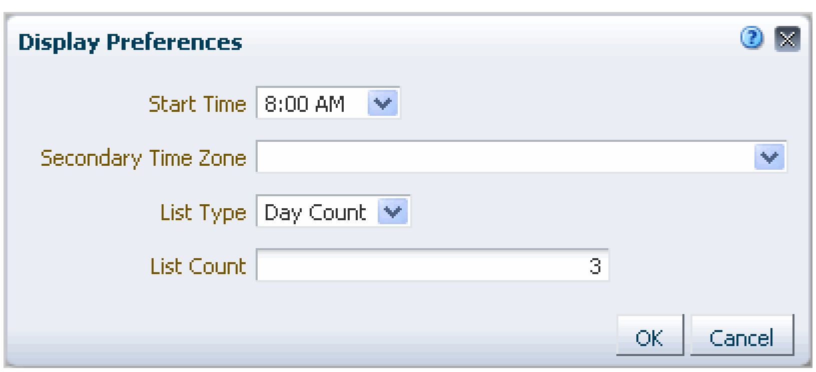
Events service display preferences:

- Determine the earliest time displayed on the calendar when events are viewed by day or week.
- Identify a secondary time zone.
- Specify how to display events in List view: by day, week, month, or for a specified number of days.

To set these preferences, click the **Set Event Preferences** icon (Figure 63–8) to access the Display Preferences dialog (Figure 63–9).

Figure 63–8 The Set Event Preferences Icon

Figure 63–9 The Events Display Preferences Dialog



Note: The **Set Event Preferences** icon, and therefore the Display Preferences dialog, is not available in the Events - Mini View task flow.

This section includes the following subsections:

- Section 63.2.3.5.1, "Setting the Calendar Start Time"
- Section 63.2.3.5.2, "Setting a Secondary Time Zone"
- Section 63.2.3.5.3, "Configuring List View"

63.2.3.5.1 Setting the Calendar Start Time In Day and Week view, the calendar grid is divided into hours. If vertical space for your calendar is limited, you can specify the earliest hour to display on the calendar grid to save space. If the space available is big enough to display hours from before the specified start time up until 11PM, it does so.

To set the calendar start time:

1. Go to the Events task flow or **Events** page where you want to set the calendar start time.

   > **Tip:** If the **Events** page is not available, see Section 63.2.3.1, "Displaying the Events Page for a Space."

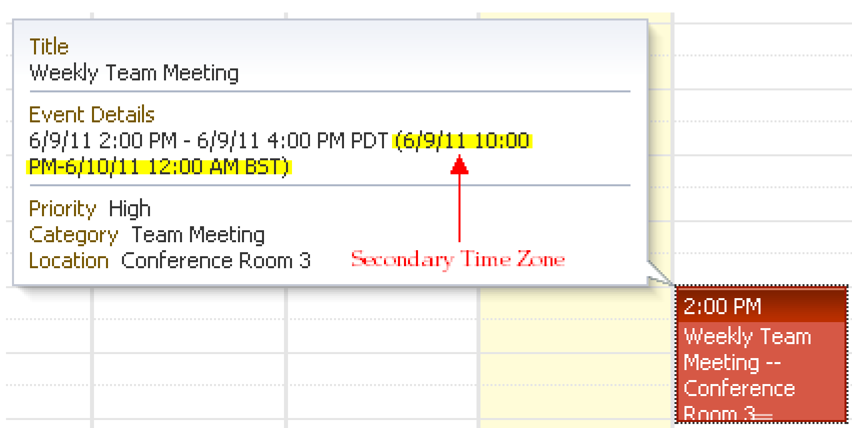
2. Click the **Set Event Preferences** icon on the toolbar (Figure 63–8).
3. In the Display Preferences dialog (Figure 63–9), from the **Start Time** dropdown list, select the earliest hour to display on the grid.

   Select from 12AM to 11PM.
4. Click **OK** to save your changes.

63.2.3.5.2 Setting a Secondary Time Zone In these days of distributed workforces, it is not unusual to be working in teams with members in different locations. When scheduling meetings, it is useful to know the hours most optimal to all invitees. To make this easier, you can specify a secondary time zone to see what time a meeting is in that time zone as well as your own.

When you hover your mouse over an event, the event details popup shows the time of the meeting in your time zone and in the secondary time zone (Figure 63–10).

Figure 63–10 An Event Details Popup Displaying Primary and Secondary Time Zones



To set a secondary time zone:

1. Go to the Events task flow or **Events** page where you want to set a secondary time zone.

> **Tip:** If the **Events** page is not available, see Section 63.2.3.1, "Displaying the Events Page for a Space."

2. Click the **Set Event Preferences** icon on the toolbar (Figure 63–8).
3. In the Display Preferences dialog (Figure 63–9), from the **Secondary Time Zone** dropdown list select a secondary time zone to display along with the primary time zone.
4. Click **OK** to save your changes.

63.2.3.5.3 Configuring List View You can specify how you want to display events, when the calendar is displayed in List view. You can display events by day, week, month, or for a specified number of days.

To configure List view:

1. Go to the Events task flow or **Events** page where you want to configure List view.

> **Tip:** If the **Events** page is not available, see Section 63.2.3.1, "Displaying the Events Page for a Space."

2. Click the **Set Event Preferences** icon on the toolbar (Figure 63–8).
3. In the Display Preferences dialog (Figure 63–9), from the **List Type** list, select how you want to display events in List view:
   - **Day Count**—List all upcoming events for a specified number of days.
   - **Day**—List all upcoming events for the currently selected day.
   - **Week**—List all upcoming events for the currently selected week.
   - **Month**—List all upcoming events for the currently selected month.
4. If you selected **Day Count** in the previous step, in the **List Count** field, specify the number of days for which you want to display events. The default is 14.
5. Click **OK** to save your changes.

63.2.4 Scheduling Events

You can schedule space events and personal events. When you schedule a personal event, the details are pushed to your Microsoft Exchange calendar.

> **Note:** You cannot schedule new events in the Events - Mini View task flow.

To schedule an event:

1. Go to the Events task flow or **Events** page where you want to schedule the event.

> **Tip:** If the **Events** page is not available, see Section 63.2.3.1, "Displaying the Events Page for a Space."

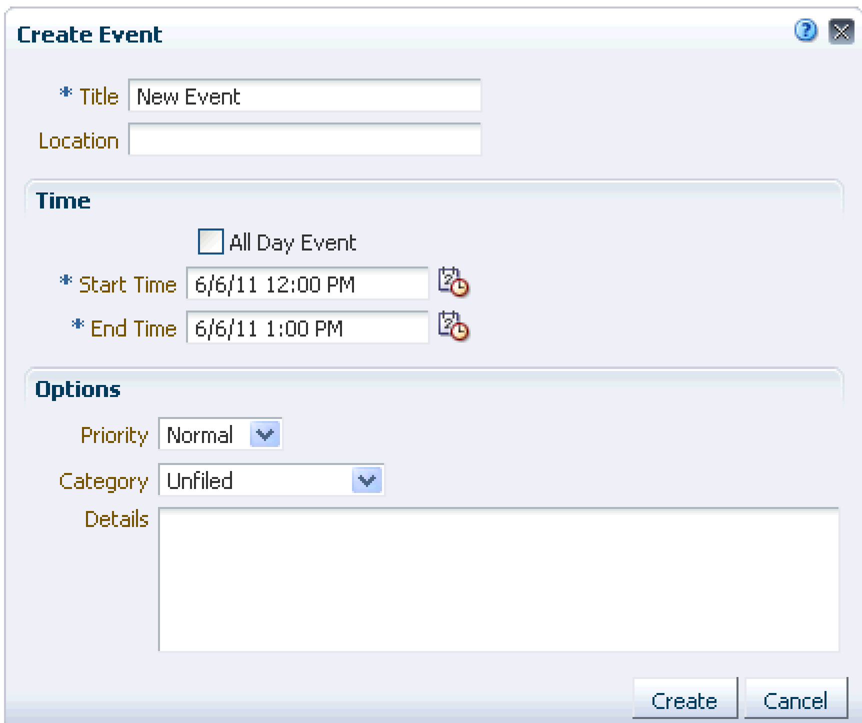
2. Click the **Create a new event** icon on the toolbar (Figure 63–11).

Figure 63–11 The Create a New Event Icon

The Create Event dialog opens (Figure 63–12). The fields in the Create Event dialog are slightly different depending on whether you are creating a personal event or a space event. These differences are pointed out later in this procedure.

Note: You can also easily invoke the Create Event dialog in grid view by double-clicking an empty space or right-clicking an empty space and choosing **Create**. The advantage of this is that the date and time of the event are automatically specified in the dialog.

Figure 63–12 The Create Event Dialog Invoked from a Space



3. In the **Title** field, enter a brief descriptive title for the event.

   For example, `Project Update`.

4. In the **Location** field, enter the location of the event.

   For example, `Conference Room 5`.

5. From the **Calendar** dropdown list, select the calendar against which you want to create the event.

> **Note:** The **Calendar** dropdown list is available only when the calendar overlay feature is enabled and at least one other calendar is displayed in the task flow.
>
> The **Calendar** dropdown list is not available for events created from the **Events** page (where calendar overlaying is not available).
>
> For more information about calendar overlaying, see Section 63.2.7, "Displaying Multiple Calendars in a Single Task Flow."

6. Select **All Day Event** to block out the entire day for the event.

   All day events can span multiple days. In Day and Week view mode, all day events are displayed in a separate area at the top of the calendar. In Month view, all day events are displayed surrounded by a block of color.

7. In the **Start Time** field enter a date and time to start the event.

   > **Tip:** You can click the **Select Date and Time** icon and select a start time from the Date Picker, if you prefer.

   For all day events, you specify the date only.

8. In the **End Time** field enter a date and time to finish the event.

   > **Tip:** You can click the **Select Date and Time** icon and select an end time from the Date Picker, if you prefer.

   For all day events, you specify the date only.

9. (Optional) From the **Priority** dropdown list, select a priority for the event: **Highest**, **High**, **Normal**, **Low**, or **Lowest**.

   The priority of an event determines where it appears when events clash. An event with Highest priority is displayed first. The event priority is also displayed in the event popup when a user hovers the mouse over the event.

10. (Optional) From the **Category** dropdown list, select a category to classify this event.

    Categories are useful for creating distinct groups of events, organized according to their general purpose.

    The event category is displayed in the event popup when a user hovers the mouse over the event. You can display events in different categories in different colors.

    > **See Also:** For information about how to create and manage categories, see Section 53.10.6, "Creating and Managing Space Event Categories."

    You can also filter a calendar to display events belonging to a specific category.

    > **See Also:** For more information, see Section 63.2.3.4, "Filtering Events by Category."

    > **Note:** The **Category** dropdown list is available only for space events.

11. (Optional) In the **Details** field, enter any additional details you want to include, up to a maximum of 4000 characters.

    For example, you might want to describe the purpose of the meeting, provide a brief agenda, or indicate if attendees need to prepare anything for the meeting.

    Note: The details that you enter here are available only when editing the event, they do not display in the event popup when users hover over the event. You should not assume that all users will read these details. Important details about the meeting should be communicated in a different way, for example, through the meeting notification email or by using an announcement.

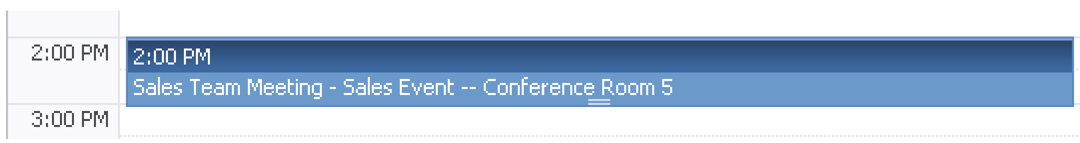
12. (Optional) Select **Private** if you do not want other users to be able to view your personal events.

    If the Events task flow is included on page in the Home space that you have made available to other users, those users are not able to see the event.

    Note: The **Private** check box is available only for personal events.

13. Click **Create** to add the event to the calendar (Figure 63–13).

Figure 63–13 An Event in Day View



63.2.5 Revising Scheduled Events

You may want to change some aspect of an event; for example, it may become necessary to change the time to accommodate a particular attendee, or the location may become unavailable.

To revise a scheduled event:

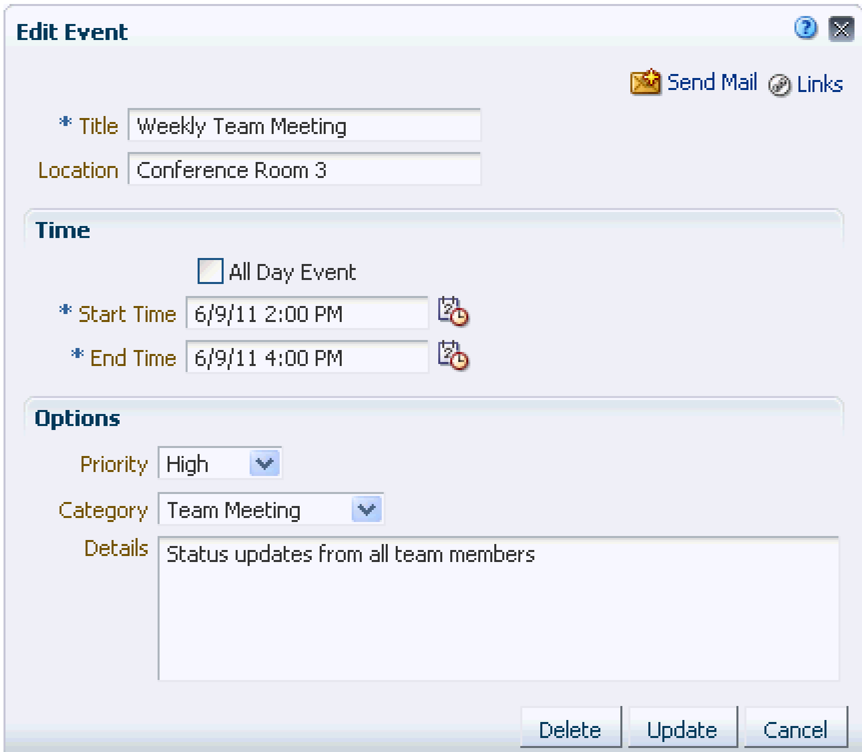
1. Go to the Events task flow, Events - Mini View task flow, or **Events** page where you want to revise a scheduled event.

    Tip: If the **Events** page is not available, see Section 63.2.3.1, "Displaying the Events Page for a Space."

2. Click the event to open the Edit Event dialog (Figure 63–14).

    Tip: In the Events task flow or **Events** page, you can also access the Edit Event dialog by right-clicking an event and choosing **Edit**, or by moving the mouse pointer (or using the Tab key) to highlight an event and pressing Enter.

Figure 63–14 The Edit Event Dialog Invoked from a Space



3. Revise the event details.

   For information about the different options available in the dialog, see Section 63.2.4, "Scheduling Events."

   > **See Also:** For information about using the Send Mail feature, see Chapter 67, "Working with the Mail Service."
   >
   > For information about creating links to other objects, see Chapter 65, "Working with the Links Service."

4. Click **Update** to save your changes.

63.2.6 Cancelling Scheduled Events

To cancel an event, you delete it from the **Events** page or task flow.

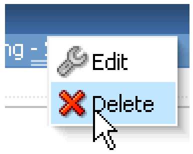
To cancel a scheduled event:

1. Go to the Events task flow or **Events** page where you want to cancel a scheduled event.

   > **Tip:** If the **Events** tab is not available, see Section 63.2.3.1, "Displaying the Events Page for a Space."

2. Right-click the event and select **Delete** (Figure 63–15).

Figure 63–15 Deleting an Event



> **Tip:** You can also delete an event by hovering your mouse over the event and pressing the Delete key or, in the Edit Event dialog, by clicking **Delete**.
>
> To delete an event from the Events - Mini View task flow, you must go through the Edit Event dialog.

3. Click **Delete** in the Delete Confirmation dialog.

   The event is removed from the calendar.

63.2.7 Displaying Multiple Calendars in a Single Task Flow

Within Spaces, you may be a member of several spaces. Each of those spaces may have its own calendar of events. In addition to that, you may also have your own calendar where you track those events that concern only yourself. At the start of each day, it is not practical to have to view each of these calendars individually to determine your schedule for the day.

To solve this issue, the Events service enables you to view multiple calendars in a single Events task flow. This is called calendar overlaying. You can do this in the Home space so that you can also include your personal appointments. You can also overlay calendars in an Events task flow on a space page.

> **Note:** The events from each calendar are displayed in a different color to help identify the source of the event.
>
> If you are overlaying calendars on a space page, category colors are used only for events from the current space. All events from overlaid calendars are displayed in the color defined for that calendar, regardless of their category.

For example, you might have a sales event that involves your Marketing, Sales, and Facilities departments. You want to create a calendar that includes events and tasks for all the departments so that each group has a clear picture of the overall plan.

To create the All Events calendar:

1. Create a space called All Events.
2. Add events to the calendars for the Marketing, Sales, and Facilities spaces.
3. Add the Events task flow to a page in the All Events space, overlaying the calendars from the Marketing, Sales, and Facilities spaces.

> **Note:** Calendar overlaying is available only in Events task flows. It is not available in Events - Mini View task flows or in the **Events** page.

This section includes the following subsections:

- Section 63.2.7.1, "Enabling Calendar Overlaying"
- Section 63.2.7.2, "Displaying Additional Calendars"
- Section 63.2.7.3, "Editing Calendar Display Options"

63.2.7.1 Enabling Calendar Overlaying

To display additional calendars in the Events task flow, you must first enable the calendar overlaying feature for the task flow.

To enable calendar overlaying:

1. Go to the Home space or the appropriate space and locate the page that contains the Events task flow.

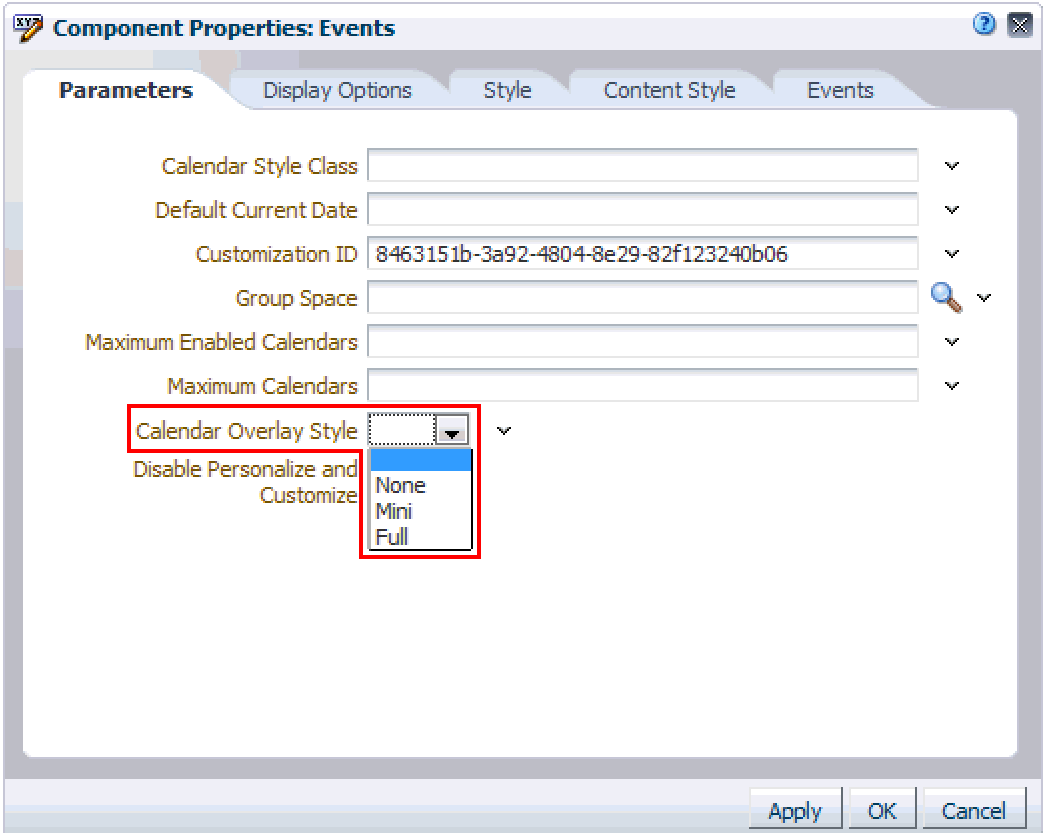
   If you have not yet added the Events task flow to a page, see Section 18.5, "Adding a Component to a Page."

2. Open the page in edit mode (Composer), for example, by pressing Ctrl+Shift+E.
3. Click the **Edit** icon (wrench) for the Events task flow.

   > **Note:** If you are working in a space, you may not have the appropriate permissions to edit the task flow. To enable calendar overlaying, contact the space moderator.

4. In the Component Properties: Events dialog, click the **Parameters** tab (Figure 63–16).
5. From the **Calendar Overlay Style** dropdown list, select:
   - **None** if you do not want to use calendar overlays.
   - **Mini** to use a compact view of the calendar overlay. This takes up less space on the page, but it might not be immediately obvious how to work with the overlays. Use this option if space is very limited on the page, or when your users have become familiar with calendar overlays and how to use them. Mini style is available only with Day and List view, not Week or Month.
   - **Full** to use a detailed calendar overlay. Use this option if space is not an issue on the page and to provide a richer user interface.

Figure 63–16 The Calendar Overlay Style Events Service Property

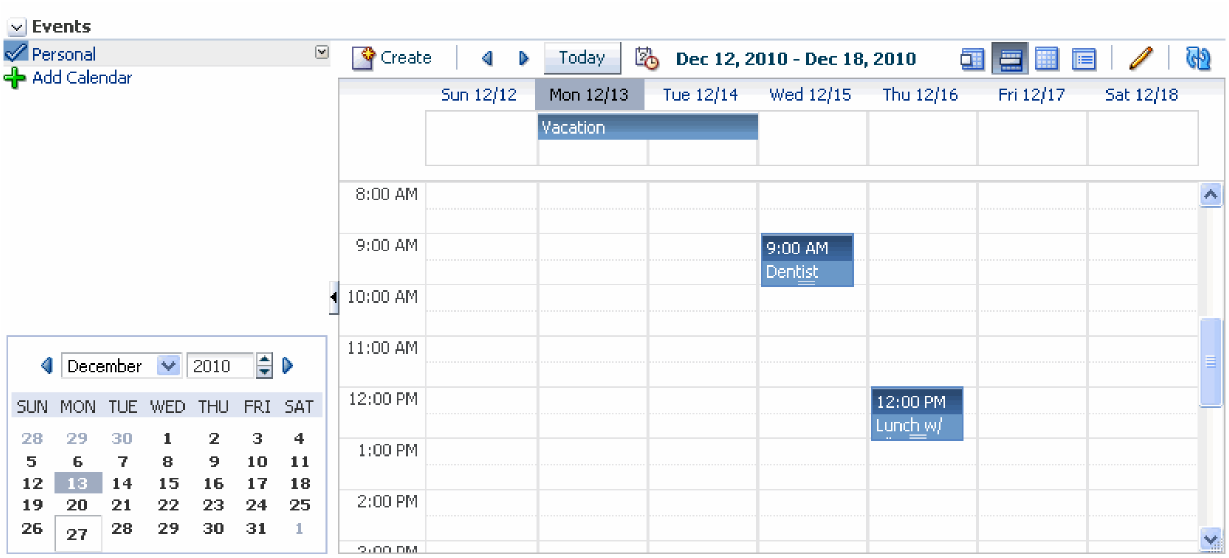


6. Click **OK** to save your changes and exit the Component Properties dialog.
7. Click **Save** at the top right of Composer to save your changes.
8. Click **Close** at the top right to exit Composer.

   The Events task flow now includes an area to the left of the calendar where you can select other calendars to display in the task flow.

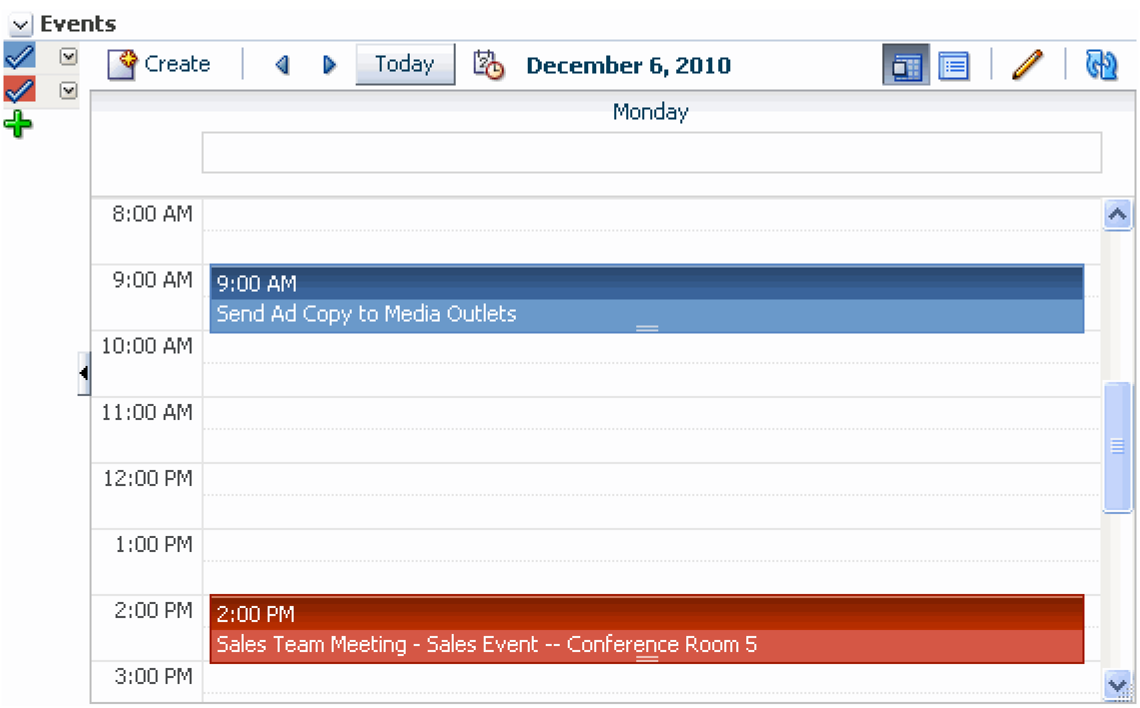
   If you selected the **Full** option for the **Calendar Overlay Style**, the calendar overlay area includes text as well as icons and also includes a date picker to help you easily move around your calendar (Figure 63–17).

Figure 63–17 Events Task Flow with Full Calendar Overlay Area



If you selected the **Mini** option for the **Calendar Overlay Style**, the calendar overlay area is much smaller, displaying icons only and no date picker (Figure 63–18).

Figure 63–18 Events Task Flow with Mini Calendar Overlay Area



Note: If you have not yet set up and logged in to your personal calendar, click the **Continue** link to display the calendar in the task flow. For information about how to set up your personal calendar, see Section 63.2.2, "Accessing Your Personal Events."

63.2.7.2 Displaying Additional Calendars

When the calendar overlaying feature is enabled, users can display as many calendars as they want in the Events task flow. Each calendar's events are displayed in a different color to make it easier to distinguish which calendar it belongs to.

To display additional calendars:

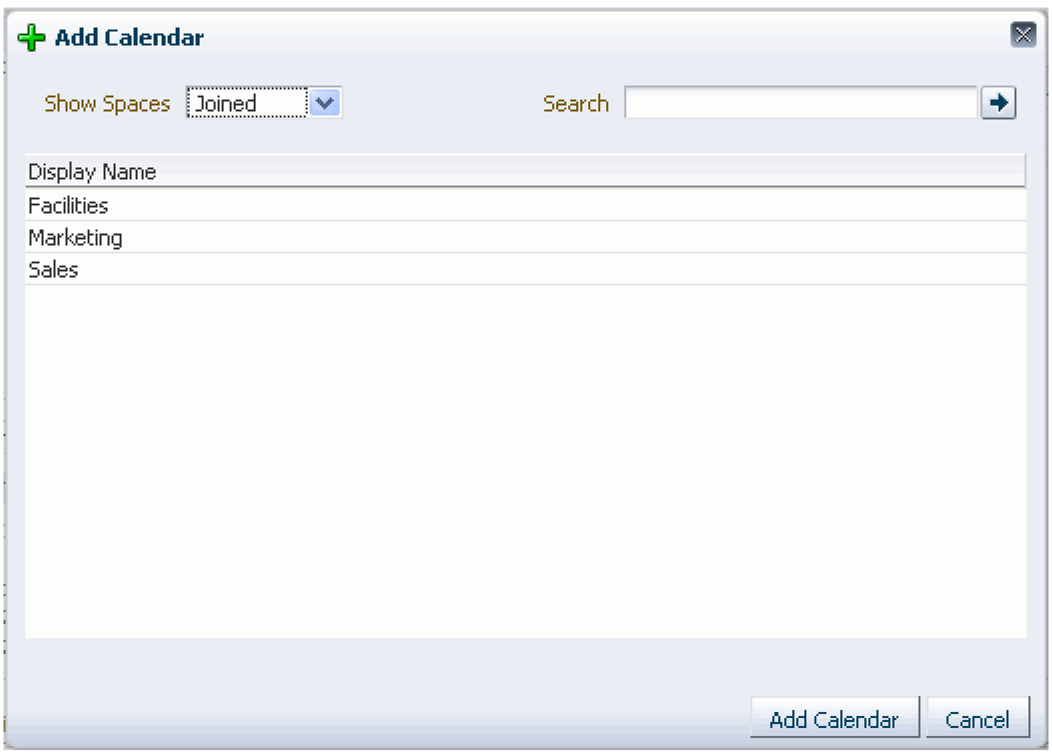
1. Go to the Home space or the appropriate space and locate the page that contains the Events task flow.
2. In the calendar overlay area of the Events task flow, click the **Add Calendar** icon (Figure 63–19).

Figure 63–19 The Add Calendar Icon

3. In the Add Calendar dialog (Figure 63–20), select the space that provides the calendar that you want to display in the task flow.

   You can select multiple spaces.

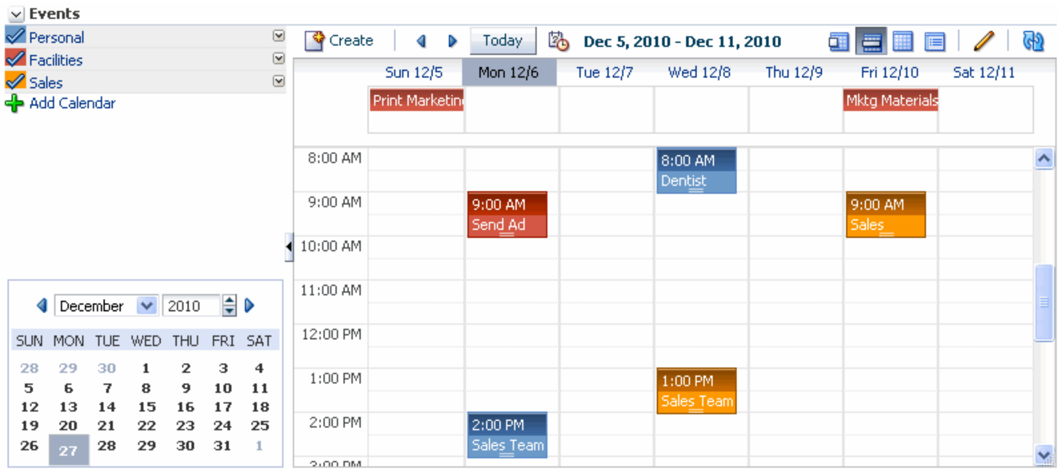
Figure 63–20 The Add Calendar Dialog



4. Click **Add Calendar.**

   The calendar overlay area now includes the selected space and the calendar on the right includes events from that space. The events from each space are displayed in a different color.

Figure 63–21 The Events Task Flow Displaying Multiple Calendars



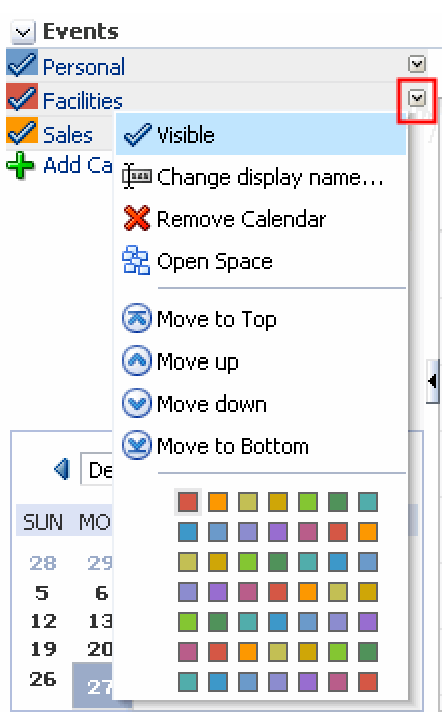
63.2.7.3 Editing Calendar Display Options

After adding a space's events to your calendar you can change various display options, including the order the calendar appears in the list and the color used to identify events from the calendar.

To edit calendar display options:

1. Go to the Home space or the appropriate space and locate the page that contains the Events task flow.
2. Click the arrow icon to the right of the space for which you want to edit display options. This displays the calendar overlay popup menu (Figure 63–22).

Figure 63–22 The Calendar Overlay Menu



3. From the popup menu, select:

- **Visible** to toggle the display of this space's events in the calendar.

  You can also toggle the display of a space's events by clicking the space name (Full view only) or the colored square next to the space name.
- **Change display name** to make the name in the list of spaces in Full view more meaningful to you than just the space name.
- **Remove Calendar** to remove this space's calendar from the task flow.
- **Open Space** to open the space associated with this calendar.
- **Move to Top/Move up/Move down/Move to Bottom** to rearrange this space in the list.

  The order in which the spaces are listed determines the order in which events are listed when events from multiple spaces occur in the same time slot. Events from the space at the top of the list are displayed first.
- A color to change the color used for the events from this space.

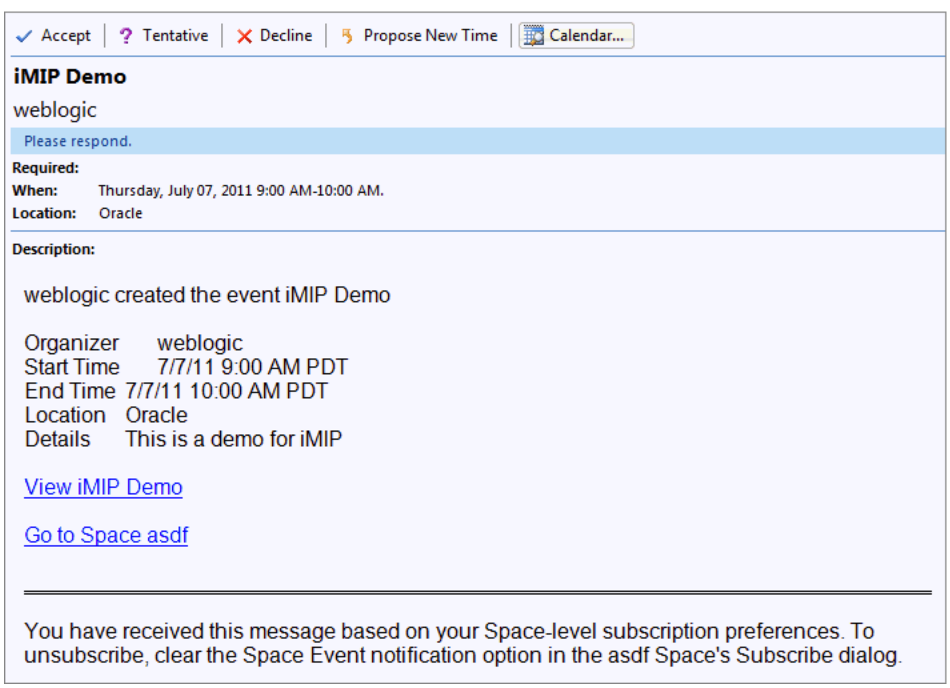
63.2.8 Subscribing to Events

You can subscribe to receive notifications when events for a particular space are created, updated, or deleted.

> **See Also:** For information about how to subscribe to space events, see Section 39.3.2, "Setting Space-Level Subscriptions."

When you subscribe to a space's events, whenever an event is created, updated, or deleted in that space, a notification is sent to you. If the client to which that notification is sent supports iMIP (for example, Microsoft Outlook, Mozilla Thunderbird, Gmail, and so on), the notification email includes the ability to accept or decline the event, propose a new time for the event, and so on within the email.

Figure 63–23 Email Notification for a Space Event

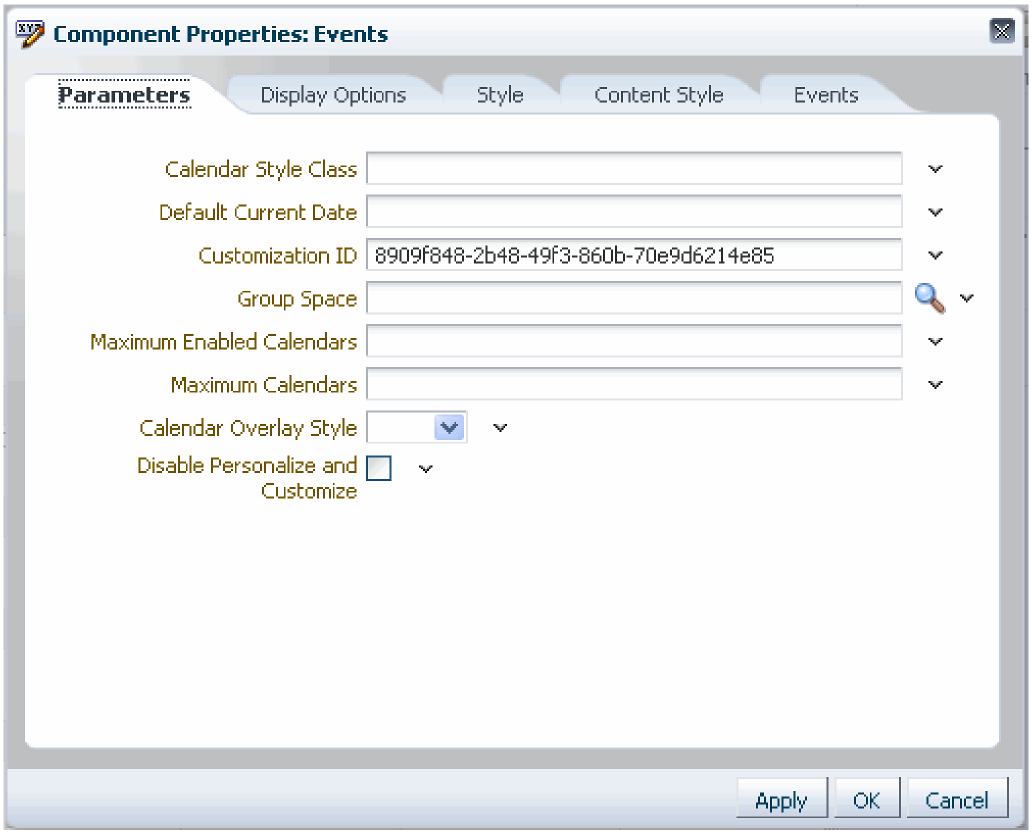


If you accept an event, it is added to your calendar in your email client.

63.3 Setting Events Service Task Flow Properties

The Events service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 63–24).

Figure 63–24 Events Service Task Flow Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Events service task flows and describe the properties on the Parameters tab:

- Section 63.3.1, "What You Should Know About the Events Service Task Flow Properties"
- Section 63.3.2, "Events Task Flow Parameters"
- Section 63.3.3, "Events - Mini View Task Flow Parameters"

63.3.1 What You Should Know About the Events Service Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 63.3.2, "Events Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For information about wiring pages and components, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So this tab may be omitted. For more information, see Section 18.6.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

63.3.2 Events Task Flow Parameters

Table 63–2 describes the parameters that are unique to the Events task flow.

Table 63–2 Events Task Flow Parameters

Parameter	Description
`Calendar Overlay Style`	Whether calendar overlay is enabled. Valid values are: ■ Empty (default): No calendar overlay ■ **None:** No calendar overlay ■ **Mini:** Calendar overlay is enabled in Mini mode, which takes up less screen space ■ **Full:** Calendar overlay is enabled in Full mode
`Calendar Style Class`	The name of the custom style class you want to apply to the calendar component.
`Customization ID`	A unique identifier for event view customization. Customization ID assists with maintaining the association of this task flow instance with its customization and personalization settings. This value is set automatically. Do not edit this value.
`Default Current Date`	The default current date on the calendar. Valid values are: ■ Empty (default): The current date (that is, today's date) ■ Any date using the format `mm/dd/yyyy`
`Disable Personalize and Customize`	A check box to determine whether users can personalize or customize the task flow. If not selected, users can personalize and customize the task flow.

Table 63–2 (Cont.) Events Task Flow Parameters

Parameter	Description
`Group Space`	The name of the space that is the source of listed events. Valid values are: ▪ Empty: Task flow displays events for the current space (that is, the space in which it is placed) ▪ Any space display name: Task flow displays events for the named space The space display name is available on the **General** page in the space administration settings.
`Maximum Calendars`	The maximum number of calendars that a user can add to the task flow. When the maximum is reached, the Add Calendar icon no longer appears in the task flow. Default value: 20
`Maximum Enabled Calendars`	The maximum number of calendars that a user can display simultaneously. This value must not be greater than the value specified for **Maximum Calendars**. Default value: The same value as that specified for **Maximum Calendars**

63.3.3 Events - Mini View Task Flow Parameters

Table 63–3 describes the parameters that are unique to the Events - Mini View task flow.

Table 63–3 Events - Mini View Task Flow Parameters

Property	Description
`Calendar Toolbox Layout`	Custom calendar toolbox layout. The value is passed to the ADF calendar component as a `toolboxLayout` attribute.
`Customization ID`	A unique identifier for event view customization. Customization ID assists with maintaining the association of this task flow instance with its customization and personalization settings. This value is set automatically. Do not edit this value.
`Event Text Length`	The maximum number of characters of the event title to display in Mini view. Leave blank or enter `0` if you do not want the event title to be truncated. Default value: `18`
`List Events in Number of Upcoming Days`	The number of days for which to list upcoming events. Default value: `30`
`Number of Events Per Page`	The number of events to display at one time. Default value: `5`
`Using ADF Calendar Component`	A check box to select determine whether to use the ADF Calendar UI Component or a simple list with page flow.

64

Working with the Instant Messaging and Presence Service (IMP)

This chapter describes how to use the features provided through the Instant Messaging and Presence (IMP) service. The IMP service lets you see the presence status of other authenticated application users. It provides instant access to interaction options, such as instant messages and mails. Additionally, if enterprise presence is unavailable, you can connect to a 3rd-party network presence service, such as Yahoo! Messenger.

This chapter includes the following sections:

- Section 64.1, "What You Should Know About the IMP Service"
- Section 64.2, "Identifying Your Preferred Instant Messaging Provider"
- Section 64.4, "Working with IMP Service Features"

Audience

This chapter is intended for authenticated users who want to view, create, and manage instant messaging and presence. It also is intended for administrators in Spaces with the `Application-Manage Configuration` permission and individual space moderators who want to configure instant messaging and presence within their spaces. For more information, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

Note: Tasks discussed in this chapter are not available if the IMP service is not enabled in the current space.

64.1 What You Should Know About the IMP Service

The IMP service enables you to observe the presence status of other authenticated users (online, offline, busy, or away) and provides instant access to interaction options, such as instant messages (IM) and mail. Any WebCenter Portal service that has a user name can integrate with the IMP service; for example, Discussions, Documents, or Mail. Wherever a user is indicated, for example as the author of a document in the document library, you can see an icon (Figure 64–1) depicting the presence state of that user.

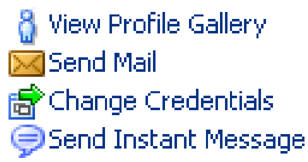
Figure 64–1 The Presence Icon for Online Users

If you hover your mouse over the **Presence** icon, a tooltip displays the current status message for that user, if available. If the user has not provided a status message, or the message cannot be retrieved, then the tooltip displays the presence state of the user (online, offline, busy, or away).

> **Note:** There is no idle status. In the case of extended user inactivity, the status still displays as online.

Additionally, you can click the **Presence** icon to invoke a context menu (Figure 64–2).

Figure 64–2 The Presence Icon Context Menu



From the context menu you can:

- View the user's profile. For more information, see Section 33.5.1, "Viewing Profile Details."
- Send mail to the user. For more information, see Section 64.4.2, "Sending a Mail Message from the Presence Icon Menu."
- Change credentials, which works as an alternative to using an external application.
- Send an instant message to the user. For more information, see Section 64.4.3, "Sending an Instant Message from the Presence Icon Menu."

> **Note:** The options that display on the context menu depend on what services are available to your application, how those services are configured, and which services are supported by the back-end presence server.

64.2 Identifying Your Preferred Instant Messaging Provider

The IMP service requires a back-end presence server. WebCenter Portal is certified with Microsoft Office Live Communications Server (LCS) 2005, Microsoft Office Communications Server (OCS) 2007, and Microsoft Lync 2010. When presence is not available (for example, if your enterprise uses a Jabber/XMPP presence server or has federated presence servers with users distributed across identity management systems), you can connect to a public network presence service.

Out-of-the-box, WebCenter Portal supports Yahoo! Messenger on network presence. However, the network presence model can be extended to include other providers, such as ICQ. To do so, you must build a presence network agent (PNA) that understands how to process each user's presence from a certain URL.

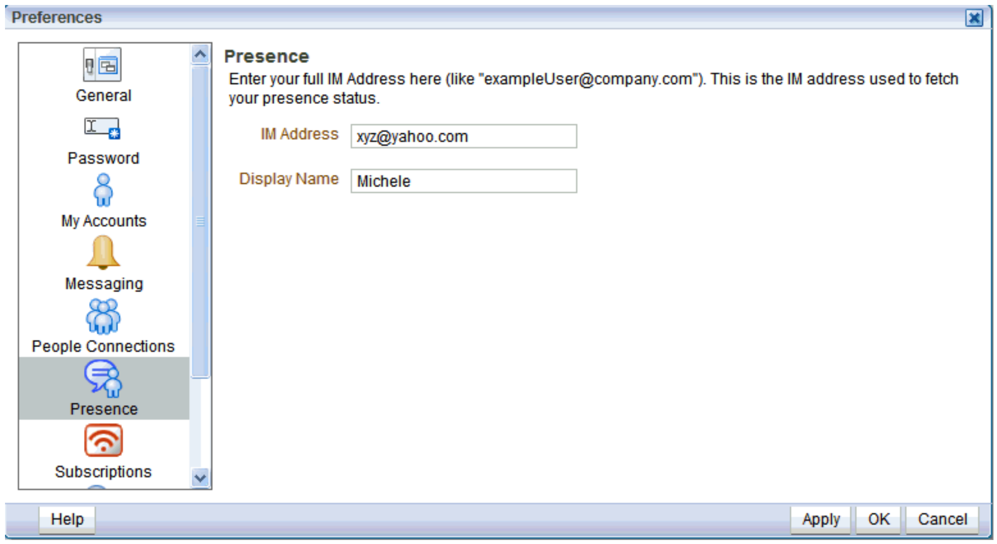
To enable network presence:

1. Click the **Preferences** link at the top of the application.
2. Click **Presence** to open the Presence Preferences pane.

3. Enter the IM address for the presence status and a display name (Figure 64–3).

> **Note:** PNAs run on the IM address. The IMP service consults all registered PNAs to see if one can handle this IM address. If so, then it delegates to the respective agent. If you register a new PNA where you identify every user presence with the domain mydomain.com, then your PNA handles the presence for user IM addresses like XYZ@mydomain.com.

Figure 64–3 The Presence Preferences Pane



4. Click **OK** to save your change and exit the Preferences dialog.

Presence tags for that user shows their network presence, either online (Figure 64–4) or offline (Figure 64–5).

Figure 64–4 Yahoo Presence Icon - Online

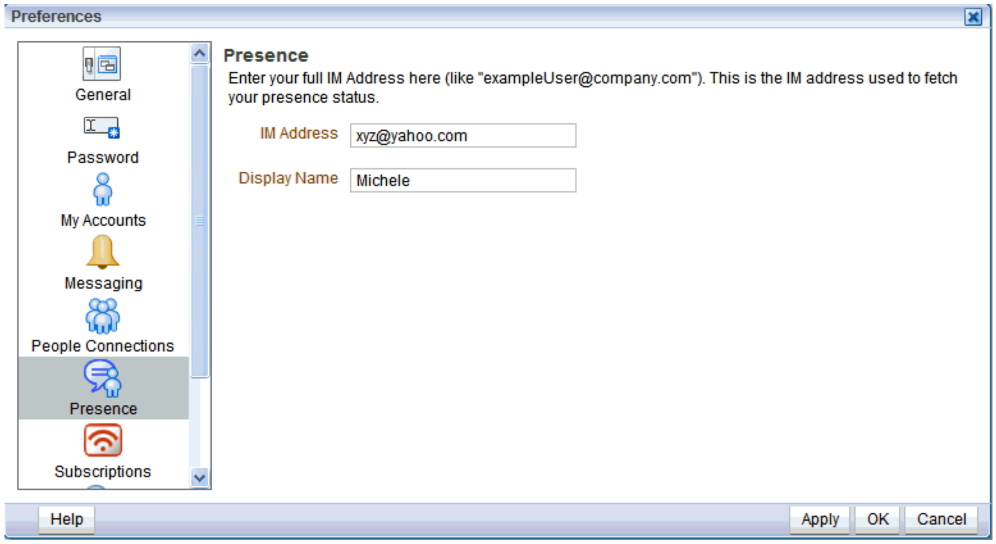
Figure 64–5 Yahoo Presence Icon - Offline

64.3 Configuring Network Presence

To set your presence to Yahoo! Messenger:

1. Click the **Preferences** link at the top of the application.
2. Click **Presence** to open the Presence Preferences pane.
3. Enter your Yahoo! Messenger ID and a display name for yourself (Figure 64–6).

Figure 64–6 The Presence Preferences Pane



4. Click **OK** to save your change and exit the Preferences dialog.

To revert back to your enterprise presence, when you are back on your network, simply remove this information from Presence Preferences.

Note: To send instant messages to an online user on Yahoo! Messenger, you also must have Yahoo! Messenger installed.

64.4 Working with IMP Service Features

Many task flows include a presence capability that enables you to make contact with other users from within the context of what you want to contact them about. For example, if you see a post in a discussion topic and want to contact the author of that post, you can do so directly from the Discussions task flow.

This section includes the following subsections:

- Section 64.4.1, "Viewing the Status of Other Users"
- Section 64.4.2, "Sending a Mail Message from the Presence Icon Menu"
- Section 64.4.3, "Sending an Instant Message from the Presence Icon Menu"

64.4.1 Viewing the Status of Other Users

Many task flows support on-the-spot communication with other users. That is, wherever a task flow includes a **Presence** icon (Figure 64–1), you can start an instant chat or send a mail to the user associated with the icon.

The way you communicate with another user depends upon their availability. For example, if the user is online, then you could send an instant message to make immediate contact. However, if the user is offline or busy, then sending a mail is probably a better option.

Additionally, users can provide further information about their status by providing status messages. If such a status message exists for a user, hovering over the **Presence** icon displays that message as a tooltip. The status message enables you to make an even more informed decision about how to make contact. If there is no status message for the user, then the presence state is displayed in the tooltip instead (online, offline, busy, or away).

To view the current presence status or status message of a user, simply hover the mouse over the **Presence** icon next to the user's name.

> **Note:** The presence state of the user is held in a cache with a default expiry time of 60 seconds. As a result, the **Presence** icon may not reflect the actual status of the user if the status has changed between the initial retrieval and the cache expiry time.

Table 64–1 describes the presence state each **Presence** icon indicates.

Table 64–1 Presence Icon Presence States

Presence Icon	State
	Associated user is online.
	Associated user is online, but busy. Please do not disturb.
	Associated user is still connected but away from the computer.
	Associated user is offline.

64.4.2 Sending a Mail Message from the Presence Icon Menu

Wherever you see a **Presence** icon, you can send a mail message to its associated user.

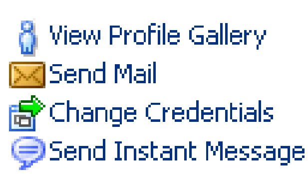
To send a mail message:

1. Locate a **Presence** icon (Figure 64–1) for the person you want to contact.

   For example, you can find **Presence** icons associated with documents and discussion topics, and anywhere a task flow is configured to support IMP.

2. Click the **Presence** icon associated with the user you want to contact. The available options pop up, as in Figure 64–7.

Figure 64–7 The Presence Icon



3. From the menu, select **Send Mail**.

You may be presented with a login window. If so, then enter your user name and password for your mail application. If your preferences are set up to deliver your login credentials automatically, you can start your message right away. For more information about login credentials and preferences, see Chapter 38, "Setting Your Personal Preferences."

4. Compose your message and click **Send**.

64.4.3 Sending an Instant Message from the Presence Icon Menu

Wherever you see a **Presence** icon, you can send an instant message to its associated user.

Before you can send an instant message, you must install the appropriate chat client (and only that client) on your local computer. The client must be configured to connect to the back-end presence server. To use Microsoft Live Communications Server (LCS) 2005, Microsoft Office Communications Server (OCS) 2007, or Microsoft Lync 2010, install the Microsoft Communicator.

Contact your administrator if you are not sure which client to install or how to connect to the presence server.

To send an instant message:

1. Locate a **Presence** icon (Figure 64–1) for the person you want to contact.

   For example, you can find **Presence** icons associated with documents and discussion topics, and anywhere a task flow is configured to support IMP.

2. Click the **Presence** icon associated with the user you want to contact. The available options pop up, as in Figure 64–8.

Figure 64–8 The Presence Icon Options

3. From the menu, select **Send Instant Message**.

   WebCenter Portal invokes your instant messaging client, and starts a chat session with the selected user.

65

Working with the Links Service

This chapter describes how to use the features provided through the Links service. The Links service provides a way to view, access, and associate related information.

This chapter includes the following sections:

- Section 65.1, "What You Should Know About the Links Service"
- Section 65.2, "Working with Links Service Features"

Audience

This chapter is intended for users who want to view, create, and manage links.

Such users must be granted, minimally, the space-level permission `View Pages and Content` to view links. They can view shared links only for resources for which they have `view` permission.

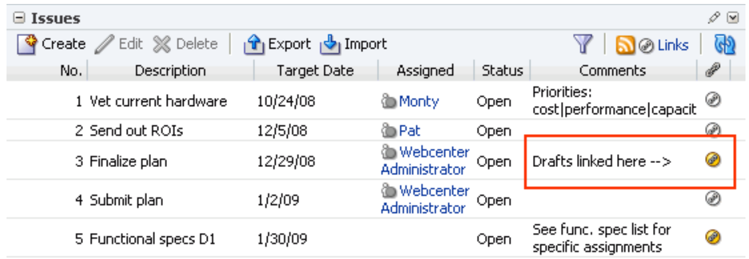
Authenticated users who plan to create and manage links require the space-level permission `Customize Pages and Edit Content`. They must have `view` permission on the resource. For more information, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

> **Note:** Tasks discussed in this chapter are not available if the Links service is not enabled in the current space.

65.1 What You Should Know About the Links Service

Linking gives users a means of explicitly associating two objects with each other through easy-access reference points, called *links*. The Links service assists with setting up these links from one application object to another. For example, using links you can associate a project plan document with a list of project issues. When users access the list, they can also immediately access the project plan by clicking a link that appears on the list (Figure 65–1). This service also provides a quick way to create new objects when establishing a link.

Figure 65–1 A Link on a List Row



Links are scoped to spaces. For example, the links that display in the *Finance* space differ from the links that display in the *Infrastructure* space, even though links are accessed from the same places in both spaces. The objects to which you can link also depend on which services have been enabled in your application.

Anywhere you see a **Links** icon, you can create a link to both new and existing content.

There are two **Links** icons that each indicate the state of the Links dialog:

- The gray **Links** icon (Figure 65–2) indicates that no links are present in the Links dialog.

Figure 65–2 The Links Icon (No Links Present)

- The gold **Links** icon (Figure 65–3) indicates that links are present in the Links dialog.

Figure 65–3 The Links Icon (Links Present)

Use the **Link to Existing** option in the Links dialog to link to existing application objects, such as documents, discussion forum topics, and announcements. For more information, see Section 65.2.1, "Linking to Existing Objects."

Use the **Link to New** option in the Links dialog to both create an application object and link to it in a single operation. Select **Link to New** to upload and link to documents, create and link to discussion forum topics, enter the URL of a web page to link to, and create and link to other types of items. For more information, see Section 65.2.2, "Linking to New Objects."

You can create links from announcements, discussions, documents, events, lists, and pages.

The items you can link to differ between the **Link to New** and **Link to Existing** lists. For example, while you can link to a new note, you cannot link to an existing note. Additionally, the items you can link to from a Home space differ from those you can link to from a space. Table 65–1 lists the types of objects you can link to and from.

Table 65–1 Linking to Objects

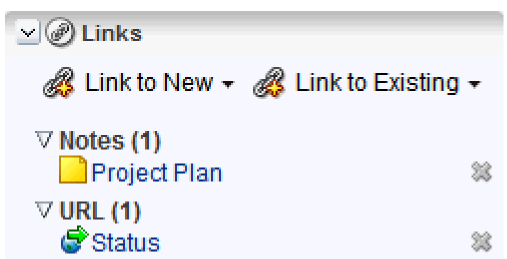
Object Type	Link to New Resource	Link to Existing Resource	Home space	Space
Announcement	No	Yes	No	Yes
Discussion Topic	Yes	Yes	No	Yes
Document/Wiki	Yes	Yes	Yes	Yes
Event	Yes	Yes	No	Yes
Note	Yes	No	Yes	Yes
URL	Yes	No	Yes	Yes

Given the right permission, other users can see your links, and you can see other users' links. For most services, what you can do with a link (such as view, create, delete) is handled by your Links permission. However, with the Notes service, you can delete a link only if you also have delete permission on the Notes service. For more information about permissions, see Table 54–3, " Space Permissions - Advanced Permission Model".

What you can do with the *linked object* is handled by the target object's security.

Links retain their originating location. For example, if you create a link on a list row, then that link appears only on that row, and not on all the other rows in the same list. Suppose you link to an article about a particular widget from the list row that describes that widget. The link to that article appears only on that row's Links dialog (Figure 65–4). It does not display on the Links dialog associated with the other rows on the same list.

Figure 65–4 The Links Dialog

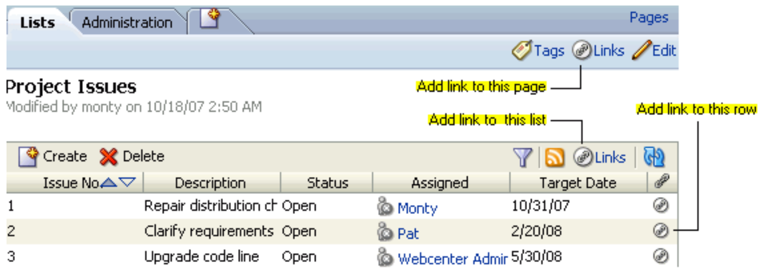


Most Links are also bidirectional. That is, when you create a link from a discussion to a document, a return link from the document to the discussion is automatically created. This bidirectional relationship holds for most, though not all, links. Links on notes, URLs, and list rows do not create a reciprocal link on the link target. For example, if you create a link from a document to a note, from a document to a URL, or from a list row to a document, then a reciprocal link is not created on the link target. However, a link from an entire list (rather than an individual list row) does create a reciprocal link from the target.

65.2 Working with Links Service Features

Many task flows include a linking capability that enables you to associate application objects with other application objects, and with internal and external web pages. For example, the List task flow automatically includes a **Links** icon on each list and on each list row. Additionally, the **Lists** page has its own link (Figure 65–5).

Figure 65–5 Link Icons on the Lists Page



Use the Links feature to link to relevant documents, discussions, notes, web pages, events, and announcements. When viewing the details of an event, you can link to the event's agenda. In a list of project assignments, you can link to the functional and design specifications relevant to each assignment. In a discussion forum, you can link to a related discussion, document, web page, or WebCenter Portal: Spaces page. No more fruitless wandering through different lines of business to find information.

This section describes how to link one thing to another and how to access those links.

This section includes the following subsections:

- Section 65.2.1, "Linking to Existing Objects"
- Section 65.2.2, "Linking to New Objects"
- Section 65.2.3, "Accessing Link Targets"
- Section 65.2.4, "Deleting a Link"
- Section 65.2.5, "Linking in the Rich Text Editor"

65.2.1 Linking to Existing Objects

This section describes how to use the **Link to Existing** option on the Links dialog to link to announcements, discussion forum topics, documents, and events currently available in your application.

This section includes the following subsections:

- Section 65.2.1.1, "Opening the Links Dialog to Link to Existing Objects"
- Section 65.2.1.2, "Linking to an Existing Announcement"
- Section 65.2.1.3, "Linking to an Existing Discussion Forum Topic"
- Section 65.2.1.4, "Linking to an Existing Document"
- Section 65.2.1.5, "Linking to an Existing Event"

65.2.1.1 Opening the Links Dialog to Link to Existing Objects

To create a link to an existing object, first go to the object from which you want to link and open the Links dialog. From there, the steps vary depending on the type of object you are linking to.

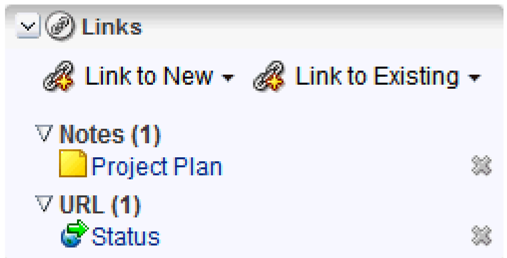
To open the Links dialog:

1. Go to the object from which you want to link.
2. Click the object's associated **Links** icon (Figure 65–6).

Figure 65–6 The Links Icon

This opens the Links dialog (Figure 65–7).

Figure 65–7 The Links Dialog



3. From the Links dialog, select **Link to Existing** and then the type of object you want to link to.

   For information about what to do next see:

   - Section 65.2.1.2, "Linking to an Existing Announcement"
   - Section 65.2.1.3, "Linking to an Existing Discussion Forum Topic"
   - Section 65.2.1.4, "Linking to an Existing Document"
   - Section 65.2.1.5, "Linking to an Existing Event"

65.2.1.2 Linking to an Existing Announcement

You can bring timely announcements to the highest traffic areas in your application by linking to them.

To link to an existing announcement:

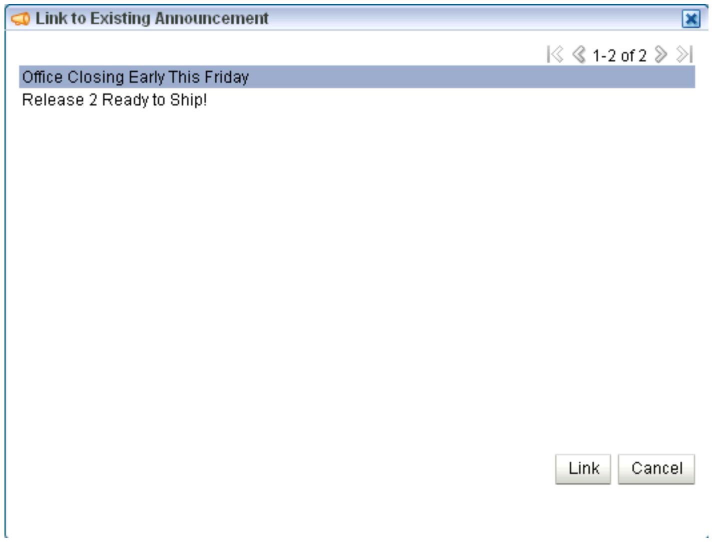
1. Go to the object from which you want to link to an announcement and click the **Links** icon.

   For more information, see Section 65.2.1.1, "Opening the Links Dialog to Link to Existing Objects."

2. From the Links dialog, select **Link to Existing** and then **Announcement**.

   A window listing announcements opens (Figure 65–8).

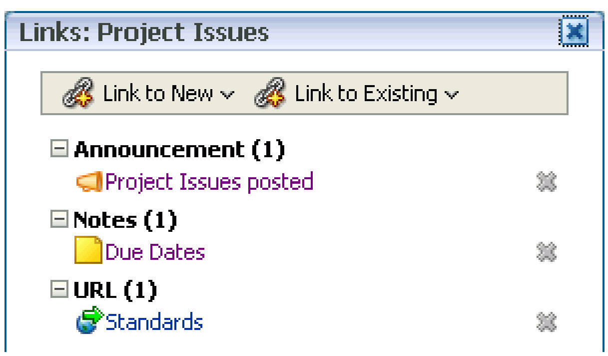
Figure 65–8 Existing Announcements



3. In the window, click the announcement to which you want to link.
4. Click **Link**.

   The title of the selected announcement appears on the list of links in the Links dialog (Figure 65–9).

Figure 65–9 Newly-Added Announcement on Links Dialog



5. Close the Links dialog.

65.2.1.3 Linking to an Existing Discussion Forum Topic

Help users find answers to questions before they even ask them by linking to relevant discussion forum topics.

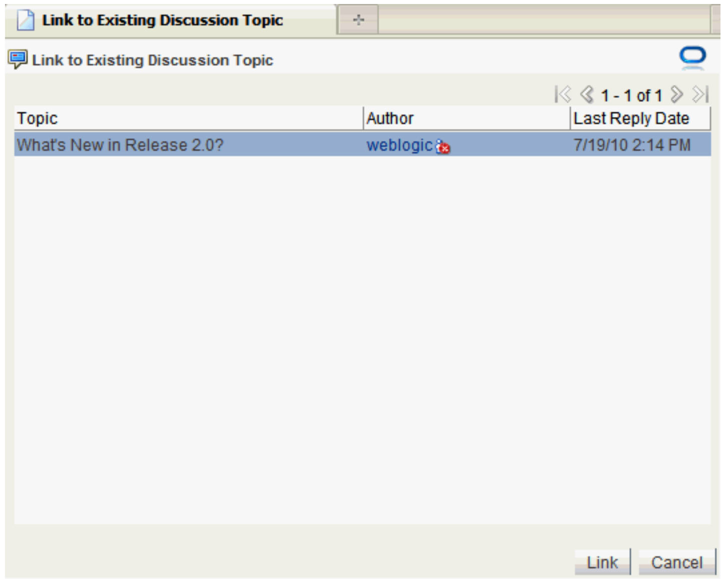
To link to an existing discussion forum topic:

1. Go to the object from which you want to link to a discussion forum message and click the **Links** icon.

   For more information, see Section 65.2.1.1, "Opening the Links Dialog to Link to Existing Objects."
2. From the Links dialog, select **Link to Existing** and then **Discussion**.

A window listing available topics opens (Figure 65–10). If the space or application supports multiple discussion forums, then a dropdown list at the top enables you to switch to a different forum.

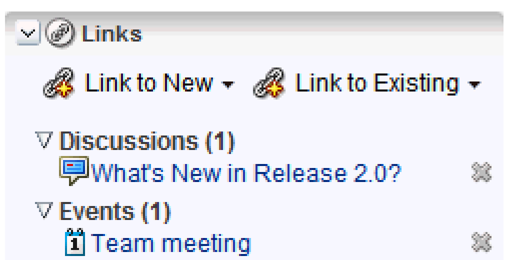
Figure 65–10 Existing Discussion Topics



3. Click the discussion topic to which you want to link.
4. Click **Link**.

   The title of the selected discussion topic appears on the list of links in the Links dialog (Figure 65–11).

Figure 65–11 Newly-Added Discussion Topic on Links Dialog



5. Close the Links dialog.

65.2.1.4 Linking to an Existing Document

To save users from having to search for documents in the document library, link to them directly. For example, link to a meeting's agenda directly from the meeting's event details.

To link to an existing document:

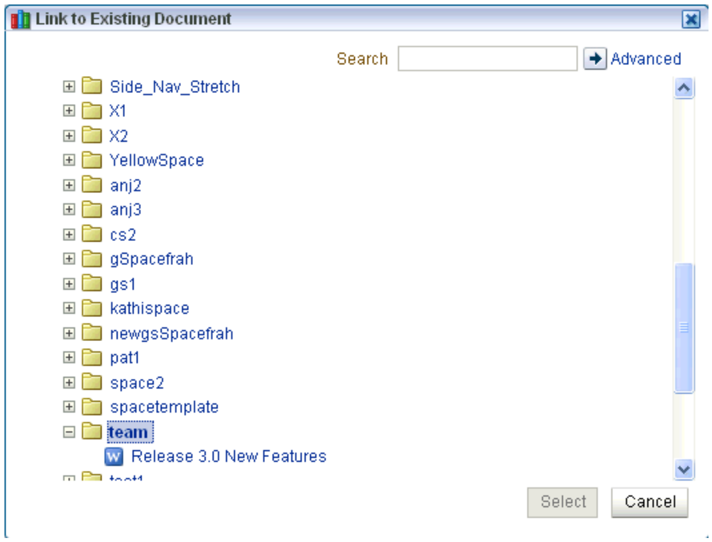
1. Go to the object from which you want to link to a document and click the **Links** icon.

   For more information, see Section 65.2.1.1, "Opening the Links Dialog to Link to Existing Objects."

2. From the Links dialog, select **Link to Existing** and then **Document**.

   The Link to Existing Document dialog opens (Figure 65–12).

Figure 65–12 Existing Documents



3. Select the document, and click **Select**.

   The document link appears on the list of links in the Links dialog (Figure 65–13).

Figure 65–13 A Document Link on the Links Dialog

4. Close the Links dialog.

65.2.1.5 Linking to an Existing Event

You can link to information about events that are relevant to the current object. For example, you could provide a link from an issues document to an event scheduled to discuss those very issues.

To link to an existing event:

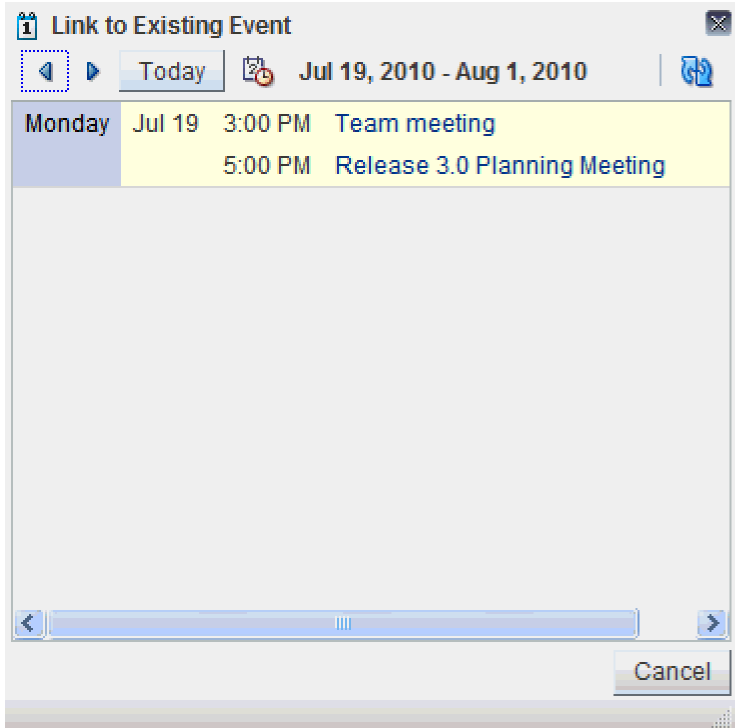
1. Go to the object from which you want to link to an event and click the **Links** icon.

   For more information, see Section 65.2.1.1, "Opening the Links Dialog to Link to Existing Objects."

2. From the Links dialog, select **Link to Existing** and then **Event**.

   A window opens listing all of the events you can access.

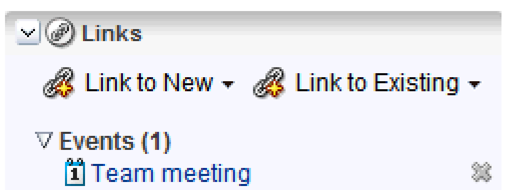
Figure 65–14 Existing Events



3. In the window, click the event to which you want to link.

   The title of the selected event appears on the list of links in the Links dialog (Figure 65–15).

Figure 65–15 Newly-Added Event on Links Dialog



4. Close the Links dialog.

65.2.2 Linking to New Objects

When you use **Link to New**, you accomplish two things at the same time: you create a new object, and you create a link to that object. Use the **Link to New** option on the Links dialog to link to a new discussion forum topic, a new document, a new event, a new note, or a web page.

This section describes how to link to these types of objects. It contains the following subsections:

- Section 65.2.2.1, "Opening the Links Dialog to Link to a New Object"
- Section 65.2.2.2, "Adding and Linking to a Discussion Forum Topic"
- Section 65.2.2.3, "Adding and Linking to a Document"
- Section 65.2.2.4, "Adding and Linking to an Event"

- Section 65.2.2.5, "Adding and Linking to a Note"
- Section 65.2.2.6, "Linking to a Web Page"

65.2.2.1 Opening the Links Dialog to Link to a New Object

When you want to create a link to a new object, the first thing to do is go to the object from which you want to link and open the Links dialog. From there the steps vary depending on the type of object you are linking to.

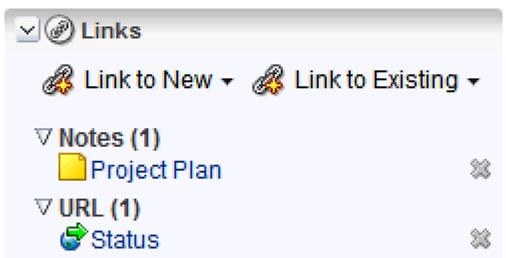
To open the Links dialog:

1. Go to the object from which you want to link.
2. Click the object's associated **Links** icon (Figure 65–16).

Figure 65–16 The Links Icon

   This opens the Links dialog (Figure 65–17).

Figure 65–17 The Links Dialog



3. From the Links dialog, select **Link to New** and then the type of object you want to link to.

   For information about what to do next see:

   - Section 65.2.2.2, "Adding and Linking to a Discussion Forum Topic"
   - Section 65.2.2.3, "Adding and Linking to a Document"
   - Section 65.2.2.4, "Adding and Linking to an Event"
   - Section 65.2.2.5, "Adding and Linking to a Note"
   - Section 65.2.2.6, "Linking to a Web Page"

65.2.2.2 Adding and Linking to a Discussion Forum Topic

You can create a new thread directly from the object that first prompted the discussion, adding a link at the same time.

To link to a new discussion forum topic:

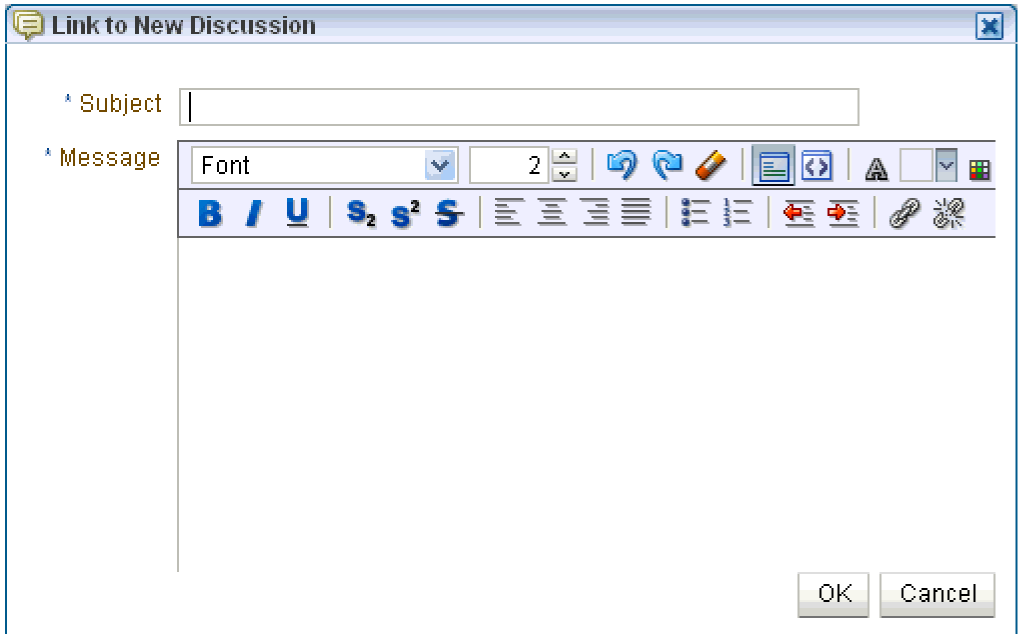
1. Go to the object from which you want to link to a new discussion forum topic and click the **Links** icon.

   For more information, see Section 65.2.2.1, "Opening the Links Dialog to Link to a New Object."

2. From the Links dialog, select **Link to New** and then **Discussion**.

The Link to New Discussion Topic dialog opens (Figure 65–18).

Figure 65–18 Link to New Discussion Dialog



3. If the space or application supports multiple discussion forums, then in the **Forum** list, select the forum in which you want to create the discussion topic.
4. In the **Subject** field, enter a subject for the new topic.
5. In the **Message** field, enter the topic content.
6. Click **OK**.

   The topic is added to the selected discussion forum, and the link is added to the Links dialog.
7. Close the Links dialog.

65.2.2.3 Adding and Linking to a Document

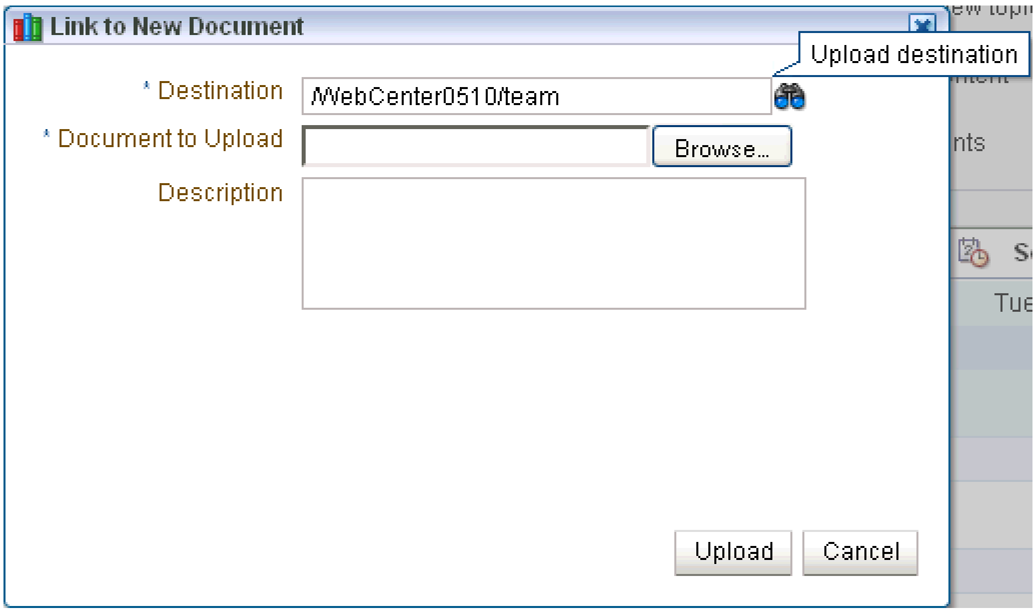
When viewing an object, such as a discussion forum topic, you might be aware of an informative document that would help other viewers of the object. You can add the document or wiki to the document library directly from the original object, adding a link to it at the same time.

To link to a new document:

1. Go to the object from which you want to link to a new document and click the **Links** icon.
2. From the Links dialog, select **Link to New** and then **Document**.

   The Upload Document dialog opens (Figure 65–19).

Figure 65–19 Link to New Document Dialog



3. Click **Browse**, and navigate to the location of the document you want to upload.
4. Select the document, and click **Open**.
5. Enter an optional description and change the default destination directory, if necessary. Click the **Browse** icon to locate a destination, if necessary.
6. Click **Upload**.

   The document is uploaded, and the link is added to the Links dialog.

   The location of the uploaded document depends on where you initiated the linking action. The document could be uploaded to the selected space's document library or to the root folder of your WebCenter Portal default document repository connection.
7. Close the Links dialog.

65.2.2.4 Adding and Linking to an Event

You can create a new event and immediately add a link to it, for example, to schedule a meeting to address issues raised in a discussion forum topic.

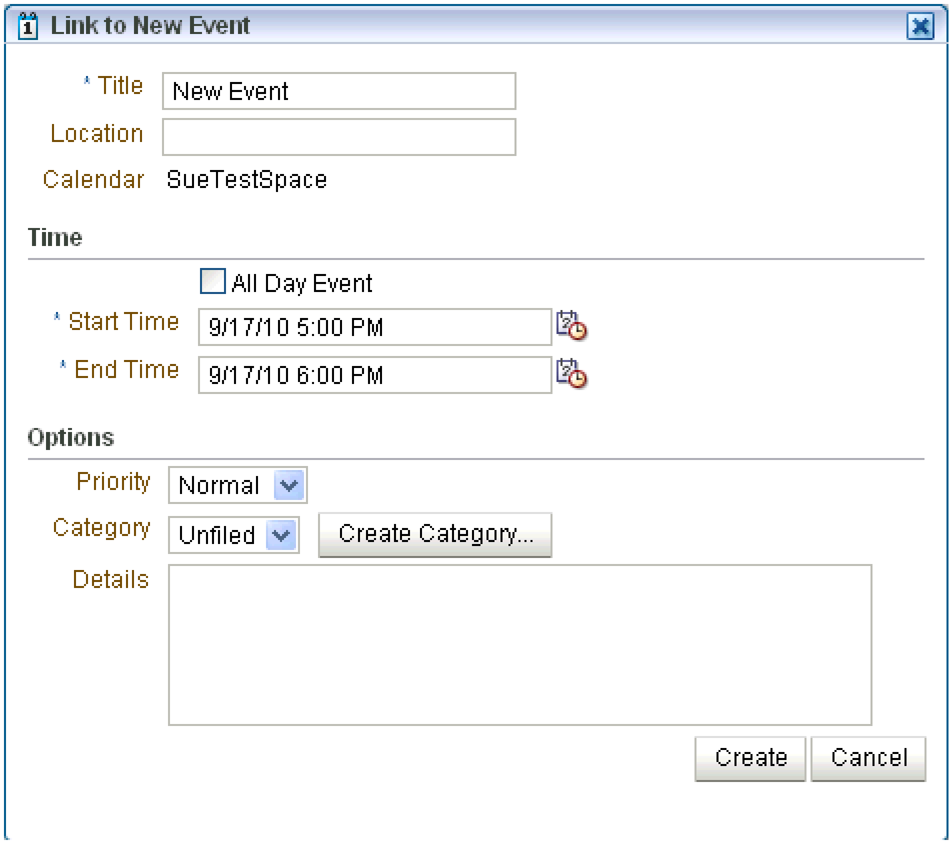
To add and link to a event:

1. Go to the object from which you want to link to a new event and click the **Links** icon.

   For more information, see Section 65.2.2.1, "Opening the Links Dialog to Link to a New Object."
2. From the Links dialog, select **Link to New** and then **Event**.

   The Link to New Event dialog opens (Figure 65–20).

Figure 65–20 The Link to New Event Dialog



3. Enter event details as described in Section 63.2.4, "Scheduling Events."
4. Click **Create**.

   The event is added and the link is added to the Links dialog.
5. Close the Links dialog.

65.2.2.5 Adding and Linking to a Note

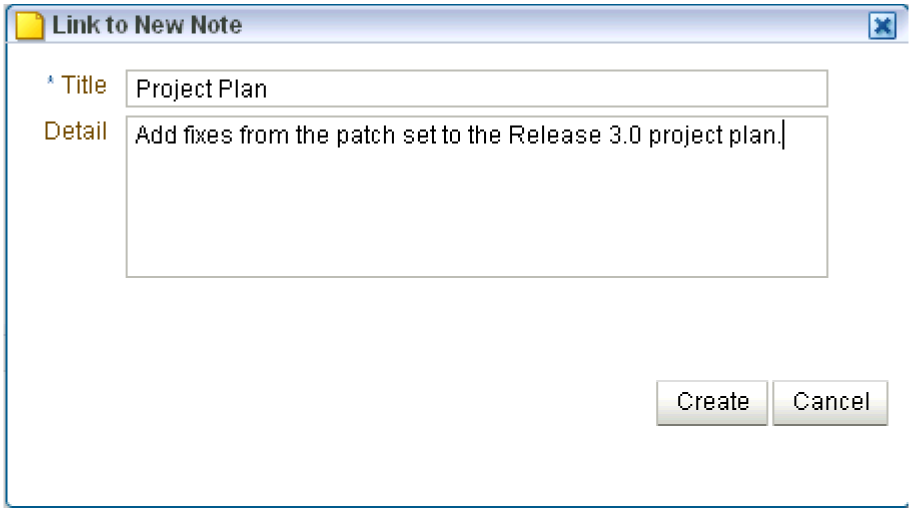
Create a personal note about another object, maybe to buy doughnuts for the team meeting, or to add an annotation to an object, like an online post-it note. The note is also linked to the object, serving as a reminder whenever you view it.

To add and link to a note:

1. Go to the object from which you want to add and link to a note and click the **Links** icon.
2. From the Links dialog, select **Link to New** and then **Note**.

   The Link to New Note dialog opens (Figure 65–21).

Figure 65–21 The Link to New Note Dialog



3. In the **Title** field, enter a title for the note.
4. In the **Detail** field, enter the note content.
5. Click **Create**.

   The note link is added to the Links dialog.
6. Close the Links dialog.

65.2.2.6 Linking to a Web Page

Link to a web page to provide access to additional information.

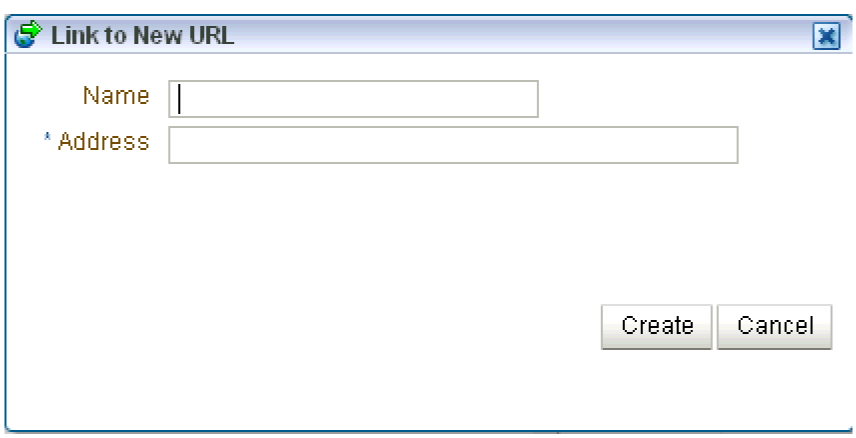
To link to a web page:

1. Go to the object from which you want to link to a web page and click the **Links** icon.

   For more information, see Section 65.2.2.1, "Opening the Links Dialog to Link to a New Object."
2. From the Links dialog, select **Link to New** and then **URL**.

   The Link to New URL dialog opens (Figure 65–22).

Figure 65–22 The Link to New URL Dialog



3. In the **Name** field, enter a name to use for the link.
4. In the **Address** field, enter the URL of the page to which you want to link.
5. Click **Create**.

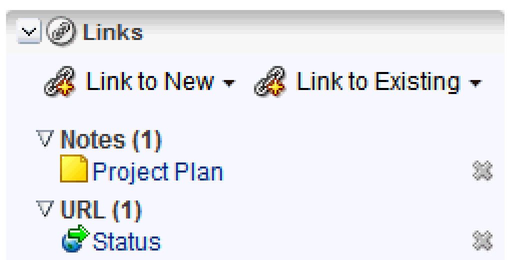
   The link is added to the Links dialog.
6. Close the Links dialog.

65.2.3 Accessing Link Targets

You access link targets from the Links dialog. Click the **Links** icon (Figure 65–23) associated with the item of interest, and then click the link you want to open on the resulting Links dialog (Figure 65–24).

Figure 65–23 The Links Icon

Figure 65–24 Links in the Links Dialog



65.2.4 Deleting a Link

When a link ceases to serve any purpose, you can delete it.

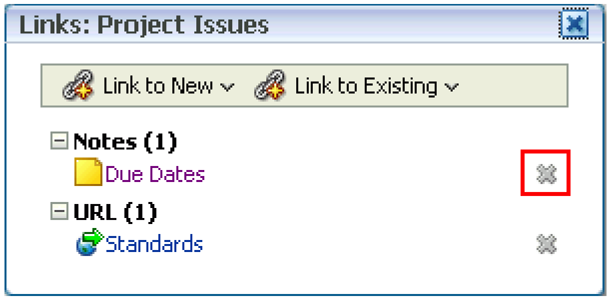
To delete a link:

1. Go to the object associated with the link you want to delete, such as the document, list, list row, or other item on which the link was created.
2. Click the **Links** icon (Figure 65–25).

Figure 65–25 The Links Icon

   This opens the Links dialog.
3. Click the **Delete** icon next to the link you want to delete (Figure 65–26).

Figure 65–26 Delete Icon Next to a Link

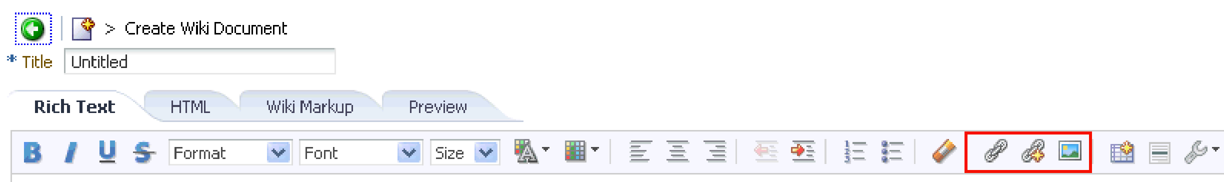


65.2.5 Linking in the Rich Text Editor

The Rich Text Editor (RTE) included with the Documents services is an HTML text editor, which you can use to link to existing and new WebCenter Portal resources. For example, this provides a quick way to add and link to a new, empty wiki page.

Figure 65–27 shows the highlighted RTE icons to link to existing or new resources and also to embed an image.

Figure 65–27 New Wiki Document in Rich Text Editor (RTE)



For more information, see Section 43.11, "Using the Rich Text Editor (RTE)."

Part XVI

Services: Lists through Worklist

Part XVI of the User's Guide provides overview and usage information about services from Lists through Worklist.

Part XVI includes the following chapters:

66

Working with the Lists Service

Use the Lists service to create, publish, and manage lists in the Spaces application. Create lists from Excel spreadsheets or from prebuilt templates, or create your own custom lists from scratch. When you create a list, it becomes available in the Resource Catalog. You can add lists from the catalog to any page in the space in which it was created.

This chapter describes how to use the features offered through the Lists service. It includes the following sections:

- Section 66.1, "What You Should Know About the Lists Service"
- Section 66.2, "Working with Lists Service Features"
- Section 66.3, "Setting List Viewer Task Flow Properties"

Audience

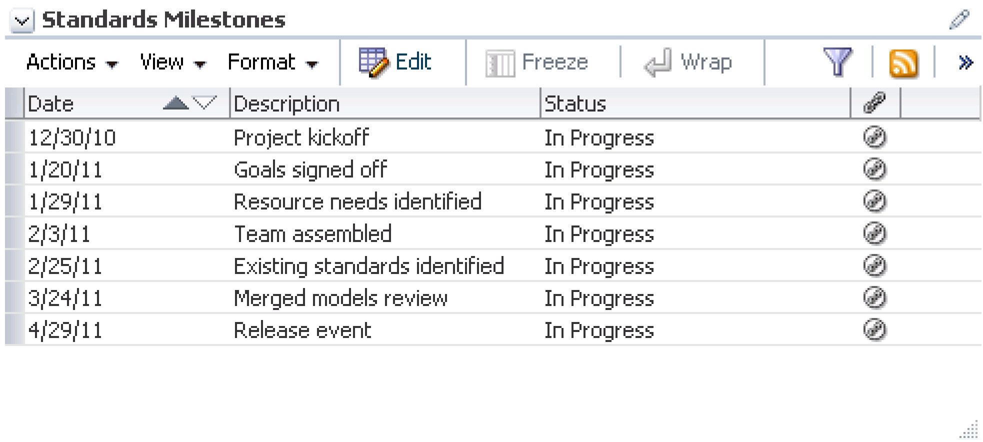
This chapter is for users who are interested in viewing, creating, populating, revising, importing, exporting, and removing lists and filtering list data. Such users must be granted, minimally, the space-level permission `View Pages and Content`. Such users can view lists. Users who plan to create and manage lists require the space-level permission `Customize Pages and Edit Content`.

Note: Tasks discussed in this chapter are not available if the Lists service is not enabled in the current space.

66.1 What You Should Know About the Lists Service

The Lists service provides a means of creating, publishing, and managing lists (Figure 66–1).

Figure 66–1 A List in the List Viewer Task Flow



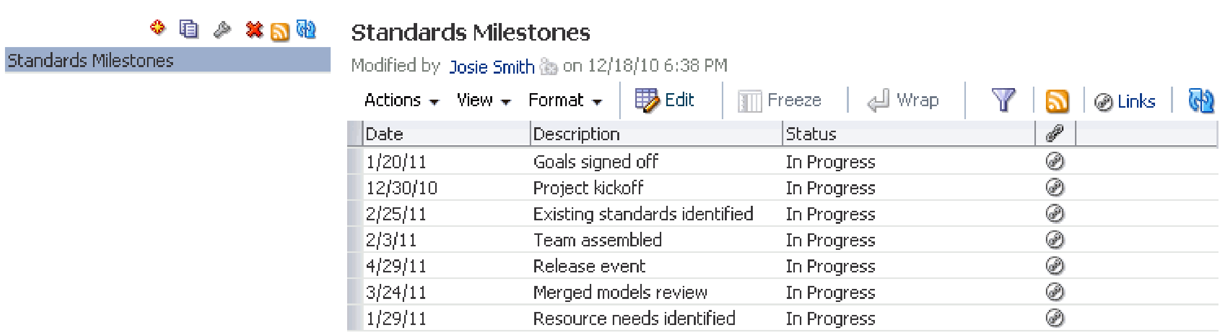
Lists are useful for many space activities, such as tracking issues, capturing project milestones, publishing project assignments, and much more. The lists you create in Spaces can be widely varied in their complexity. For example, you can start with a list of team members, and then include columns for contact information, project role, and links to relevant documents, such as any plans or proposals associated with a listed team member.

The Lists service is available to all spaces except the Home space. Whether it is exposed for use depends on the actions of your space moderator (for more information, see Section 53.10.1, "Enabling and Disabling Services Available to a Space"). The lists you create in a space are unique to that space. A space cannot consume the lists created in another space.

Create and populate lists using the controls on the **Lists** page. Place populated lists on a page using the List Viewer task flow. Users must have appropriate permissions to perform actions on lists (for more information, see Audience).

Use the controls on the **Lists** page to create and revise lists and list data and to view all of a space's current lists (Figure 66–2).

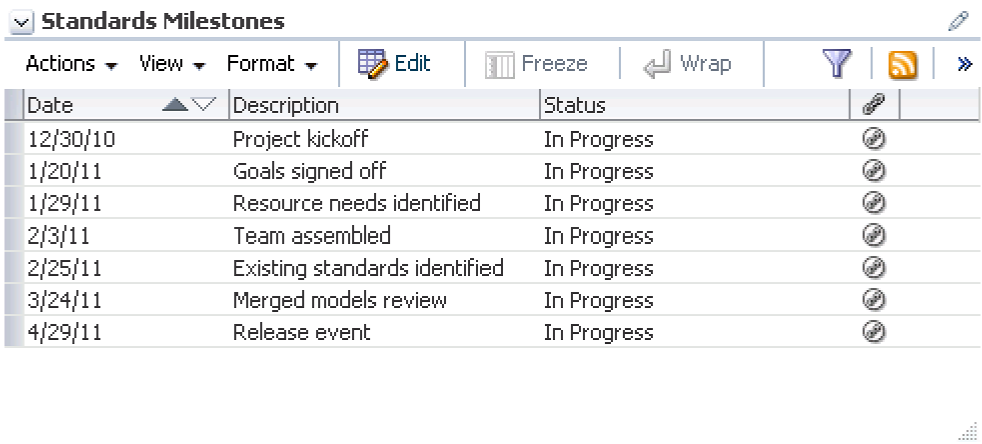
Figure 66–2 A List on the Lists Page



On the **Lists** page, you can make use of templates for rapid creation of lists and tools for designing and revising list structure. If you prefer, you can create a list from scratch, adding, and configuring all of the columns yourself, or you can create a list from an Excel spreadsheet. For more information, see Section 66.2.3, "Creating and Managing Lists."

The List Viewer task flow (Figure 66–3) provides a means of placing a particular list on a page.

Figure 66–3 A List in the List Viewer Task Flow



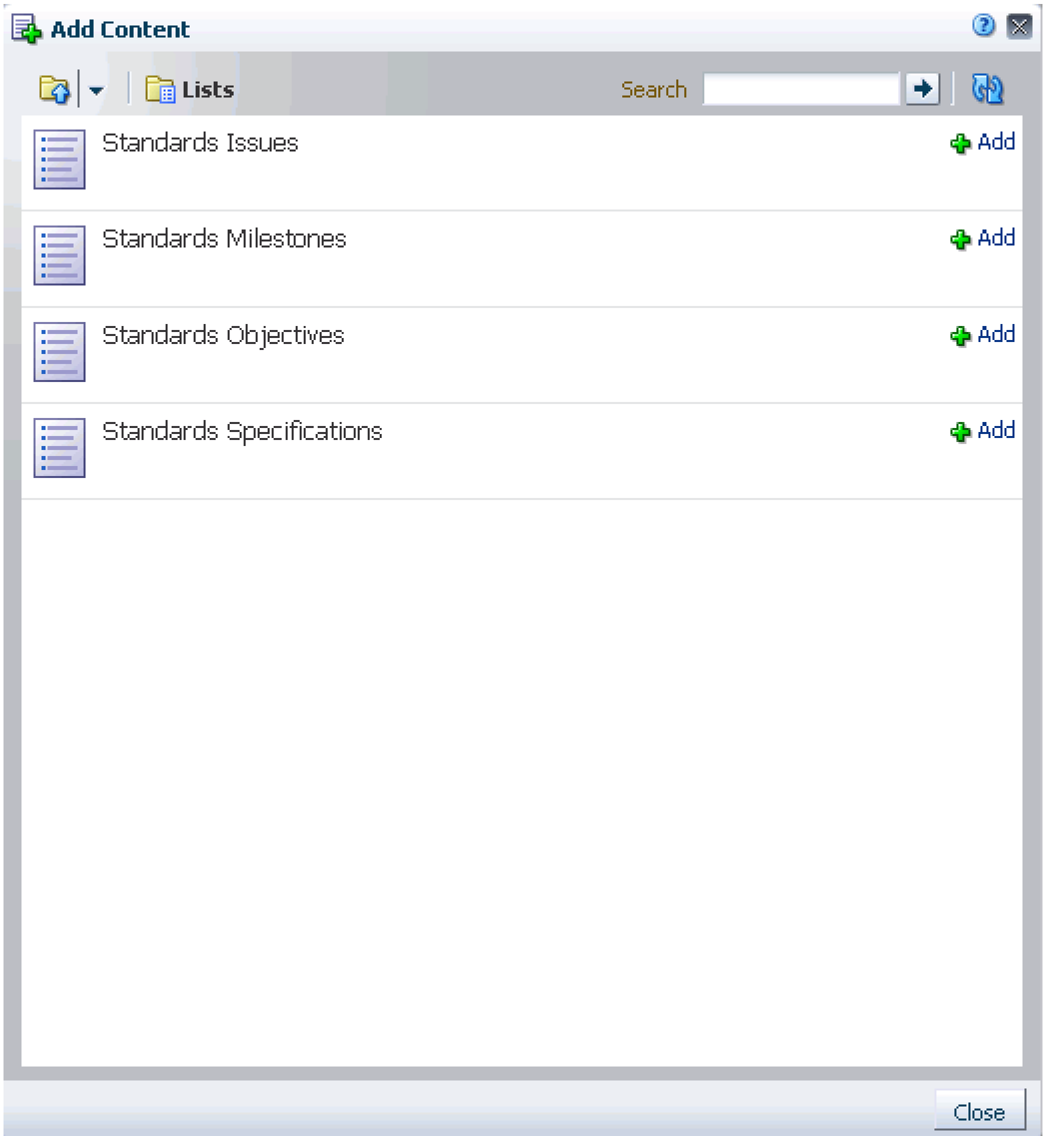
The List Viewer provides easy access to all the tools required for adding and revising list data, importing/exporting list data, filtering list data, obtaining a list RSS feed, and linking to other Spaces objects from the list and from a list row.

Additionally, the List Viewer provides access to customization tools that enable you to control the look of a particular list instance and its data. For example, use customization to control color banding of rows or columns or to apply filters to list data. For more information, see Section 66.2.5, "Customizing Lists."

Use the **Lists** page and the List Viewer to add and revise list data throughout the life of the list (for more information, see Section 66.2.4, "Adding and Managing List Data"). Add and revise content directly on a list, or use the list Export/Import feature to send list data to an Excel file, revise it there, and then import it back into the original list in the Spaces application (for more information, see Section 66.2.7, "Exporting a List and Importing a List from an Excel Spreadsheet").

All of the lists created in a given space are available on the **Lists** page and through the space's Resource Catalog (Figure 66–4).

Figure 66–4 Lists in the Resource Catalog



> **Tip:** By default, you can find lists under **Lists** in the **Social and Communication** folder in the Resource Catalog. However, the location of lists in a Resource Catalog depends on how the catalog was structured by its designer. You can use the catalog's Search feature to search for *Lists* or the list name.

In the Resource Catalog, click the **Add** link next to a list to add it to the current page (for more information, see Section 18.5, "Adding a Component to a Page"). The list is rendered within a List Viewer task flow.

The Lists page is available in any space where the Lists service is enabled. If the **Lists** page is not shown by default when you navigate to a space, you can open it through the **Personalize Pages** page. For more information, see Section 51.11.1, "Showing or Hiding Pages in Your View."

Note: The Lists service is not available in the Home space.

Through its tight integration with the Links service, the Lists service provides the opportunity to associate other Spaces items with an entire list or an individual list row. Linking enables you to associate documents, notes, and URLs with a list or a list row. For more information, see Chapter 65, "Working with the Links Service."

The Lists service additionally provides RSS feeds for all lists and for individual lists. For information about the Lists service and RSS, see Chapter 70, "Working with the RSS Service."

66.2 Working with Lists Service Features

This section provides information about using the features available through the **Lists** page and the List Viewer task flow. It includes the following subsections:

- Section 66.2.1, "Adding Lists to a Page"
- Section 66.2.2, "Viewing Lists"
- Section 66.2.3, "Creating and Managing Lists"
- Section 66.2.4, "Adding and Managing List Data"
- Section 66.2.5, "Customizing Lists"
- Section 66.2.6, "Sending a Link to a List to Other Users"
- Section 66.2.7, "Exporting a List and Importing a List from an Excel Spreadsheet"

66.2.1 Adding Lists to a Page

For the steps to add a list to a page, see Section 18.5, "Adding a Component to a Page."

> **See Also:** If you do not find lists in the Resource Catalog, it may be that you need to add them. For more information, see Section 16.3.1.2, "Adding Resources."

66.2.2 Viewing Lists

To view the lists associated with a particular space, you must have access to that space. Once you have access, you can view all of a space's lists on its **Lists** page.

To view a list on the **Lists** page:

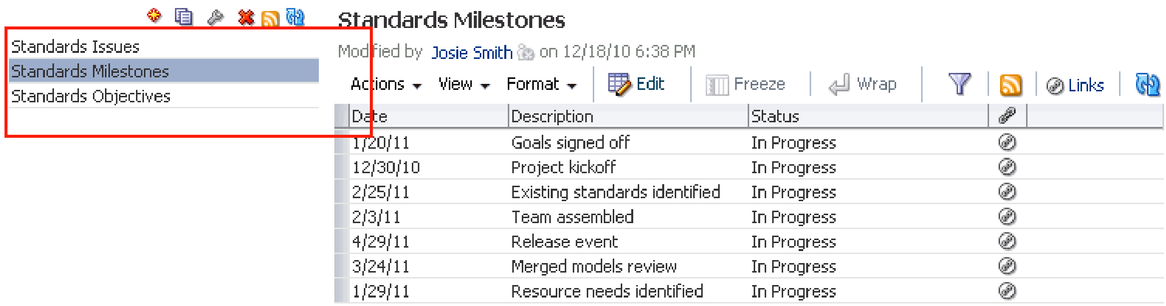
1. Go to the space that contains the list you want to view, and open its **Lists** page.

   If the **Lists** page is not available, see Section 51.11.1, "Showing or Hiding Pages in Your View."

2. From the **Lists** panel, select the list you want to view.

   List details appear to the right (Figure 66–5).

Figure 66–5 List of Lists on a Lists Page



66.2.3 Creating and Managing Lists

This section describes how to create, edit, copy, and delete lists on the **Lists** page.

This section includes the following subsections:

- Section 66.2.3.1, "Creating Lists"
- Section 66.2.3.2, "Editing List Structure"
- Section 66.2.3.3, "Copying a List"
- Section 66.2.3.4, "Deleting Lists"

66.2.3.1 Creating Lists

In Spaces, you can create a list using one of the following methods:

- Create a blank list for which you create and configure all columns (up to 30).
- Create a list from a template, and use that "as is" or as a starting point.
- Create a list from a Microsoft Excel spreadsheet.

This section describes how to create a list using each method.

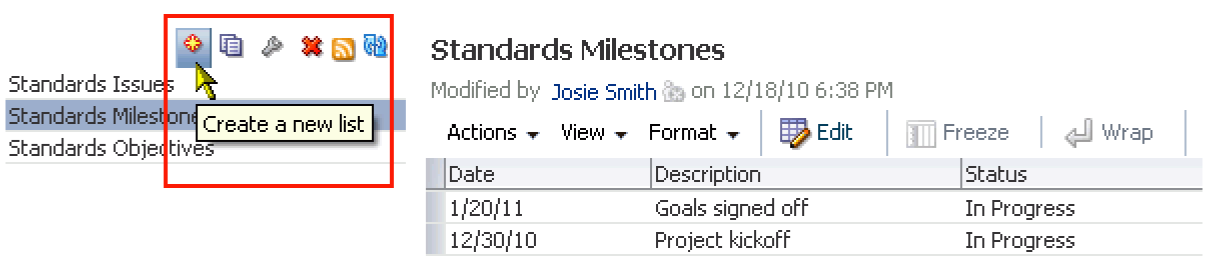
To create a list:

1. Go to the **Lists** page of the space where you want to create a list.

   See Also: For information about navigating to a **Lists** page, see Section 66.2.2, "Viewing Lists."

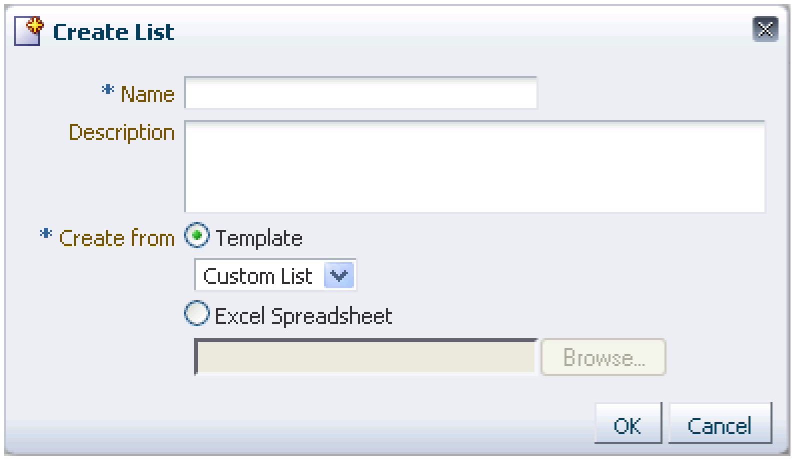
2. In the **Lists** panel toolbar, click the **Create a new list** icon (Figure 66–6).

Figure 66–6 Create a New List Icon on a Lists Page



3. In the resulting Create List dialog, enter a name for the list in the **Name** field (Figure 66–7).

Figure 66–7 Create List Dialog



4. Optionally, in the **Description** field enter a description of the list.

   Tip: In a completed list, the description appears between the list title and list data.

5. Under **Create From**, select to create the list using a **Template** or from an **Excel Spreadsheet**.
6. If you select to create a list from a **Template**, select a template from the **Template** menu:
   - **Custom List**—To create a list without using a template.
   - **Issues**—To create a list of, for example, project issues. By default, this template provides the columns Subject, Assigned To, Closed, and Comments.
   - **Milestones**—To create a list of, for example, project milestones. By default, this template provides the columns Date, Description, and Status.
   - **Objectives**—To create a list of, for example, project objectives. By default, this template provides the columns Title, and Description.

   If you select to create a list from an **Excel Spreadsheet**, click **Browse** to navigate to and select the spreadsheet:

   - The first row of the spreadsheet is used as column headings. The subsequent rows are added as data.
   - All the columns are created with the data type `Plain Text`. After creation, you can modify the data types as desired. For information about data types, see Table 66–1, " Data Type Selections for List Columns"

   Tip: You can use the **Excel Spreadsheet** option to import a list from a different space or from a different WebCenter Portal instance. That is, you can export the list from the space or WebCenter Portal instance and import it into the current space or instance.

7. Click **OK**.

The new list appears in the **Lists** panel on the **Lists** page.

You may now revise default list columns and add new columns to the list by clicking the **Edit list** icon. For more information, see Section 66.2.3.2, "Editing List Structure." For a custom list, you must add columns to the list before you can add rows.

> **See Also:** For information about adding new list rows, see Section 66.2.4, "Adding and Managing List Data."

66.2.3.2 Editing List Structure

When you edit list structure, you can revise everything about the list. For example, you can change column details; remove, add, and rearrange columns; and rename or redescribe the list.

This section describes the various tasks you can perform while editing a list structure. It contains the following subsections:

- Section 66.2.3.2.1, "Renaming a List and Revising a List Description"
- Section 66.2.3.2.2, "Adding Columns to a List"
- Section 66.2.3.2.3, "Revising List Column Details"
- Section 66.2.3.2.4, "Rearranging List Columns on All Instances of a List"
- Section 66.2.3.2.5, "Deleting a List Column"

66.2.3.2.1 Renaming a List and Revising a List Description To rename a list and revise a list description:

1. Go to the space where you want to rename a list or revise a list description, and open its **Lists** page.

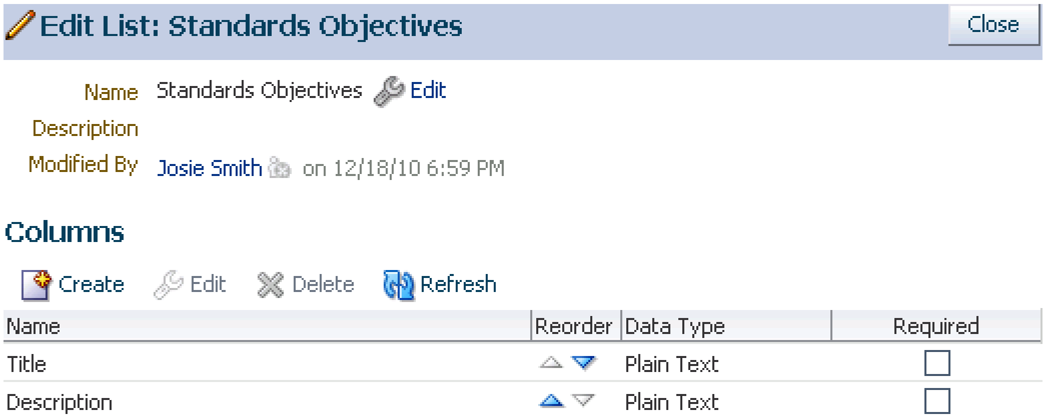
   > **See Also:** For information about navigating to a **Lists** page, see Section 66.2.2, "Viewing Lists."

2. In the **Lists** panel, select the list you want to change, and click the **Edit list** icon (Figure 66–8).

Figure 66–8 Edit List Icon

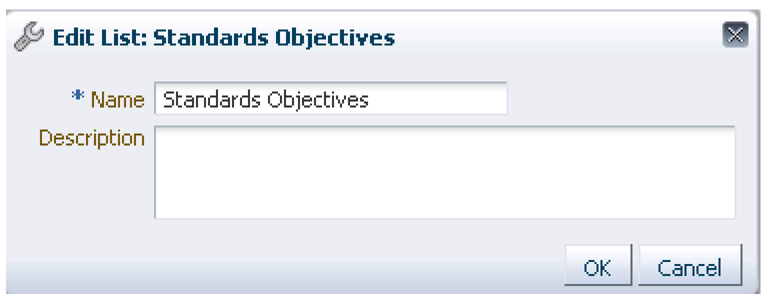
The list enters edit list mode (Figure 66–9).

Figure 66–9 List in Edit List Mode



3. Click the **Edit** link to the right of the **Name** field to open the Edit List dialog (Figure 66–10).

Figure 66–10 Edit List Dialog



4. Revise the list name and description.
5. Click **OK** to close the dialog and save your changes.
6. Click the **Close** button in edit list mode to return to view list mode.

66.2.3.2.2 Adding Columns to a List This procedure is useful when you create a custom list or you want to alter a list that you created from a template or a spreadsheet.

Note: A list supports up to 30 columns.

When you add a column to a list, the new column is added after the selected column. If no column is selected, the new column is added as the first column.

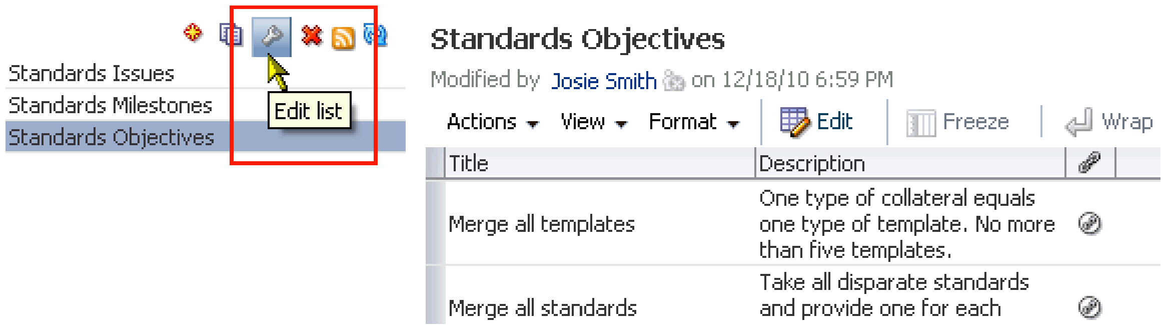
To add columns to a list:

1. Go to the **Lists** page of the space where you want to add columns to a list.

   See Also: For information about navigating to a **Lists** page, see Section 66.2.2, "Viewing Lists."

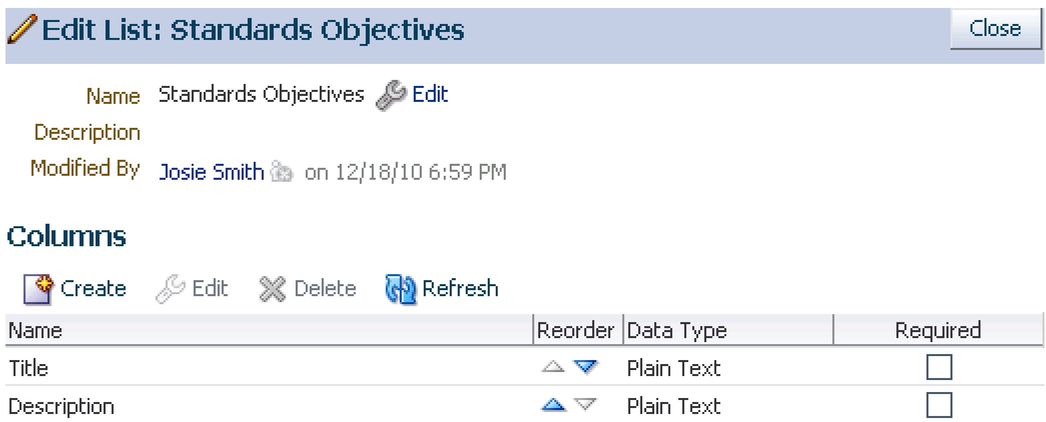
2. In the **Lists** panel, select the list to which to add columns and click the **Edit list** icon (Figure 66–11).

Figure 66–11 Edit List Icon



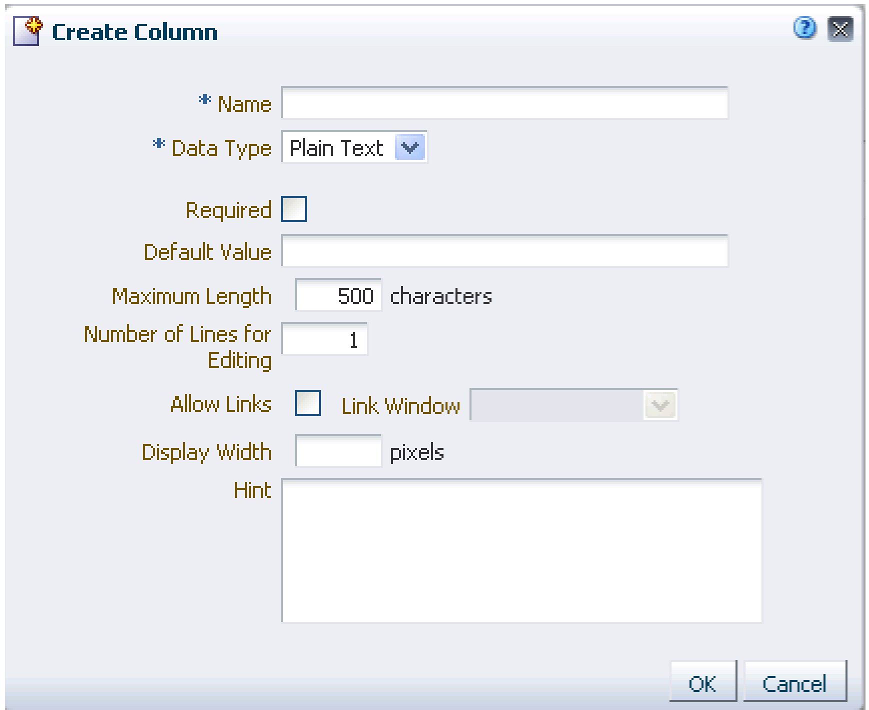
The **Lists** page enters list edit mode (Figure 66–12).

Figure 66–12 List in Edit List Mode



3. Under **Columns**, click the **Create** button to open the Create Column dialog (Figure 66–13).

Figure 66–13 Create Column Dialog



Tip: Select a column to add a new column after it.

4. In the **Name** field, provide a name for this column.
5. From the **Data Type** list, select the type of data you want to enter in this column.

Note: The data type you select affects the type of data that can be entered for the column and the way the data is rendered (see Table 66–1 and Table 66–2). It also affects the type of validation that is run on column data when you and other authorized users add list rows. For example, if you select a `DateTime` data type, and a user enters text that is not in the `DateTime` format, Spaces returns an error.

Table 66–1 lists and describes the data types available to list columns, and provides information about the additional details that appear for each type.

See Also: For information about additional column details, see Table 66–2, " Data Type Column Details".

Table 66–1 Data Type Selections for List Columns

Data Type	Description	Comments
`Plain Text`	Unformatted text, provides options for making the text a link	Additional column details include: ■ Required ■ Default Value ■ Maximum Length ■ Number of Lines for Editing ■ Allow Links ■ Link Window ■ Display Width ■ Hint
`Rich Text`	Rich, formatted text entered through a rich text editor, may include links	Additional column details include: ■ Required ■ Display Width ■ Hint
`Number`	Numbers	Additional column details include: ■ Required ■ Format ■ Default Value ■ Minimum Value ■ Maximum Value ■ Display Width ■ Hint For Format, select from: ■ `Number`—an unformatted number; decimal separator is based on the currently selected locale. For more information, see Section 38.2, "Choosing Your Preferred Display Language." ■ `Currency`—value is formatted as a currency value; the currency symbol and decimal separator are based on the currently selected locale. For more information, see Section 38.2, "Choosing Your Preferred Display Language." ■ `Percent`—value is formatted as a percentage; the value *0.6* is formatted as `0.6%`; the value *60* is formatted as `60%`. The Number data type supports numbers from ±1.79769313486231570e+308 with 14 to 15 significant digits.[1]

Table 66–1 (Cont.) Data Type Selections for List Columns

<table>
<tr><th>Data Type</th><th>Description</th><th>Comments</th></tr>
<tr>
<td><code>DateTime</code></td>
<td>Dates and times in the format specified in a given user's Spaces Preferences (for more information, see Section 38.3, "Setting Date and Time Preferences")</td>
<td>
Additional column details include:

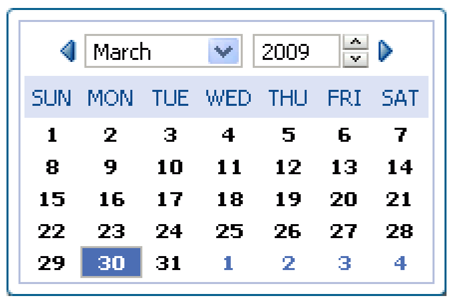
- Required
- Format
- Default Value
- Display Width
- Hint

For Format, select from:

- `Date`—For requiring a date.
- `Time`—For requiring a time.
- `Date and Time`—For requiring a date and a time.

The way the selected Format is rendered is controlled by the user's date and time preferences.

The **Default Value** field includes a date picker, which you can use to select a default date in the correct format. The current date has a box around it, for example, March 30th in the following figure.



This field does not require leading zeroes, for example, it does not require `05/04/2009`. Instead, you can use `5/4/2009`.
</td>
</tr>
</table>

Table 66–1 (Cont.) Data Type Selections for List Columns

Data Type	Description	Comments
`Boolean`	Either `TRUE` or `FALSE`	Additional column details include: ■ Default Value ■ Display Width ■ Hint `TRUE` or `FALSE` is rendered as a check box. Checked equals `TRUE`; deselected equals `FALSE`.
`Picture`	A URL to an image (the image is rendered in list view mode)	Additional column details include: ■ Required ■ Display Width ■ Hint
`Person`	A valid user name	Additional column details include: ■ Required ■ Range of Users ■ Default Value ■ Display Width ■ Hint The **Range of Users** field enables you to limit the valid range of users to the membership of the current space (or to include all users). The **Default Value** field includes a **Find user** icon, which you can use to locate and select a default user. For tips on searching for a user in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store." The list column contains a presence indicator next to the user name. Click the presence indicator to open a context menu with options for making contact with the person instantly. For more information, see Section 64.4.1, "Viewing the Status of Other Users."

[1] Number data-type columns adhere to the range and precision specified for the 8 byte IEEE 754 double data type. When the maximum number of significant digits is exceeded, the number is rounded.

6. After you select a data type, enter values for the remaining fields.

   Table 66–2 lists the possible remaining fields and their associated data types.

Table 66–2 Data Type Column Details

Column Detail	Description	Associated Data Type(s)
Allow Links	Specify whether to allow column data to be hyperlinked. Specifying **Allow Links** enables the user to enter both a column value and a URL. If a URL is specified, the column value is rendered as a hyperlink.	Plain Text
Default Value	Optionally, provide a default value for the column entry, such as a default image, number, user name, and the like.	■ Plain Text ■ Number ■ DateTime ■ Boolean ■ Person
Display Width	Enter a value in pixels to set the column width.	All data types

Table 66–2 (Cont.) Data Type Column Details

Column Detail	Description	Associated Data Type(s)
Format	Use this pick list to specify the format for column values. For more information, see Table 66–1.	▪ Number ▪ DateTime
Hint	Enter text to assist the user in understanding the content to enter into the column. This text appears when focus is on this column in edit list data mode.	All data types
Link Window	Indicate how a hyperlink on column data should open. Choose from: ▪ New Window—The link opens in a new browser tab or window. ▪ Current Window—The link opens in the current browser window.	Plain Text
Maximum Length	Enter the maximum number of characters for this column entry. This includes character spaces.	Plain Text
Maximum Value	Indicate the highest number that can be entered in this column.	Number
Minimum Value	Indicate the lowest number that can be entered in this column.	Number
Number of Lines for Editing	Indicate the number of lines to make available for editing. When the value is `1`, the user enters data in a single line text field when editing list data. Long values scroll horizontally. When the value is greater than `1`, the user enters data in a multiline text field. Long values scroll vertically. This makes entering and viewing large values much easier.	Plain Text
Range of Users	Indicate whether to limit the selection of users to members of the current space (space Members) or to allow a selection from all authenticated users (All Users).	Person
Required	Select this check box to require that data is entered in this column.	▪ Plain Text ▪ Rich Text ▪ DateTime ▪ Number ▪ Picture ▪ Person

7. Click **OK** to save your changes and exit the dialog.
8. Click **Close** to exit List Edit mode.

66.2.3.2.3 Revising List Column Details You can revise every detail of a list column. That is, you can rename the column, change the column data type, require a value, or remove a value requirement. Keep in mind, however, if you change a column data type, any values currently entered in the list column are either converted to the new data type or removed irrevocably.

For example, if you move from a `Plain Text` data type to a `Number` data type, values that can be converted to a number are retained; other values are removed. Before any values are removed by the change, you are asked for confirmation. In contrast, if you move from a `Number` data type to a `Plain Text` data type, all values are retained.

Note: Validation occurs only on data entry. If a user changes column details after data has been entered into the column, the existing data is not affected (that is, validated) even if it does not meet the new column detail conditions on the columns.

If you want to validate new list data, you can export the list data to an Excel spreadsheet and then import it. On import, all rows are validated. The rows that fail validation are noted. You can fix invalid rows in the spreadsheet and import again.

See Also: For more information, see Section 66.2.7, "Exporting a List and Importing a List from an Excel Spreadsheet."

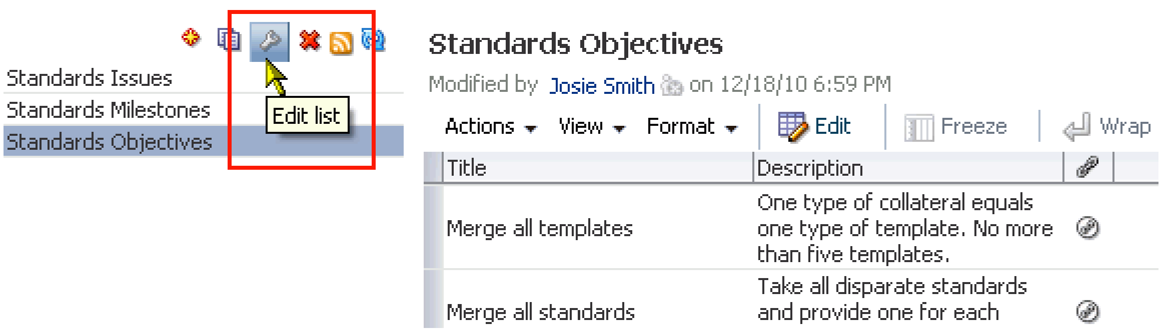
To revise list column details:

1. Go to the **Lists** page of the space where you want to revise list column details.

   See Also: For information about navigating to a **Lists** page, see Section 66.2.2, "Viewing Lists."

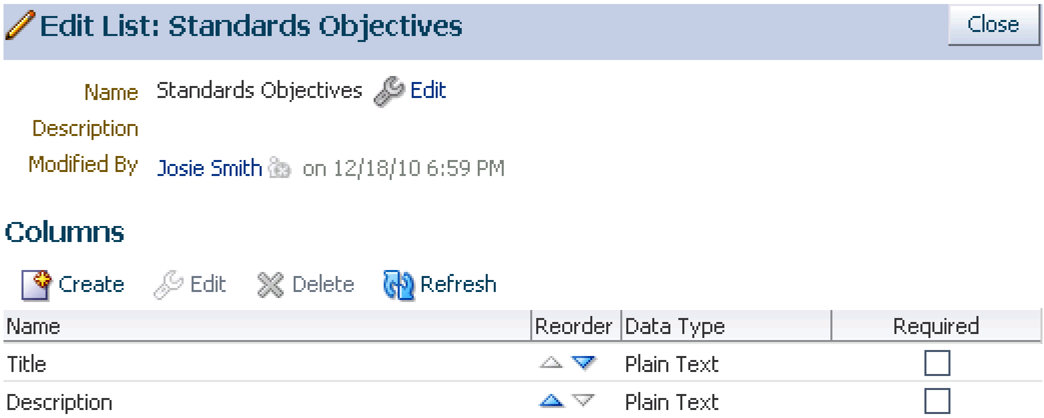
2. In the **Lists** panel, select the list you want to change and click the **Edit list** icon (Figure 66–14).

Figure 66–14 Edit List Icon



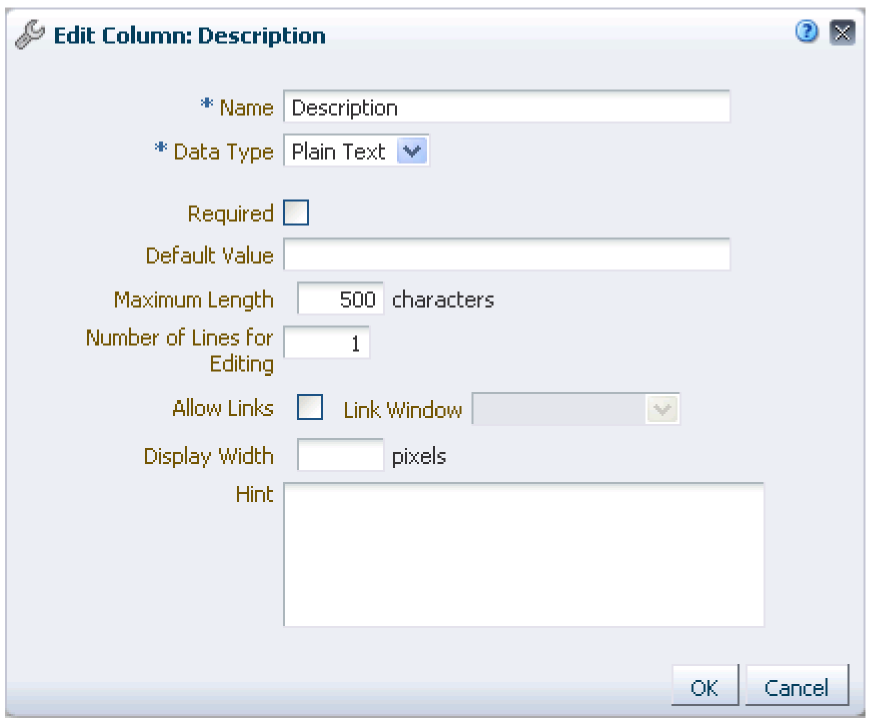
The **Lists** page enters edit list mode (Figure 66–15).

Figure 66–15 List in Edit List Mode



3. Under **Columns**, select the list column you want to revise and click the **Edit** button to open the Edit Column dialog (Figure 66–16).

Figure 66–16 Edit Column Dialog



4. Edit column details as you prefer.

   For information about column details, see Section 66.2.3.2.2, "Adding Columns to a List."

5. Click **OK** to save your changes and close the dialog.
6. Click the **Close** button to exit edit list mode.

66.2.3.2.4 Rearranging List Columns on All Instances of a List You can rearrange list columns in the list structure, affecting all instances of a list, by clicking rearrange icons or by dragging and dropping.

> **See Also:** For information about rearranging column order of a particular list instance in your view or everyone's view, see Section 66.2.5.3, "Changing Column Order on a List Instance."

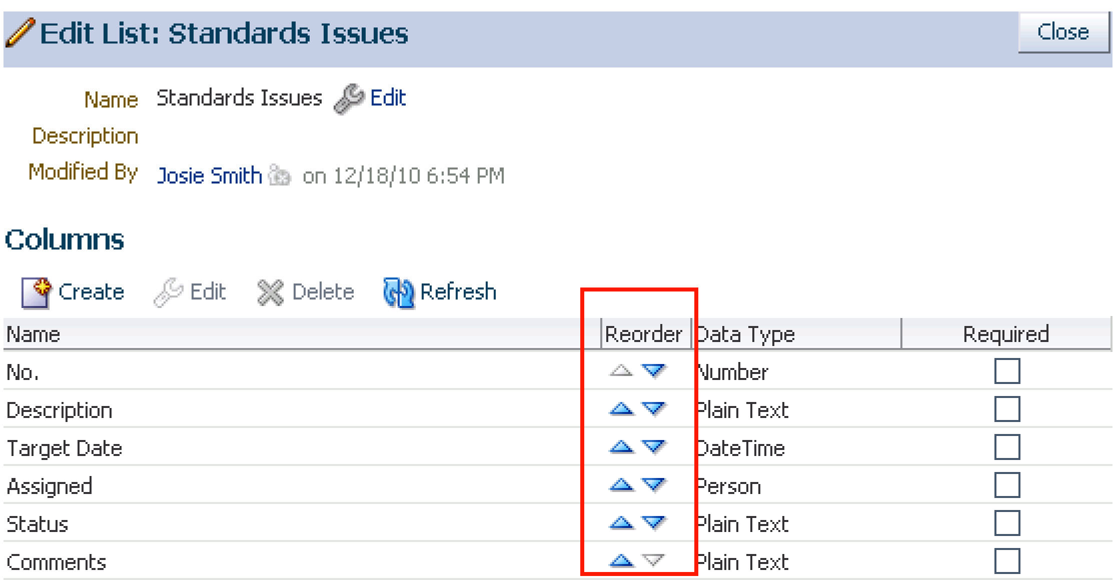
To rearrange columns on all instances of a list:

1. Go to the **Lists** page of the space where you want to rearrange list columns.

   > **See Also:** For information about navigating to a **Lists** page, see Section 66.2.2, "Viewing Lists."

2. In the **Lists** panel, select the list you want to change and click the **Edit list** icon to enter list edit mode.
3. Under **Columns**, click an icon under the **Reorder** column to move a column higher or lower in the order of columns (Figure 66–17).

Figure 66–17 Reorder Column Icons on Edit List Page



> **Tip:** Moving a column higher causes it to appear further to the left in column display order. Moving a column lower causes it to appear further to the right.

   Alternatively, drag and drop a column higher or lower in the column hierarchy.

4. Click the **Close** button to exit list edit mode.

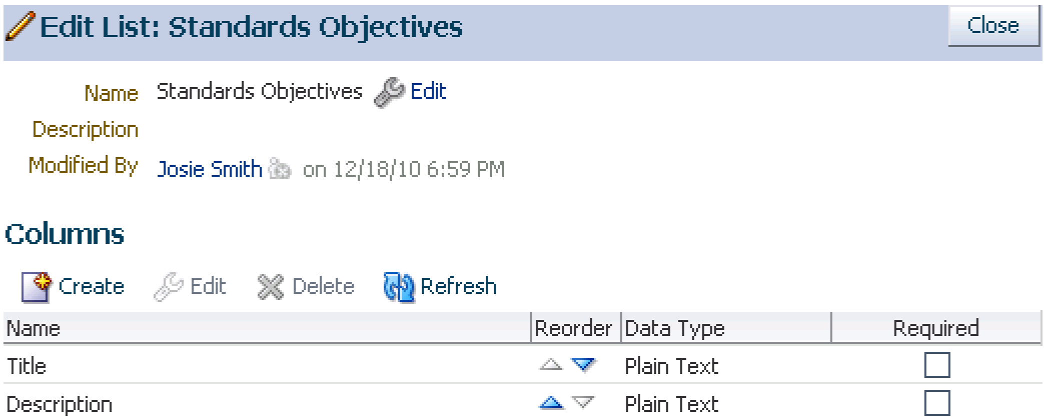
66.2.3.2.5 Deleting a List Column To delete a list column:

1. Go to the **Lists** page of the space where you want to delete list columns.

   > **See Also:** For information about navigating to a **Lists** page, see Section 66.2.2, "Viewing Lists."

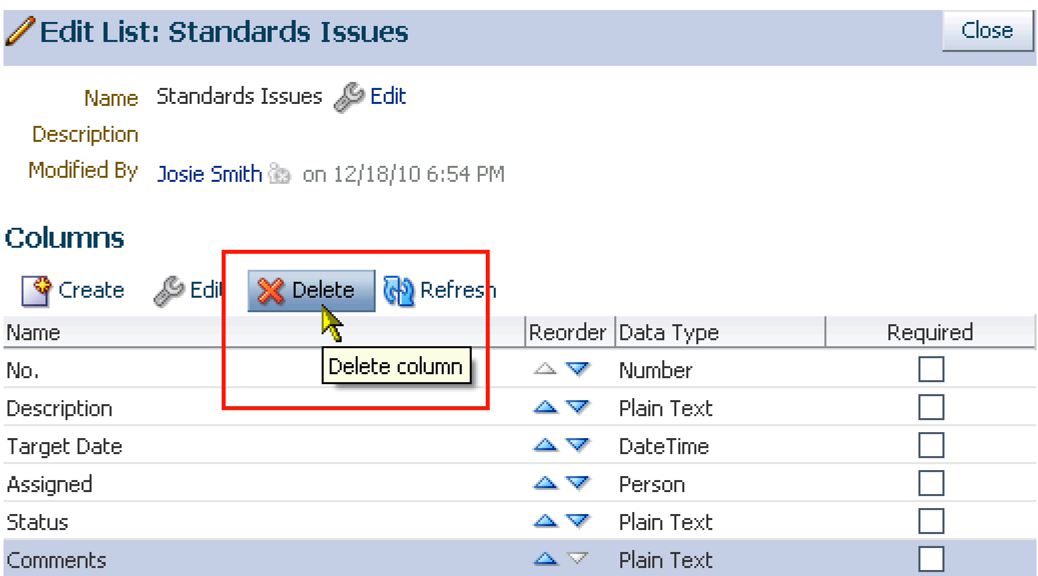
2. In the **Lists** panel, select the list you want to change and click the **Edit list** icon to enter list edit mode (Figure 66–18).

Figure 66–18 List in Edit List Mode



3. Select a column, and click the **Delete** button (Figure 66–19).

Figure 66–19 Delete Button on Edit List Page



4. In the resulting confirmation dialog, click the **Delete** button to complete the deletion.

66.2.3.3 Copying a List

You can use an existing list as a template simply by copying it. First, copy the list, and then edit the copied list as you like.

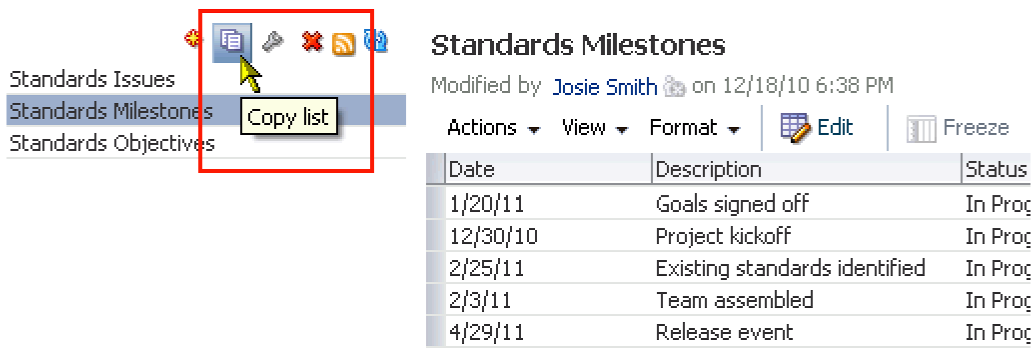
To copy a list:

1. Go to the **Lists** page of the space that contains the list you want to copy.

See Also: For information about navigating to a **Lists** page, see Section 66.2.2, "Viewing Lists."

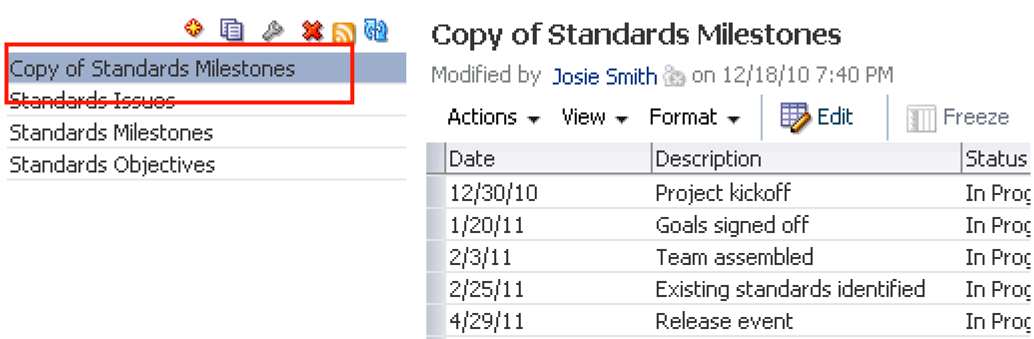
2. In the **Lists** panel, select the list you want to copy.
3. Click the **Copy List** icon (Figure 66–20).

Figure 66–20 Copy List Icon on Lists Page



A copy of the list becomes available for selection in the **Lists** panel (Figure 66–21).

Figure 66–21 A List Copy



See Also: For information about changing the list name or description, see Section 66.2.3.2.1, "Renaming a List and Revising a List Description." For information about revising list structure, see Section 66.2.3.2, "Editing List Structure."

66.2.3.4 Deleting Lists

To delete a list:

1. Go to the **Lists** page of the space that contains the list you want to delete.

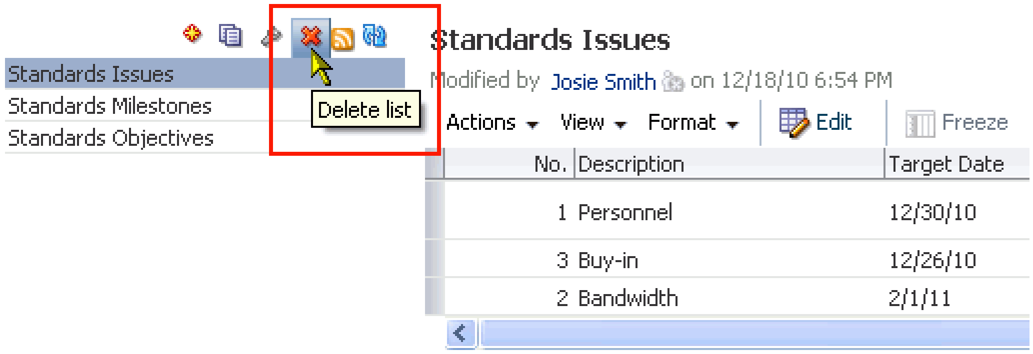
   See Also: For information about navigating to a **Lists** page, see Section 66.2.2, "Viewing Lists."

2. In the **Lists** panel, select the list you want to delete.

   To select multiple lists, use Ctrl+Click; to select a range of lists, use Shift+Click.

3. Click the **Delete list** icon (Figure 66–22).

Figure 66–22 Delete List Icon on Lists Page



4. In the resulting confirmation dialog, click the **Delete** button.

   After confirmation, the selected lists are removed from the **Lists** panel.

66.2.4 Adding and Managing List Data

Once you have created a list structure, you can add data to the list. This section describes how to add, edit, and refresh list data, and how to delete lists rows. It includes the following subsections:

- Section 66.2.4.1, "Adding Data of a Given Data Type to a List"
- Section 66.2.4.2, "Editing List Data"
- Section 66.2.4.3, "Deleting List Rows"
- Section 66.2.4.4, "Refreshing List Data"

> **See Also:** For information about list structure, see Section 66.2.3, "Creating and Managing Lists." For information about list data types, see Table 66–1, " Data Type Selections for List Columns" and Table 66–2, " Data Type Column Details".

66.2.4.1 Adding Data of a Given Data Type to a List

This section describes how to add data to a list. When you add data to a list, you do so row-by-row (unless you are importing a spreadsheet). The placement of a new row depends on the following considerations:

- When you add a new row, it is created after the selected row.
- If no row is selected, the new row is created as the first row.
- Once you save, list data is refreshed and rows are shown in sort order.

> **See Also:** for more information, see Section 66.2.5.1, "Sorting List Data on a Column"

You can add one or multiple list rows before you add content, or you can create a list row and add content to it right away.

This section provides an overview procedure for adding list data, and steps you through how to add data for a given data type. It includes the following subsections:

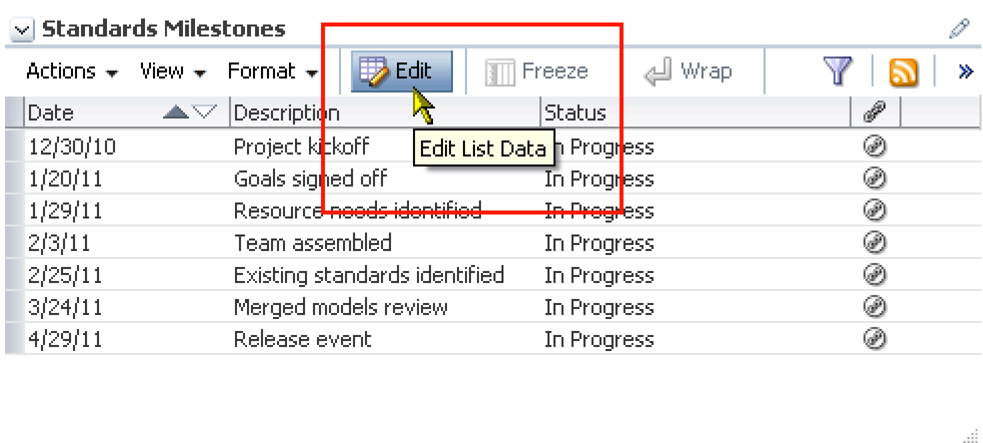
- Section 66.2.4.1.1, "Adding Data to a List"
- Section 66.2.4.1.2, "Adding Plain Text Data to a List"
- Section 66.2.4.1.3, "Adding Rich Text Data to a List"
- Section 66.2.4.1.4, "Adding DateTime Data to a List"
- Section 66.2.4.1.5, "Adding Picture Data to a List"
- Section 66.2.4.1.6, "Adding Person Data to a List"

> **Tip:** The `Number` and `Boolean` data types are not included here because, for a `Number` data type, you simply enter a number, and, for a `Boolean` data type, you simply select or deselect a check box.

66.2.4.1.1 Adding Data to a List To add data to a list:

1. Go to the **Lists** page or the List Viewer task flow that displays the list you want to populate with data, and click the **Edit List Data** icon to open the list in edit list data mode (Figure 66–23).

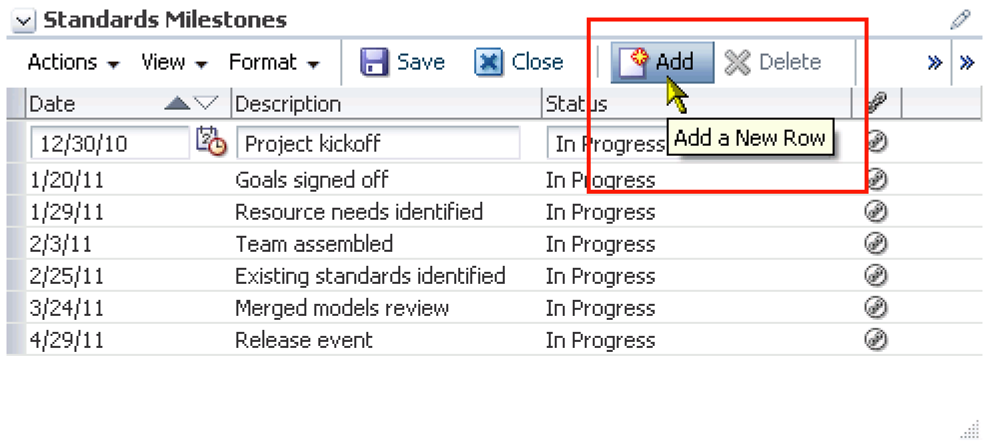
Figure 66–23 Edit List Data Icon



> **Tip:** You can also enter list edit mode by selecting **Edit** from the **Actions** menu or by pressing Crtl+E.

2. Click the **Add a New Row** icon to add a row to the list (Figure 66–24).

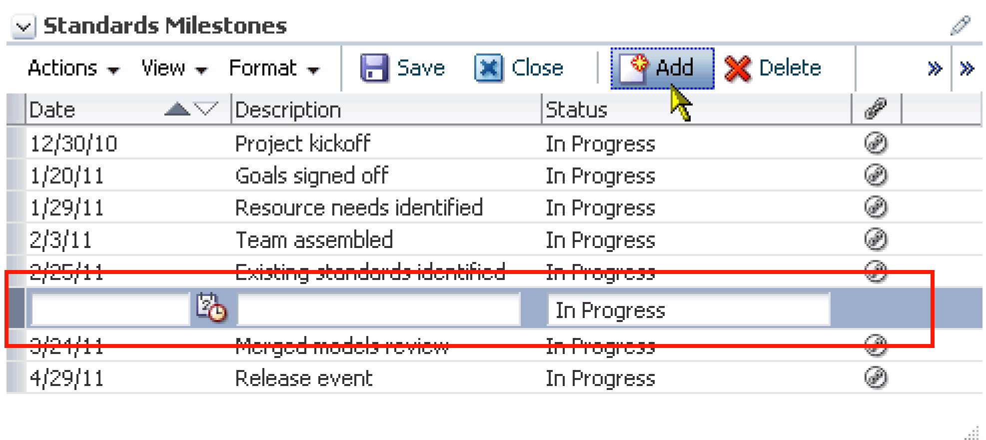
Figure 66–24 Add A New Row Icon on a List



> **Tip:** You can also start the add-row process by selecting **Add Row** from the **Actions** menu or by pressing Ctrl+I.

The new row is added after the selected row. If no row is selected, it is added as the first row (Figure 66–25).

Figure 66–25 A Newly Added Row



3. Add data to the new row.

   > **Tip:** You can only edit the row with focus. Click a row to give it focus and edit it.

4. Repeat the previous two steps to create new rows and add data.
5. When you finish adding rows and data, click **Save** to save your changes and exit edit list data mode.

   > **Tip:** To save, you can also select **Save** from the **Actions** menu, or press Ctrl+M. To close, click **Close**, select **Close** from the **Actions** menu, or press Ctrl+Q.

When you save your changes, the list data is refreshed and the rows are rendered in sort order (for more information, see Section 66.2.5.1, "Sorting List Data on a Column").

66.2.4.1.2 Adding Plain Text Data to a List The `Plain Text` data type allows for the entry of unformatted text, and provides options for making the text a link.

> **Tip:** To create a hyperlink on a `Plain Text` data type, the list column must be configured to allow for the creation of hyperlinks. For more information, see Section 66.2.3.2.2, "Adding Columns to a List."

To enter `Plain Text` data into a list row:

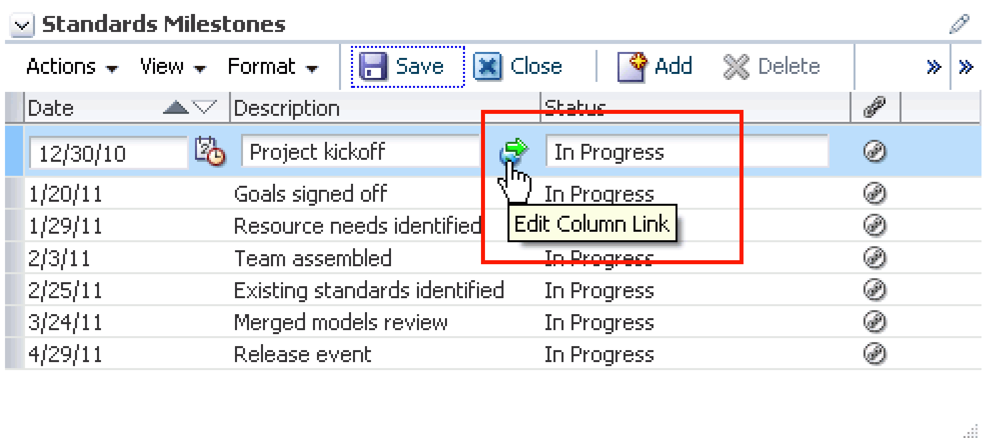
1. Enter edit list data mode as described in Section 66.2.4.1.1, "Adding Data to a List."
2. Go to the column that is formatted to support the `Plain Text` data type:

   To enter unlinked text, enter text in the field provided.

   To enter linked text:

   a. Click the **Edit Column Link** icon to the right of the data entry field (Figure 66–26).

Figure 66–26 Edit Column Link Icon



   b. In the resulting **Edit Column Link** dialog, enter text in the **Text** field, and enter a full URL in the **Link Location** field (Figure 66–27).

Figure 66–27 Edit Column Link Dialog

c. Click **OK**.

> **Tip:** To remove a link, click the **Edit Column Link** icon, and delete the URL from the resulting dialog.

3. When you finish adding rows and data, click **Save** to save your changes and exit edit list data mode.

> **Tip:** To save, you can also select **Save** from the **Actions** menu, or press Ctrl+M. To close, click **Close**, select **Close** from the **Actions** menu, or press Ctrl+Q.

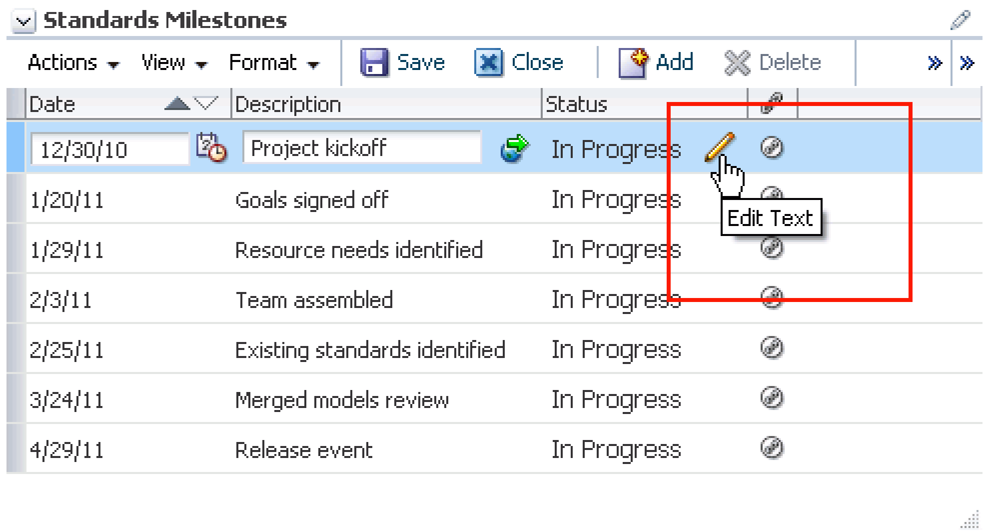
If both text and a link location were specified, the text is rendered as a hyperlink.

66.2.4.1.3 Adding Rich Text Data to a List The `Rich Text` data type allows for the entry of rich, formatted text through a rich text editor. Rich text may include links.

To enter `Rich Text` data into a list row:

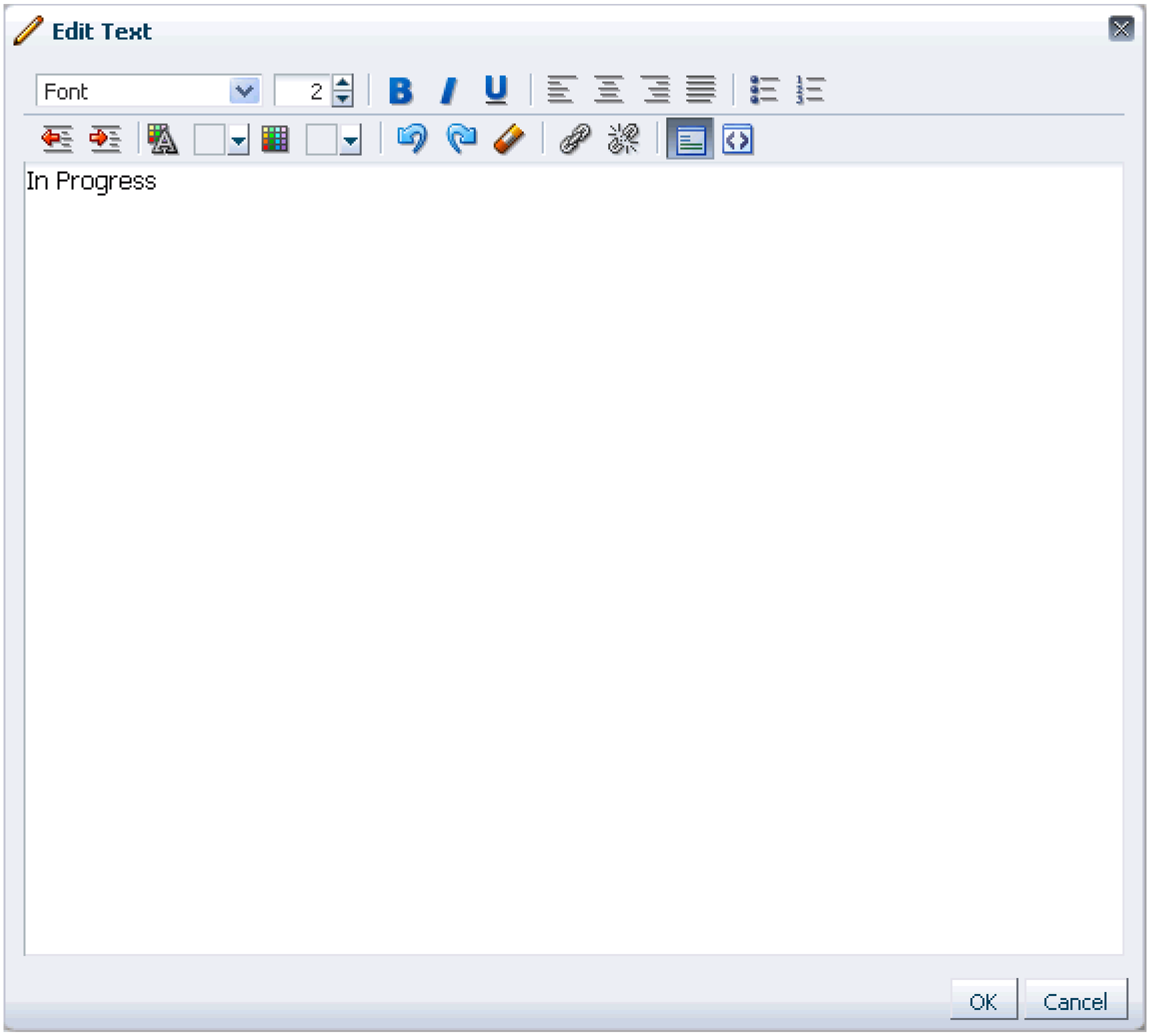
1. Enter edit list data mode as described in Section 66.2.4.1.1, "Adding Data to a List."
2. Go to the column that is formatted to support the `Rich Text` data type, and click the **Edit Text** icon to the right of the data entry field (Figure 66–28).

Figure 66–28 Edit Text Icon



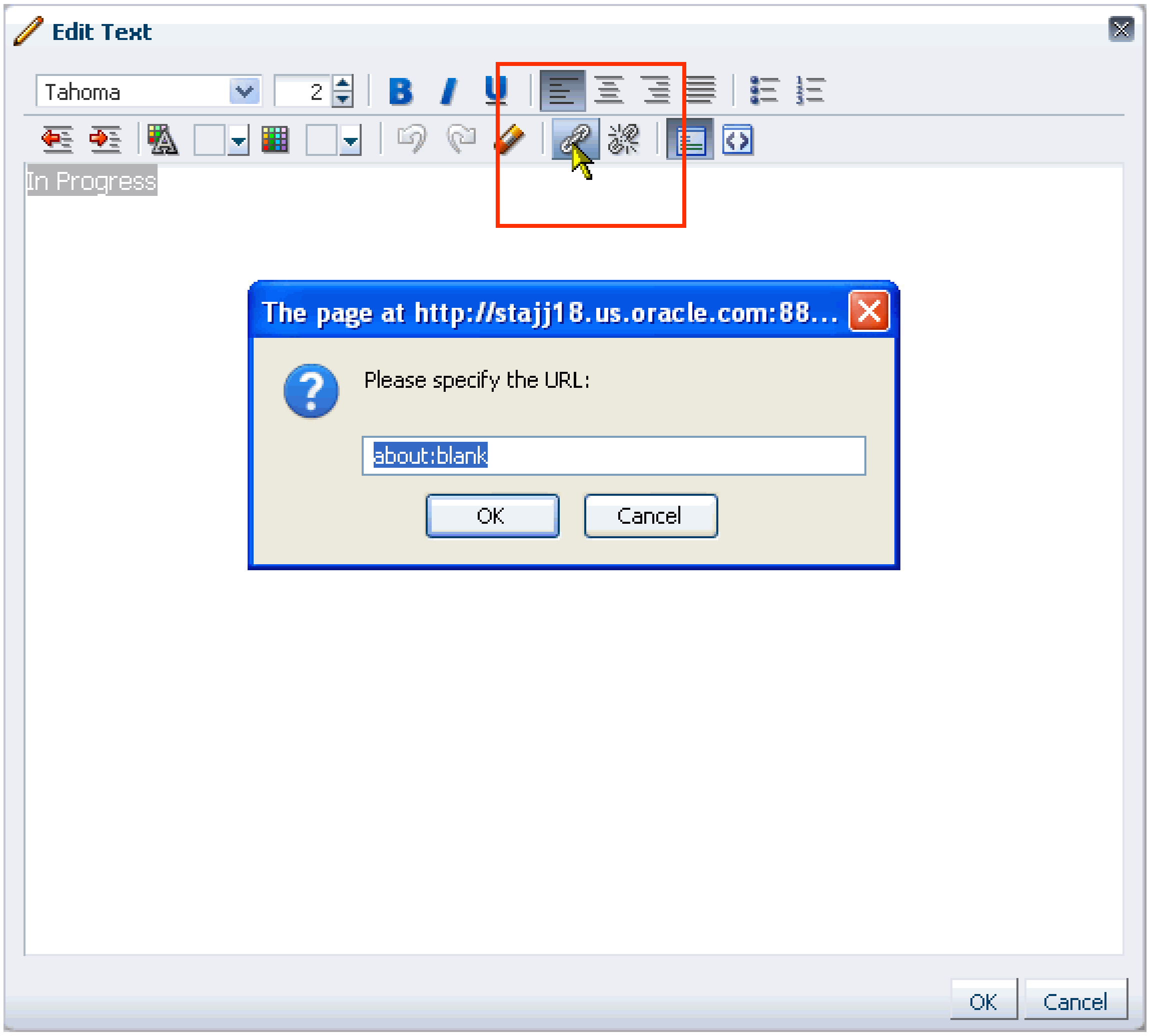
This launches the rich text editor (Figure 66–29).

Figure 66–29 The Rich Text Editor



3. Enter text and apply styles according to your requirements.
4. To add a link:
    a. Highlight the link text, and click the **Add Link** icon in the editor's toolbar (Figure 66–30).

Figure 66–30 Add Link through Rich Text Editor



b. In the resulting dialog, enter a URL in the field provided.

c. Click **OK**.

Tip: To remove a link, highlight the linked text and click the **Remove Link** icon.

5. Click **OK** to exit the editor.

6. When you finish adding rows and data, click **Save** to save your changes and exit edit list data mode.

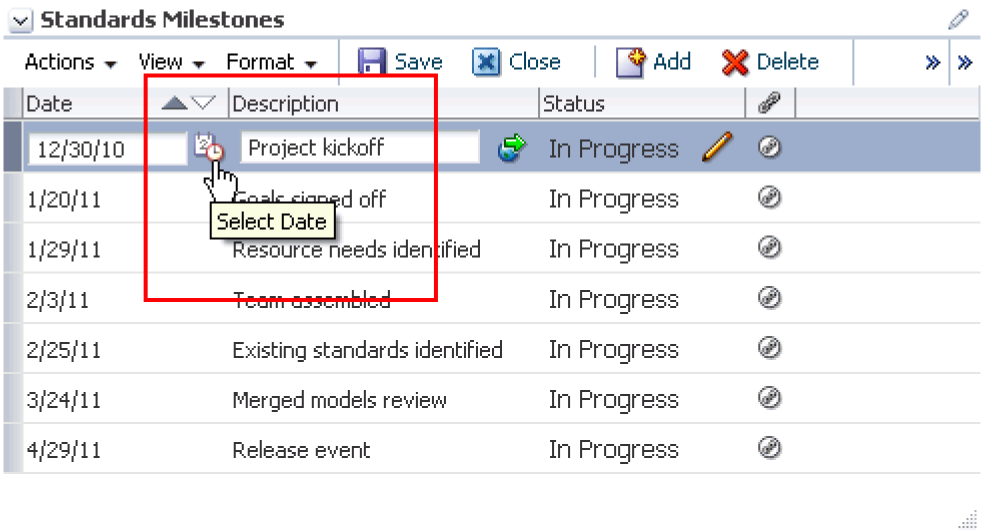
Tip: To save, you can also select **Save** from the **Actions** menu, or press Ctrl+M. To close, click **Close**, select **Close** from the **Actions** menu, or press Ctrl+Q.

66.2.4.1.4 Adding DateTime Data to a List The `DateTime` data type allows for the entry of dates and times in the format specified in a given user's Spaces Preferences (for more information, see Section 38.3, "Setting Date and Time Preferences").

To enter `DateTime` data into a list row:

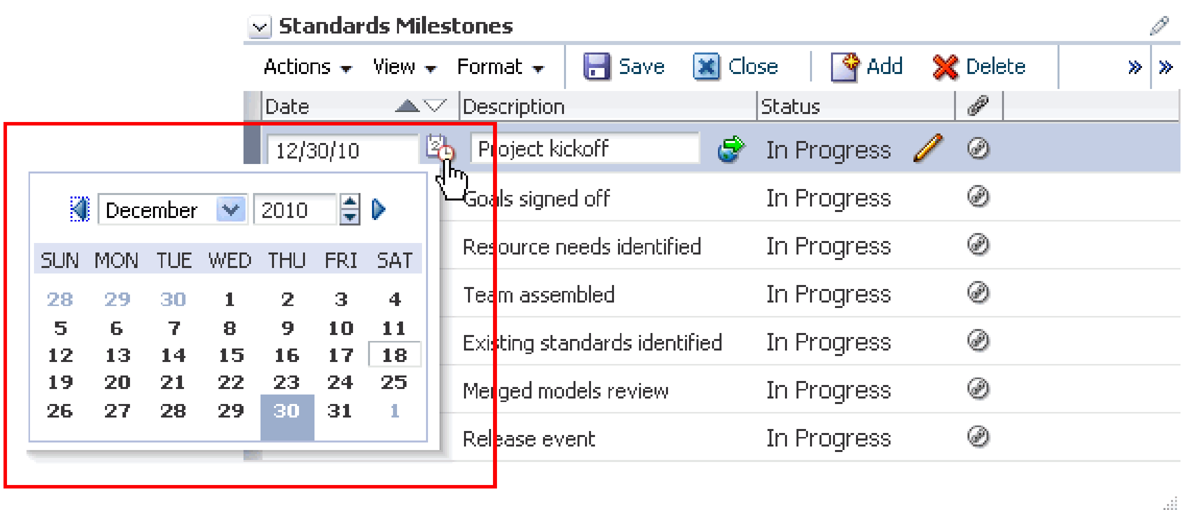
1. Enter edit list data mode as described in Section 66.2.4.1.1, "Adding Data to a List."
2. Go to the column that is formatted to support the `DateTime` data type, and enter a value or click the **Select** <*data type*> icon to the right of the data entry field (Figure 66–31).

Figure 66–31 Select Date Icon



3. If you click the icon, from the resulting calendar, select a date, a time, or a date and time, according to the column's requirements (Figure 66–32).

Figure 66–32 Popup Calendar for Date Selection



4. If the column requires just a date, the calendar closes once you select a value.

   If the calendar requires a time or a date and time, click **OK** to close the calendar.
5. When you finish adding rows and data, click **Save** to save your changes and exit edit list data mode.

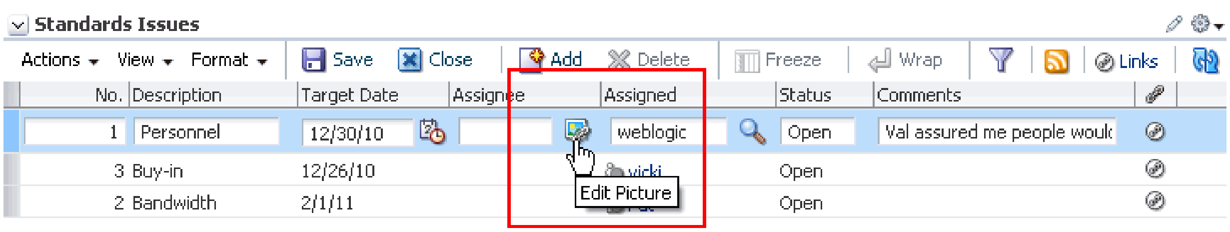
Tip: To save, you can also select **Save** from the **Actions** menu, or press Ctrl+M. To close, click **Close**, select **Close** from the **Actions** menu, or press Ctrl+Q.

66.2.4.1.5 Adding Picture Data to a List The `Picture` data type allows for the entry of a URL to an image (the image is rendered in list view mode).

To enter a `Picture` data type into a list row:

1. Enter edit list data mode as described in Section 66.2.4.1.1, "Adding Data to a List."
2. Go to the column that is formatted to support the `Picture` data type, and enter a URL to a picture or click the **Edit Picture** icon to the right of the data entry field (Figure 66–33).

Figure 66–33 Edit Picture Icon



3. If you click the icon, in the Edit Picture dialog, enter a URL to an image in the **Picture Location** field (Figure 66–34).

   For example, enter:

   ```
   http://www.oracleimg.com/admin/images/ocom/hp/oralogo_small.gif
   ```

Figure 66–34 Edit Picture Dialog

Tip: The image must be available in a location that does not require login credentials for access.

You can select an image that is located in your Spaces Document Library. In a Documents service task flow, select the image and use the **Get a Link** option on the **View** menu to access a link to the image. Copy the link and paste it into the **Picture Location** field.

4. Provide `ALT` text for the image in the **Description** field.

5. Click **OK**.
6. When you finish adding rows and data, click **Save** to save your changes and exit edit list data mode.

> **Tip:** To save, you can also select **Save** from the **Actions** menu, or press Ctrl+M. To close, click **Close**, select **Close** from the **Actions** menu, or press Ctrl+Q.

66.2.4.1.6 Adding Person Data to a List The `Person` data type allows for the entry of a user name from your company's identity store. The selection of a `Person` may be further limited to the members of the current space. If you search for a user name, the values returned indicate whether such a limit is in place.

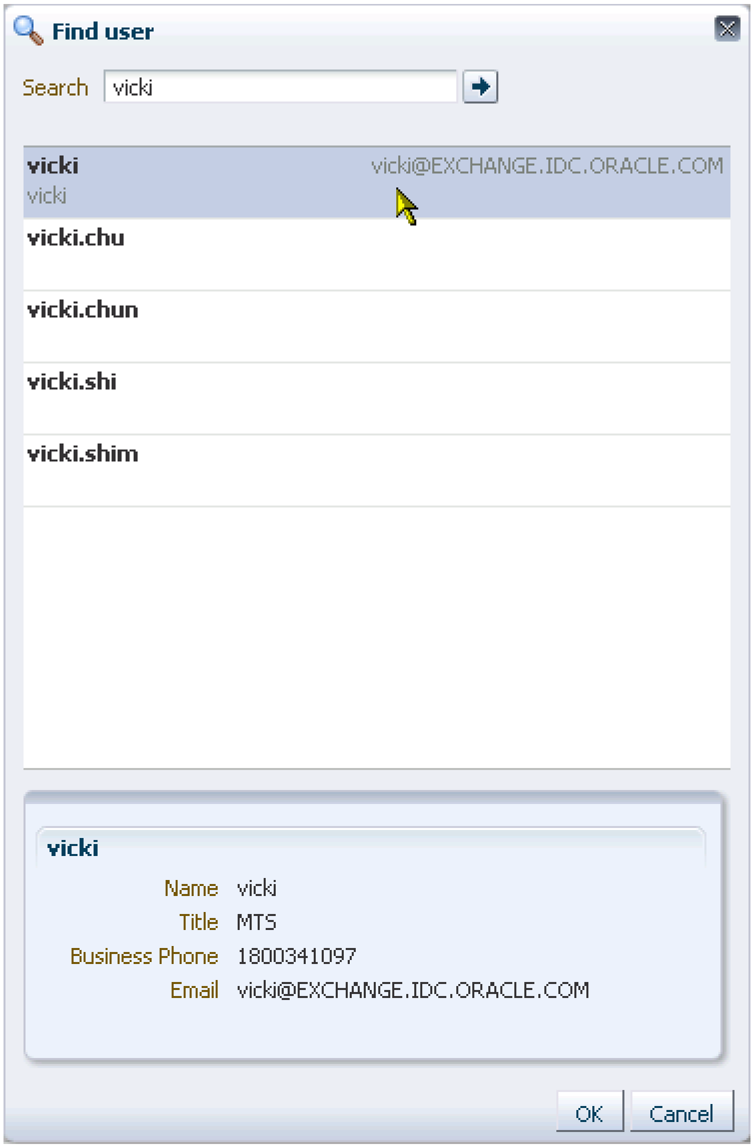
To enter a `Person` data type into a list row:

1. Enter edit list data mode as described in Section 66.2.4.1.1, "Adding Data to a List."
2. Go to the column that is formatted to support the `Person` data type, and enter a user name or click the **Find user** icon to the right of the data entry field (Figure 66–35). For tips on searching for a user in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."

Figure 66–35 Find User Icon

Either all names in your company LDAP directory, or those users who belong to the current space, that match your search criteria appear in the results area (Figure 66–36).

Figure 66–36 Find User Dialog



3. Select a user, and click **OK** to populate the field with your selection.
4. When you finish adding rows and data, click **Save** to save your changes and exit edit list data mode.

 Tip: To save, you can also select **Save** from the **Actions** menu, or press Ctrl+M. To close, click **Close**, select **Close** from the **Actions** menu, or press Ctrl+Q.

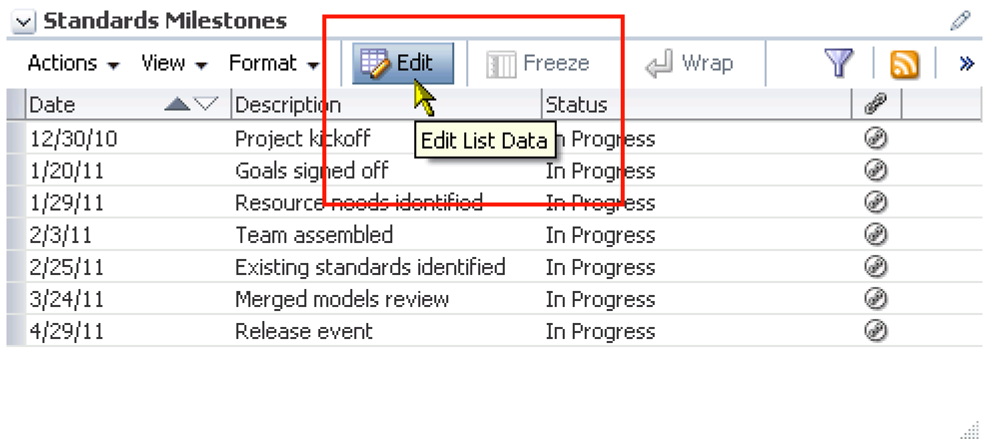
66.2.4.2 Editing List Data

When a list is in edit mode, you can edit one or multiple list rows. In edit mode, you can initiate a row edit simply by clicking within the row. You can continue to click in rows and edit row content until you exit edit mode.

To edit list data:

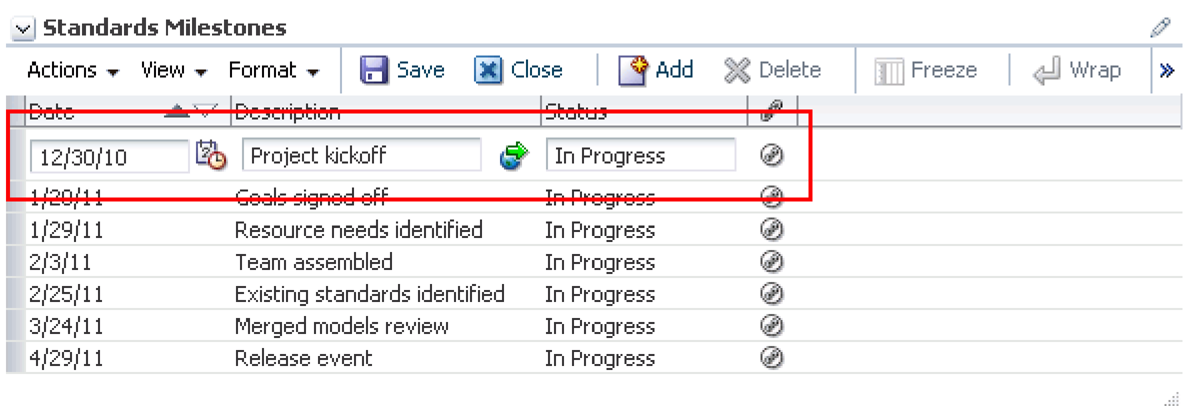
1. Go to the list that contains data you want to edit, and click the **Edit List Data** icon to open the list in edit mode (Figure 66–37).

Figure 66–37 Edit List Data Icon



2. Click a list row to revise its data (Figure 66–38).

Figure 66–38 A Row Open for Edit



Tip: The type of list data affects the action that you take:

- To edit a `Picture` data type, click the **Edit Picture** icon next to the data entry field. Enter the URL to the picture and ALT text.
- To edit a `Rich Text` data type, click the **Edit Text** icon next to the data entry field to launch the editor.
- To edit a hyperlink in a column that allows links, click the **Edit Link** icon.

3. Continue clicking rows and revising data until you are finished.
4. Click **Save** to save your changes and exit edit list mode.

> **Tip:** To save, you can also select **Save** from the the **Actions** menu, or press Ctrl+M. To close, click **Close**, select **Close** from the **Actions** menu, or press Ctrl+Q.

66.2.4.3 Deleting List Rows

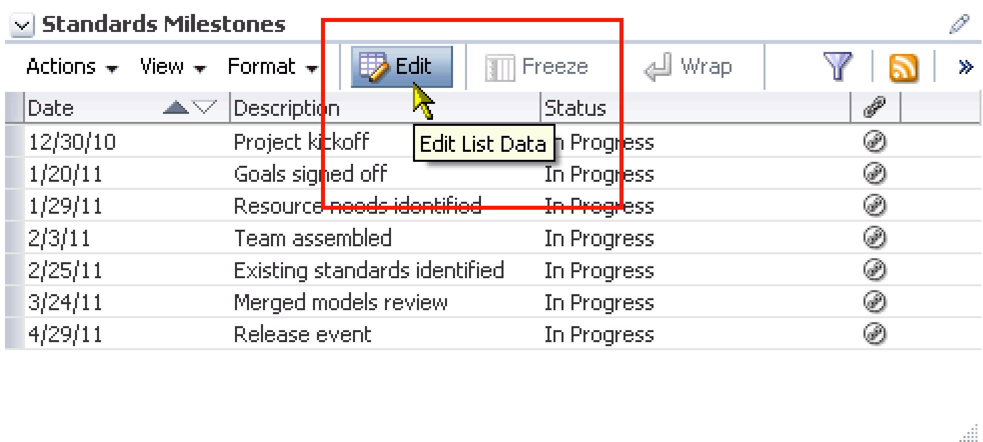
You can delete one or multiple list rows in one operation.

> **Tip:** Selecting a row and clicking **Delete** marks a list row for deletion. The row is removed from your view, but the list data continues to exist in the WebCenter Portal's repository. The actual delete takes place when you save the change.

To delete one or multiple list rows:

1. Go to the list with rows to delete.
2. Click the **Edit List Data** icon to open the list in edit mode (Figure 66–39).

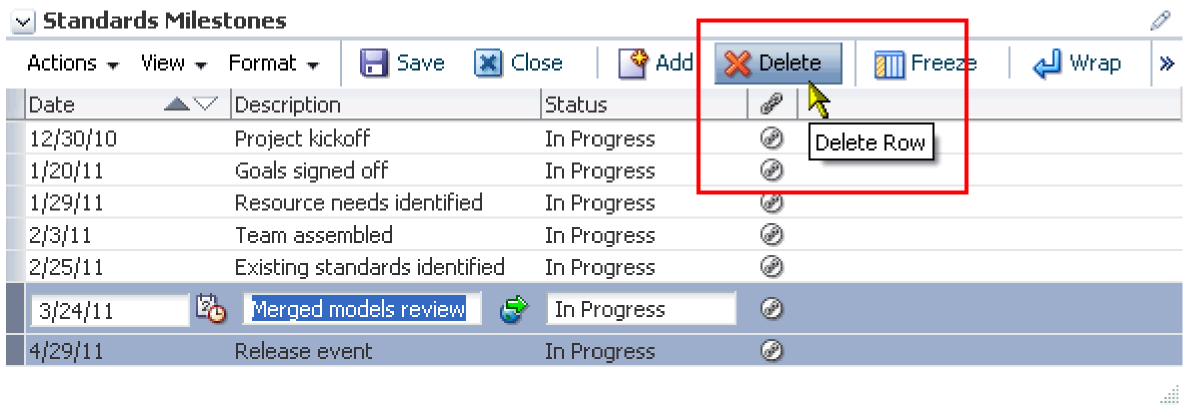
Figure 66–39 Edit List Data Icon



3. Select one or more rows to delete.

   In Windows, use Ctrl+Click to select multiple rows. In UNIX, simply click multiple rows. In both operating systems, use Shift+Click to select a range of rows.
4. Click the **Delete** button above the list (Figure 66–40).

Figure 66–40 Delete Button and Selected Rows



The selected rows are marked for deletion removed from your view of the list.

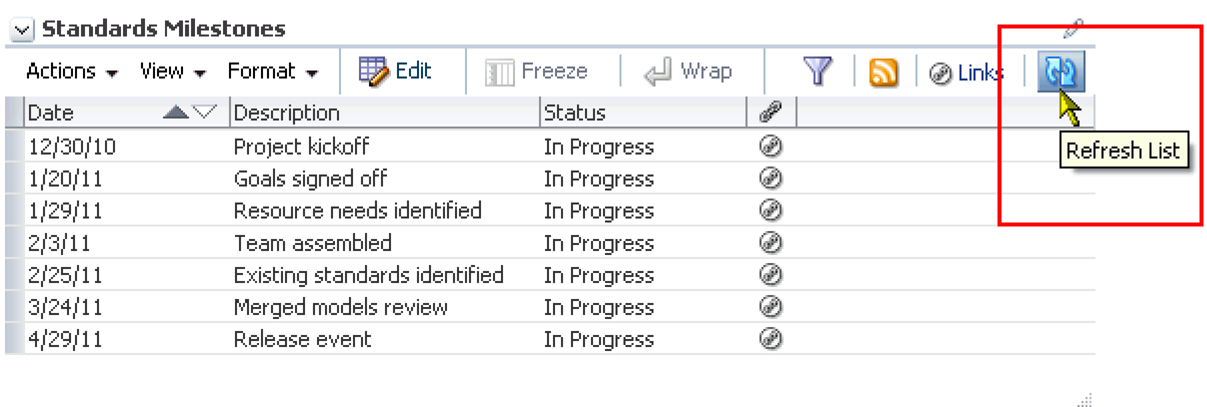
5. Click **Save** to save your changes and exit edit list mode.

> **Tip:** To save, you can also select **Save** from the **Actions** menu, or press Ctrl+M. To close, click **Close**, select **Close** from the **Actions** menu, or press Ctrl+Q.

66.2.4.4 Refreshing List Data

All lists come with a **Refresh List** icon, which you can click to refresh the display of list data (Figure 66–41).

Figure 66–41 Refresh List Icon



66.2.5 Customizing Lists

You can perform user customizations on your own view of a list instance, or you can perform application customizations on a list instance, affecting everyone's view. User customizations involve changes made in page *view* mode; while application customizations involve changes made in page *edit* mode (that is, in Composer). Everyone can perform user customizations their own view of a list; but page edit privileges are always required for application-level list customizations.

User and application customizations apply to a list rendered in a List Viewer task flow. They do not apply to lists rendered on the **Lists** page.

A second instance of a list is not affected by the customizations you make to the first instance. For example, imagine that you have placed the *Issues* list on both the *Sales* page and the *What's New* page. If you sort the list by the *Number* column on the *Sales* page, the *Issues* list is not automatically sorted by *Number* on the *What's New* page.

While application customizations affect everyone's view of a list instance, user customizations are layered over them. For example, someone may perform an application customization on a list containing columns A, B, and C, so that column C is first in list column order (C, A, B). You can then perform a user customization on the list so that column A is first in list column order in your personal view of the same list instance (A, C, B).

Note: In page edit mode, you see only application customizations. In page view mode, you see user customizations layered over application customizations. If the same property is set at both the application and user levels, the user value takes precedence in your own view.

This section describes various application- and user-level customizations you can make to a list instance. It includes the following subsections:

- Section 66.2.5.1, "Sorting List Data on a Column"
- Section 66.2.5.2, "Resizing List Columns"
- Section 66.2.5.3, "Changing Column Order on a List Instance"
- Section 66.2.5.4, "Hiding and Showing List Columns"
- Section 66.2.5.5, "Freezing a Column Position"
- Section 66.2.5.6, "Wrapping Column Data"
- Section 66.2.5.7, "Applying Color Banding to List Rows"
- Section 66.2.5.8, "Filtering List Data"

66.2.5.1 Sorting List Data on a Column

By default, list data is sorted by create date. You can control the sort order of list data by clicking sort icons in each column's header. You can perform an advanced sort using **View** menu options.

Sort list data in the List Viewer task flow. You can sort list data on the **Lists** page, but the sort is not persisted. It will revert back if you change lists or navigate away from the page.

To sort list data on a column in your view, perform the actions described in this section in page view mode. To sort list data on a column in everyone's view, perform the actions described in this section in page edit mode.

This section describes regular and advanced sorting. It includes the following subsections:

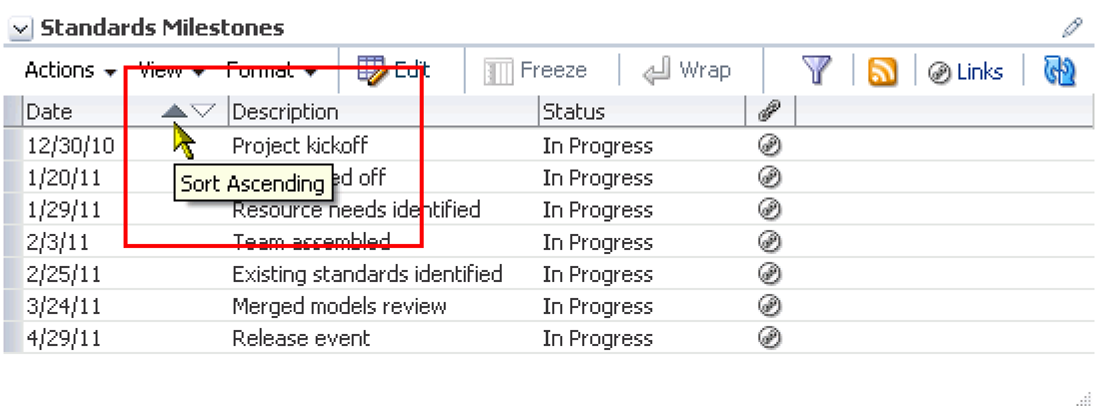
- Section 66.2.5.1.1, "Sorting List Data Using Column Icons"
- Section 66.2.5.1.2, "Performing an Advanced Sort of List Data"

Note: When your Spaces application is running against an Oracle database, a click on a column header in the List View results in a linguistic sort based on your locale. For non-Oracle databases, the sorting is based on the linguistic sorting specified in the database (collation in the case of SQL Server). This means when you connect to a Spaces instance in different languages, list rows are sorted according to the default collation of the database, regardless of the language your application is currently using.

66.2.5.1.1 Sorting List Data Using Column Icons To sort list data on a column using column icons:

1. Go to the list instance you want to change.
2. Go to the column you want to use to control the sort, roll your mouse over the column header, and click the **Sort Ascending** icon to sort the list in ascending order (1, 2, 3, a, b, c); or click the **Sort Descending** icon to sort the list in descending order (c, b, a, 3, 2, 1) (Figure 66–42).

Figure 66–42 Sort Icons on a List Column



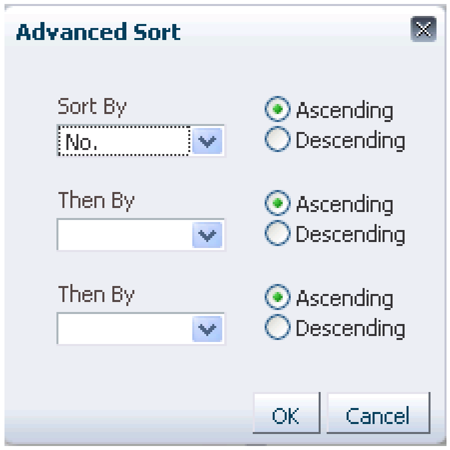
Tip: You can also sort list data on a column by selecting a column and then selecting **Sort** and then **Ascending** or **Descending** from the **View** menu. You can right-click a column and select these options from a context menu.

66.2.5.1.2 Performing an Advanced Sort of List Data The **View** menu provides an **Advanced** option that presents another way to sort list data.

To use the **Advanced** option to sort list data:

1. Go to the list instance you want to change.
2. From the **View** menu, select **Advanced** to open the Advanced Sort dialog (Figure 66–43).

Figure 66–43 Advanced Sort Dialog



3. From the **Sort By** list, select the column to be considered first in sorting list data.

   The **Sort By** and **Then By** fields are arranged in order of precedence, with **Sort By** considered first, and **Then By** in second and third positions.

4. Select either **Ascending**, to sort list data on the selected column in ascending order (1, 2, 3, a, b, c), or **Descending**, to sort list data on the selected column in descending order (c, b, a, 3, 2, 1).

   > **Note:** Currently, you can sort against only one column. Look to future releases for this feature to be fully realized.

5. Click **OK**.

   > **Tip:** You can access the options described in this section by right-clicking a column header and selecting from a context menu.

66.2.5.2 Resizing List Columns

You can control the width of a list column by dragging it wider or by setting a specific column width through a dialog. You can also control column width by expressing a default width in column details (for more information, see the `Display Width` detail in Table 66–2, " Data Type Column Details").

Resize columns in the List Viewer task flow. You can resize columns on the **Lists** page, but these are not persisted and will revert back when changing lists or navigating away.

To resize list columns in your view, perform the following actions in page view mode. To resize list columns in everyone's view, perform the following actions in page edit mode.

> **Note:** To resize list columns, the list must contain at least one row.

To resize list columns:

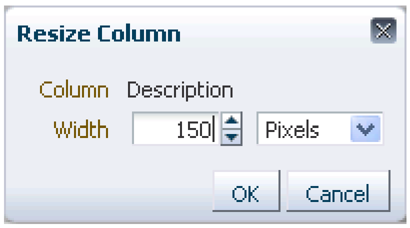
1. Go to the list instance you want to change.
2. Resize columns using one of the following methods:

- Click and hold on a column splitter, and drag it to make the column wider or narrower.
- In the list, select the column to resize.

  From the **Format** menu, select **Resize Columns**.

  In the resulting dialog, enter a column width and select a unit of measure (Figure 66–44).

Figure 66–44 Resize Column Dialog



  Choose from:

  – **Pixels**—To express column width in a specified number of pixels.

  – **Percent**—To express column width as a percentage of the total list width.

  Click **OK**.

  Tip: You can access the options described in the section by right-clicking a column and selecting from a context menu.

66.2.5.3 Changing Column Order on a List Instance

You can rearrange the order of list columns by dragging a column and dropping it to the desired position or by using the reorder dialog.

Change column order in the List Viewer task flow. You cannot change column order on the **Lists** page.

To change column order on a list instance in your view, perform the following actions in page view mode. To change column order on a list instance in everyone's view, perform the following actions in page edit mode.

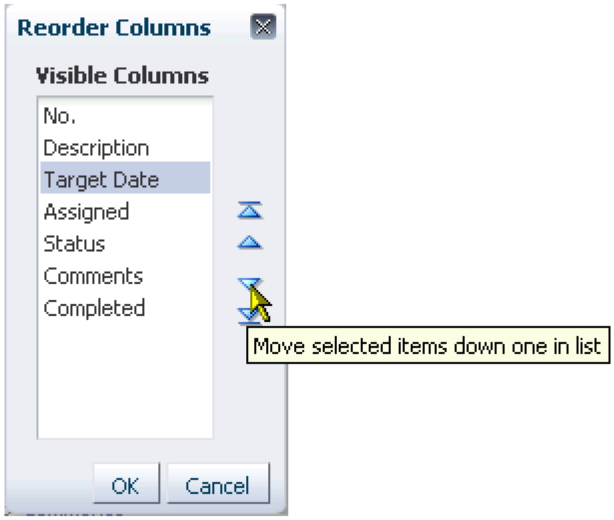
Note: To reorder columns by dragging, the list must have at least one row.

To change column order:

1. Go to the list instance you want to change.
2. Rearrange list columns using one of the following methods:
   - Click and hold on a list column title, and drag and drop it to the desired location.
   - Select **Reorder Columns** from the **View** menu.

     In the resulting dialog, select a column and click a **Move** icon to the right of the list of **Visible Columns** to reposition your selection (Figure 66–45).

Figure 66–45 Reorder Columns Dialog



Repeat until you have columns arranged in the desired order.

Click **OK**.

Tip: You can access the options described in the section by right-clicking a column and selecting from a context menu.

66.2.5.4 Hiding and Showing List Columns

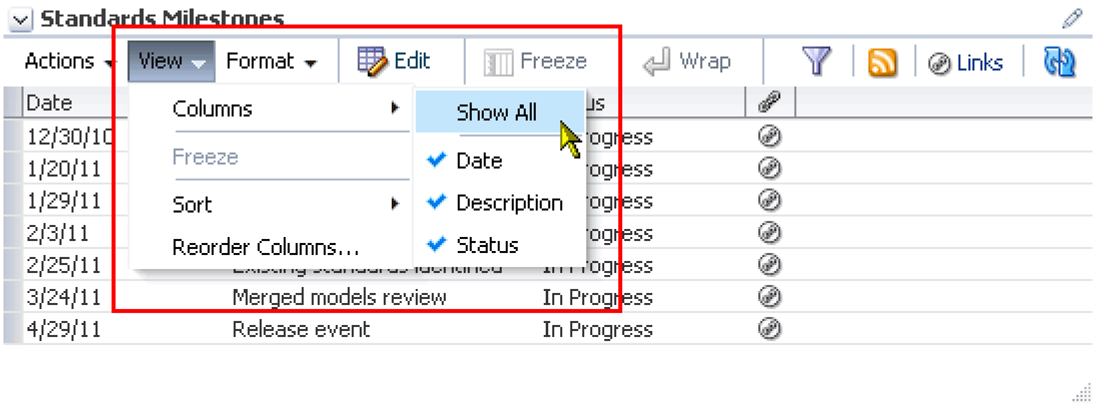
You can use an option on a list's View menu to hide selected list columns. To hide or show columns in your view, perform the following actions in page view mode. To change column order in everyone's view, perform the following actions in page edit mode.

Hide or show list columns in the List Viewer task flow. You can hide or show columns on the **Lists** page, but this setting is not persisted and reverts back when changing lists or navigating away.

To hide or show list columns:

1. Go to the list instance you want to change.
2. Click the **View** menu, and select the **Columns** submenu (Figure 66–46):

Figure 66–46 Columns Submenu on View Menu



- Select a column you want to show (a check appears on the menu next to shown columns).
- Deselect a column you want to hide (no check appears on the menu next to hidden columns).
- Select **Show All** to show all columns (all columns are checked on the menu).

66.2.5.5 Freezing a Column Position

When a list is too wide to display all of its columns in one view, you can scroll the list left and right. If there is a column you always want to keep in view, you can use column freezing to hold a column in place during scrolling. Freezing causes a selected column to hold its position while the columns to the right of it scroll by. You can set **Freeze** on one column on a given list instance. Freezing holds in place the selected column and any column to the left of it.

Note: To freeze a column position in your view, perform the following actions in page view mode. To freeze a column position in everyone's view, perform the following actions in page edit mode.

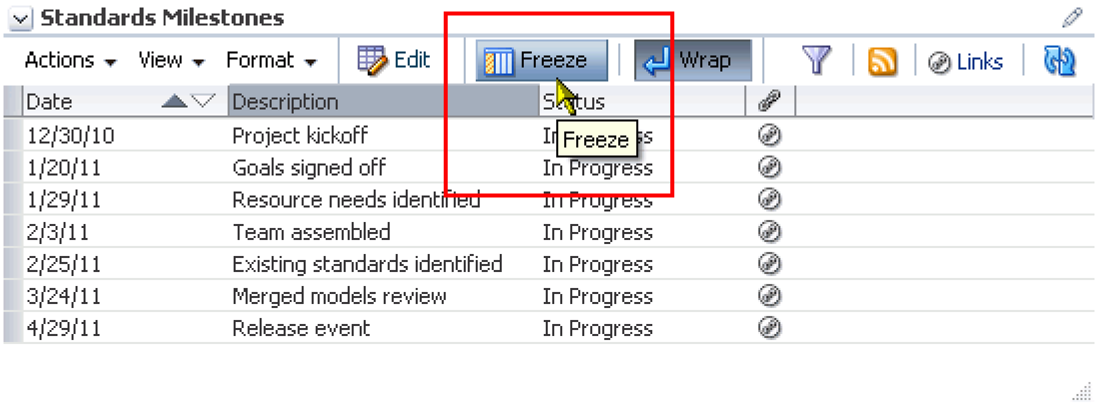
To freeze a column position:

1. Go to the list with a column you want to freeze.
2. Select the relevant column by clicking its header.

   The **Freeze** icon becomes available.
3. Click the **Freeze** icon (Figure 66–47).

   Tip: You can also freeze a column by selecting it and then selecting **Freeze** from the **View** menu.

Figure 66–47 Freeze Icon



To unfreeze a column, select it as described in step 2, and click the **Freeze** icon again.

> **Tip:** You can access the options described in the section by right-clicking a column and selecting from a context menu.

66.2.5.6 Wrapping Column Data

Use the Wrap feature to control whether to allow column data to wrap in a selected list column. Data that wraps breaks onto additional lines if it would otherwise exceed the column width. Data that does not wrap, shows only as much data as fits into the current column width (you can widen the column to view the data if you prefer, see Section 66.2.5.2, "Resizing List Columns").

> **Note:** By default, column data is wrapped.

To wrap column data:

1. Go to the list in which to wrap column data.
2. Select the relevant column by clicking its header.
3. Click the **Wrap** icon.

   > **Tip:** You can also wrap data by selecting the column and then selecting **Wrap** from the **Format** menu.
   >
   > You can access the options described in the section by right-clicking a column and selecting from a context menu.

   If any data was previously truncated, it now appears in the row with line breaks to accommodate the column's width.

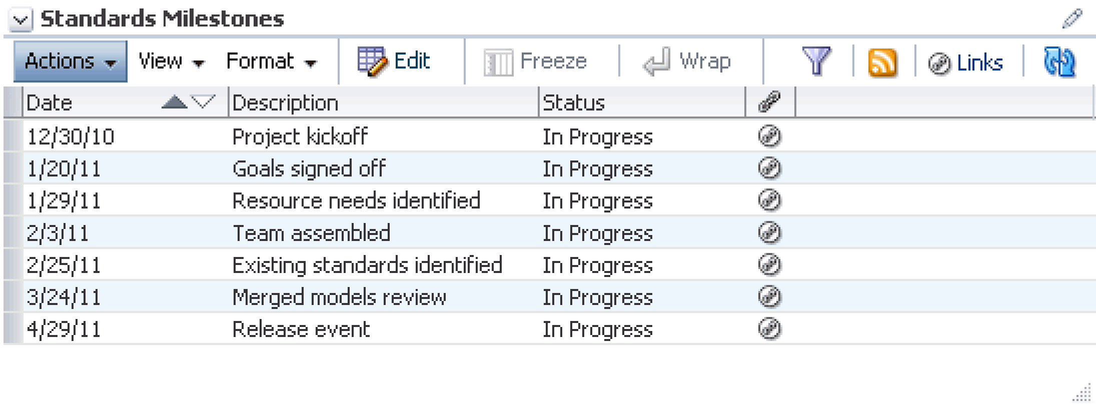
To turn wrapping off, select the relevant column and click the **Wrap** icon again.

66.2.5.7 Applying Color Banding to List Rows

Color banding refers to a transparent overlay of color applied at specified intervals to list rows or columns. When you define color banding on a list, you specify whether to apply color banding and how often to apply it.

You can easily enhance the readability of a list by applying row or column color banding (Figure 66–48).

Figure 66–48 List with Color Banding



You can apply color banding to your personal view of a list instance or to everyone's view of a list instance. This section describes how. It contains the following subsections:

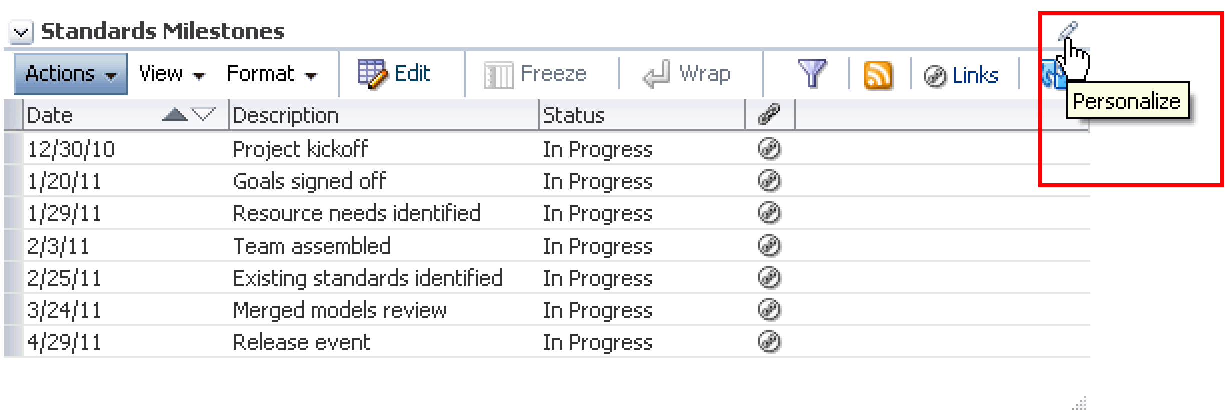
- Section 66.2.5.7.1, "Applying Color Banding to Your Personal View of a List"
- Section 66.2.5.7.2, "Removing Personal Color Banding"
- Section 66.2.5.7.3, "Applying Color Banding to Everyone's View of a List Instance"
- Section 66.2.5.7.4, "Removing Color Banding from Everyone's View of a List"

66.2.5.7.1 Applying Color Banding to Your Personal View of a List You can apply color banding to list rows or to list columns.

To apply color banding to your personal view of a list instance:

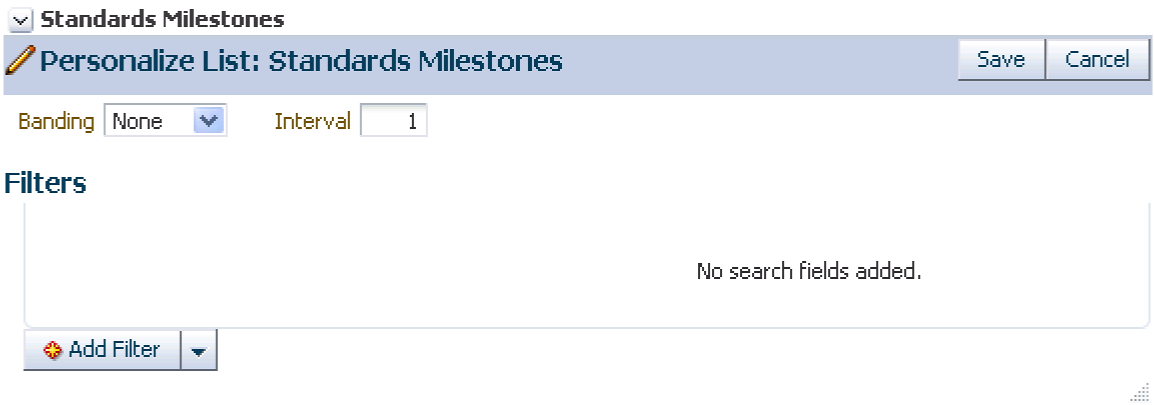
1. Go to the list you want to change.
2. Click the **Personalize** icon on the task flow header (Figure 66–49).

Figure 66–49 Personalize Icon



The List Viewer enters personalize list mode (Figure 66–50).

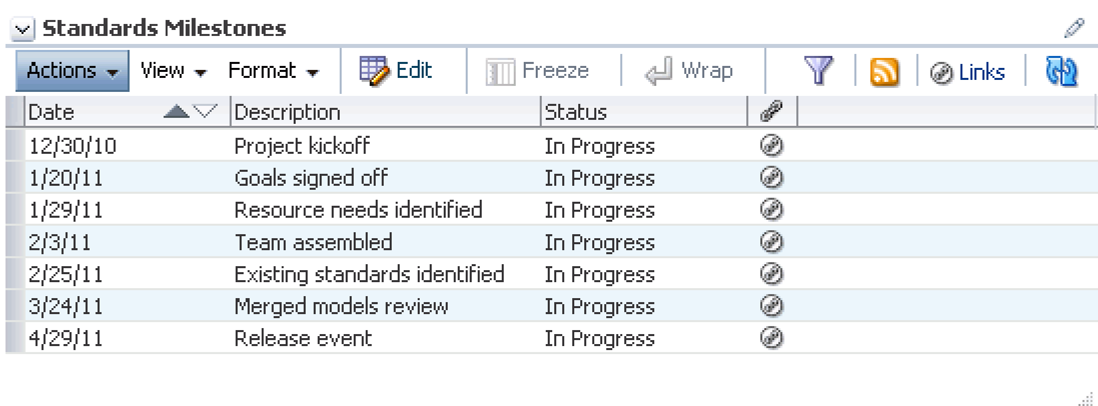
Figure 66–50 List in Personalize List Mode



3. From the **Banding** pick list, select a banding style for the list instance:
   - **Row**—To specify color banding on list rows.
   - **Column**—To specify color banding on list columns.
   - **None**—To turn color banding off.
4. In the **Interval** field, enter the number of rows or columns to skip between color bands.

   For example, when you apply color bands to rows, a value of `1` applies a color band to the second row, fourth row, sixth row, and so on. Figure 66–51 illustrates an interval value of `1`.

Figure 66–51 List with Color Banding



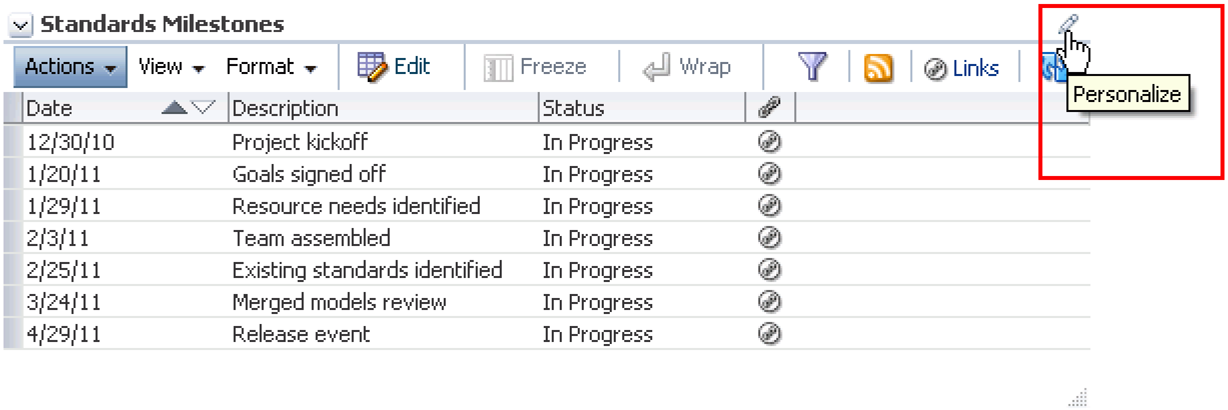
5. Click **Save** to save your settings and return to the list.

   List data is refreshed, now reflecting your color banding settings.

66.2.5.7.2 Removing Personal Color Banding To remove personal color banding from a list:

1. Go to the list from which to remove color banding.
2. Click the **Personalize** icon on the task flow header (Figure 66–52).

Figure 66–52 Personalize Icon



The List Viewer enters personalize list mode.

3. From the **Banding** pick list, select **None**.
4. Click **Save** to save your settings and return to the list.

   List data is refreshed, now showing no color banding.

66.2.5.7.3 Applying Color Banding to Everyone's View of a List Instance When you want your color banding settings to affect everyone's view of a particular list instance, follow the steps in this section.

> **Note:** If you have previously performed a user customization on a list instance to omit color banding, you may need to reset your user customization, as described in Section 66.2.5.7.1, "Applying Color Banding to Your Personal View of a List." Your user customizations take precedence over space-level customizations, and thus may prevent you from seeing the change described in this procedure.

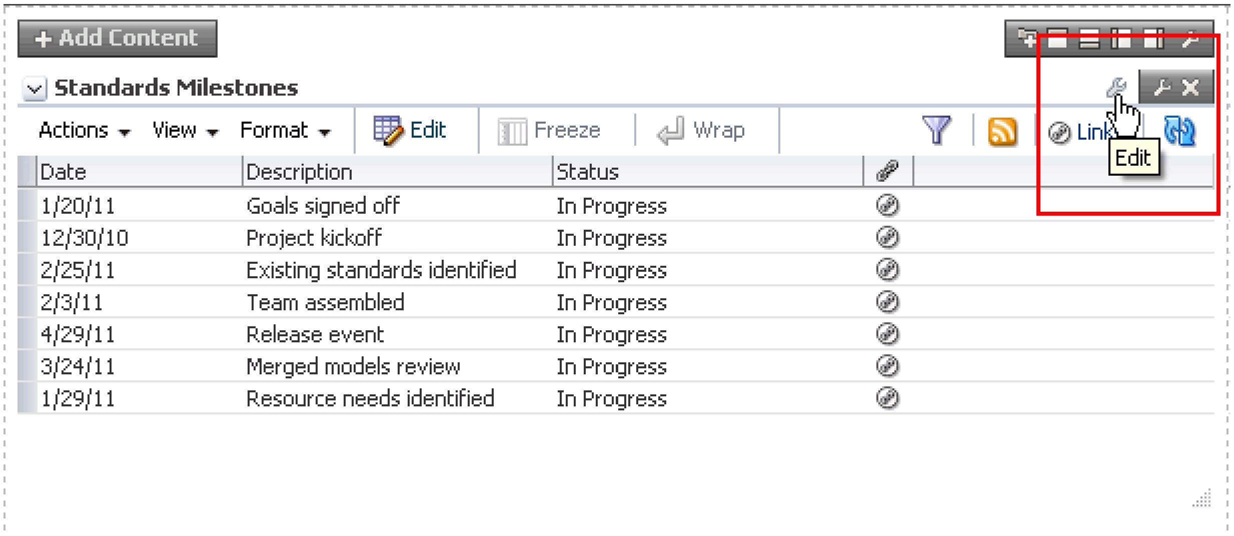
To apply color banding to everyone's view of a list instance:

1. Go to the list you want to customize with color banded rows or columns.
2. Enter edit page mode.

   See Also: For information about entering edit page mode, see Section 18.1, "Entering and Exiting Composer."

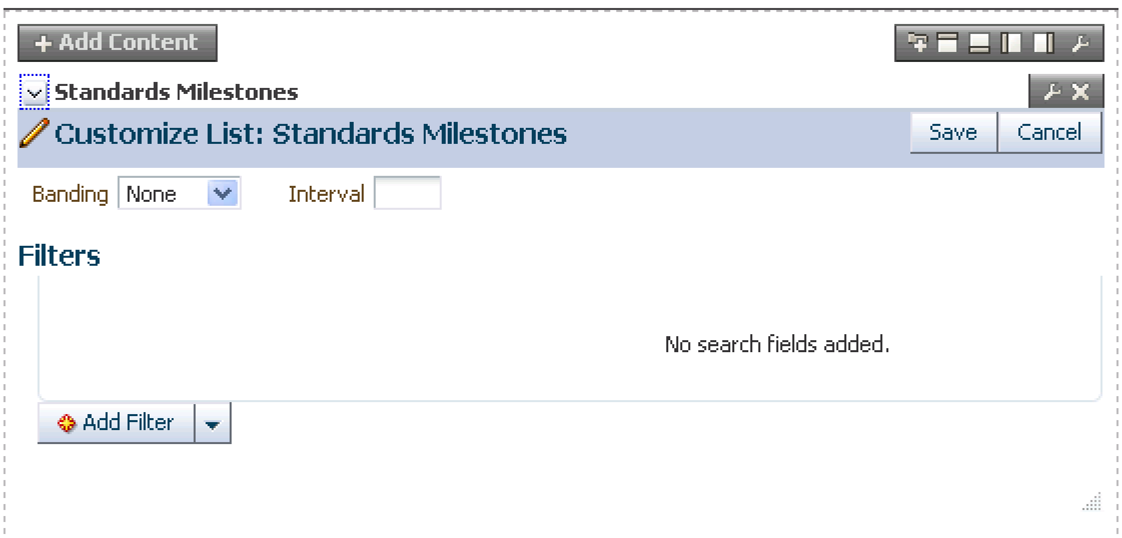
   The page opens in Composer.
3. Go to the list instance you want to customize, and click the **Edit** icon on the task flow header (Figure 66–53).

Figure 66–53 Edit Icon on the Task Flow Header in Page Edit Mode



The list enters customize list mode (Figure 66–54).

Figure 66–54 Customize List Mode



4. Configure color-banding settings as described in Section 66.2.5.7.1, "Applying Color Banding to Your Personal View of a List."
5. Click **Close** to exit Composer.

66.2.5.7.4 Removing Color Banding from Everyone's View of a List To remove color banding from everyone's view of a list instance:

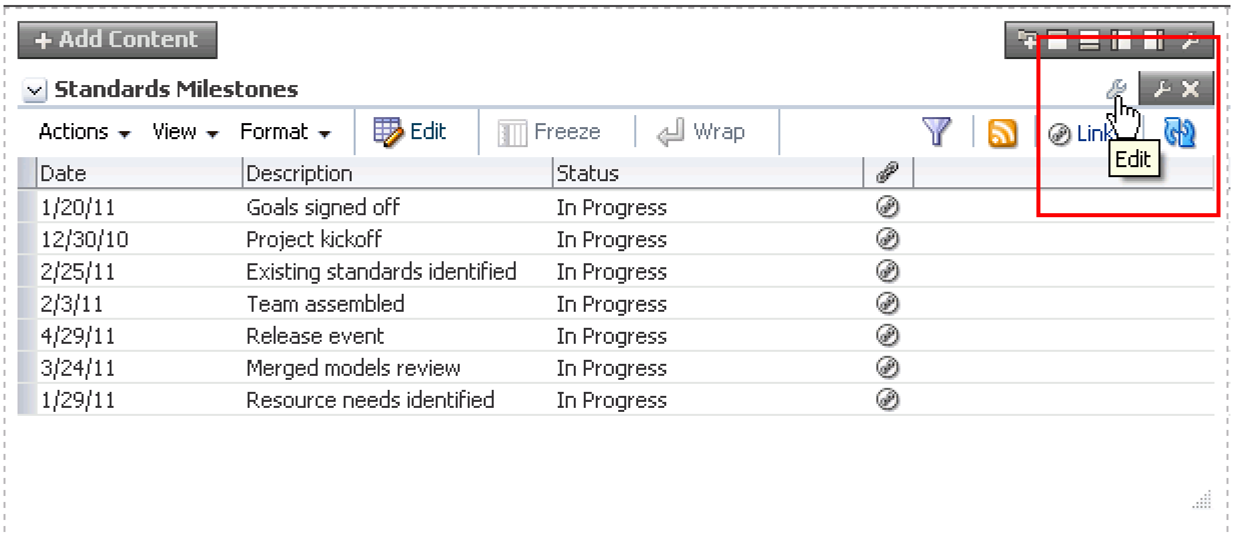
1. Go to the list from which to remove color banding.
2. Enter edit page mode.

> **See Also:** For information about entering edit page mode, see Section 18.1, "Entering and Exiting Composer."

The page opens in Composer.

3. Go to the list instance you want to customize, and click the **Edit** icon on the task flow header (Figure 66–55).

Figure 66–55 Edit Icon on the Task Flow Header in Page Edit Mode



The List Viewer enters customize list mode.

4. From the **Banding** pick list, select **None**.
5. Click **Save** to save your changes and exit customize list mode.

   The list refreshes, with color banding removed.
6. Click **Close** to exit Composer.

66.2.5.8 Filtering List Data

The Lists service provides data filtering options for your personal view of a list instance and for everyone's view of the instance. Filtering provides a means of limiting the display of list data to those rows that match your filtering criteria.

Temporary, personal filtering (also called *ad hoc filtering*) is available with both the List Viewer task flow and **Lists** page. Custom filtering that affects everyone's view of a list instance is available only with the List Viewer task flow.

This section describes the processes of applying ad hoc, permanent personal, and permanent list filters. It contains the following subsections:

- Section 66.2.5.8.1, "Applying an Ad Hoc Filter to a List Instance"
- Section 66.2.5.8.2, "Applying a Permanent, Personal Filter to a List Instance"
- Section 66.2.5.8.3, "Removing a Permanent, Personal List Filter"
- Section 66.2.5.8.4, "Applying Filters to Everyone's View of a List"
- Section 66.2.5.8.5, "Removing Filters from Everyone's View of a List"

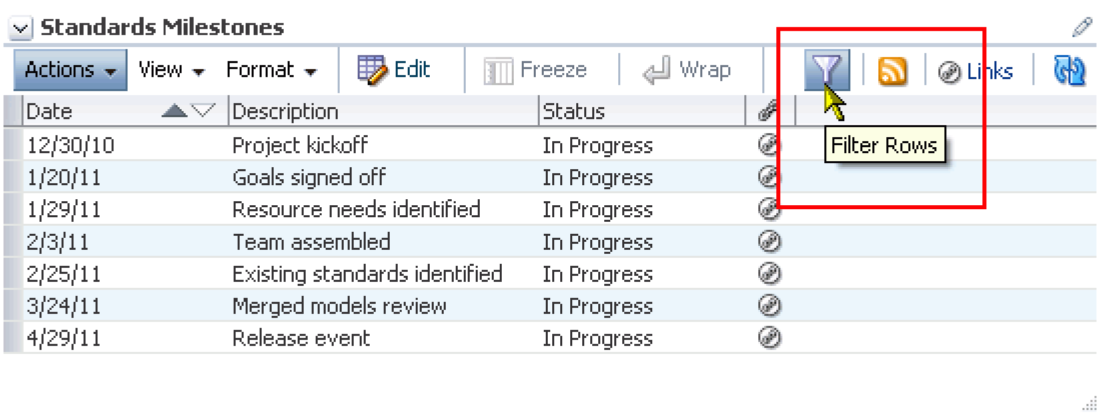
66.2.5.8.1 Applying an Ad Hoc Filter to a List Instance Use *ad hoc* list filtering to easily find a particular list entry or group of entries in a list instance.

Note: *Ad hoc* list filtering applies only to `Plain Text` and `Person` data types. Columns that use other data types, such as `Date` and `Number`, are not used in *ad hoc* filtering. For example, if you have dates shown in format `dd-mon-yy` and you filter on `jan`, you do not see rows with dates in January.

To apply an *ad hoc* filter to a list instance:

1. Go to the list that contains the data you want to temporarily filter.
2. Click the **Filter Rows** icon in the List toolbar (Figure 66–56).

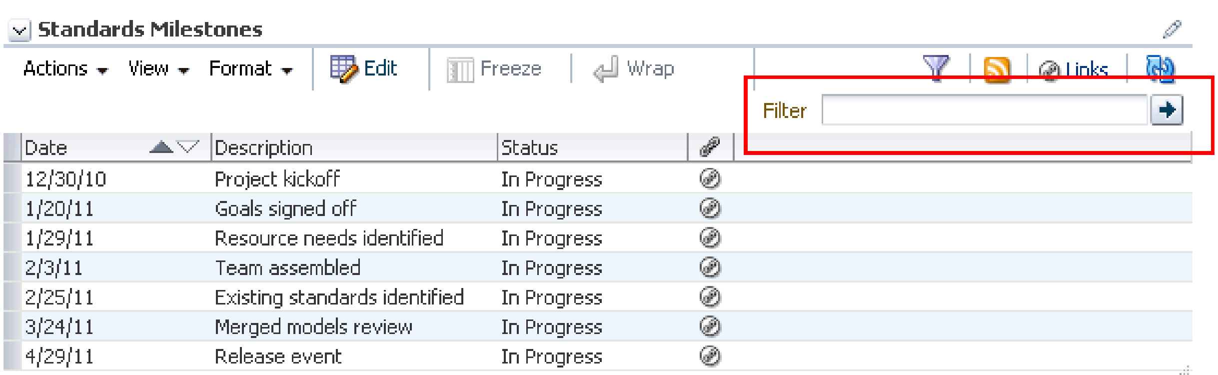
Figure 66–56 Filter Rows Icon



Tip: You can also select **Filter Rows** from the **Actions** menu.

The **Filter** field opens (Figure 66–57).

Figure 66–57 The Filter Field



3. Enter space-separated keywords in the **Filter** field, and click the **Filter** icon to execute the filter.

   All row details that match any of the keywords are shown.

4. Click the **Filter Rows** icon again to hide the **Filter** field and remove the temporary filter.

Tip: You can also select **Cancel Filter** from the **Actions** menu.

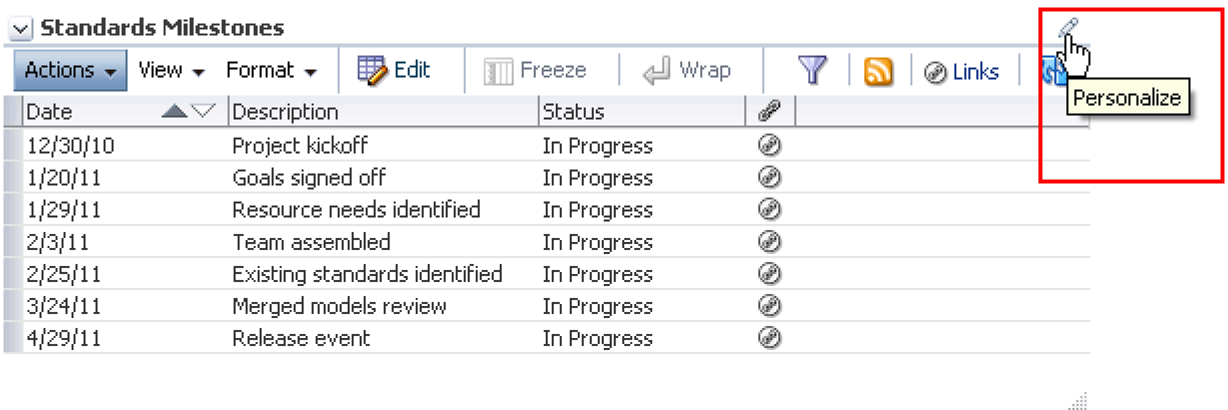
66.2.5.8.2 Applying a Permanent, Personal Filter to a List Instance In addition to an *ad hoc* filter, you can apply a permanent personal filter to your view of a list instance. We use the term *permanent* to convey the fact that you can keep your list filtered in a particular way for as long as you like. The filter is retained across page navigations within a browser session and across browser sessions.

It is still possible to remove such a filter. This section describes how to apply and remove a permanent personal filter.

To apply or remove a permanent filter on your view of a list instance:

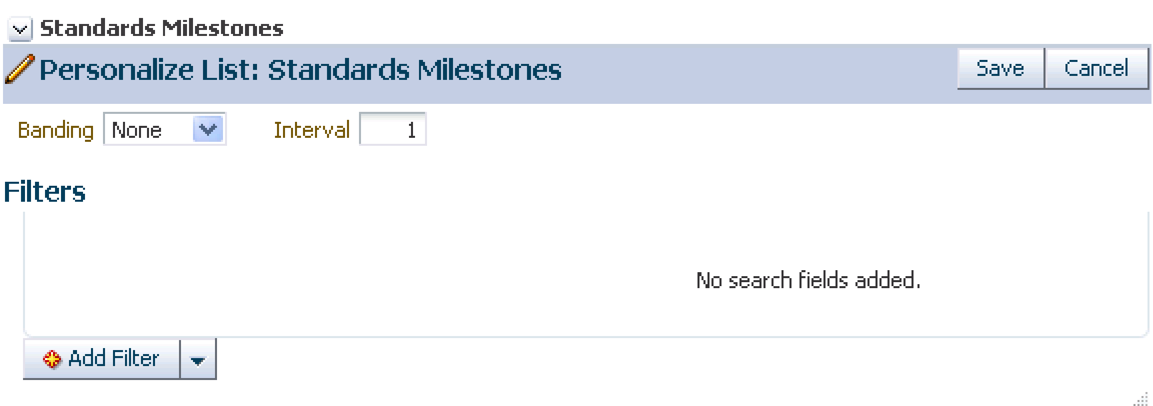
1. Go to the list that contains the data you want to permanently filter.
2. Click the **Personalize** icon on the task flow header (Figure 66–58).

Figure 66–58 Personalize Icon



The list enters personalize list mode (Figure 66–59).

Figure 66–59 List in Personalize List Mode



3. From the **Add Filter** list, select a column against which to apply a filter.

   The selected column appears, ready for a filter definition.
4. Select an operator from the list, and enter the filter content in the field provided (Figure 66–60).

Figure 66–60 Filter Operator and Content

The filter operators that appear on the list vary according to the data type of the selected column. Table 66–3 lists and describes filter operators as they apply to different data types.

Table 66–3 Filter Operators for List Data Types

Data Type	Description
`Boolean`	Use `Boolean` data type filter operators to specify that Boolean values in the selected list column must: ■ = —Match the value you specify ■ <>—Not match the value you specify The Boolean value is expressed as a check box. A checked box means TRUE or YES; a deselected box means FALSE or NO.
`DateTime`	Use `DateTime` data type filter operators to specify that date and time values in the selected column must be: ■ = —The same as the date or date and time that you specify ■ >= —More recent or the same as the date or date and time that you specify ■ <>—Any date or date and time other than the value you specify ■ >—More recent than the date or date and time that you specify ■ <= —Preceding or matching the date or date and time that you specify ■ <—Preceding the date or date and time that you specify
`Number`	Use `Number` data type filter operators to specify that number values in the selected column must be: ■ = —Equal to the value you specify ■ >= —Equal to or greater than the value you specify ■ <>—Greater or lesser than the value you specify ■ >—Greater than the value you specify ■ <= —Equal to or lesser than the value you specify ■ <—Lesser than the value you specify

Table 66–3 (Cont.) Filter Operators for List Data Types

Data Type	Description
`Person`	Use `Person` data type filter operators to specify that person values in the selected list column must: ▪ = —Match the user name you specify ▪ Starts With—Start with the character(s) you specify ▪ Ends With—End with the character(s) you specify ▪ Contains—Include the character(s) you specify ▪ <>—Contain any user name other than the one you specify
`Picture`	You cannot apply filter operators to a `Picture` data type in a list.
`Plain Text`	Use `Plain Text` data type filter operators to specify that values in the selected column must: ▪ = —Match the characters you specify ▪ Starts With—Start with the character(s) you specify ▪ Contains—Include the character(s) you specify ▪ Ends With—End with the character(s) you specify ▪ <>—Contain any value other than the one you specify
`Rich Text`	You cannot apply filter operators to a `Rich Text` data type in a list.

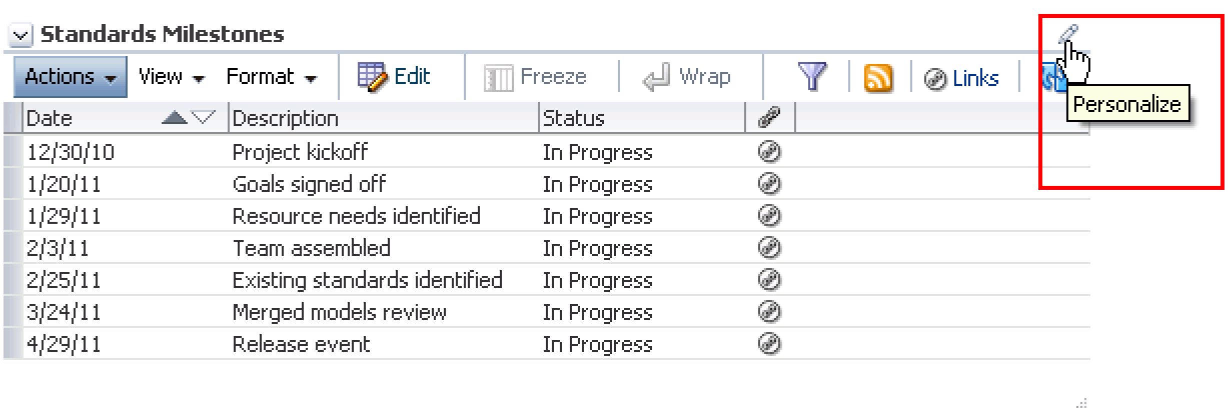
5. When you define multiple filters, **Match All Any** options appear:
   - Select **All** to require that displayed rows match all conditions.
   - Select **Any** to require that displayed rows match at least one condition.
6. Click **Save** to save your filter criteria and return to the list.

   The list is refreshed, now displaying data that matches your filter criteria.

66.2.5.8.3 Removing a Permanent, Personal List Filter To remove a permanent, personal list filter:

1. Go to the list from which you want to remove personal filtering.
2. Click the **Personalize** icon on the task flow header (Figure 66–61).

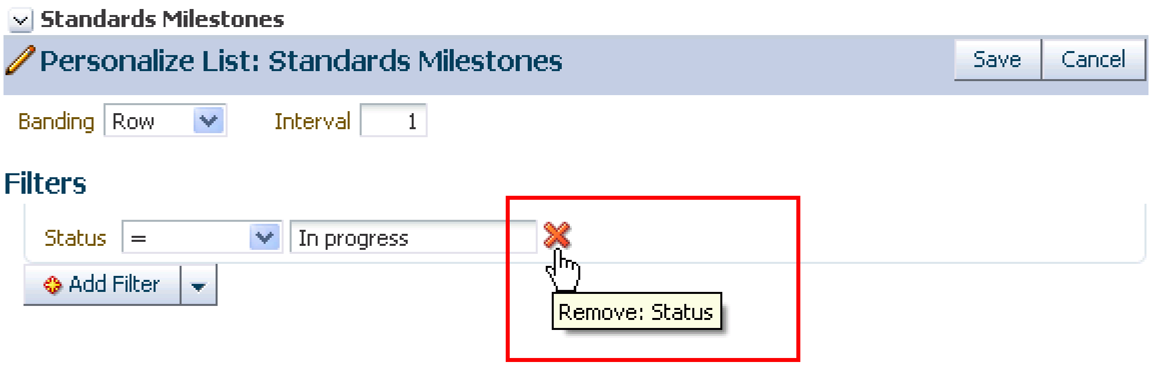
Figure 66–61 Personalize Icon



The List Viewer enters personalize list mode.

3. Click the **Remove** icon next to the filtering criteria you want to remove (Figure 66–62), and then click **Save**.

Figure 66–62 Remove Icon on a Filter



List data is refreshed, now displaying any data previously hidden by a filter.

66.2.5.8.4 Applying Filters to Everyone's View of a List If you want the list filters you create to apply to all users' views of a particular list instance, simply create the filters in page edit mode.

To apply filters to everyone's view of a list:

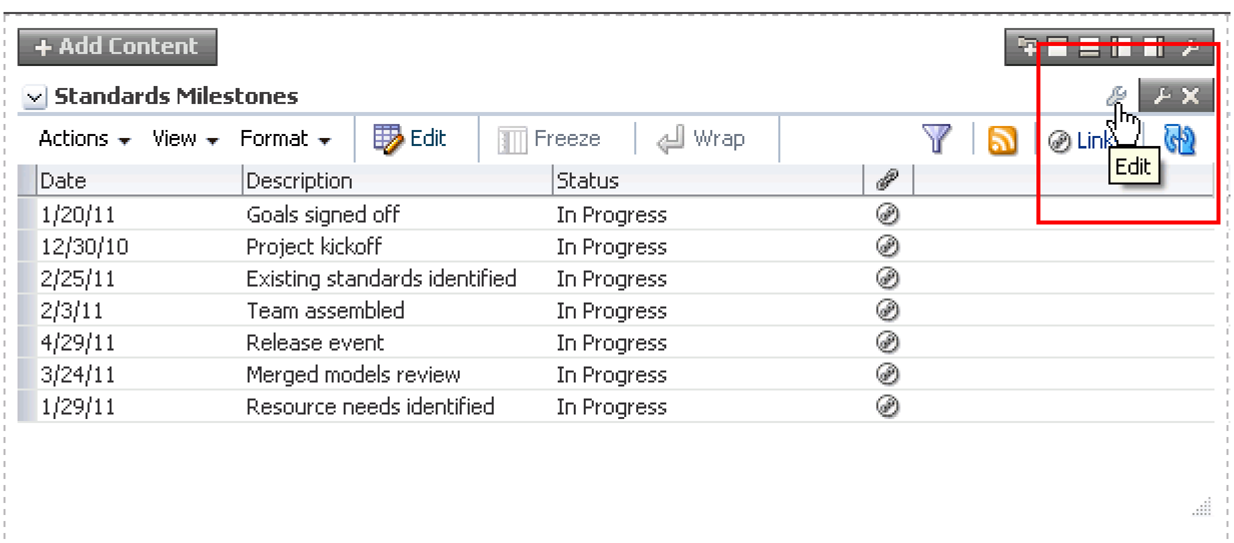
1. Go to the list that contains the data you want to filter from everyone's view.
2. Enter edit page mode.

   See Also: For information about entering edit page mode, see Section 18.1, "Entering and Exiting Composer."

   The page opens in Composer.

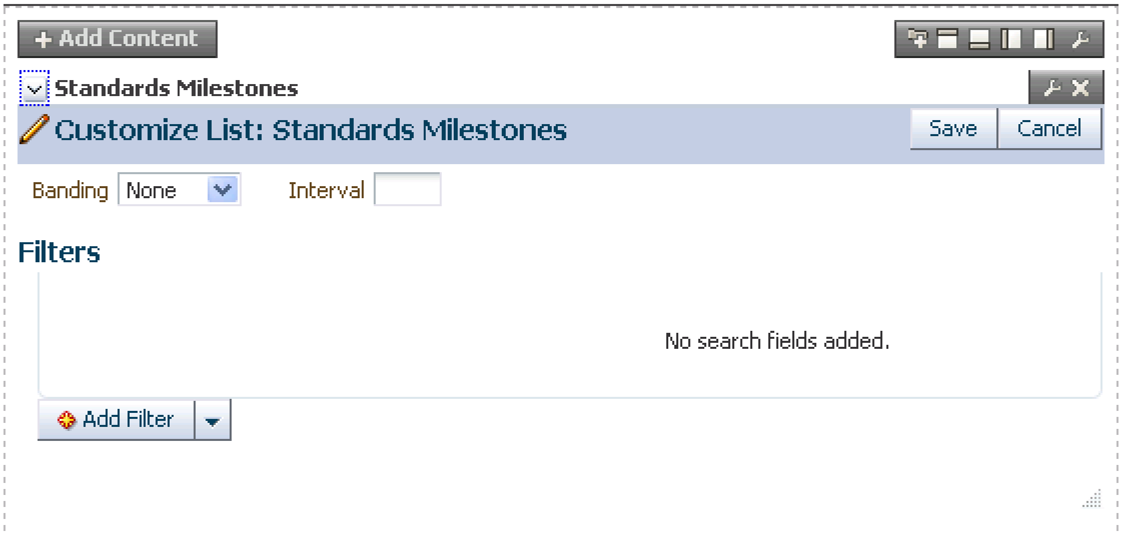
3. Go to the task flow instance you want to filter, and click the **Edit** icon on the task flow header (Figure 66–63).

Figure 66–63 Edit Icon on the Task Flow Header in Page Edit Mode



The list enters customize list mode (Figure 66–64).

Figure 66–64 Customize List Mode



4. Create and apply filtering criteria as described in Section 66.2.5.8.2, "Applying a Permanent, Personal Filter to a List Instance."
5. Click **Close** to exit Composer.

> **See Also:** For information about removing a filter from everyone's view of a list instance, see Section 66.2.5.8.5, "Removing Filters from Everyone's View of a List."

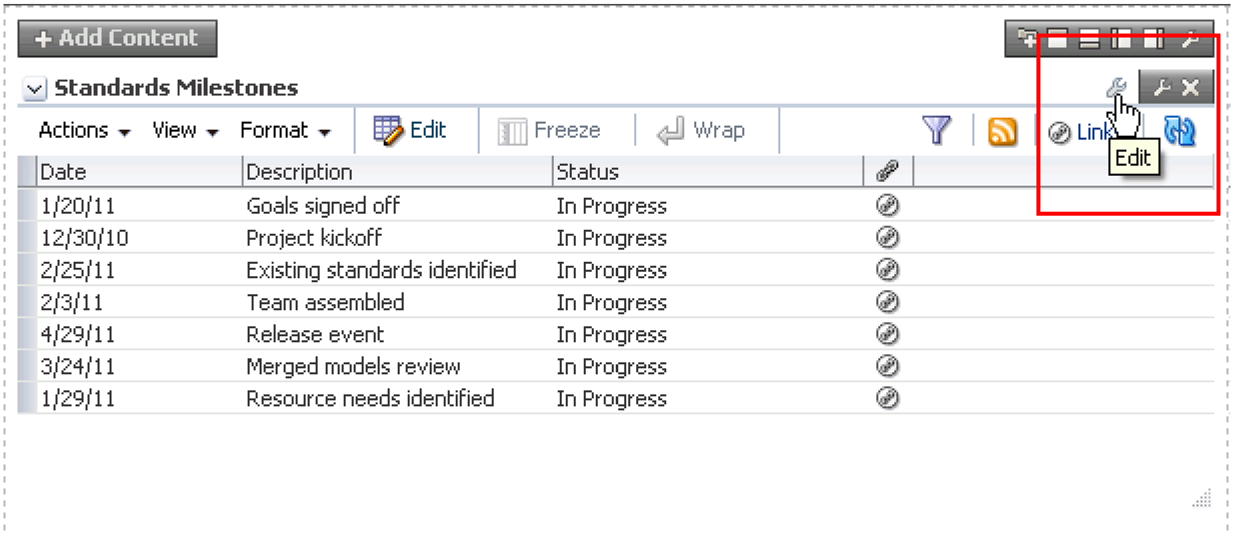
66.2.5.8.5 Removing Filters from Everyone's View of a List To remove a filter from everyone's view of a list:

1. Go to the list from which to remove a filter.
2. Enter edit page mode.

   > **See Also:** For information about entering edit page mode, see Section 18.1, "Entering and Exiting Composer."

   The page opens in Composer.
3. Click the **Edit** icon on the List Viewer task flow header (Figure 66–65).

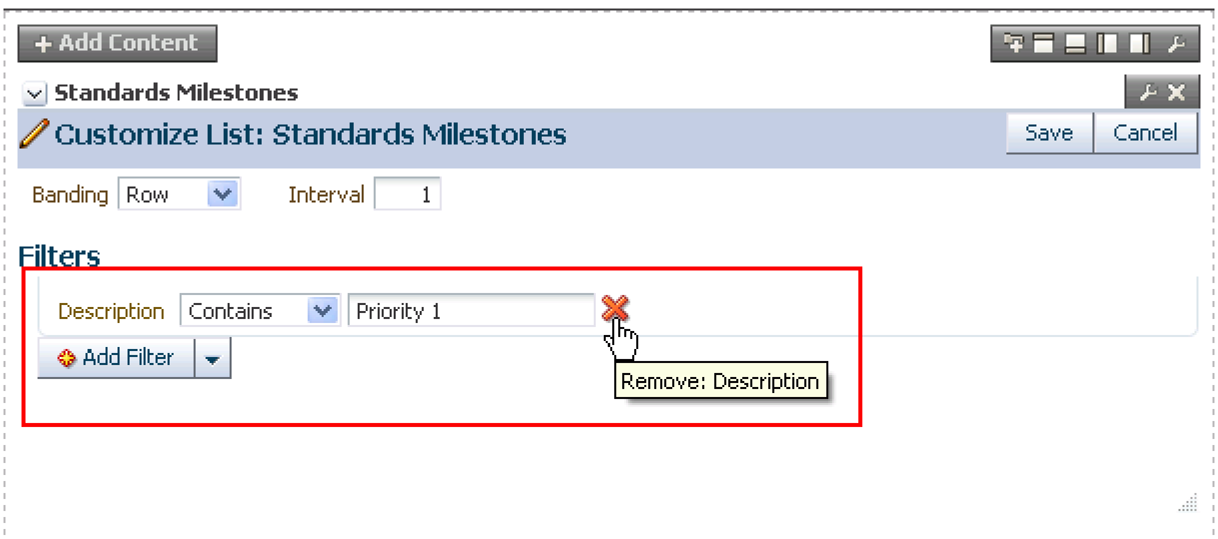
Figure 66–65 Edit Icon on the Task Flow Header in Page Edit Mode



The list enters customize list mode.

4. Click the **Remove** icon next to the filters you want to remove (Figure 66–66), and then click **Save**.

Figure 66–66 Remove Filter Icon



List data is refreshed, now displaying all unfiltered data.

5. Click **Close** to exit Composer.

66.2.6 Sending a Link to a List to Other Users

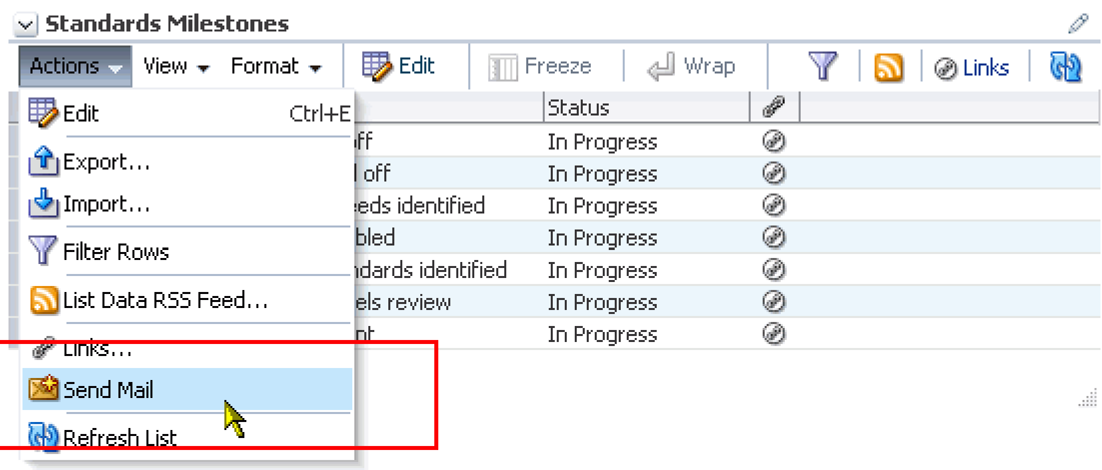
The list **Actions** menu includes a **Send Mail** option for sending a link to a list through a mail message.

To send a link to a list through mail:

1. Log in, and go to the list instance you want to send as a link through mail.

2. From the list **Actions** menu, select **Send Mail** (Figure 66–67).

Figure 66–67 Send Mail Option on Actions Menu



A compose message window opens, addressed to space members, with the following information:

- The name of the space from which the list instance originates
- The list title and description
- A link to the space
- A link to the list instance

Users click the link to the list instance to open a view of the list.

Note: To view the list, users must have access to the space that contains the list instance.

---

3. Compose the message and send as you would any other mail message.

66.2.7 Exporting a List and Importing a List from an Excel Spreadsheet

The Lists service provides a means of exporting and importing lists. If you can view the list, you can export it to Microsoft Excel 1997 - 2003 and 2007 formats and revise list data in Excel. If you have sufficient privileges to edit the list, you can import the revised list back into Spaces.

Tip: You can also create a list by importing an Excel spreadsheet. For more information, see Section 66.2.3.1, "Creating Lists."

This section describes how to export and import lists and provides information about additional software that may be of use in this process. It includes the following subsections:

- Section 66.2.7.1, "What You Should Know About Exporting and Importing Lists"
- Section 66.2.7.2, "Exporting a List to a Spreadsheet"
- Section 66.2.7.3, "Importing an Exported List"

66.2.7.1 What You Should Know About Exporting and Importing Lists

Use list export and import to add and revise list rows in a Microsoft Excel spreadsheet. List structure and links for the list and list rows are unaffected by export and import. When exporting a list, only the list data is exported, not the list structure nor the links. When a list is imported, new links and modified links will not be affected by the import.

After you export a list, if other changes are made to list data in Spaces, they are overwritten when you import the list. Before content is overwritten, a confirmation dialog provides you with an opportunity to stop the import and preserve Spaces changes.

Importing a spreadsheet cannot be used to modify list structure. However, you can import any spreadsheet to a list that has the same columns. A warning is raised if the spreadsheet was not created from an export of the list, but you can dismiss this warning and proceed if desired. You can also export a rowless list to a spreadsheet, add rows in Excel, and then import it.

You must take care when you export a list not to revise the list structure in Excel nor in Spaces. You cannot import an exported list if the list structure is changed in Spaces after export. You can add and remove list rows in the spreadsheet; such changes are reflected in the list on import.

Adding and removing list columns in the spreadsheet does not affect the list structure. Consequently, when you import a spreadsheet with columns that were removed through Excel, the import succeeds. The columns continue to appear in the imported list; though the deleted column data does not.

When you export a list from Spaces, you are prompted for the Excel format (1997 - 2003 and 2007 formats are offered). To import a spreadsheet, the same formats are accepted.

66.2.7.2 Exporting a List to a Spreadsheet

When you can view a list, you can export the list to a Microsoft Excel file. Exporting enables you to use your Excel skills to easily add to and revise list data. Controls for exporting lists are available in both the List Viewer task flow and on the **Lists** page.

To export a Spaces list:

1. Go to the list you want to export, and select **Export** from the **Actions** menu.
2. Select a format for the output file:
   - MS Excel 2007
   - MS Excel 1997 - 2003
3. Follow your browser's prompts to save the exported file to your local file system.

   The list is saved in the Excel format you select. The file name is the list name, with underscores in lieu of character spaces. For example, `my list` becomes `my_list.xlsx` or `my_list.xls`.

66.2.7.3 Importing an Exported List

After you have created or revised list data and saved it in an Excel format, you can import it using controls available in both the List Viewer task flow and on the **Lists** page. To import list data, you must have, minimally, `Edit` permission on the page that contains the list.

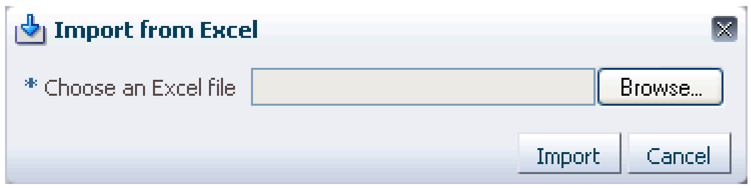
To import an exported list:

1. Go to the list into which to import a spreadsheet, and select **Import** from the **Actions** menu.
2. In the Import from Excel dialog (Figure 66–68), click the **Browse** button and navigate to and select the relevant spreadsheet.

> **Note:** The spreadsheet must have the same columns as the list.

The file must be in Excel 1997-2003 (`*.xls`) or 2007 format (`*.xlsx`).

Figure 66–68 Import from Excel Dialog



3. Click **Import**.

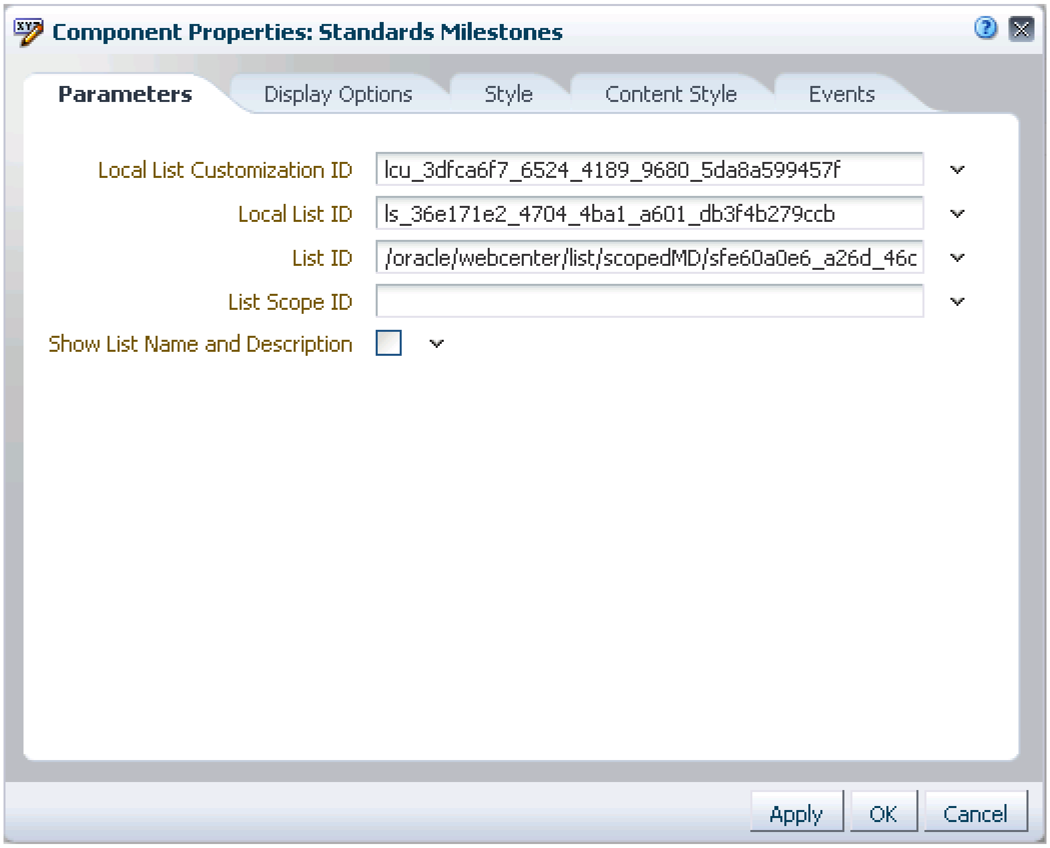
   If the spreadsheet was not created from an export of the list, a warning is given. Click **Import** to proceed.

   The list is refreshed, now displaying the imported data. List data is validated on import. If any rows contain validation errors, such errors are presented in a dialog and the import is terminated. You can correct validation errors in the spreadsheet and import again.

66.3 Setting List Viewer Task Flow Properties

The List Viewer task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 66–69).

Figure 66–69 List Viewer Task Flow Parameters in the Component Properties Dialog



See Also: For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties associated with the List Viewer task flow and describe the parameters that are unique to it:

- Section 66.3.1, "What You Should Know About List Viewer Task Flow Properties"
- Section 66.3.2, "List Viewer Task Flow Parameters"

66.3.1 What You Should Know About List Viewer Task Flow Properties

When you set property values on a List Viewer task flow, you are affecting only the task flow instance on which the value is set. Other instances of the same task flow are not affected by such changes.

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 66.3.2, "List Viewer Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

66.3.2 List Viewer Task Flow Parameters

Table 66–4 describes the parameters that are unique to the List Viewer task flow. Note that List Viewer task flow parameter values are set automatically and should not be changed.

Table 66–4 List Viewer Task Flow Parameters

Parameter	Description
`List ID`	A unique identifier for the list to show Either `List ID` or `Local List ID` must have a value. This value is set automatically. Do not edit this value.
`List Scope ID`	A unique identifier for the scope containing the list If no value is present, the current scope is used. This value is set automatically. Do not edit this value.
`Local List Customization ID`	A unique identifier within the scope for the list customization This value is set automatically. Do not edit this value.
`Local List ID`	A unique identifier within the scope for the list to show Either `List ID` or `Local List ID` must have a value. This value is set automatically. Do not edit this value.
`Show List Name and Description`	A check box for specifying whether to display the list name and description If no value is present, the list name and description are not shown. Values include `true` and `false`. This value is set automatically. Do not edit this value.

67

Working with the Mail Service

This chapter describes how to use the Send Mail feature and also the features provided through the Mail service. The Send Mail feature does not require the Mail service. That is, even if the Mail service has not been configured in your application, you can use the Send Mail feature with your local mail client.

This chapter includes the following sections:

- Section 67.1, "What You Should Know About the Send Mail Feature"
- Section 67.2, "What You Should Know About the Mail Service"
- Section 67.3, "Selecting Your Preferred Mail Connection"
- Section 67.4, "Working with the Mail Service Task Flow"
- Section 67.5, "Setting Mail Service Task Flow Properties"

Audience

This chapter is intended for users who want to use and manage mail, as well as administrators in Spaces with the `Application-Manage Configuration` permission and individual space moderators who want to configure mail within their spaces. For more information, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

Note: Tasks discussed in this chapter are not available if WebCenter Portal's Mail service is not enabled in the current space.

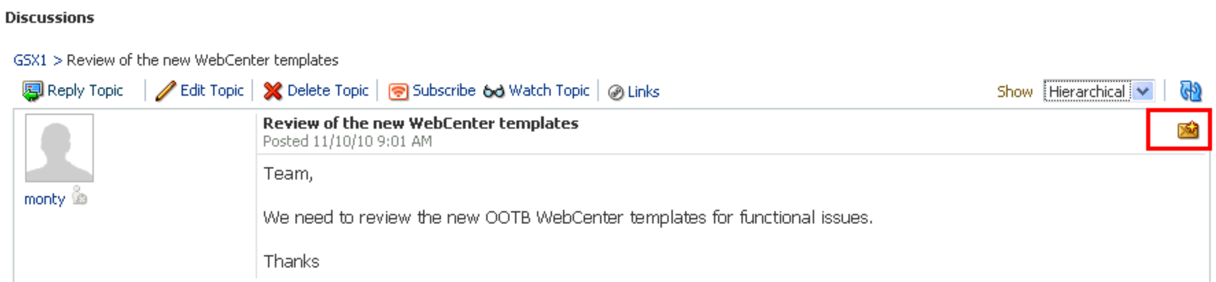
67.1 What You Should Know About the Send Mail Feature

Throughout the application, you can click the **Send Mail** icon to mail directly from that resource (Figure 67–1).

Figure 67–1 Send Mail Icon

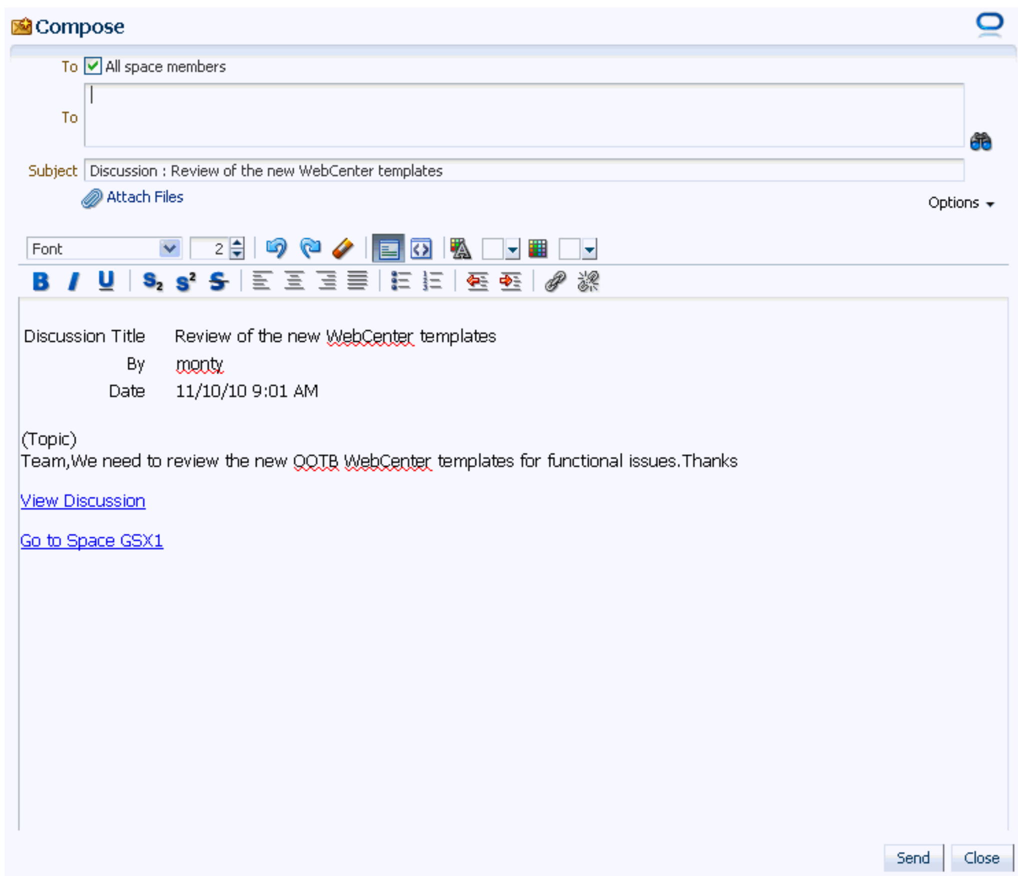
For example, Figure 67–2 shows a discussion topic with the **Send Mail** icon.

Figure 67–2 Send Mail Icon in a Discussion Topic



Click the **Send Mail** icon to open a mail compose window prepopulated with information including the discussion topic title, author, date created, topic text, and links to the discussion and the space. You can edit and add to the mail, as necessary.

Figure 67–3 Mail Compose from a Discussion Topic



The way the mail window is prepopulated depends on the resource sending it. For example, from a wiki, **Send Mail** opens a mail window prepopulated with the name of the wiki, the size, who created it and when, who modified it and when, and a URL link to the wiki.

Mail can be addressed to all members of the space. Space moderators (and anyone granted the `Manage Configuration` permission on the space) set this through the **Services** page in the space administration settings. For more information, see Section 53.10.2, "Configuring the Mail Distribution List for a Space."

If the number of recipients is so large that the mail cannot be prepopulated with the addresses, then you must either enter the addresses manually or set up a distribution list for the space.

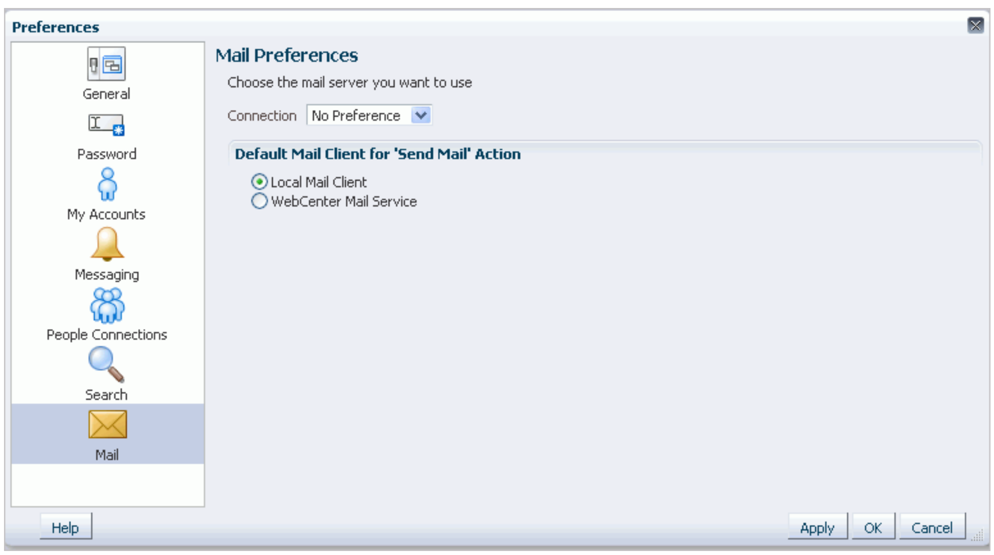
> **Tips:** With the Microsoft Outlook local mail client, you must configure Outlook to support comma-delimited mail addresses; that is, select the **Allow comma as address separator** check box on the **Tools - Options - Preferences - E-mail Options - Advanced E-mail Options** page.

67.1.1 Configuring the Send Mail Feature

The Send Mail feature does not require WebCenter Portal's Mail service. That is, even if the Mail service has not been configured in your application, the Send Mail feature is available using your local mail client.

Your administrator determines the mail client that the Send Mail feature uses: either WebCenter Portal's Mail service or a local mail client. The default value is a local mail client. If your administrator enabled users to override this mail client setting, then you can choose to use a different mail client on the Mail Preferences page (Figure 67–4).

Figure 67–4 Mail Preferences for Send Mail



67.2 What You Should Know About the Mail Service

The Mail service conveniently exposes familiar mail functionality in your WebCenter Portal application interface. The Mail service runs against the same mail server that provides your regular business mail, and the mail messages exposed in your application are the same messages you would see in your mail inbox. Many of the same actions are also supported. For example, you can send messages with attachments, forward messages, and so on. The Mail service does not replace your company mail, but rather enhances it by making it accessible within WebCenter Portal.

WebCenter Portal's Mail service enables users to perform simple mail functions, such as view, read, create and create with attachments, reply, forward, and delete. All mail is stored in your inbox and can be accessed from there through a link.

The Mail service fetches mails from the inbox folder only. It does not support fetching mails from other folders or moving messages.

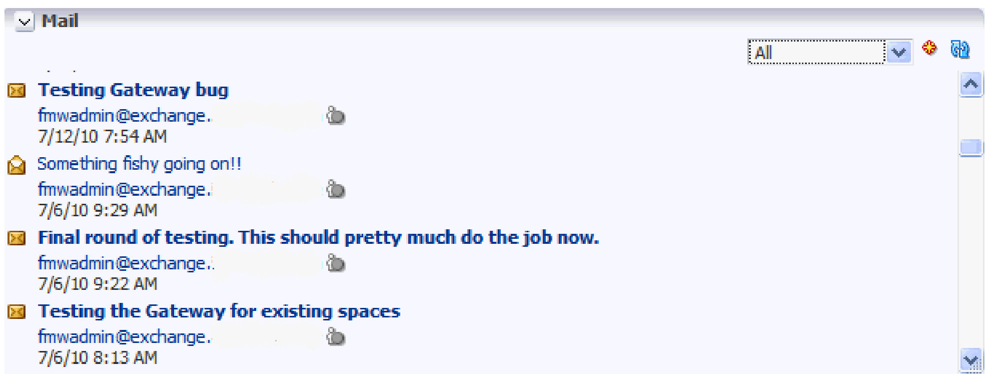
The Mail service supports any mail server based on IMAP4 and SMTP protocol. A Spaces application provides access to multiple mail connections. You can use a different mail connection by selecting it in the application's Preferences settings. For more information, see Section 67.3, "Selecting Your Preferred Mail Connection."

Note: You can add a Mail task flow to your page from the Catalog dialog in Oracle Composer. For information about adding a task flow, see Section 18.5, "Adding a Component to a Page."

However, all instances of the Mail task flow in an application run against the same mail server and it serves no purpose to add multiple Mail task flow instances. This is true for all service task flows that require connections to back-end servers, for example, task flows from Discussions, Announcements, and IMP services.

The Mail service exposes features from your mail server through the Mail task flow (Figure 67–5).

Figure 67–5 The Mail Task Flow



The Mail task flow presents the following features:

- A menu for specifying which messages to display
- A **Compose** icon for starting the process of creating a new message
- A **Refresh** icon for updating the task flow with new messages

A space moderator can configure the Mail service to automatically create a mailing list of all space members. Once configured, as members are added to or deleted from the space, the mailing list is updated automatically. For more information, see Section 53.10.2, "Configuring the Mail Distribution List for a Space." All mails sent to a space mailing list are also posted to the space discussion forum.

Use the Mail service to mail other application users or any user recognized by the back-end server that supports the Mail service.

The Mail service is integrated with the Instant Messaging and Presence (IMP) service to provide additional options for contacting others. Each mail message includes the sender's user name and status icon, which you can click to open a context menu with options for starting a chat session or sending a new mail.

Note: If the IMP service is not configured in your application, the status icons are grayed out. For more information, see Chapter 64, "Working with the Instant Messaging and Presence Service (IMP)."

Users with page-edit privileges can access the task flow's region parameter through the Component Properties dialog in Composer. For more information about setting the Mail service task flow properties, see Section 67.5, "Setting Mail Service Task Flow Properties."

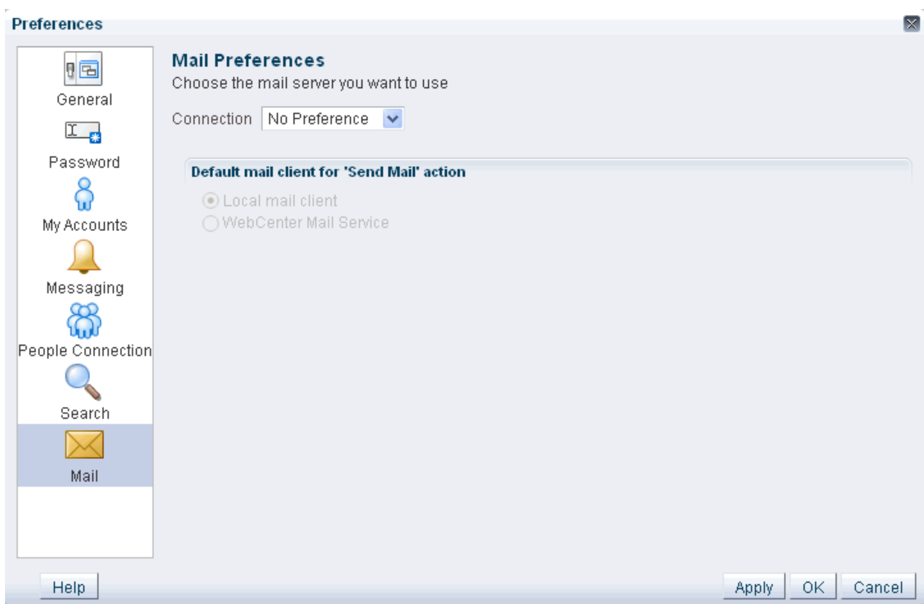
67.3 Selecting Your Preferred Mail Connection

When your application provides access to multiple mail connections, it also provides a way for you to select which connection to use. This section describes how.

To select your preferred mail connection:

1. Click the **Preferences** link at the top of the application.
2. Click **Mail** to open the Mail Preferences panel (Figure 67–6).

Figure 67–6 The Mail Preferences Panel



3. From the **Connection** dropdown list, select the mail connection you want to use for accessing your mail through WebCenter Portal: Spaces.

   The options available on this list depend on the connections your system administrator makes available to your application. The **No Preference** option uses your system-level active mail connection.

4. Under **Default mail client for 'Send Mail' action**, select an option to identify the mail application to open when the `SendMail` command is invoked:

   - **Local mail client**—Select to specify that the local mail client you normally use, such as Microsoft Outlook or Mozilla Thunderbird, should open a compose message window when the `SendMail` command is invoked.

- **WebCenter Portal's Mail Service**—Select to specify to open WebCenter Portal's Mail service compose message window when the `SendMail` command is invoked.

5. Click **OK** to save your change and exit the Preferences dialog.
6. Log out of WebCenter Portal: Spaces.
7. Log in to WebCenter Portal: Spaces.
8. If you previously saved your credentials for this mail connection to the WebCenter Portal: Spaces credential store, then you are logged in to the new mail connection automatically.

   If you have not previously saved your credentials, log in to this mail connection using Preferences (see Section 38.7, "Providing Login Information for External Applications") or using the login link in a Mail task flow (see Section 67.4.2, "Logging in to Mail").

67.4 Working with the Mail Service Task Flow

The Mail task flow exposes your company's mail server features within the context of your application. Use the Mail task flow to view, respond to, and manage your personal mail.

This section provides information on how to use the Mail task flow. It contains the following subsections:

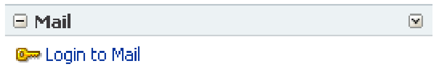
67.4.1 Adding the Mail Service Task Flow to a Page

For the steps to add a Mail service task flow to a page, see Section 18.5, "Adding a Component to a Page."

67.4.2 Logging in to Mail

Before you can access your mail in an application, you must provide your mail login credentials. The first time you access a Mail task flow, it displays the message depicted in Figure 67–7.

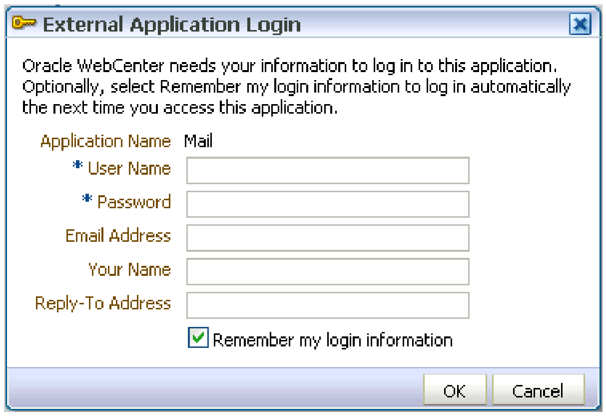
Figure 67–7 Login Message in a Mail Task Flow



To log in to a Mail task flow:

1. Go to a Mail task flow, and click the **Login to Mail** link (Figure 67–7) to open an External Application Login dialog (Figure 67–8).

Figure 67–8 External Application Login Dialog



Note: The External Application Login dialog may include additional fields and information, depending on the requirements of the service that provides it. For more information about external applications and storing your login credentials in a WebCenter Portal: Spaces application, see Section 38.7, "Providing Login Information for External Applications."

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2. Enter your user name and password and any other login credentials that your mail application requires.

   Required fields are marked with an asterisk (*).

3. Optionally, select **Remember my login information** to store your credentials.

   The next time you log in to the application, your mail credentials are retrieved from storage and you are logged in.

4. Click **OK**, and the Mail task flow displays mails from your inbox.

67.4.3 Personalizing Your View of the Mail Task Flow

You can personalize your view of the Mail task flow by filtering the number of displayed messages. For example, you can choose to display only the messages that were delivered **Today**, **Since Yesterday**, **This Week**, or **This Month**. Additionally, you can choose to display **All** messages in your inbox.

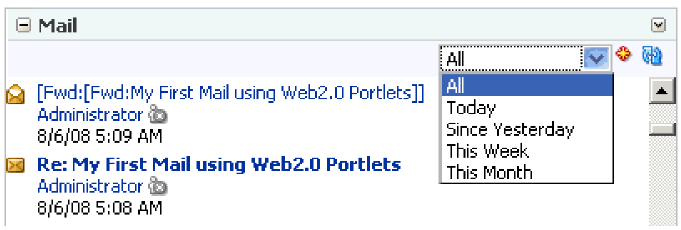
Note: By default, the Mail service displays the 50 most recent mail messages from your mail server inbox folder. However, if required, your Fusion Middleware administrator can configure this to a higher value, if your server supports the increase in memory cache that fetching additional mail requires. Care should be taken to have a value suitable to your environment. This value impacts all users. That is, if the Mail service is configured to read 200 recent mail messages, then the Mail service reads 200 recent mail messages for all users.

Personalizations affect only your view of the Mail task flow. No other user's view is changed because of your selection.

To personalize your view of the Mail task flow:

1. Go to the Mail task flow.
2. Open the menu at the top of the task flow (Figure 67–9).

Figure 67–9 The Mail Personalization Menu



3. Select a display option:
   - **All**—to show all messages
   - **Today**—to show all messages received today
   - **Since Yesterday**—to show all messages received yesterday and today
   - **This Week**—to show all messages received in this calendar week
   - **This Month**—to show all messages received in this calendar month

   The Mail task flow redraws, displaying only those messages that match your selection.

67.4.4 Opening Mail Messages

The messages that display in your Mail task flow are the same messages that display in your regular mail application inbox. You open them in much the same way, too.

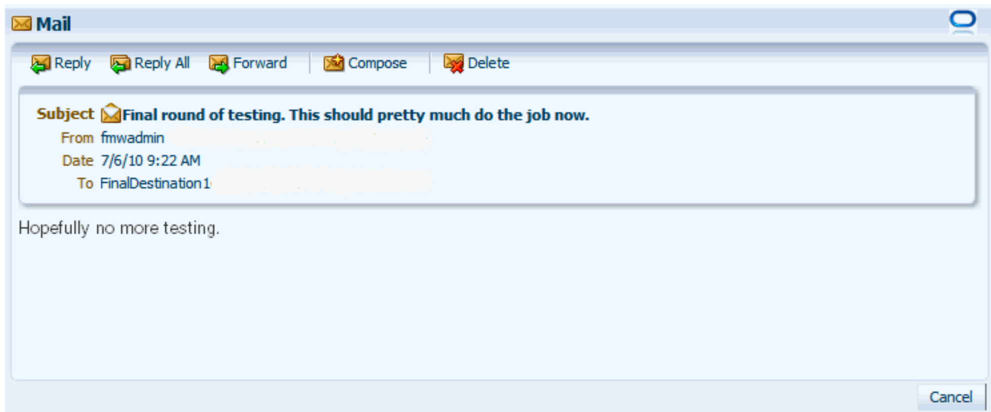
To open a mail message:

1. Go to a Mail task flow, and click the link to the message you want to open (Figure 67–10).

Figure 67–10 A Mail Message Link

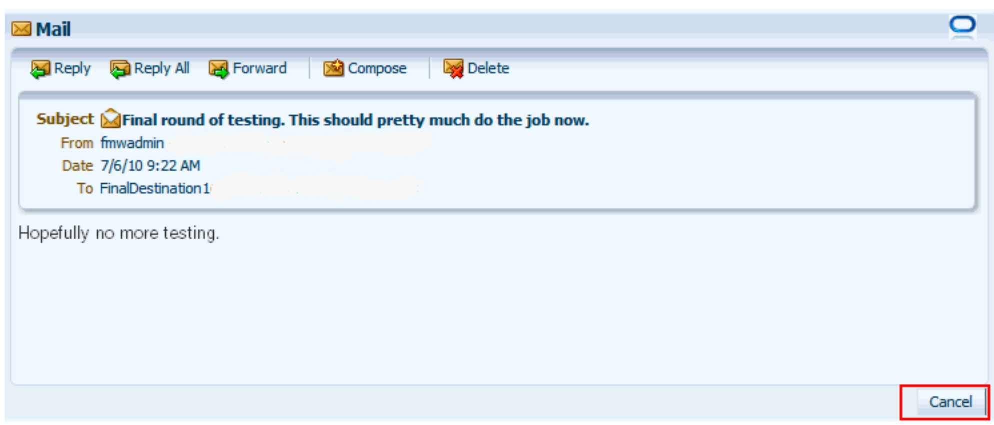
The message opens (Figure 67–11).

Figure 67–11 A Mail Message



2. After reading the message click **Cancel** to close the message (Figure 67–12).

Figure 67–12 Cancel a Mail Message



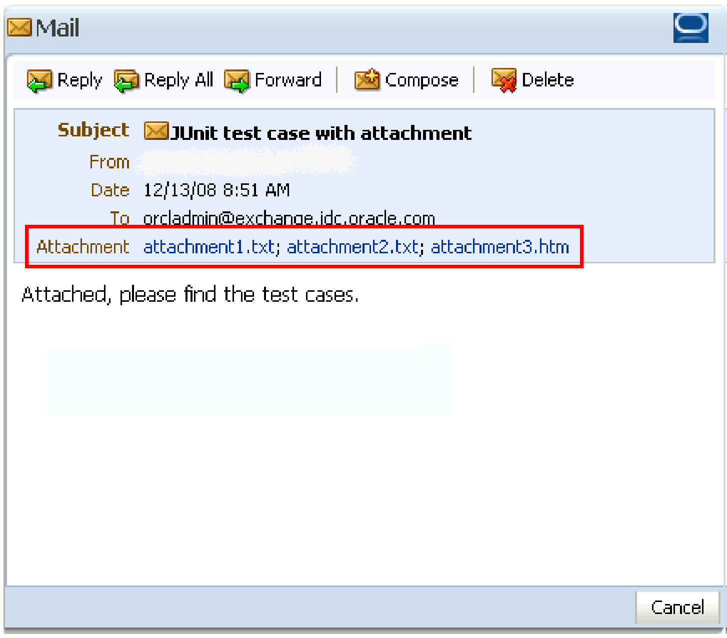
Note: HTML reports, tables, images that are inlined (copy paste), and fonts viewed in a mail message may not render correctly. The Mail service requires HTML data to be well-formed to display as expected in a mail message.

The mail should show everything that your browser supports. However, some tags, like `<script>`, are encoded and disabled from execution.

67.4.5 Downloading Mail Attachments

Attachments display in mail messages as links (Figure 67–13).

Figure 67–13 Mail Attachments



Accessing files associated with attachments is the same as accessing a file from any browser window: simply click the link. Clicking an attachment link opens a download dialog that gives you the option of viewing the file in its native application or saving the file to a local drive. This is browser behavior, so the way you follow through depends on the browser you use.

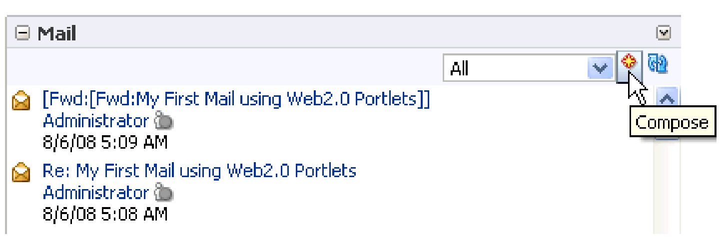
67.4.6 Composing and Sending Mail Messages

Composing and sending messages through WebCenter Portal's Mail service is very much like doing so in your regular mail application.

To compose and send a mail message:

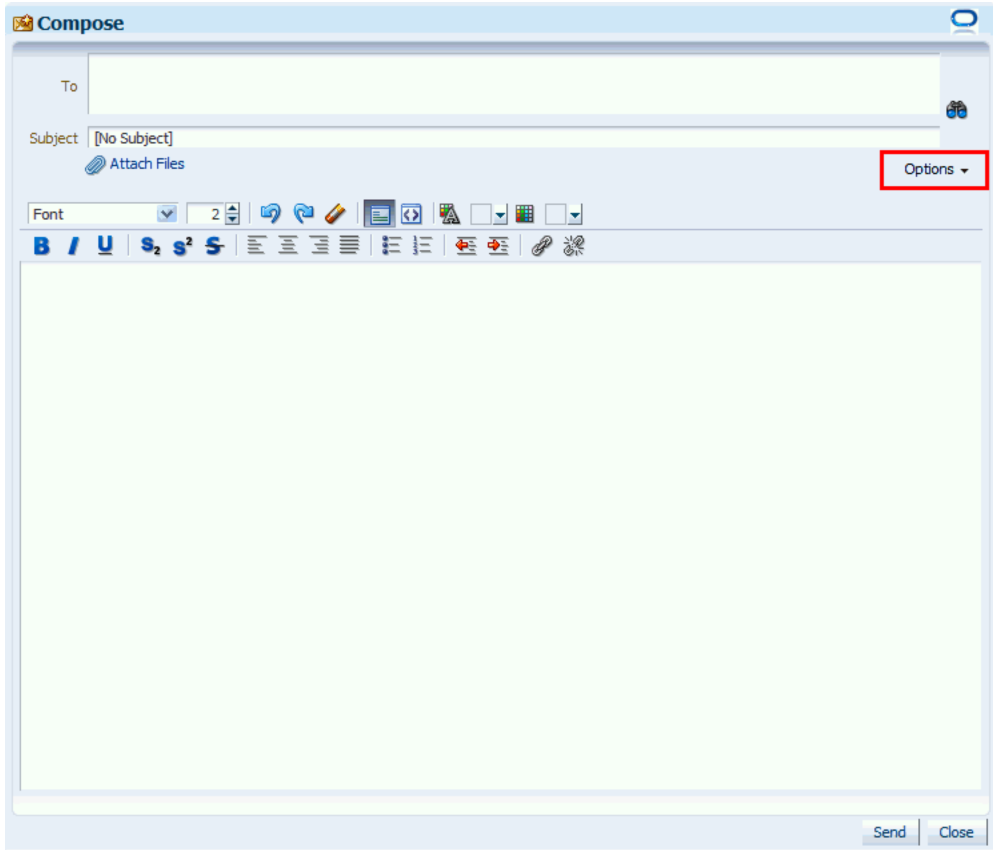
1. In a Mail task flow, click the **Compose** icon (Figure 67–14).

Figure 67–14 The Compose Icon on a Mail Task Flow



2. In the **Compose** window (Figure 67–15), enter recipients in the **To** field. Separate multiple addresses with a comma (,).

Figure 67–15 Compose Window

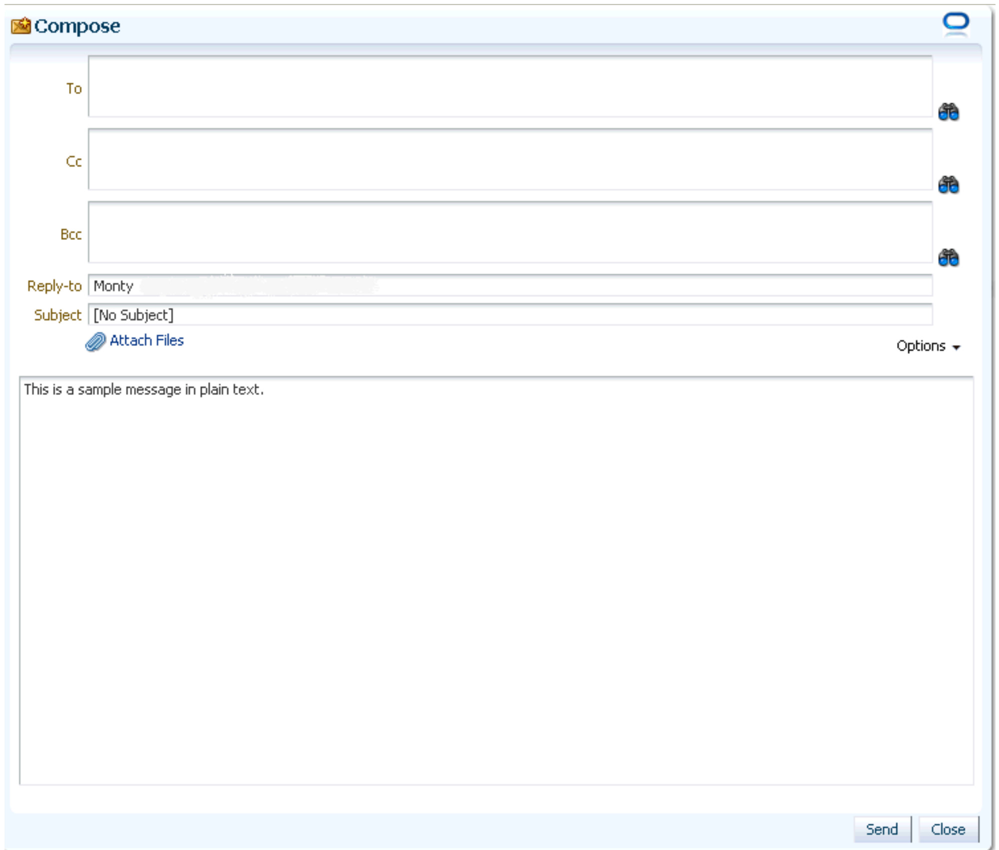


Click the **Options** dropdown list to include Cc, Bcc, or Reply-to fields in the message. The Reply-to field is prepopulated with the user composing the mail, but it can be changed to any address. From this dropdown list, you also can select to compose the message in plain text, instead of the rich text editor.

The selected options persist until they are changed.

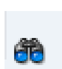
Figure 67–3 shows the compose window with the Cc, Bcc, and Reply-to fields added as well as the rich text editor removed.

Figure 67–16 Mail Compose Window with Different Options Selected



The **Compose** window is directly connected to your mail server, so you can use the **Find User** icon (Figure 67–17) to find mail addresses and contacts.

Figure 67–17 Find User Icon in a Compose Window



Click the **Find User** icon and, in the resulting dialog, enter a search term for a user.

> **See Also:** For tips on searching with the Find User icon, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."

3. In the **Subject** field, enter a subject for your message.

   Enter up to 255 characters.
4. Compose your message.
5. Click **Send**.

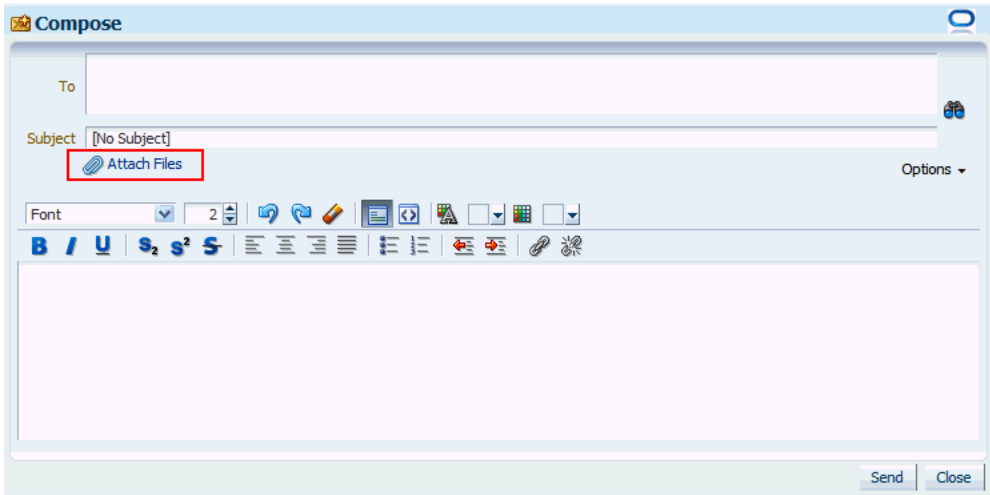
67.4.7 Sending Mail with Attachments

Just like your regular mail, you can use the Mail task flow to send messages with attachments.

To send a mail with attachments:

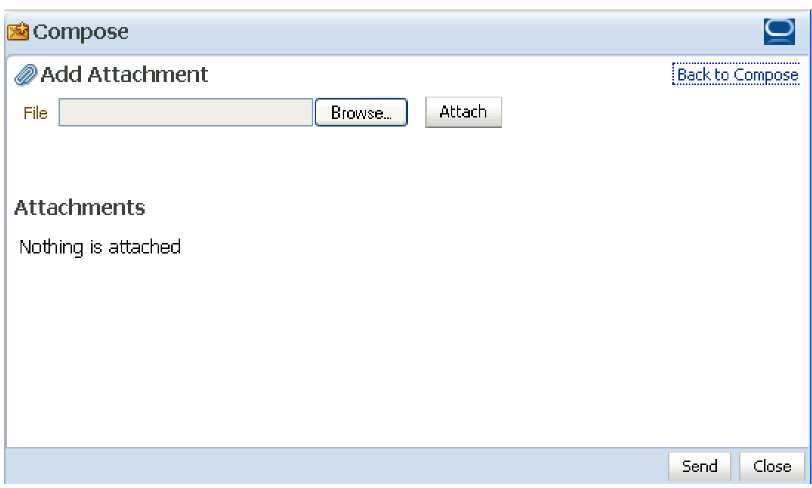
1. Create a mail message as described in Section 67.4.6.
2. In the **Compose** window, click the **Attach Files** link (Figure 67–18).

Figure 67–18 The Attach Link



The **Add Attachment** window opens (Figure 67–19).

Figure 67–19 The Add Attachment Window



3. Click **Browse** to locate and select an attachment.
4. Click **Attach** to attach the selected file.

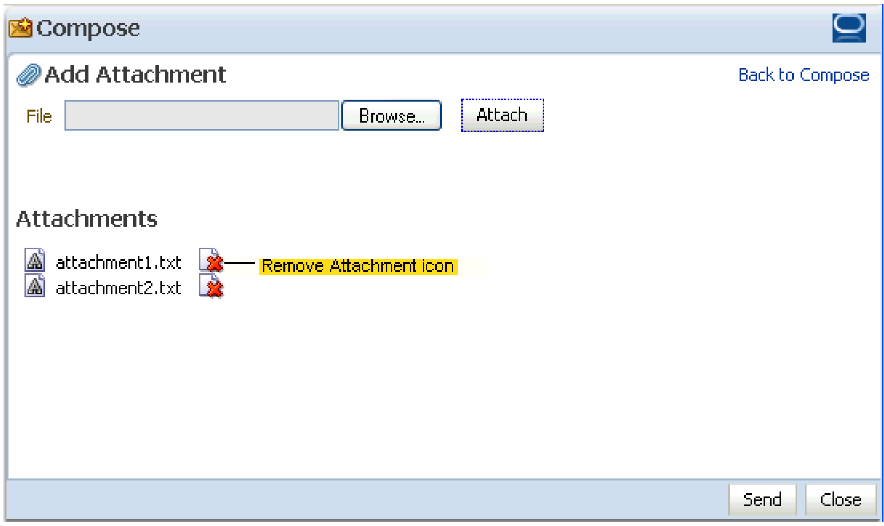
   The file size must be greater than zero bytes but less than 2 MB. Zero-byte files do not get attached.

> **Note:** It is recommended that you avoid attaching large files, as this causes the server to slow down or not respond. If you attach large files (greater than 2MB), then because of how the HTTP protocol handles attachments, the system reports an error only after reading all of the 2MB characters.

5. Repeat steps 3 and 4 to add additional attachments.

   Attachments are listed under the **Attachments** heading in the **Add Attachment** window (Figure 67–20).

Figure 67–20 Attachments in the Add Attachment Window



   A **Remove Attachment** icon appears next to each attachment (Figure 67–20). Click this to remove a selected attachment from the window.

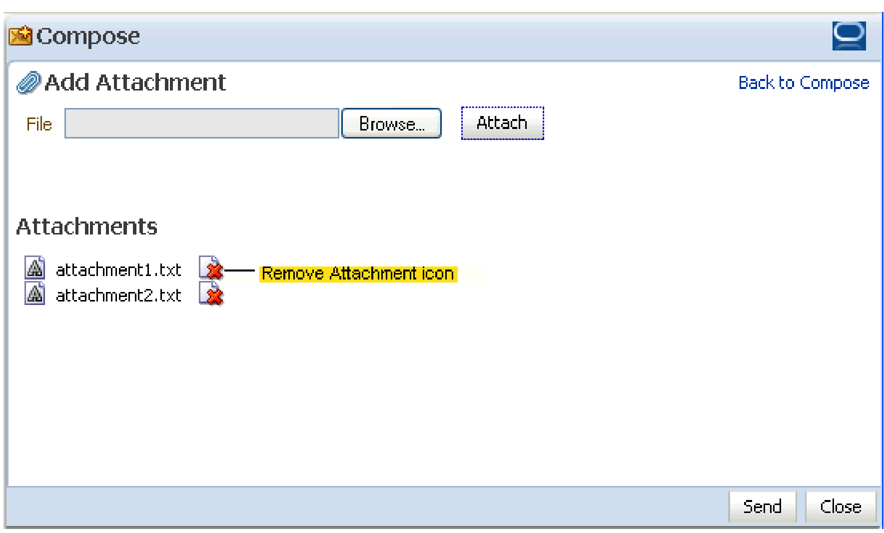
6. Click the **Back to Compose** link to go back to the Compose window.
7. Click **Send**.

67.4.8 Removing Attachments from the Add Attachment Window

You can remove attachments from the **Add Attachment** window and from the **Compose** window:

- To remove mail attachments from the **Add Attachment** window, click the **Remove Attachment** icon next to the attachment you want to remove (Figure 67–21).

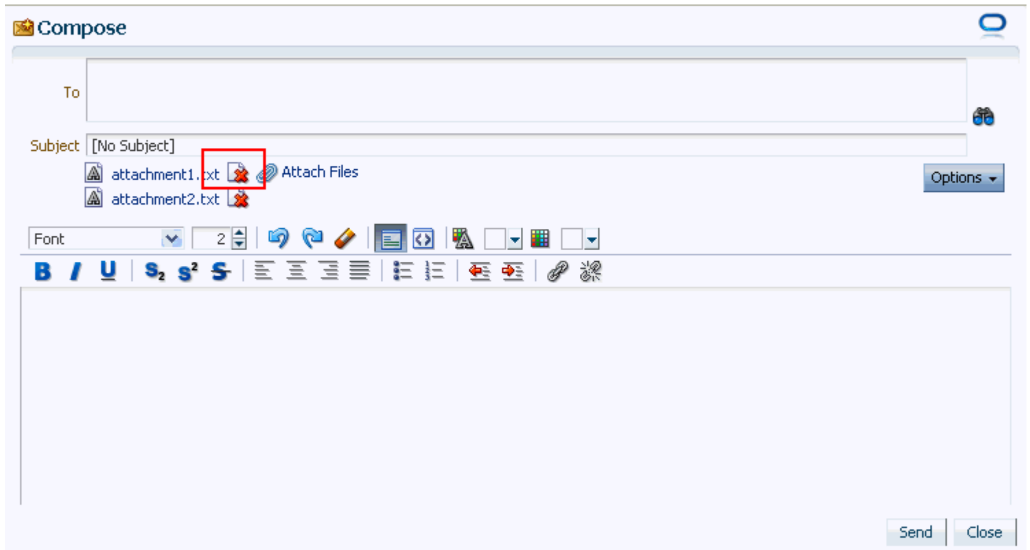
Figure 67–21 Attachments in the Add Attachment Window



For information about accessing the **Add Attachment** window, see Section 67.4.7, "Sending Mail with Attachments."

- To remove mail attachments from the **Compose** window, click the **Remove Attachment** icon next to the attachment you want to remove (Figure 67–22).

Figure 67–22 Remove Attachment Icon in the Compose Window



For information about accessing the **Compose** window, see Section 67.4.6, "Composing and Sending Mail Messages."

67.4.9 Replying to and Forwarding Mail

When you reply to or forward a mail, the mail content is sent as an attached HTML file instead of being displayed in the mail message window. Replying to and forwarding mail is as straightforward as in your regular mail application.

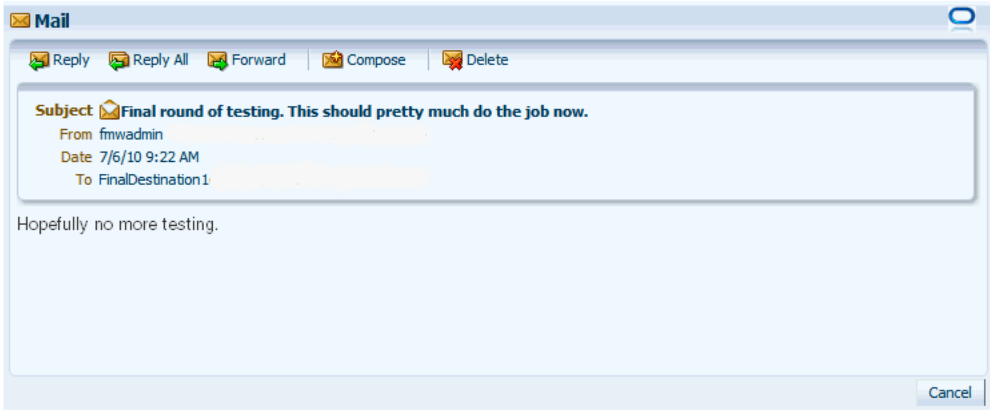
To reply to or forward a mail message:

1. Go to a Mail task flow.
2. Click the link to the message you want to reply to or forward (Figure 67–23).

Figure 67–23 A Mail Message Link

The message opens (Figure 67–24).

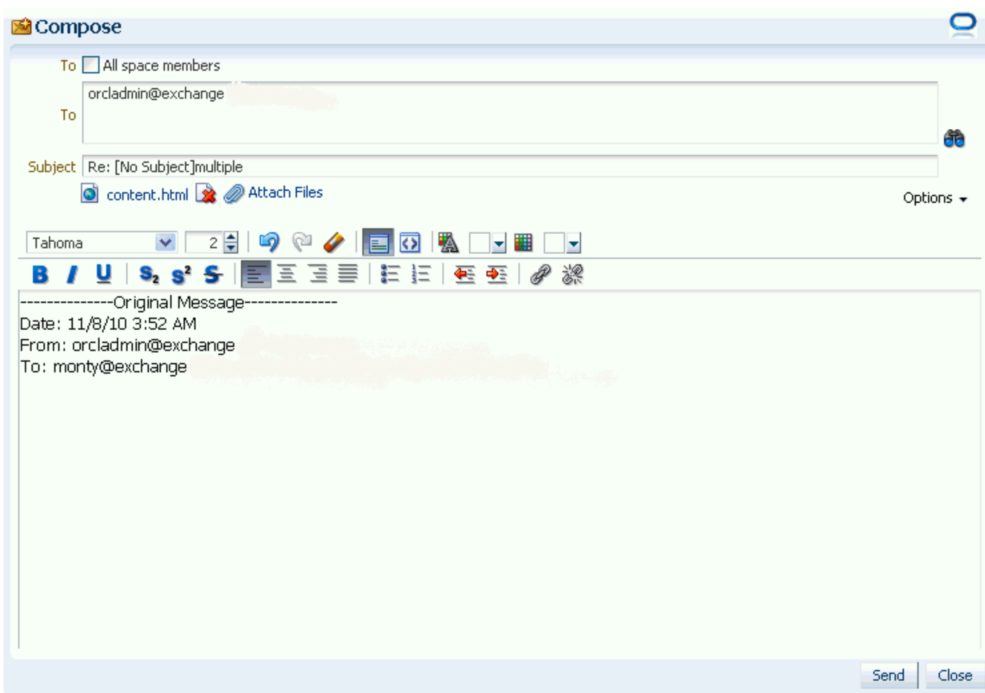
Figure 67–24 A Mail Message



3. Select one from the following options:

   - Click **Reply** to reply to the sender. Figure 67–25 shows the Reply Mail window.

Figure 67–25 A Reply Mail Message Window



   - Click **Reply All** to reply to all recipients (including users who received a blind copy).
   - Click **Forward** to send the message on to a third party.

4. In the resulting **Compose** window, enter recipients in the **To** field as you require. Separate multiple entries with a comma (,)

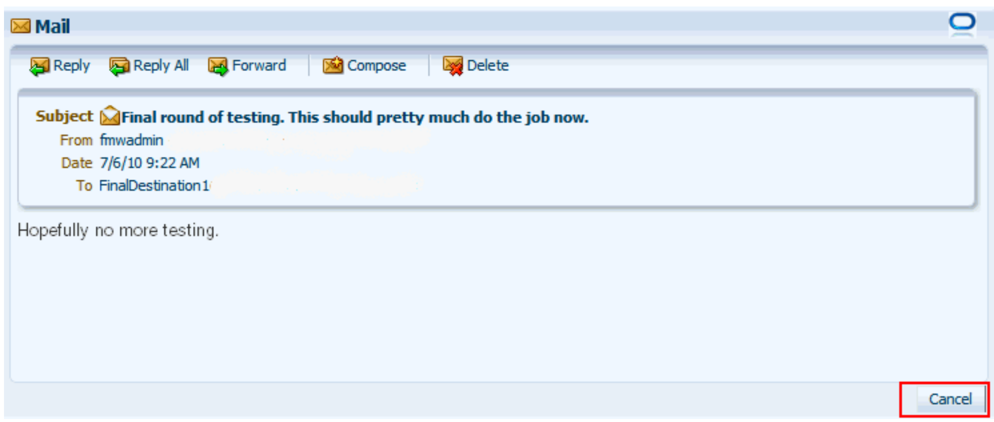
   Click the **Options** dropdown list to add Cc, Bcc, or Reply-to fields or to remove the rich text editor and use plain text.

   The **Compose** window is directly connected to your mail server, so you can use the **Find User** icon to find mail addresses and contacts. Click the **Find User** icon and, in the resulting dialog, enter a search term for a user. For tips on searching for a user in the identity store, see Section 54.3.4.1, "Searching for a User or Group in the Identity Store."

5. Optionally, revise the subject in the **Subject** field.
6. In the Mail's message area, enter your reply or any forwarding message before or after the original message.
7. Optionally, add attachments as described in Section 67.4.7, "Sending Mail with Attachments."
8. Click **Send**.

   The message is sent, and the original message reappears.
9. Click **Cancel** at the bottom of the original message to close the window (Figure 67–26).

Figure 67–26 Cancel Message



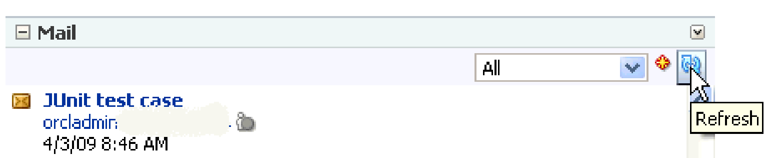
67.4.10 Refreshing Mail

You must perform a refresh to check for new mail messages. Because the refresh operation triggers an event to the server to check for new mails, it may take a while to get new messages. Therefore, you may have to refresh a couple of times to display new mails in the Mail task flow.

To refresh Mail:

1. Go to the Mail task flow.
2. Click the **Refresh** icon (Figure 67–27) on the task flow.

Figure 67–27 The Refresh Icon on the Mail Task Flow



The Mail task flow displays the latest mails.

67.4.11 Deleting Mail

You can easily remove a message from your inbox.

To delete a Mail message:

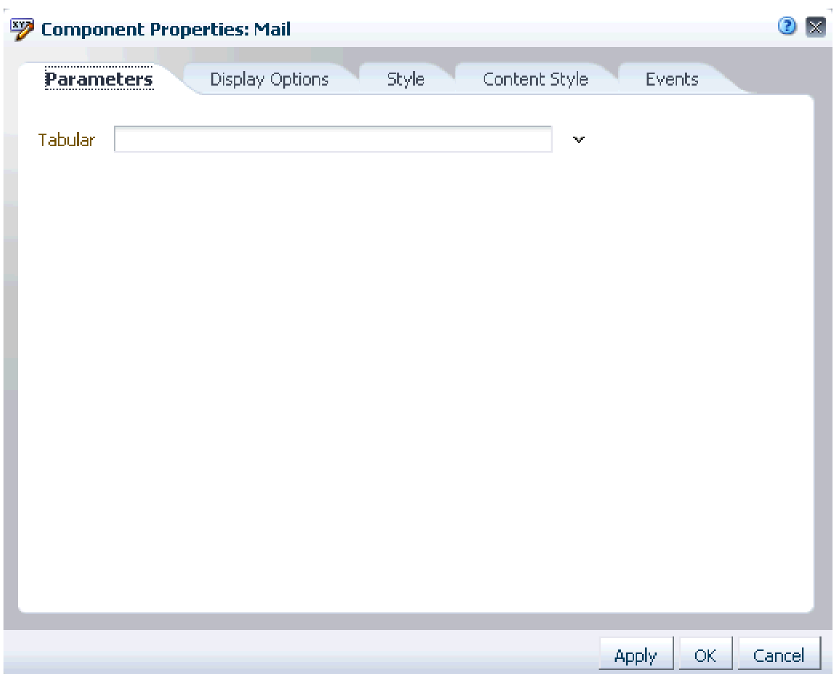
1. Open the message you want to delete as described in Section 67.4.4, "Opening Mail Messages."
2. Click **Delete** at the top of the message (Figure 67–28).

Figure 67–28 Delete Message

67.5 Setting Mail Service Task Flow Properties

The Mail service task flow has associated properties, which users with sufficient privileges can access from the Component Properties dialog in Oracle Composer (Figure 67–29).

Figure 67–29 Mail Task Flow Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Mail service task flow and describe the properties on the **Parameters** tab.

- Section 67.5.1, "What You Should Know About the Mail Service Task Flow Properties"
- Section 67.5.2, "Mail Service Task Flow Parameters"

67.5.1 What You Should Know About the Mail Service Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 67.5.2, "Mail Service Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 18.6.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

> **Note:** Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.
>
> EL validation is not performed on non-generic display options.

67.5.2 Mail Service Task Flow Parameters

The Mail task flow has one associated region parameter: `Tabular`. Using the EL value type, enter a value of `true` to display the information associated with a mail message, such as its subject, sender, and, date sent, in a tabular format. Figure 67–30 illustrates a tabular format Mail task flow.

Figure 67–30 A Mail Task Flow where the Region Parameter Tabular Is Set to True

68

Working with the Notes Service

This chapter describes the features and functions of the Notes service, and provides specific how-to information about creating personal notes.

Note: The Notes service is available only in the Spaces application, not in Framework applications.

This chapter includes the following sections:

- Section 68.1, "What You Should Know About the Notes Service"
- Section 68.2, "Working with the Notes Service Task Flow"
- Section 68.3, "Setting Notes Service Task Flow Properties"

Audience

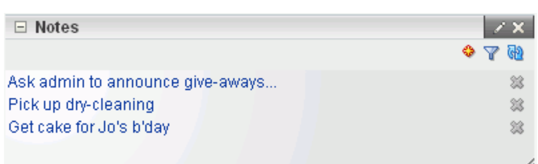
This chapter is intended for Spaces users interested in creating personal notes in the Spaces application.

The Spaces administrator has the authority to expose or hide a particular service's task flows. Tasks discussed in this chapter are not available to you if the Notes service is hidden.

68.1 What You Should Know About the Notes Service

The Notes service provides useful features for writing yourself reminders in the form of personal notes. You can add notes by using the Notes task flow, which displays the personal notes of the currently logged in user (Figure 68–1). Only the notes that you create are displayed in the Notes task flow. No other user sees your notes, and you do not see any other user's notes.

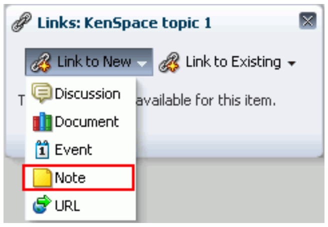
Figure 68–1 A Notes Task Flow



You can filter your Notes list by note titles. Filtering enables you to narrow the focus of your Notes to just the notes that match your filtering criteria. Consider devising a naming scheme for your notes to make the most of filtering.

The Notes service is integrated with the Links service. In a space or Home space, by using the Link service, you can link a note to an object like a document, list, or announcement. While you can link to a new note (Figure 68–2), you cannot link to existing notes. All users who have access to the object can view the linked note too. For more information, see Section 65.2.2.5, "Adding and Linking to a Note."

Figure 68–2 Linking a Discussion Topic to a New Note



68.2 Working with the Notes Service Task Flow

Every work day brings new things that you, and only you, must remember: I before E except after C. Use only bonded 25# paper for your report. John hides his candy in the coffee room stir-stick drawer. Spaces offers a way for you to keep track of these useful, sometimes vital, bits of information through Notes.

This section describes how to use the Notes task flow. It includes the following subsections:

- Section 68.2.1, "Adding the Notes Service Task Flow to a Resource Catalog"
- Section 68.2.2, "Adding the Notes Service Task Flow to a Page"
- Section 68.2.3, "Creating a Note"
- Section 68.2.4, "Filtering and Clearing Filters on Notes"
- Section 68.2.5, "Editing Note Details"
- Section 68.2.6, "Refreshing Your View of Notes"
- Section 68.2.7, "Deleting Notes"

68.2.1 Adding the Notes Service Task Flow to a Resource Catalog

Spaces provides rich Resource Catalogs that expose components and connections that users can add to their pages. You can use a Resource Catalog to populate resources such as page templates, navigation models, pages, and task flows.

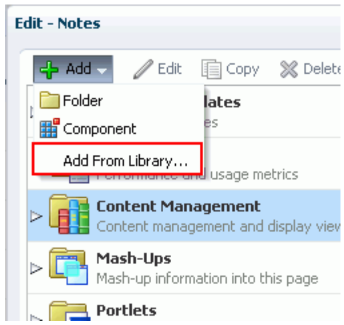
As the Spaces administrator or a space moderator, you can make the Notes task flow available in a custom Resource Catalog so that users can add the task flow to their pages and use it for adding personal notes.

To make the Notes task flow available in a custom Resource Catalog:

1. Create a Resource Catalog or make a copy of an existing one. Creating a Resource Catalog follows the same procedure as any other resource. For information about creating a blank Resource Catalog, see Section 11.2, "Creating Resources." For information about copying an existing Resource Catalog, see Section 11.4.1, "Copying a Resource."
2. On the **Resources** page, select the Resource Catalog to which you want to add the Notes task flow.

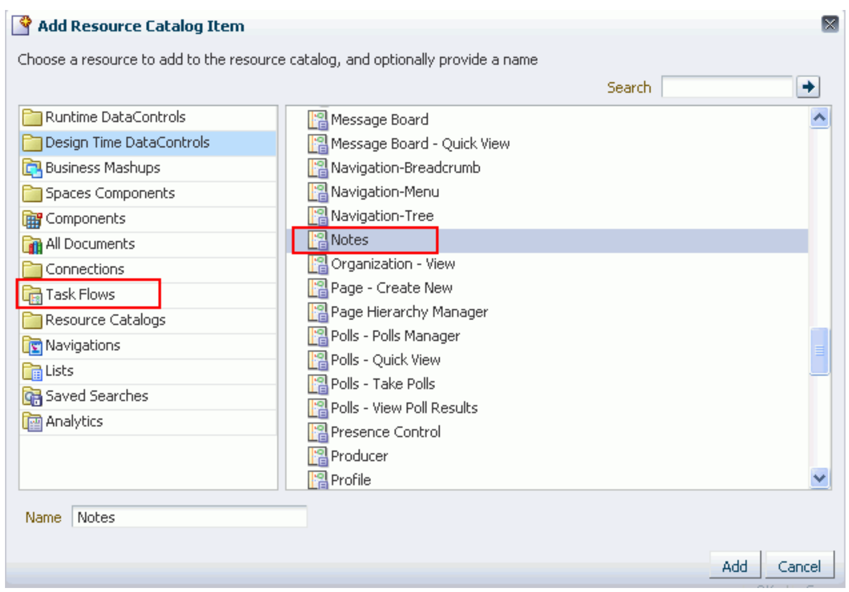
3. From the **Edit** menu, select **Edit**.
4. If you have created folders (see Section 16.3.1.1, "Creating a Folder") and want to add resources inside a particular folder, select the folder in the Edit dialog.
5. In the Edit dialog, select **Add**, and then **Add From Library**, as shown in Figure 68–3.

Figure 68–3 Adding a Resource to a Resource Catalog



6. In the Add Resource Catalog Item dialog, select **Task Flows** from the list displayed on the left.
7. From the list on the right, select **Notes** (Figure 68–4).

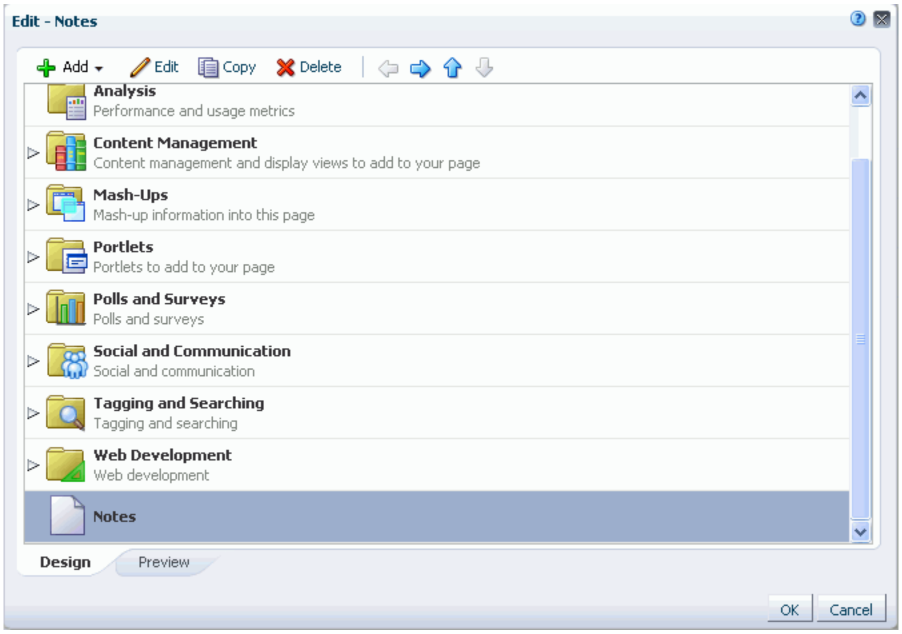
Figure 68–4 Adding the Notes Task Flow to a Resource Catalog



8. Click **Add**.

   The **Notes** task flow displays in the Edit dialog of your Resource Catalog (Figure 68–5).

Figure 68–5 Notes Task Flow in a Resource Catalog



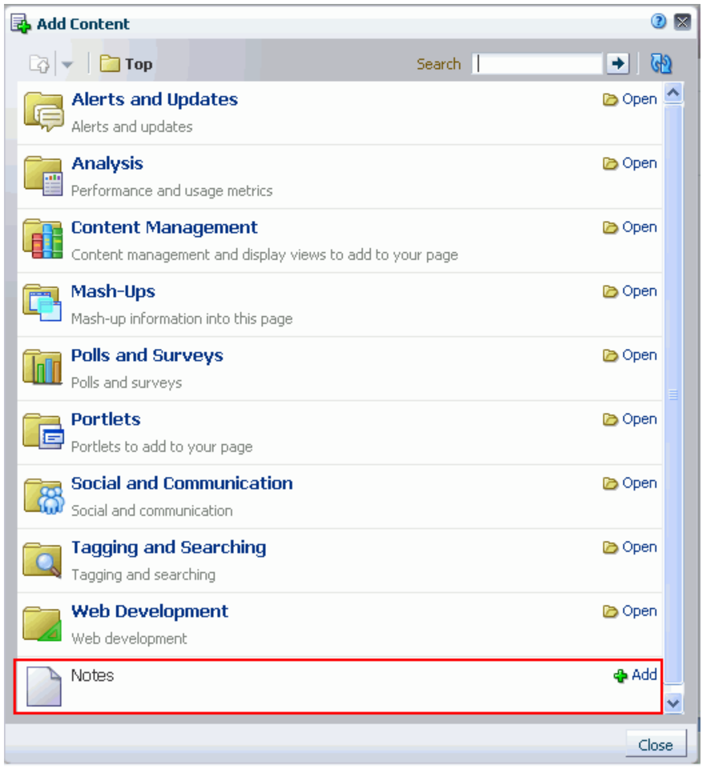
9. Click **OK** to close the Edit dialog.
10. Configure the Spaces application or the space to use the new catalog as the default one. For information, see Section 16.10, "Configuring Resource Catalogs in Your Application."

68.2.2 Adding the Notes Service Task Flow to a Page

To add the Notes task flow to a page, you need to click **Add** next to the **Notes** task flow in the Resource Catalog, as shown in Figure 68–5.

The procedure for adding the Notes service task flow to a page is same as adding any other component from the Resource Catalog. For the generic procedure, see Section 18.5, "Adding a Component to a Page."

Figure 68–6 Selecting the Notes Task Flow from the Resource Catalog



68.2.3 Creating a Note

Create notes to track personally relevant bits of information, such as your favorite route to the fifth floor, the place to find the most plentiful desk supplies, and so on. This section describes how to create a note.

To create a note:

1. Navigate to the page that contains the Notes task flow.
2. In the Notes task flow, click the **Create a new note** icon (Figure 68–7).

Figure 68–7 The Create a New Note Icon in a Notes Task Flow

A panel opens with fields for entering your note (Figure 68–8).

Figure 68–8 Panel for Creating a New Note

3. In the **Title** field, enter a note title.

   The note title is rendered as a link in the list of notes. You can filter your notes by their titles. Consider devising a naming scheme for your notes to make the most of filtering. For more information about filtering, see Section 68.2.4, "Filtering and Clearing Filters on Notes."

4. In the **Detail** field, enter note content.

5. Click **Save** to save the note.

   When you click **Save**, the detail panel remains open, allowing you to create additional notes. After you finish, click **Close** to exit the panel.

68.2.4 Filtering and Clearing Filters on Notes

Your note list may become lengthy, making it a challenge to find a particular note. In a given session with the Notes task flow, you can shorten the list by filtering out all but the note titles that contain your filtering criteria. Enter a filtering value to temporarily limit display to notes that match the value. You can filter the Notes list against whole or partial words. Filtering looks for matches anywhere in the title.

To clear the filter, click the filtering icon again.

To filter notes:

1. Go to a Notes task flow, and click the **Filter notes** icon (Figure 68–9).

Figure 68–9 The Filter Notes Icon

   A filtering toolbar opens.

2. Enter your filtering term in the field provided in the filtering toolbar, then click the **Filter** icon next to the field, to apply the filter (Figure 68–10).

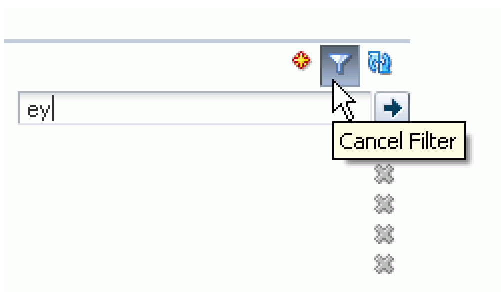
Figure 68–10 Filtering Toolbar

Note: Filtering terms are not case sensitive. Use whole or partial words. Filtering looks for matches anywhere in the title.

---

3. Click the **Cancel Filter** icon to remove the filter and display all notes (Figure 68–11).

Figure 68–11 The Cancel Filter Icon



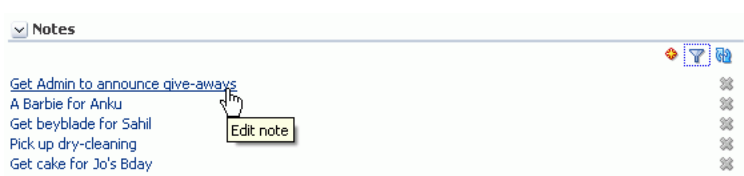
68.2.5 Editing Note Details

Things change. This truism may apply to the details you have entered about a particular note. If so, it's an easy matter to revise note details. This section tells you how.

To edit note details:

1. Go to a Notes task flow, then click the title of the note that you want to edit (Figure 68–12).

Figure 68–12 A Note Title in the Notes Task Flow



Note details display at the top of the task flow (Figure 68–13).

Figure 68–13 Note Details

2. Edit the details in the **Title** and **Detail** fields as you prefer.
3. Click the **Update** button to save your changes and exit the edit panel.

68.2.6 Refreshing Your View of Notes

The Notes task flow includes a **Refresh notes** icon that you can use to refresh your display of notes (Figure 68–14).

Figure 68–14 The Refresh Notes Icon on a Notes Task Flow

This comes in handy for updating your view of the task flow with any recent changes. Click the **Refresh notes** icon, and the Notes task flow redraws, reflecting recent changes.

68.2.7 Deleting Notes

When a note has outlived its usefulness, you can remove it from the Notes task flow. Each note comes equipped with its own **Delete note** icon. This section describes how to delete a note.

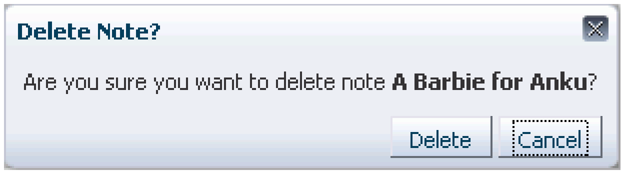
To delete a note:

1. Go to a Notes task flow, and click the **Delete note** icon next to the note you want to delete (Figure 68–15).

Figure 68–15 Delete Note Icon

A Delete Note dialog opens (Figure 68–16).

Figure 68–16 Delete Note Dialog

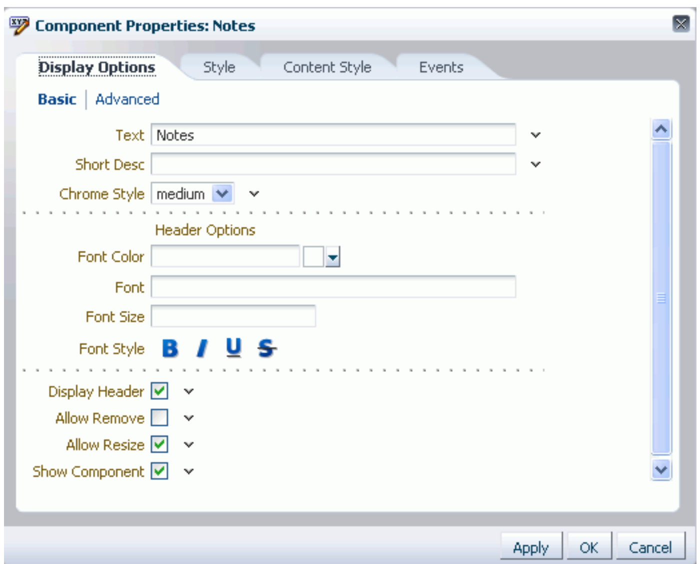


2. Click the **Delete** button to delete the selected note.

68.3 Setting Notes Service Task Flow Properties

The Notes service task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 68–17). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 18.6, "Modifying Page Components."

Figure 68–17 Notes Service Task Flow Component Properties



To access the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The Notes service task flow does not have any unique properties, and therefore no **Parameters** tab in the Component Properties dialog.

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6.4, "Working with Component Display Options" and Section 18.6.6, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

69

Working with the Polls Service

The Polls service lets you create, edit, take, and analyze online polls. With polls, you can survey your audience (such as their opinions and their experience level), check whether they can recall important information, and gather feedback on the efficacy of presentations.

This chapter includes the following sections:

- Section 69.1, "What You Should Know About the Polls Service"
- Section 69.2, "Working with Polls Service Task Flows"
- Section 69.3, "Setting Polls Service Task Flow Properties"

Audience

This chapter is intended for users who want to create and manage polls, as well as administrators in Spaces with the `Application-Manage Configuration` permission and individual space moderators who want to configure polls within their spaces. For more information, see Section 54.2.1.2, "Understanding Permissions and Permission Models in a Space."

69.1 What You Should Know About the Polls Service

In addition to taking available polls, you can do the following:

- Create a poll. You can create quick polls with only a name, description, and question, or you can create detailed polls.
- Create a template for polls. Templates contain the same questions, sections, and welcome and closing content.
- Edit an existing poll; for example, add questions to the poll, change existing questions, or publish (open) and close the poll.
- Take a specific or the most recently-published poll.
- View poll results.
- See the status of all polls and available actions for each poll, such as edit, delete, publish, analyze, and clear results.

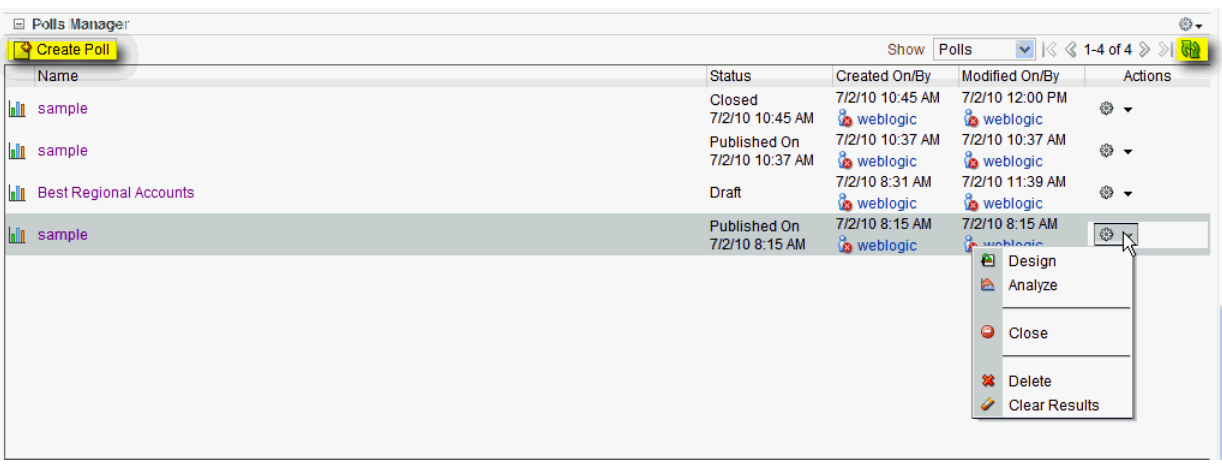
The Polls service is integrated with the Instant Messaging and Presence service in the Polls Manager.

Figure 69–1 shows a sample quick poll.

Figure 69–1 Quick Poll

More detailed poll functionality is available through the Polls Manager (Figure 69–2).

Figure 69–2 Polls Manager



Polls created through the Polls Manager must be published and open to be taken. Users cannot take unpublished or closed polls.

69.2 Working with Polls Service Task Flows

The Polls task flows let you create, take, and manage polls. This section includes the following subsections:

- Section 69.2.1, "Adding a Polls Service Task Flow to a Page"
- Section 69.2.2, "Creating a Quick Poll"
- Section 69.2.3, "Taking Polls"
- Section 69.2.4, "Working with the Polls Manager"
- Section 69.2.5, "Viewing Poll Results"

69.2.1 Adding a Polls Service Task Flow to a Page

To add a Polls service task flow to a page in a Spaces application:

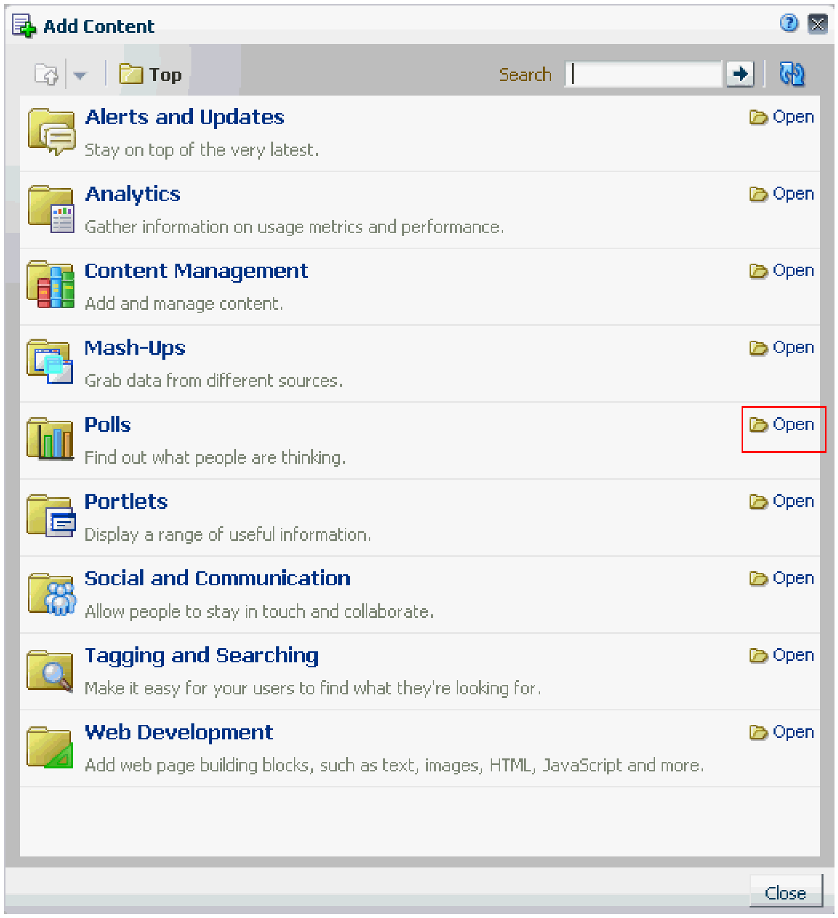
1. Open the page in edit mode.

   See Also: Section 18.1, "Entering and Exiting Composer"

2. Click **Add Content** in the target region to open the Resource Catalog.

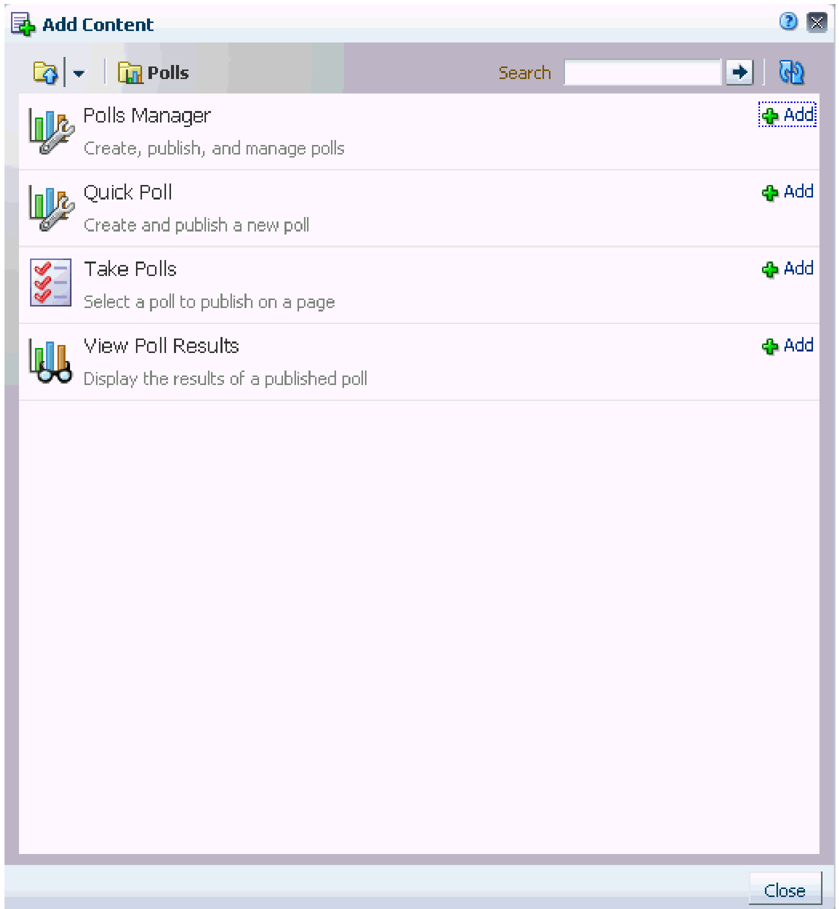
3. Navigate to the section of the Resource Catalog that provides access to polls (Figure 69–3).

Figure 69–3 Opening the Polls Section in the Resource Catalog



4. Click **Add** next to the task flow that you want to add to your page (Figure 69–4).

Figure 69–4 Polls Selections in a Space



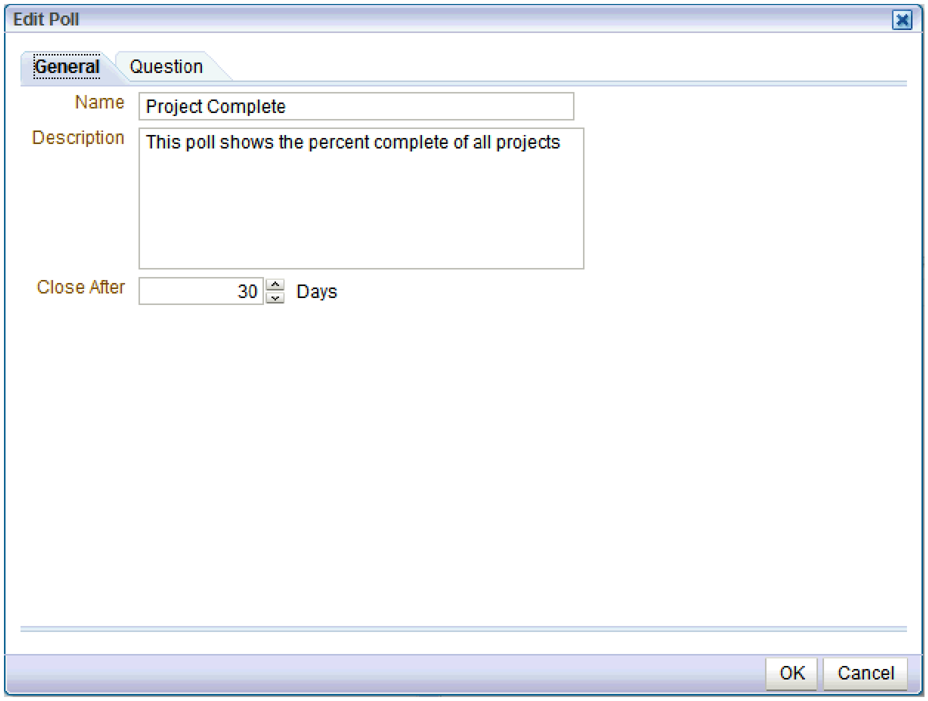
See Also: Chapter 16, "Working with Resource Catalogs"

69.2.2 Creating a Quick Poll

Quick Polls allow one-question polls to be published immediately. Each quick poll needs its own Quick Poll task flow on the page.

On the General tab (Figure 69–5), enter a name and description for your poll, and the number of days for the poll to stay open. The name you enter appears in the Component Properties as a parameter in the Take Polls and View Poll Results task flows.

Figure 69–5 Quick Poll - General

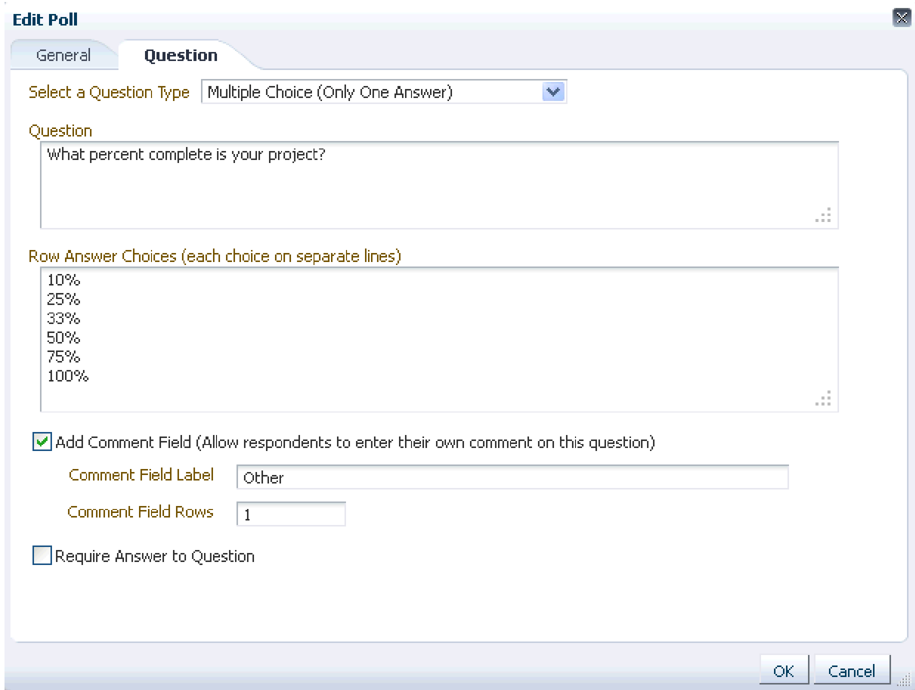


On the Question tab (Figure 69–6), design your one-question poll. Select the **Add Comment Field** box to add a custom field, such as **Tell us more!** or **Other**.

Click **OK**.

Note: The same types of questions are available in Quick Polls and in the Polls Manager.

Figure 69–6 Quick Poll - Question

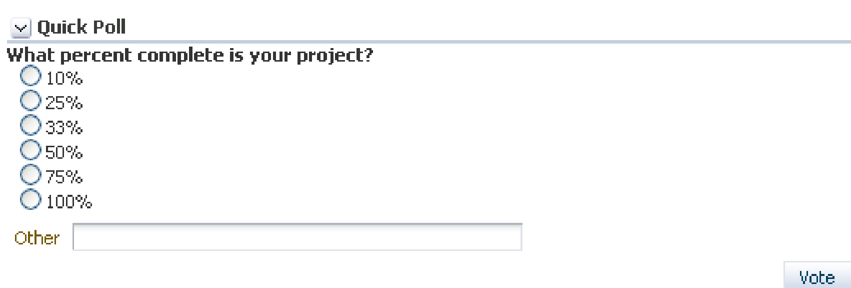


Quick polls can be managed with the Polls Manager. Or, in Edit Page mode, you can click the **Design Poll** button to edit the quick poll.

See Also: Section 69.3.2, "Polls Service Task Flow Parameters"

Figure 69–7 shows the poll users see.

Figure 69–7 Quick Poll



69.2.3 Taking Polls

To take a poll, simply select or enter your choice, and click **Vote**.

The Take Polls task flow (Figure 69–8) displays the most recently-published available poll, unless it is set to display a specific poll with the `Poll Id` parameter. After a user submits a response for that poll, this task flow displays the next most recently-published poll.

See Also: Section 69.3.2, "Polls Service Task Flow Parameters"

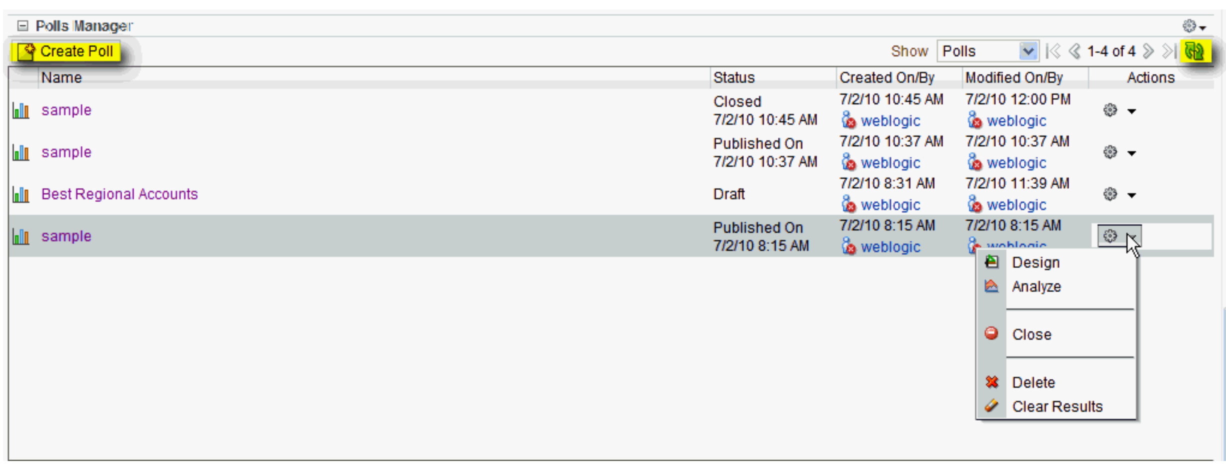
Figure 69–8 Take Polls

69.2.4 Working with the Polls Manager

The Polls Manager lets you create polls, view the status all current polls, and perform operations on existing polls, including edit, save (as poll or as a poll template), publish, clear results, close, analyze, and delete.

See the latest poll data by clicking the **Refresh** icon on the Polls Manager view (Figure 69–9).

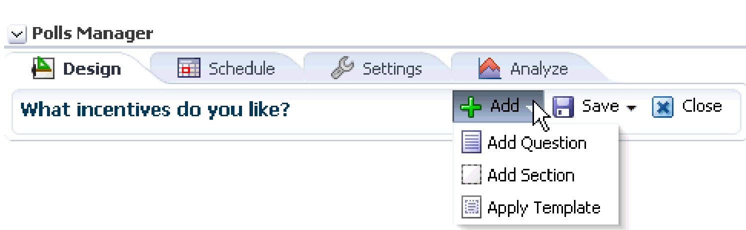
Figure 69–9 Polls Manager



To add a new poll, click **Create Poll**.

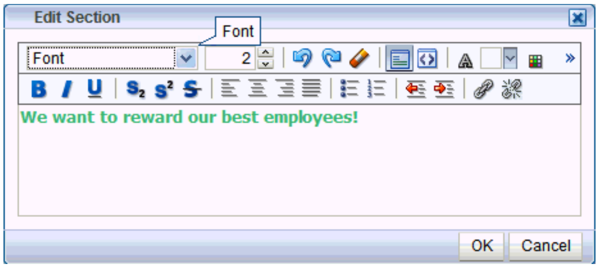
On the **Design** page, click **Add** to populate the poll with an existing template or with questions and surrounding text (Figure 69–10).

Figure 69–10 Polls Manager - Add



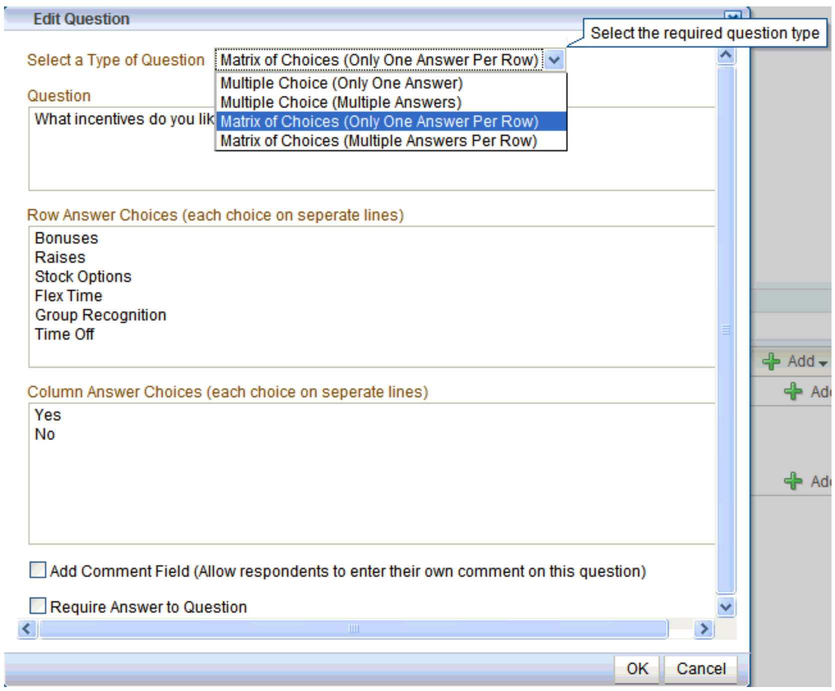
Click **Add Section** to enter any explanatory text in a rich text editor (Figure 69–11).

Figure 69–11 Polls Manager - Design Page to Create/Edit Section



Click **Add Question** to add each poll question (Figure 69–12). New questions are added to top of the poll, so you may want to enter poll questions in reverse order.

Figure 69–12 Polls Manager - Design Page to Create/Edit Questions

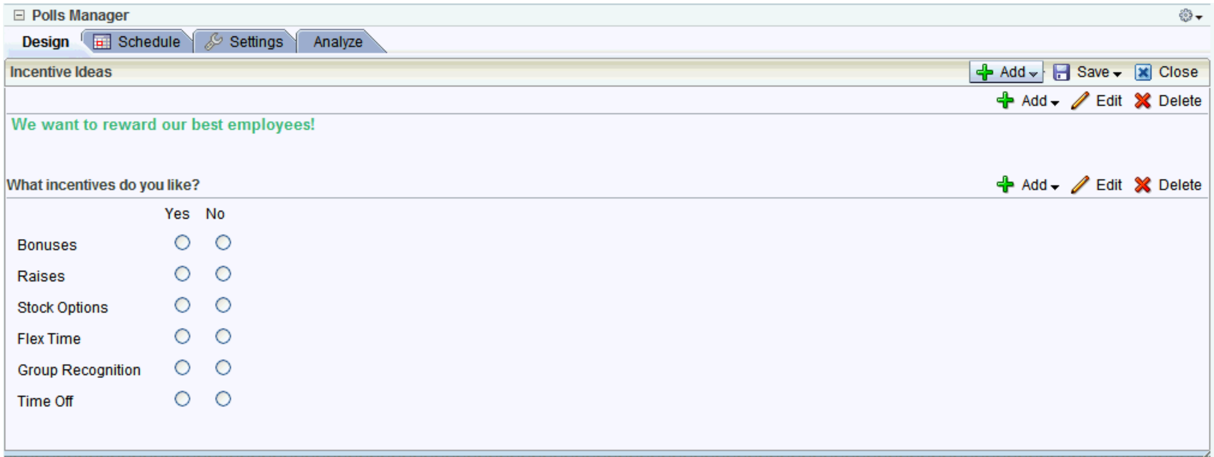


There are four question types:

- Multiple Choice (Only One Answer)
- Multiple Choice (Multiple Answer)
- Matrix of Choices (Only One Answer Per Row)
- Matrix of Choices (Multiple Answers Per Row)

With matrix questions, responses are presented in columns and rows. In this example, the current design looks like Figure 69–13.

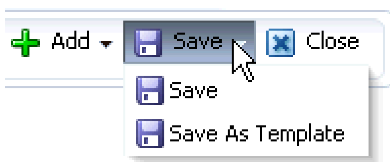
Figure 69–13   Polls Manager - Design Page



> **Note:** The same types of questions are available in Quick Polls and in the Polls Manager. For more information about adding questions, see "Creating a Quick Poll".

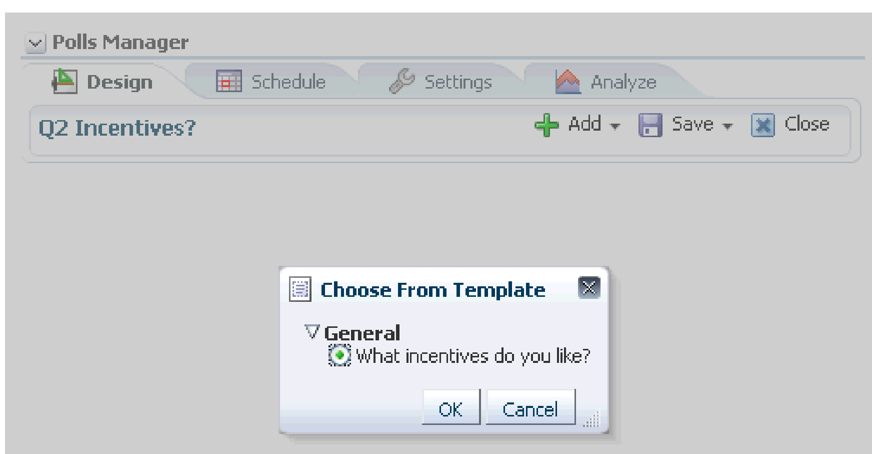
To apply a template, you must have an existing template saved. For example, when you save any poll, you can select to save it as a template (Figure 69–14).

Figure 69–14   Saving a Poll as a Template



After it is saved as a template, you later apply that poll template to other polls (Figure 69–15).

Figure 69–15   Applying a Poll Template

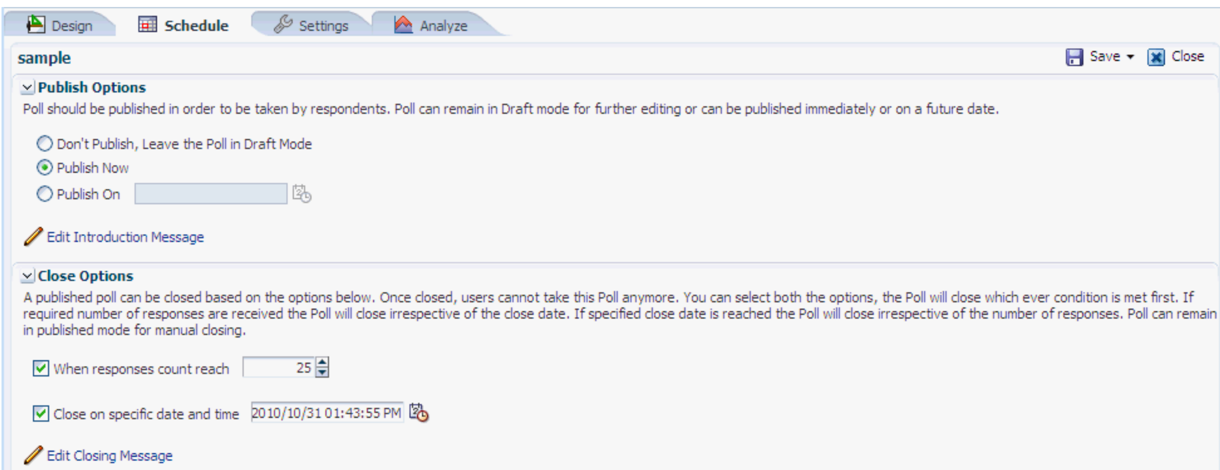


On the **Schedule** page (Figure 69–16), select publish and close options for the poll. Polls must be published and open to be taken. Users cannot take unpublished or closed polls.

In Publish Options, choose to keep the poll in draft mode for further editing, publish it immediately, or publish it on a future date. Click the **Select Date and Time** icon to enter the publishing time through a calendar. Click **Edit Introduction Message** to customize in the rich text editor the text provided at the beginning of the poll.

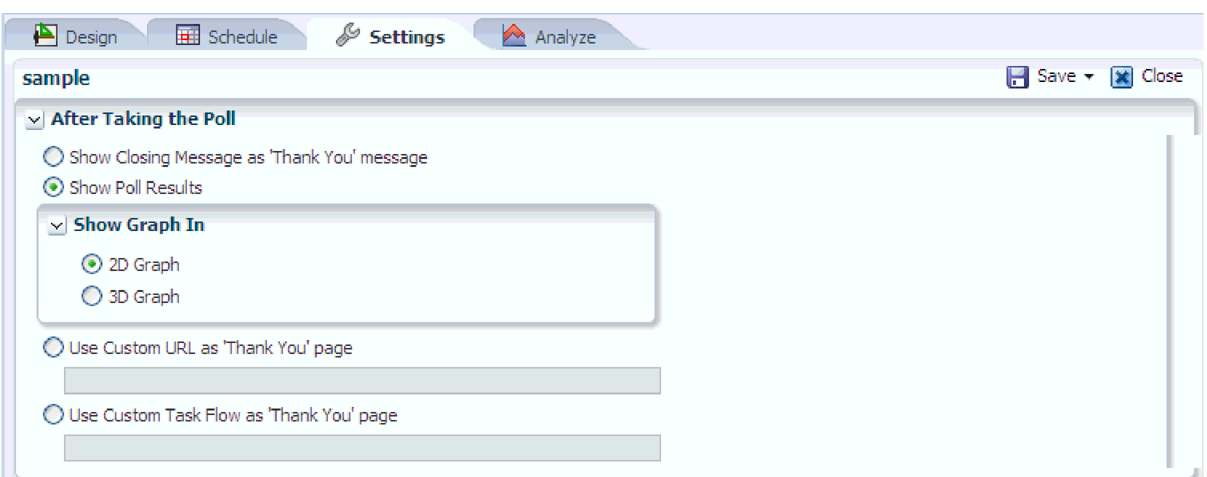
In Close Options, choose to close the published poll after it reaches a certain number of responses or on a certain date. If you select both options, then the poll closes when either condition is first met. Click the **Select Date and Time** icon to enter the closing time through a calendar. Click **Edit Closing Message** to customize in the rich text editor the text provided at the end of the poll.

Figure 69–16 Polls Manager - Schedule



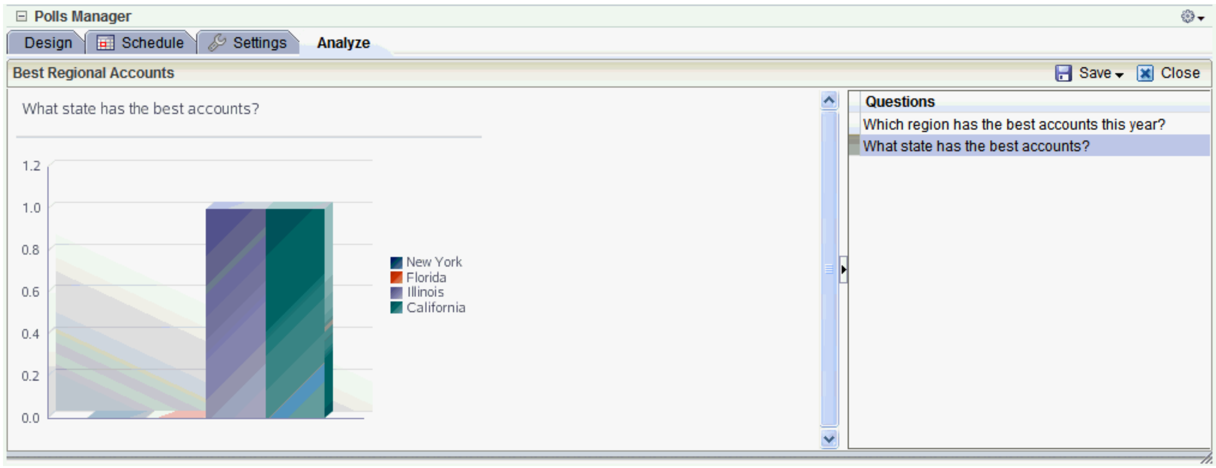
On the **Settings** page, select what to display after the poll is taken (Figure 69–17). For example, you can set a custom URL or JSF task flow as a Thank You page that appears after the poll is taken.

Figure 69–17 Polls Manager - Settings



On the **Analyze** page, poll owners can view results. Use the Questions box on the right to toggle between multiple questions (Figure 69–18).

Figure 69–18 Polls Manager - Analyze



If the poll included a field for poll takers to add comments, click **View Summary** to see consolidated comments (Figure 69–19).

Figure 69–19 View Summary to See Comments

Expand the name of the poll's custom field name to view all comments. In Figure 69–20, the custom field is named **Tell us more!** Figure 69–21 shows the expanded comments for the poll.

Figure 69–20 Response Summary Page

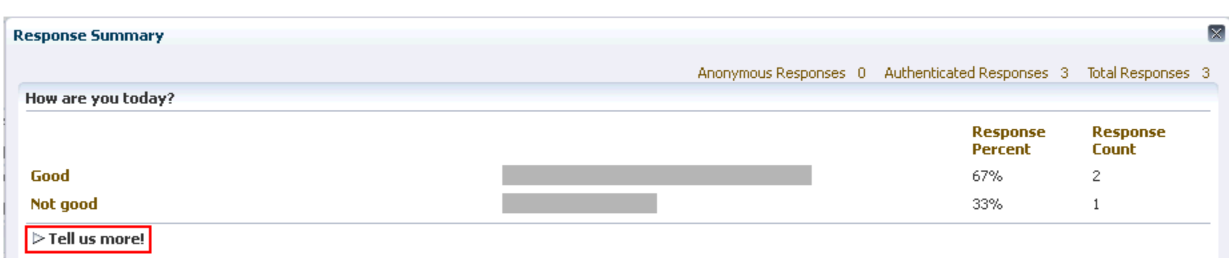
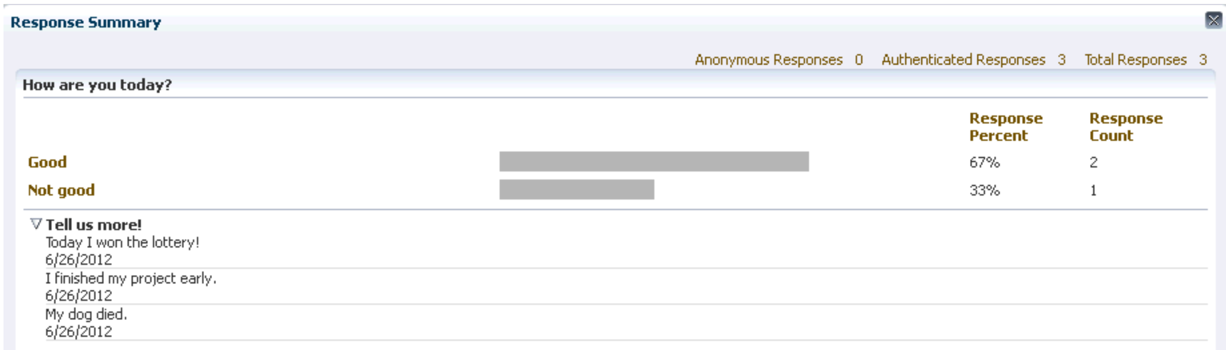


Figure 69–21 Response Summary Page with Poll Comments Showing



69.2.5 Viewing Poll Results

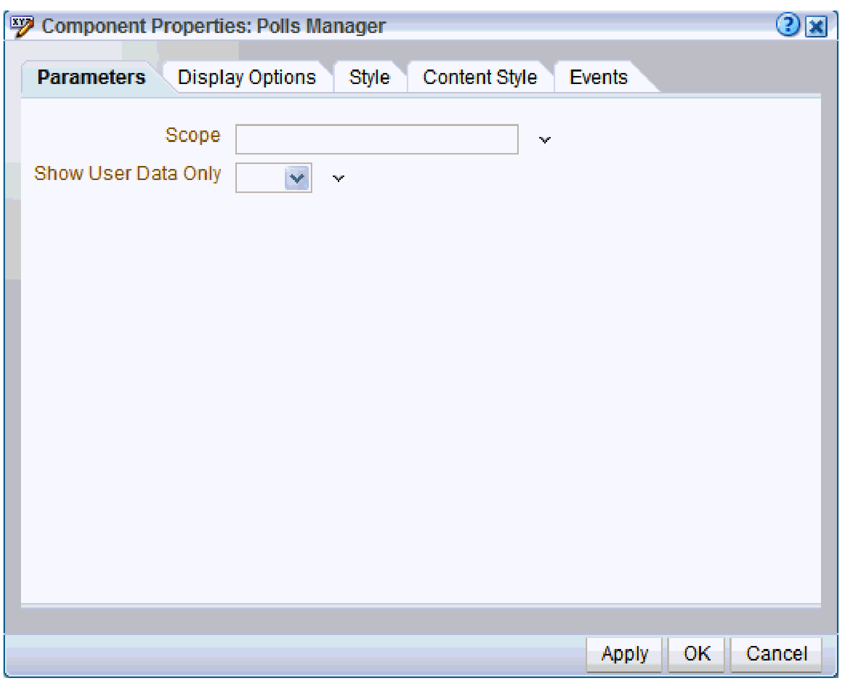
The View Poll Result task flow provides a graphical view of poll results, similar to the Analyze page in the Poll Manager. The View Poll Results task flow must be set to display a specific poll with the `Poll Id` parameter.

For more information, see Section 69.3, "Setting Polls Service Task Flow Properties."

69.3 Setting Polls Service Task Flow Properties

The Polls service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle Composer (Figure 69–22).

Figure 69–22 Task Flow Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Polls service task flows and describe the properties on the **Parameters** tab.

- Section 69.3.1, "What You Should Know About the Polls Service Task Flow Properties"
- Section 69.3.2, "Polls Service Task Flow Parameters"

69.3.1 What You Should Know About the Polls Service Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 69.3.2, "Polls Service Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The content of the **Events** tab depends on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 18.6.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

69.3.2 Polls Service Task Flow Parameters

Table 69–1 describes the parameters that are unique to the Polls service task flows.

Table 69–1 Polls Service Task Flow Parameters

Parameter	Description
`Scope`	The space name from which polls are to be fetched. If this is supplied, then polls of that particular space are shown. On the Home space, when this parameter is not supplied, it fetches polls from all spaces. This parameter appears in the properties for the Polls Manager task flow.
`Show User Data Only`	This parameter determines whether to display only those polls created by the user. Set to Yes to display only those polls created by the user. Set to No (default) to display all polls. If the `scope` parameter is specified, then this parameter works the same but within only that scope. This parameter appears in the properties for the Polls Manager task flow.
`Poll Id`	The name of the poll to display, available from the dropdown list. This parameter appears in the properties for the following task flows. ■ Take Polls ■ View Poll Results
`Show In Edit Mode`	This parameter determines whether users can edit a quick poll. When this parameter is set to No, the Design Poll button for editing the quick poll only appears in page edit mode only; it is not visible to users viewing the page. When this parameter is set to Yes, the Design Poll button appears in both view and edit modes, so users can edit the quick poll. This parameter appears in the properties for the Quick Poll task flow.

70

Working with the RSS Service

This chapter describes how to use the RSS service. The RSS service provides the ability to publish content from Oracle WebCenter Portal: Services as news feeds in RSS 2.0 and Atom 1.0 formats. News feeds deliver content update information to your favorite RSS or Atom reader. In addition, the RSS service enables you to view news feeds from external sources on your application pages in an RSS Viewer.

This chapter includes the following sections:

Audience

This chapter is intended for Spaces users interested in publishing news feeds from WebCenter Portal services and external sources on their application pages. Much of this information also applies to any Framework application, though it is written with Spaces users in mind. For information about Framework applications, see "Integrating the RSS Service" in *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

The Spaces administrator has the authority to expose or hide some space features and services. Contact your Spaces administrator if some tasks discussed in this chapter are not available to you.

70.1 What You Should Know About the RSS Service

The RSS service exposes its features in the following ways:

- The RSS icon on a service task flow - enables you to publish content from WebCenter Portal service as a news feed.
- A dedicated RSS Manager page (Spaces only) - displays a list of published feeds from all accessible spaces for viewing in either RSS 2.0 or Atom 1.0 news readers.
- The RSS task flow - adds an RSS viewer to the page for displaying feeds from external sources and WebCenter Portal service.

Note: The RSS service does not support non-ASCII user names and passwords if the character encoding of the browser-based basic authentication is different from the character encoding of the system on which Oracle WebCenter Portal is deployed. On a Linux system, the character encoding is generally different, and therefore the RSS service does not support non-ASCII credentials.

If the character encoding is same, users can use corresponding non-ASCII credentials. For example, for the Oracle WebCenter Portal instance installed on French Windows Server 2003, users can use a French user name on the French Windows to pass the basic authentication using Internet Explorer.

This section includes the following subsections:

- Section 70.1.1, "RSS Icon"
- Section 70.1.2, "RSS Manager"
- Section 70.1.3, "RSS Task Flow"

70.1.1 RSS Icon

RSS news feeds deliver content update information on the Recent Activities, Discussions, Lists, and Announcements services. Figure 70–1 shows the **RSS** icon available on the Announcements task flow in a Spaces page.

Figure 70–1 RSS Icon in the Announcements Task Flow

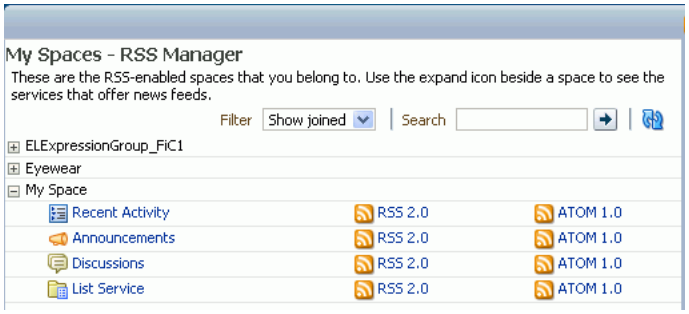
70.1.2 RSS Manager

In a Spaces application, you can obtain news feeds from individual task flow instances and also from the **RSS Manager**. Access the RSS Manager by clicking the **RSS** link at the bottom of the Spaces application (Figure 70–2).

Figure 70–2 The RSS Link in Spaces

The RSS Manager displays nodes for all the spaces for which RSS feeds have been enabled (Figure 70–3).

Figure 70–3 Expanded Space Nodes in the RSS Manager



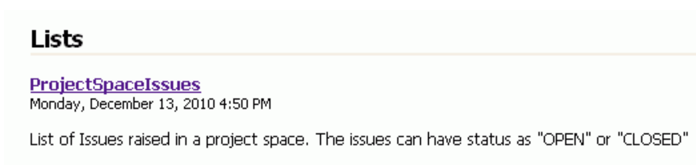
Expand a space node to obtain both RSS 2.0 and Atom 1.0 news feeds from individual services.

A space must be news feed-enabled before you can obtain feed URLs from it. For information, see Section 53.4.6, "Enabling or Disabling RSS News Feeds for a Space." Additionally, your reader of choice must support HTTP authentication.

When you access a news feed item in your reader of choice, the item links back into your application. Because the application itself requires authentication before you can access much of its content, your reader must be equipped to pass your login credentials to securely deliver access.

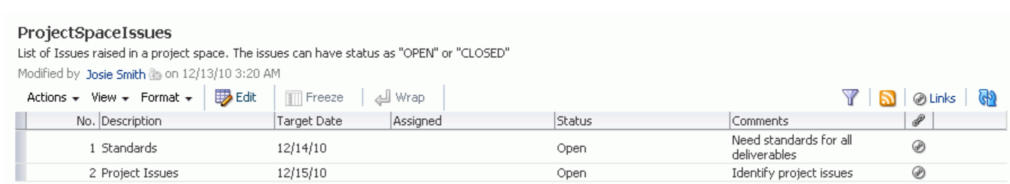
The level of detail provided through a service news feed depends on the feed source. For example, when you pull a news feed for recently added or modified lists, your news reader provides the list titles and (if available) shows descriptions of the most recently added or modified lists (Figure 70–4).

Figure 70–4 A Lists News Feed



The list titles in a feed are linked. Click a list title, and it takes you back into your application with the selected list displayed (Figure 70–5).

Figure 70–5 A List Opened from an RSS Feed and Displayed in Spaces



In contrast, when you pull a news feed from a particular list, it shows recently added or revised row details and provides links to individual rows. When you click such a link, it also takes you back into your application, with the list content displayed.

The news feeds you obtain from a Spaces application are context-aware, providing content only from the space from which they originate. For example, if you provide a list feed from the *Finance* space, your news reader displays list content that is unique to the *Finance* space. If you add a list feed from the *Languages* space, your news reader displays list content that is unique to the *Languages* space.

The RSS service delivers news feeds from the following services:

- **Recent Activities**

  The recent activity news feed tracks updates to your application that are normally reflected in a Recent Activity list and that have occurred within the last three days. For more information, see Section 70.2.1, "Obtaining the Recent Activities News Feed."

- **Discussions**

  The discussion forums news feed tracks updates to all discussion forums in a particular space. See Section 70.2.2, "Obtaining the Discussion Forums News Feed."

- **Lists** (Spaces only)

  There are two types of news feeds that can be delivered from the Lists service—all newly created or changed lists in a space (from the Lists task flow) and revisions to the data of a particular list in a space (from the List Viewer task flow on the Lists page). The news feed content depends on whether you get the news feed URL from the Lists task flow or the List Viewer task flow. For more information, see Section 70.2.3, "Obtaining List News Feeds."

- **Announcements**

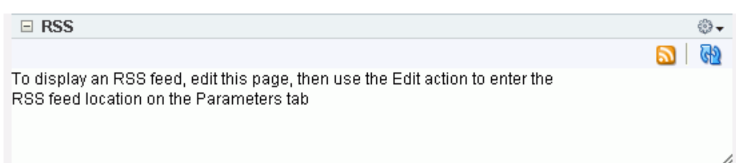
  The Announcements news feed tracks additions and revisions to announcements from a particular space, from all spaces, or application-wide, depending on the location of the feed source. For more information, see Section 70.2.4, "Obtaining the Announcements News Feed."

You can to obtain news feed URLs for all applicable services either from the RSS Manager or the required service's task flows.

70.1.3 RSS Task Flow

If you want to add a news feed from an external site to your application, the RSS service provides an RSS task flow (Figure 70–6).

Figure 70–6 The RSS Task Flow



You can add the RSS task flow to a page and configure it to display content from any external RSS feed. Additionally, the RSS task flow supports login credential passing, by using an external application.

See Also:

- For information about adding the RSS task flow, see Section 70.3.1, "Adding an RSS Service Task Flow to a Page."
- For information about specifying a feed for the RSS task flow, see Section 70.3.4, "Editing the Feed Location of an RSS Task Flow."

The RSS task flow can render news feeds outside of a corporate firewall. However, to consume external news feeds outside of the firewall, your Spaces administrator must have configured proxies for the RSS service. Contact your Spaces administrator if you cannot consume external feeds but want to do so. To contact the administrator, click the **Administrator** link at the bottom of the Spaces application.

Accessing External Applications

Every time you access a secure news feed item, you must log on to that secure application to view content. You can either supply login credentials each time you access an application, or let an external application store and manage your login credentials. After your credentials for a particular application are stored, you are logged in to that application automatically when you log in to your Spaces application. You can provide this capability for all frequently used external applications.

If the secured application you want to access is not registered as an external application, perform the steps listed in Section 38.7, "Providing Login Information for External Applications."

70.2 Obtaining Service News Feeds

Each participating service provides news feeds from locations unique to that service.

This section steps you through obtaining those feeds. It includes the following subsections:

- Section 70.2.1, "Obtaining the Recent Activities News Feed"
- Section 70.2.2, "Obtaining the Discussion Forums News Feed"
- Section 70.2.3, "Obtaining List News Feeds"
- Section 70.2.4, "Obtaining the Announcements News Feed"

70.2.1 Obtaining the Recent Activities News Feed

Use news feeds from the Recent Activities service to keep track of the wide range of activity happening in one or more spaces within the last three days. To consume a space Recent Activities news feed, you must be a member of the selected space and the space must be enabled to provide news feeds.

Spaces provides two locations for pulling a news feed from the Recent Activities service: the RSS Manager and the Recent Activity task flow.

Both the RSS Manager and the Recent Activity task flow provide the same news feed content: additions or revisions to spaces and space pages, documents, discussion forums, lists, and so on. For more information, see Chapter 71, "Working with the Recent Activities Service."

Assuming a default configuration, a news feed URL from a Recent Activity task flow in a space provides information about the activity in that space. A news feed URL from a Recent Activity task flow in your Home space provides information about the activities in a particular space.

Note: A Recent Activity task flow can be configured to display the recent activity of a space other than the one where it has been placed. In such a case, the news feed from that list provides information on the activities of the space identified during configuration. For more information, see Section 71.3, "Setting Recent Activities Task Flow Properties."

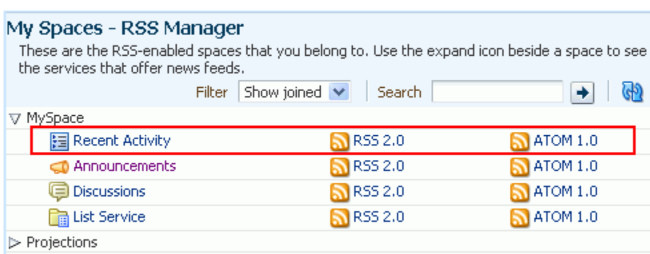
This section describes how to obtain a news feed for the Recent Activity task flow from both the locations, the RSS Manager and the Recent Activity task flow. It contains the following subsections:

- Section 70.2.1.1, "Obtaining a Recent Activity News Feed URL from the RSS Manager"
- Section 70.2.1.2, "Obtaining a News Feed URL from the Recent Activity Task Flow"

70.2.1.1 Obtaining a Recent Activity News Feed URL from the RSS Manager

The RSS Manager provides news feeds for both RSS 2.0 and Atom 1.0 news readers. It lists all RSS-enabled spaces of which you are a member. Each listed space can be expanded to display the services for which it offers news feeds (Figure 70–7).

Figure 70–7 The Recent Activity Service for a Space in the RSS Manager



To obtain a Recent Activity list news feed URL from the RSS Manager:

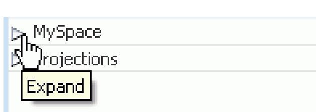
1. Click the **RSS** link at the bottom of the Spaces application (Figure 70–8).

Figure 70–8 The RSS Link

2. If required, expand the node of the space for which you want to monitor recent activities.

   You can expand a space node by clicking the **Expand** icon, as shown in Figure 70–9, or by right-clicking the space name and selecting the **Expand** option from the resulting context menu.

Figure 70–9 Expand Icon in RSS Manager



3. Under the relevant space, right-click the **RSS 2.0** or **Atom 1.0** icon next to **Recent Activity**, and, from the resulting browser context menu, select the copy-link command.

   The command you select depends on your current browser. For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

4. Go to your news reader and initiate an add-subscription action.

   How you do this depends on the news reader you use.

5. Paste the link you copied in step 3 into the relevant field in your news reader.

   You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

70.2.1.2 Obtaining a News Feed URL from the Recent Activity Task Flow

The Recent Activity task flow has its own **RSS** icon. Using this icon, you can get the Recent Activity list news feed URL. Recent Activity RSS feeds provide the same information that you can find in a Recent Activity list. This includes such things as additions or revisions to pages, documents, discussion forums, lists, and so on. The news feed tracks activity occurring over the last three days.

For an **RSS** icon to be active in a Recent Activity task flow, you must be a member of the space from which you want to obtain the news feed and news feeds must be enabled for the relevant space.

To obtain a Recent Activity list news feed URL from the Recent Activity list:

1. Go to your Home space or the space that contains the Recent Activity list from which you want to obtain an RSS feed.

   For information about navigating to a space, see Section 51.4, "Viewing and Accessing Available Spaces." A space may be configured to display in full-screen mode. For more information, see Section 53.4.9, "Changing the Page Template for a Space."

2. Right-click the **RSS** icon in the toolbar of the Recent Activity list, and from the resulting context menu, select the copy-link command.

   The command you select depends on your current browser. For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

   Alternatively, drag the **RSS** icon onto your news reader of choice. This may allow you to skip the other steps in this procedure. If you use the drag-and-drop method, you may have to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

3. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

4. Paste the link you copied in step 2 into the relevant field in your RSS reader.

Note: The news feed URL in a Recent Activity task flow is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
- Get the Atom 1.0 URL from the RSS Manager and use that URL here. For more information, see Section 70.2.1.1, "Obtaining a Recent Activity News Feed URL from the RSS Manager."

You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

70.2.2 Obtaining the Discussion Forums News Feed

Use Discussion Forum news feeds to keep track of additions and revisions to a selected space's discussions. There are three locations from which to obtain discussion forums news feed URLs: the RSS Manager, the Discussions page, and the Discussion Forums task flow. All discussion RSS and Atom URLs provide the same feed; that is, additions and revisions to all discussions in a selected space.

This section contains the following subsections:

- Section 70.2.2.1, "Obtaining a Discussion Forum News Feed from the RSS Manager"
- Section 70.2.2.2, "Obtaining a News Feed from the Discussions Page"
- Section 70.2.2.3, "Obtaining a News Feed from a Discussion Forums Task Flow"

70.2.2.1 Obtaining a Discussion Forum News Feed from the RSS Manager

The RSS Manager provides Discussion Forum news feeds for both RSS 2.0 and Atom 1.0 news readers. Select a feed from any news-feed-enabled space of which you are a member. Use discussion forum news feeds to track additions and revisions to a selected space's discussion forums.

To obtain a discussion forum news feed URL from the RSS Manager:

1. Click the **RSS** link at the bottom of the Spaces application (Figure 70–10).

Figure 70–10 The RSS Link

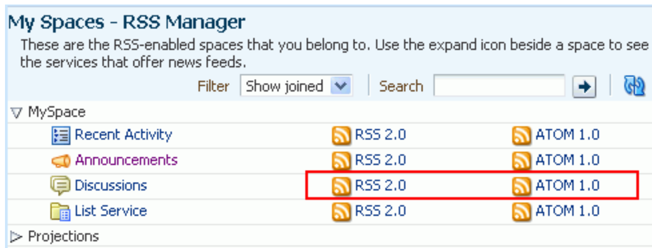
2. In RSS Manager, if required, expand the node of the space that contains the discussions you want to use as a news feed.

   You can expand a space node by clicking the **Expand** icon to the left of it or by right-clicking the space name and selecting an expand option from the resulting context menu.

3. Right-click the **RSS 2.0** or **Atom 1.0** icon next to **Discussions** (Figure 70–11), and, from the resulting context menu, select the copy-link command.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 70–11 RSS 2.0 and Atom 1.0 Icons Next to a Discussions Node in the RSS Manager



Alternatively, if you drag the **RSS** icon onto a news reader, you can skip most of the other steps. You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

4. Go to your news reader and initiate an add-subscription action.

   How you do this depends on the news reader you use.

5. Paste the link you copied in step 3 into the relevant field in your preferred news reader.

   You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

70.2.2.2 Obtaining a News Feed from the Discussions Page

The **Discussions** page provides a convenient location for grabbing a news feed URL while monitoring discussions.

To get an RSS URL for all discussions of a space from the Discussions page:

1. Go to the space that contains the discussion forums you want to use as an RSS feed.

   For information about navigating to a space, see Section 51.4, "Viewing and Accessing Available Spaces." For information about showing hidden pages, see Section 51.11.1, "Showing or Hiding Pages in Your View."

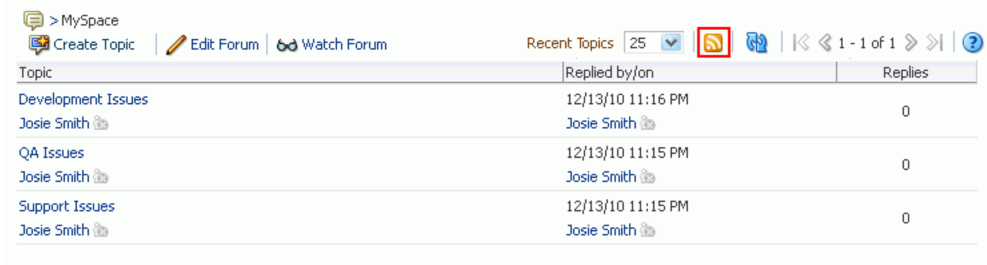
2. Click **Discussions** on the navigation bar to open the **Discussions** page.

   If the **Discussions** page is not available, open the **Personalize Pages** page and select **Discussions**. When the page appears on the navigation bar, click it to open it. For more information about locating and opening pages, see Section 51.11.3, "Opening a Page."

3. Right-click the **RSS** icon on the **Discussions** page (Figure 70–12), and from the resulting context menu, select the copy-link command.

   For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 70–12 An RSS Icon on a Discussions Page



Alternatively, if you drag the **RSS** icon onto your news reader, you can skip most of the other steps. You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

4. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

5. Paste the link you copied in step 3 into the relevant field in your preferred RSS reader.

   You may need to enter your Spaces credentials. To learn more, see Section 70.1, "What You Should Know About the RSS Service."

Note: The news feed URL on the Discussions page is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, then do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
- Get the Atom 1.0 URL from the RSS Manager and use that URL here. For more information, see Section 70.2.2.1, "Obtaining a Discussion Forum News Feed from the RSS Manager."

70.2.2.3 Obtaining a News Feed from a Discussion Forums Task Flow

The Discussion Forums task flow provides another location from where you can obtain a discussions news feed for a selected space. The placement of this task flow within a space is at the discretion of the space's designers, so we cannot pinpoint where you may find this task flow. But, wherever you find it, an **RSS** icon is available to provide you with an RSS news feed URL. This section describes how to use it.

To obtain a news feed URL from a Discussion Forums task flow:

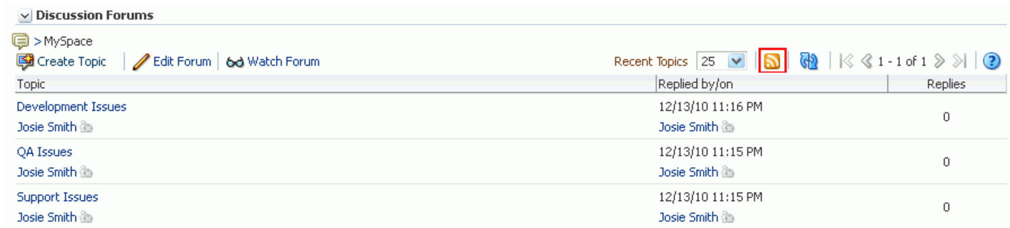
1. Go to the page in the required space that contains a Discussion Forums task flow.

   For information about navigating to a space, see Section 51.4, "Viewing and Accessing Available Spaces."

2. Right-click the **RSS** icon on the task flow (Figure 70–13), and, from the resulting context menu, select the copy-link command.

   For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 70–13 An RSS Icon in a Discussion Forums Task Flow



Alternatively, if you drag the **RSS** icon onto your news reader, you can skip most of the other steps. You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

3. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

Note: The news feed URL in the Discussions task flow is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
- Get the Atom 1.0 URL from the RSS Manager and use that URL here. For more information, see Section 70.2.2.1, "Obtaining a Discussion Forum News Feed from the RSS Manager."

You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

70.2.3 Obtaining List News Feeds

Lists provide a vital form of tracking just about everything within an organization. For example, a group might want a membership list that outlines assigned roles and contact information. A project lead might set up a list that tracks issue resolution.

It follows that it would be useful to track creation of and revisions to such lists from one convenient location: your favorite news reader.

The Lists service provides two options for keeping track of changes through a news reader:

- Keep track of all recently added or modified lists in a given space.
- Keep track of recently added or modified data rows in a given list.

You can obtain the news feed URL for lists from three locations: the RSS Manager, the Lists page, and any Lists task flow on a given page. The RSS Manager and the Lists page provide access to both types of Lists feeds. Individual List task flows provide feeds for data changes to the rows of the displayed list.

This section describes how to obtain a news feed for recently added or modified list rows or lists from a selected space. It includes the following subsections:

- Section 70.2.3.1, "Obtaining a List News Feed from the RSS Manager"

- Section 70.2.3.2, "Obtaining a News Feed from the Lists Page"
- Section 70.2.3.3, "Obtaining a News Feed from a Lists Task Flow"

70.2.3.1 Obtaining a List News Feed from the RSS Manager

The RSS Manager provides two types of list news feeds: a feed of recently added or revised lists in a space and a feed of recent data changes to the rows of one particular list. Additionally, the RSS Manager provides feeds for an RSS 2.0 reader and an Atom 1.0 reader. The main requirement for any news reader you use is that it supports HTTP authentication (for more information, see Section 70.1, "What You Should Know About the RSS Service").

To obtain a list news feed from the RSS Manager:

1. Click the **RSS** button at the bottom of the Spaces application (Figure 70–14).

Figure 70–14 The RSS Link

2. In the **RSS Manager**, expand the node for the space that contains the lists from which to obtain an RSS feed.
3. Right-click the **RSS 2.0** or **Atom 1.0** icon next to **List Service** to get RSS feeds for all lists in the space (Figure 70–15). Then, from the resulting context menu, select the copy-link command.

   For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 70–15 The Lists Service Node on the RSS Manager Page

   Alternatively, if you drag the news feed icon onto your reader you can skip most of the other steps. You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

4. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

5. Paste the link you copied in step 3 into the relevant field in your preferred RSS reader.

   You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

70.2.3.2 Obtaining a News Feed from the Lists Page

Each space has its own **Lists** page from where you can access all the lists available in your space. As you navigate through space pages in your Spaces application, you may come across a list you find particularly informative, for example, a list of project issues. It may be useful to you to track recent additions and revisions to such a list. Each list comes with its own RSS news feed, making it easy to subscribe to the list on-the-spot.

This section describes how to obtain news feed URLs from the **Lists** page. Note that the **Lists** page provides news feeds for RSS 2.0 readers only. If you want to obtain a feed for an Atom 1.0 news reader, use the RSS Manager.

To obtain a news feed from the **Lists** page:

1. Go to the space that contains the list you want to track.

   For information about navigating to a space, see Section 51.4, "Viewing and Accessing Available Spaces."

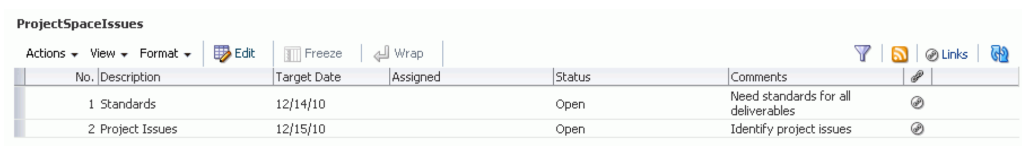
2. Navigate to the **Lists** page and open the required list.

   If the **Lists** page is not available, open the **Personalize Pages** page and select the **Lists** page for display. For more information, see Section 32.4, "Working with Pages in the Home Space."

3. Right-click the **RSS** icon (Figure 70–16), and from the resulting context menu, select the copy-link command.

   For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 70–16 A List on the Lists Page



   Alternatively, if you drag the news feed icon onto your reader you can skip most of the other steps. You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

4. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

5. Paste the link you copied in step 3 into the relevant field in your preferred RSS reader.

Note: The news feed URL on the Lists page is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
- Get the Atom 1.0 URL from the RSS Manager and use that URL here. For more information, see Section 70.2.3.1, "Obtaining a List News Feed from the RSS Manager."

You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

70.2.3.3 Obtaining a News Feed from a Lists Task Flow

Each **Lists** task flow provides RSS news feeds for recent additions and revisions to all of the lists it contains and also for recent data changes to the rows of an individual list.

To obtain a news feed from a Lists task flow:

1. Go to the space that contains the list you want to track.

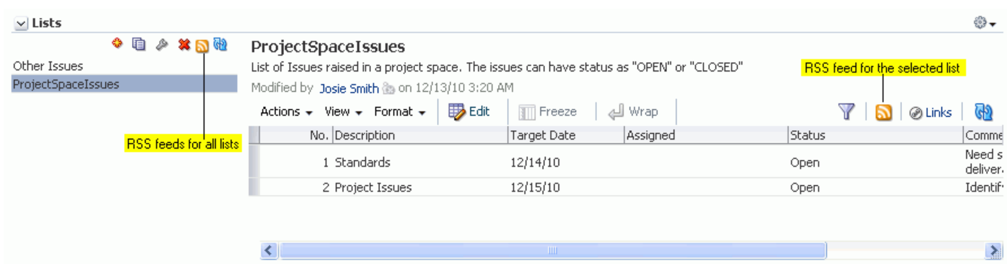
   For information about navigating to a space, see Section 51.4, "Viewing and Accessing Available Spaces." For information about showing hidden pages, see Section 51.11.1, "Showing or Hiding Pages in Your View."

2. To obtain a news feed of recently added and revised lists in a space, right-click the **RSS** icon in the **Lists** pane on the left side of the **Lists** task flow (Figure 70–16), and select the copy-link command from the resulting context menu.

   To obtain a news feed of data changes to the rows of an individual list, display the list in the right pane by selecting the list name from the left pane (Figure 70–16). Right-click the **RSS** icon in the right pane, and select the copy-link command from the resulting context menu.

   For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

   Figure 70–17 A List Task Flow

   Alternatively, if you drag the **RSS** icon onto your news reader you can skip most of the other steps. You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

3. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

Note: The news feed URL in the List task flow is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
- Get the Atom 1.0 URL from the RSS Manager and use that URL here. For more information, see Section 70.2.3.1, "Obtaining a List News Feed from the RSS Manager."

You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

70.2.4 Obtaining the Announcements News Feed

Announcements are excellent candidates for news feeds. Usually they are short, concise, and full of timely and valuable information. If you are a member of multiple spaces, it would be convenient to be able to access all announcements from one location: your favorite news reader.

You can obtain an announcement news feed from three locations: the RSS Manager, the Announcements page, and an Announcements task flow.

This section contains the following subsections:

- Section 70.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager"
- Section 70.2.4.2, "Obtaining a News Feed from the Announcements Page"
- Section 70.2.4.3, "Obtaining a News Feed from the Announcements Task Flow"

70.2.4.1 Obtaining an Announcements News Feed from the RSS Manager

The RSS Manager provides two types of feeds for the Announcements service: RSS 2.0 and Atom 1.0. Use either of these to keep track of all new and revised announcements in a particular space.

To obtain an Announcements news feed from the RSS Manager:

1. Click the **RSS** link at the bottom of the Spaces application (Figure 70–18).

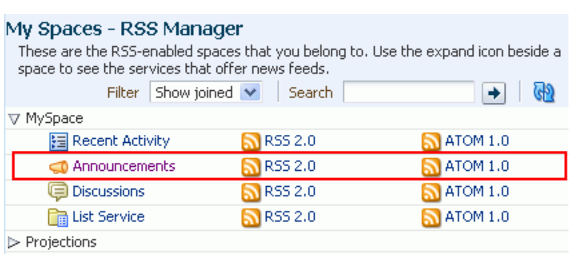
Figure 70–18 The RSS Link

2. In the **RSS Manager**, expand the node for the space that contains the announcements you want to track through a news reader.

3. Right-click the **RSS 2.0** or **Atom 1.0** icon next to **Announcements** (Figure 70–15), and, from the resulting context menu, select the copy-link command.

   For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 70–19 Announcements Node on the RSS Page



Alternatively, if you drag the news feed icon onto your reader, you can skip most of the other steps. You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

4. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

5. Paste the link you copied in step 3 into the relevant field in your preferred RSS reader.

   You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

70.2.4.2 Obtaining a News Feed from the Announcements Page

The Announcements service provides the Announcement Manager, which is exposed from the main Announcements page in the Spaces application. You can use it to create and revise announcements and to obtain an announcements news feed URL.

Unlike the RSS Manager, the Announcement Manager provides a news feed only for RSS 2.0 news readers. If you prefer an Atom 1.0 feed, use the RSS Manager to obtain the feed URL. For more information, see Section 70.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager."

To obtain a news feed from the Announcements page:

1. Open the **Announcements** page. For more information, see Section 32.4, "Working with Pages in the Home Space."

   The **Announcements** page is available in every space provided the space is configured to display announcements. For information about enabling services in a space, see Section 53.10.1, "Enabling and Disabling Services Available to a Space."

   Note: You can also access the Announcement Manager by clicking the **Open Announcement Manager** icon in the Announcements task flow. This icon is not displayed in the Announcements task flow if you do not have the required privileges.

   ---

2. Right-click the **RSS** icon on the right on the **Announcements** page (Figure 70–20), and select the copy-link command from the resulting context menu.

   For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 70–20 The RSS Icon on the Announcements Page

Alternatively, if you drag the news feed icon onto your reader you can skip most of the other steps. You may need to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

3. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

Note: The news feed URL on the Announcements page is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
- Get the Atom 1.0 URL from the RSS Manager and use that URL here. For more information, see Section 70.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager."

You may require to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

70.2.4.3 Obtaining a News Feed from the Announcements Task Flow

The Announcements task flow also provides access to a news feed URL. Like the Announcements page, the task flow provides feeds only for RSS 2.0 news readers. If you prefer an Atom 1.0 feed, use the RSS Manager to obtain the feed URL. For more information, see Section 70.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager."

To obtain a news feed from the Announcements task flow:

1. Go to the page that contains the Announcements task flow you want to view.
2. Right-click the **RSS** icon on the Announcements task flow (Figure 70–21), and select the copy-link command from the resulting context menu.

   For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 70–21 RSS Icon in the Announcements Task Flow

   Alternatively, if you drag the news feed icon onto your reader you can skip most of the other steps. You may require to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

3. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

Note: The news feed URL in the Announcements task flow is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:

- Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
- Get the Atom 1.0 URL from the RSS Manager and use that URL here. For more information, see Section 70.2.4.1, "Obtaining an Announcements News Feed from the RSS Manager."

You may require to enter your Spaces credentials. For more information, see Section 70.1, "What You Should Know About the RSS Service."

70.3 Working with the RSS Task Flow

The RSS task flow enables you to include an RSS viewer, which you can use to view content from external news feeds within your application page.

This section contains the following subsections:

- Section 70.3.1, "Adding an RSS Service Task Flow to a Page"
- Section 70.3.2, "Refreshing an RSS Task Flow"
- Section 70.3.3, "Deleting an RSS Task Flow From the Page"
- Section 70.3.4, "Editing the Feed Location of an RSS Task Flow"

70.3.1 Adding an RSS Service Task Flow to a Page

You can incorporate news feeds from external sources into your application pages by using the RSS task flow. You can add the RSS task flow from the Resource Catalog in Composer.

Each instance of the RSS viewer displays news feeds from one source. If you plan to display multiple external news feeds on a particular page, you can place multiple RSS task flows on that page.

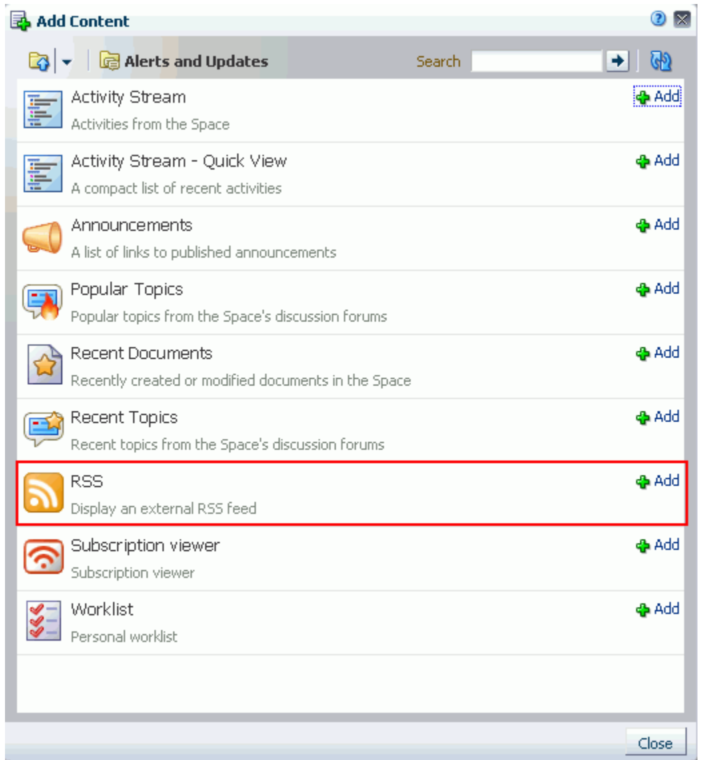
To display content from an external RSS feed, proxies must be configured in your application. Contact your Spaces administrator if you have problems accessing external RSS feeds in your task flow.

Spaces provide the ability to store and manage your login credentials by using external applications. After your credentials for a particular application are stored, you are logged in to that application automatically when you log on to your application. So, if an external RSS news feed or WebCenter Portal service feed requires your login credentials, when you get to the step where you specify the feed URL, you may have to also specify the name of the external application that is configured to store your login credentials for reading a secure RSS feed.

To add the RSS service task flow, you need to select the **RSS** service task flow from the **Alerts and Updates** folder in the Resource Catalog (Figure 70–22). The procedure to add the RSS task flow to a page is same as adding any other task flow. For information about the generic procedure, see Section 53.15.1, "Adding a Space Task Flow to a Page."

After adding the RSS task flow, you need to edit the task flow to specify the RSS feed location. For information, see Section 70.3.4, "Editing the Feed Location of an RSS Task Flow."

Figure 70–22 RSS Service Task Flow in the Resource Catalog



70.3.2 Refreshing an RSS Task Flow

The RSS task flow, along with other page components, gets refreshed with every server request. However, as the content from news feeds may be dynamic, you have the option of refreshing the RSS task flow yourself by using the **Refresh** icon (Figure 70–23), when required.

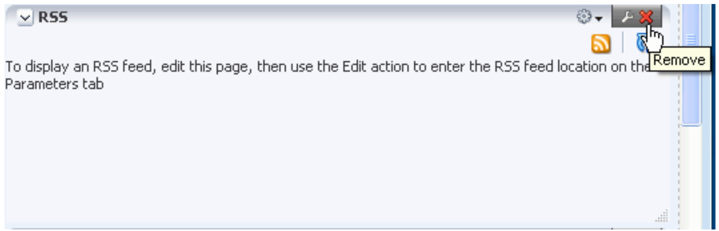
Figure 70–23 The Refresh Icon on an RSS Task Flow

The task flow updates and displays latest data from the external source.

70.3.3 Deleting an RSS Task Flow From the Page

If you have the required privileges, you have the option to delete the RSS task flow from a page by using the **Remove** icon on the task flow (Figure 70–24) in Edit mode of the page.

Figure 70–24 Remove Icon on an RSS Task Flow



When you click the **Remove** icon, the Delete Component dialog displays. Click **Delete** in this dialog to delete the task flow from the page.

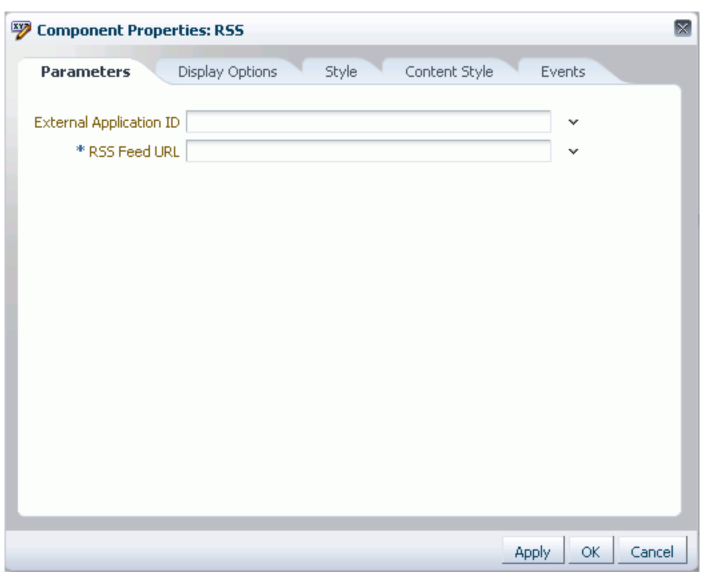
70.3.4 Editing the Feed Location of an RSS Task Flow

You can change the feed URL or the external application ID specified for an RSS task flow at any point of time.

To change the feed location of an RSS task flow:

1. Go to the web site that provides the RSS feed you want to view through the RSS viewer, and copy its RSS URL.
2. Log on to your Spaces application, and go the page that contains the RSS task flow you want to modify.
3. Switch to the page's Edit mode.
4. Click the **Edit** icon on the header of the RSS task flow.
5. In the **Component Properties** dialog, click the **Parameters** tab, if not open already. (Figure 70–25).

Figure 70–25 Specifying the Feed Location in the RSS Task Flow



6. In the **RSS Feed URL** field, paste the URL that you copied in step 1.

   For information about the RSS task flow parameters, see Section 70.4, "Setting RSS Service Task Flow Properties."

7. If the feed you want to publish requires authentication, in the **External Application ID** field, specify the name of the external application configured to store your login credentials for accessing that feed.

   For information about external applications, see "Accessing External Applications".

8. Click **Apply** to save your changes and continue editing, or click **OK** to save your changes and close the dialog.

   Content from the external feed you specified is displayed within the RSS task flow.

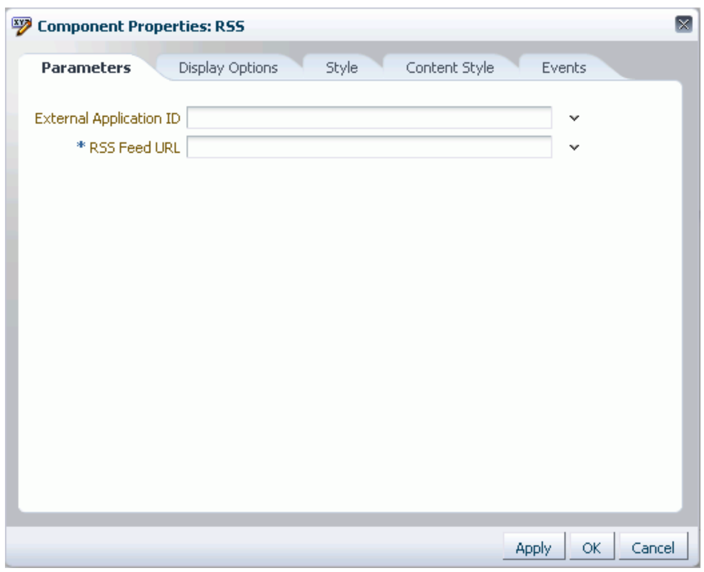
9. Click **Save** at the top-right corner of Composer to save your changes and remain in Composer.

10. Optionally, click **Close** to exit Composer.

70.4 Setting RSS Service Task Flow Properties

The RSS service task flow has associated properties, which users with sufficient privileges can access through the Component Properties dialog in Composer (Figure 70–26).

Figure 70–26 RSS Task Flow Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the RSS service task flow and describe the properties on the Parameters tab:

- Section 70.4.1, "What You Should Know About the RSS Service Task Flow Properties"
- Section 70.4.2, "RSS Service Task Flow Parameters"

70.4.1 What You Should Know About the RSS Service Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see

Section 70.4.2, "RSS Service Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

70.4.2 RSS Service Task Flow Parameters

Table 70–1 describes the parameters that are unique to the RSS task flow.

Table 70–1 RSS Service Task Flow Parameters

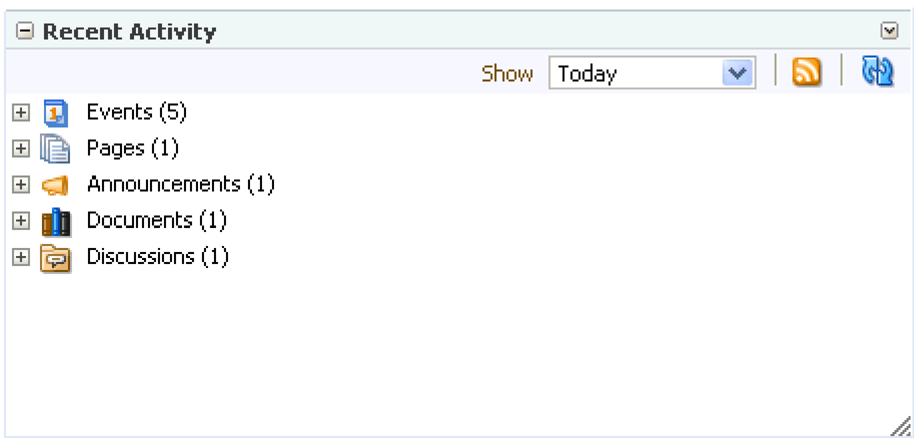
Parameter	Description
`External Application ID`	The name of the external application that is configured to store a user's login credentials for reading a secure RSS feed. If you are not sure whether there is an external application configured to store your credentials, contact your Spaces administrator. To contact the administrator, click the **Administrator** link at the bottom of the Spaces application.
`RSS Feed URL`	The URL to access the RSS feed. For example, to use the Oracle Press Releases RSS feed, enter: `http://www.oracle.com/rss/rss_ocom_pr.xml`

71

Working with the Recent Activities Service

The Recent Activities service provides a means of tracking recent activities within a Spaces application. For example, the Recent Activities task flow tracks the changes you and other users make to application pages, documents, discussion forums, lists, and the like (Figure 71–1).

Figure 71–1 The Recent Activities Task Flow



This chapter provides information about the Recent Activities service. It contains the following sections:

- Section 71.1, "What You Should Know About the Recent Activities Service"
- Section 71.2, "Working with the Recent Activities Task Flow"
- Section 71.3, "Setting Recent Activities Task Flow Properties"

Note: You can track recent activities through your favorite RSS reader. For more information, see Chapter 70, "Working with the RSS Service."

Audience

This chapter is intended for users interested in understanding and using the features of the Recent Activities service.

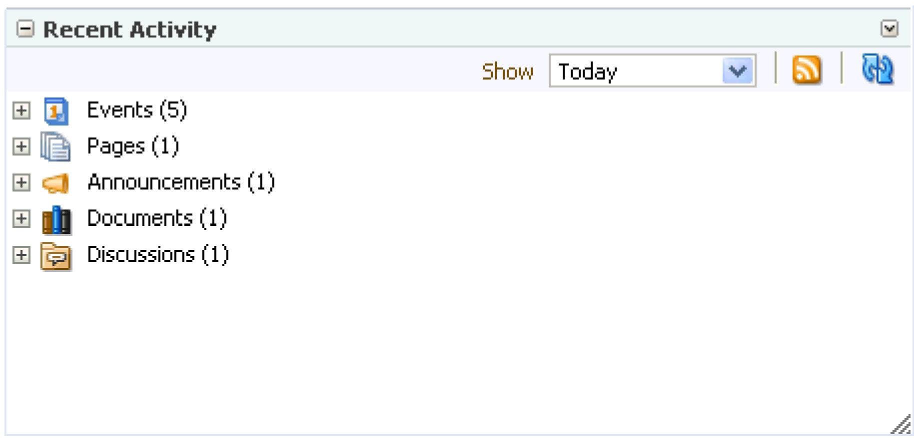
The Spaces administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

Note: For information about seeded user roles, see *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

71.1 What You Should Know About the Recent Activities Service

The Recent Activities service provides the Recent Activities task flow, which links to the additions and revisions to some services available to your application (Figure 71–2).

Figure 71–2 The Recent Activities Task Flow



Tracked changes include additions and revisions to pages, documents, discussion forums, lists (Spaces only), and events.

By default, the Recent Activity list displays 25 recent activities for a given service. If more than 25 activities have occurred, the Recent Activity list displays the 25 most recent. Your application administrator can change the default value, so your limit may be more or less than 25.

The level of information provided in the Recent Activity list depends on the context in which the list is placed. For example, in a Framework application, changes are tracked on all applicable services across the entire application.

In a space page, the Recent Activity list summarizes changes occurring in that space. In a personal space, the Recent Activities task flow must have a space specified (see Section 71.3, "Setting Recent Activities Task Flow Properties"). The Recent Activity list summarizes changes occurring in the specified space.

You can use the Recent Activity list as an access point to new and revised content. The Recent Activity list displays new and revised content as links, which you can click to go directly to the content.

71.2 Working with the Recent Activities Task Flow

With the Recent Activities task flow, there is very little to do to make the most of its features. It automatically detects recent activities on other WebCenter Portal service and reports on its findings.

There are, nonetheless, a few recent-activity-centered actions you can take on the task flow. For example, you can personalize your view of recent activities, access a changed item, and refresh your view to update the task flow with the latest changes. This section tells you how. It contains the following subsections:

- Section 71.2.1, "Adding the Recent Activities Task Flow to a Custom Resource Catalog"
- Section 71.2.2, "Adding the Recent Activities Task Flow to a Page"
- Section 71.2.3, "Personalizing the Recent Activities Task Flow"
- Section 71.2.4, "Accessing Recently Acted-On Items"
- Section 71.2.5, "Refreshing the Recent Activities Task Flow"

71.2.1 Adding the Recent Activities Task Flow to a Custom Resource Catalog

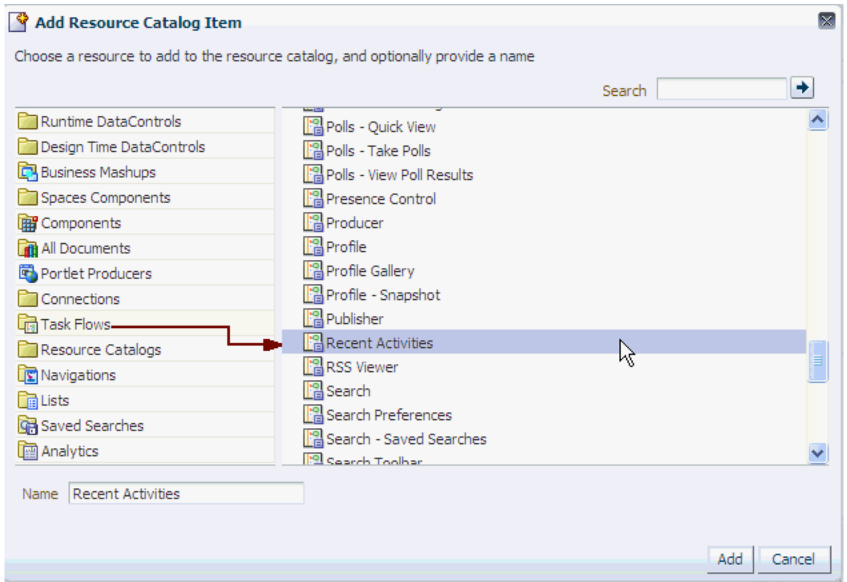
WebCenter Portal: Spaces provides rich Resource Catalogs that expose components and connections that Spaces users can add to their pages. You can use a Resource Catalog to populate resources such as page templates, navigation models, pages, and task flows.

As a Spaces administrator or a space moderator, you can make the Recent Activities task flow available in a custom Resource Catalog so that users can add the task flow to their pages and use it for keeping track of recent activities.

To make the Recent Activities task flow available in a custom Resource Catalog:

1. Create a Resource Catalog or make a copy of an existing one. Creating a Resource Catalog follows the same procedure as any other resource. For information about creating a blank Resource Catalog, see Section 11.2, "Creating Resources." For information about copying an existing Resource Catalog, see Section 11.4.1, "Copying a Resource."
2. To add the Recent Activities task flow to the Resource Catalog, on the **Resources** page, select your newly created Resource Catalog.
3. From the **Edit** menu, select **Edit**.
4. If you have created folders (see Section 16.3.1.1, "Creating a Folder") and want to add resources inside a particular folder, select the folder in the Edit dialog.
5. In the Edit dialog, select **Add**, and then **Add From Library**.
6. In the Add Resource Catalog Item dialog, click **Task Flows** on the left.
7. From the list on the right, select **Recent Activities** (Figure 71–3).

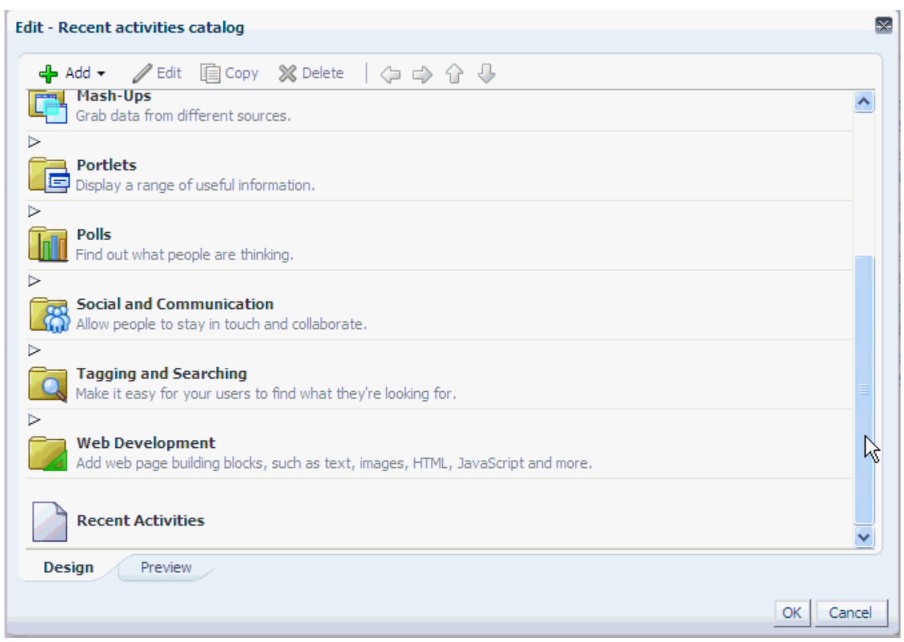
Figure 71–3 Adding the Recent Activities Task Flow to a Resource Catalog



8. Click **Add**.

   The **Recent Activity** task flow displays in your Resource Catalog.

Figure 71–4 Recent Activities Task Flow in a Resource Catalog

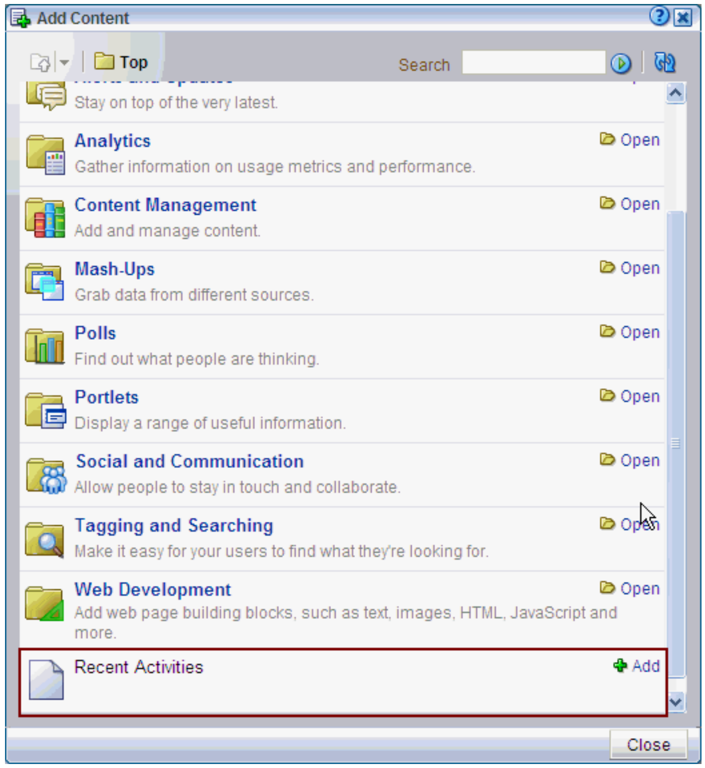


9. Click **OK** to close the Edit dialog of your Resource Catalog.
10. Configure the application or space to use the new catalog as the default one. For information, see Section 16.10, "Configuring Resource Catalogs in Your Application."

71.2.2 Adding the Recent Activities Task Flow to a Page

To add the Recent Activities task flow to a page, you need to add **Recent Activities** using the Resource Catalog (Figure 71–5).

Figure 71–5 Selecting the Recent Activities Task Flow from the Resource Catalog

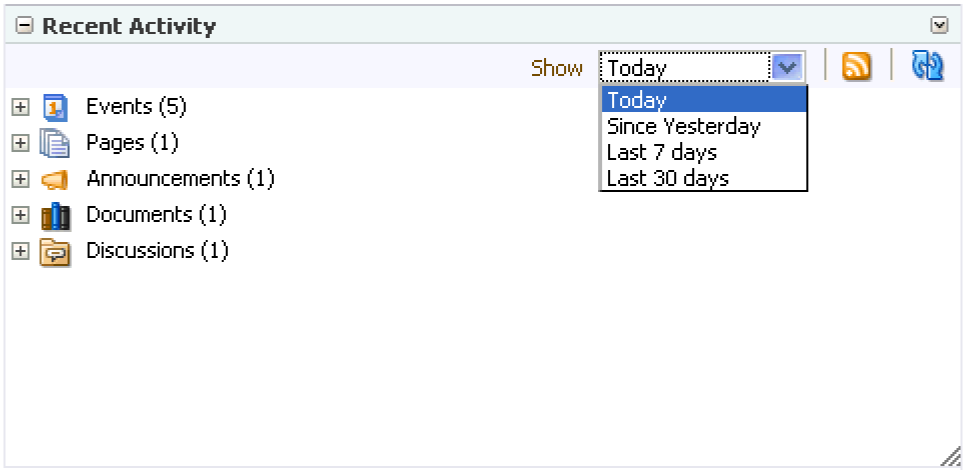


The procedure for adding the Recent Activities task flow to a page is same as adding any component from the Resource Catalog. For the generic procedure, see Section 18.5, "Adding a Component to a Page."

71.2.3 Personalizing the Recent Activities Task Flow

The Recent Activities task flow provides a way to specify the range of time within which to view changes and additions to other services. These time-range options display on the **Show** menu in the Recent Activities task flow toolbar (Figure 71–6).

Figure 71–6 Time-Range Options on the Recent Activity List



Select an option from the **Show** menu to view recent activities occurring within the selected time range. The time range you select is applicable only to that task flow instance. If you have more than one Recent Activities task flow instance on the page, you can display activities from a different time range in each task flow instance.

> **Tip:** Ensure that your application Preferences reflect your own local time zone. To access your time zone preference in the Spaces application, click the **Preferences** link at the top of the application and then select **General**. For more information, see Section 38.3, "Setting Date and Time Preferences."

The default options on the **Show** menu include:

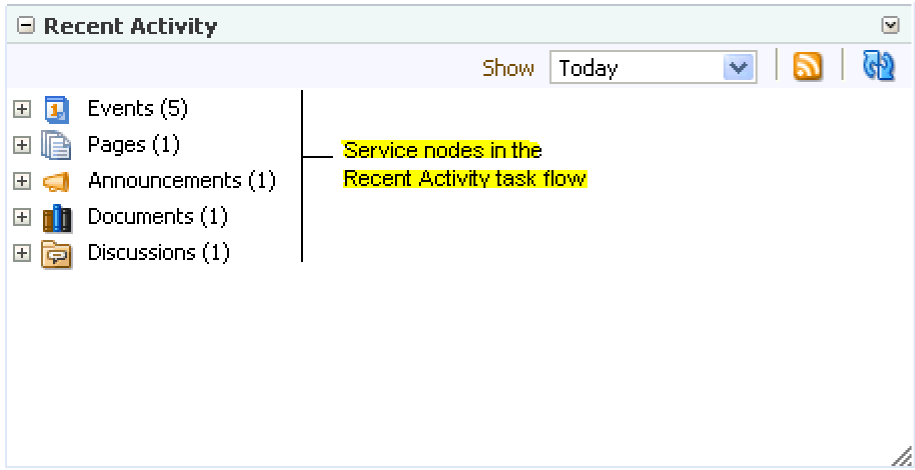
- **Today**—The task flow displays all activities that have taken place between 12:00AM (2400 hours) and now.
- **Since Yesterday**—The task flow displays all activities that have taken place between now and yesterday at 12:00AM (2400 hours).
- **Last 7 days**—The task flow displays all activities that have taken place in the last 7 days.
- **Last 30 days**—The task flow displays all activities that have taken place in the last 30 days.

> **Note:** These options are described according to their default meanings. In some instances, an advanced user can provide alternative definitions for them. For more information, see Section 71.3, "Setting Recent Activities Task Flow Properties."

71.2.4 Accessing Recently Acted-On Items

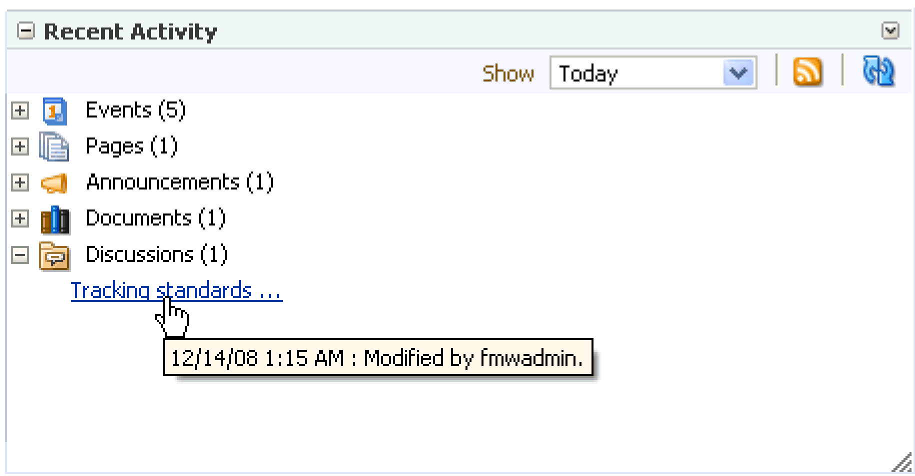
The Recent Activities task flow groups the different services it reports on into nodes that are named for each service (Figure 71–7).

Figure 71–7 Service Nodes in the Recent Activities Task Flow



Expand a node, and access the changed item directly by clicking its link (Figure 71–8).

Figure 71–8 Recent Discussion Link in the Recent Activities Task Flow

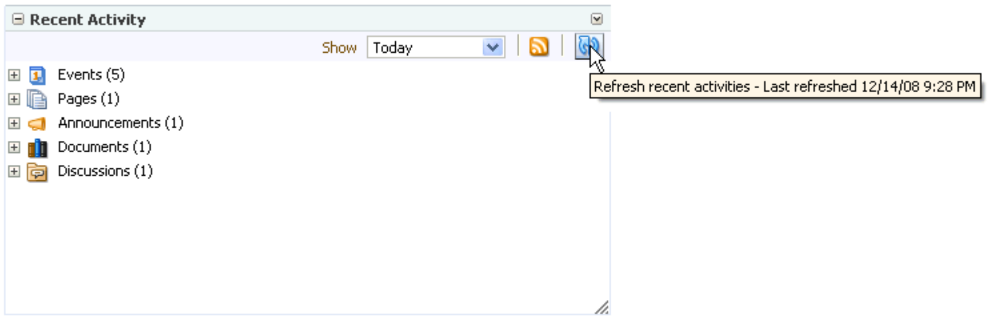


The targets of linked items open on dynamically-generated pages, or in the Spaces application, on dynamically-generated, top-level tabs. Link targets display according to their parent service. For example, click a Discussions service link to access a forum or a specific topic under a forum; click a Lists service link to access an updated list of lists or a specific updated list; click an event to display event details; and so on.

71.2.5 Refreshing the Recent Activities Task Flow

If you prefer not to wait for an automatic refresh of the Recent Activities task flow, you always have the option of refreshing the task flow yourself by clicking its Refresh icon (Figure 71–9).

Figure 71–9 The Refresh Icon on a Recent Activities Task Flow



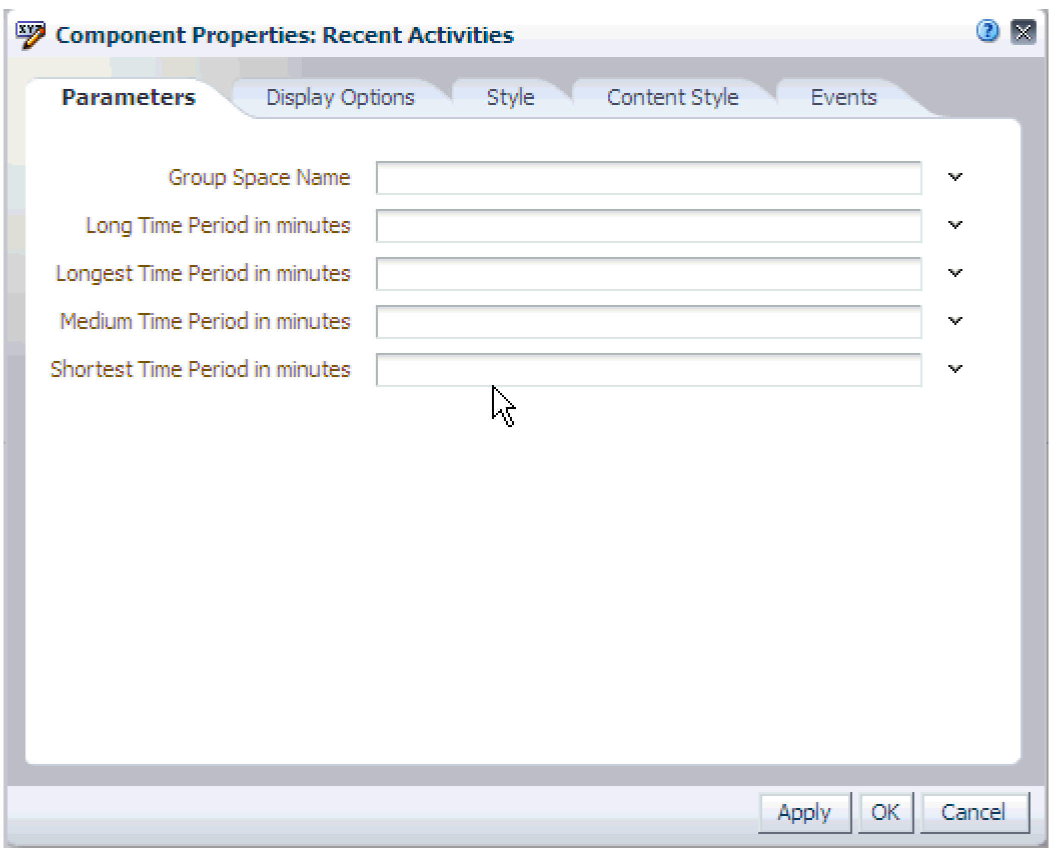
The task flow updates and indicates the number of recently-changed items by increasing the value displayed in parenthesis next to each affected service.

71.3 Setting Recent Activities Task Flow Properties

For the steps to add a Recent Activities task flow to a page, see Section 18.5, "Adding a Component to a Page."

The Recent Activities task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle WebCenter Portal's Composer (Figure 71–10).

Figure 71–10 Recent Activities Task Flow Component Properties



For information about accessing the Component Properties dialog, see Section 18.6.2, "Setting Properties on a Component."

The following sections provide information about properties of the Recent Activities task flow and describe the properties on the Parameters tab:

- Section 71.3.1, "What You Should Know About the Recent Activities Task Flow Properties"
- Section 71.3.2, "Recent Activities Task Flow Parameters"

71.3.1 What You Should Know About the Recent Activities Task Flow Properties

The properties on the **Parameters** tab of the Component Properties dialog control the default task flow content. For descriptions of the parameters on this tab, see Section 71.3.2, "Recent Activities Task Flow Parameters." For some task flows, parameters on this tab facilitate the wiring of the task flow to page parameters and page definition variables. These properties are unique to the task flow type. For more information, see Section 18.6, "Modifying Page Components." For information about wiring pages and components, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 18.6.5, "Working with Child Components."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

71.3.2 Recent Activities Task Flow Parameters

Table 71–1 describes the parameters that are unique to the Recent Activities task flow.

Table 71–1 Recent Activities Task Flow Parameters

Parameter	Description
`Group Space Name`	Applicable in Spaces only. Leave this field blank if the task flow is on a Framework application page. Use this parameter to specify the space for which to display recent activities. On a personal space page, use this to narrow the range of displayed activities. Rather than tracking activities application-wide—the default behavior—you can, for example, set a **Constant** value of a particular space's display name. On a space page, use this parameter to display some other space's recent activities or to display recent activities for all spaces. Valid values include: ■ The display name or GUID of the space to search ■ `null` (empty), to search according to the contextual default Use for space pages only. An empty value on a space page searches the current space. **Note**: Always specify a value on a personal space page. An empty value does not return any results. If no value is specified, then the following message displays in the Recent Activities task flow: `Recent Activity in the Personal Space requires a groupSpace taskflow parameter value to use for the search.` ■ `defaultScope` (or the `defaultScope` GUID), to search all spaces

`Medium Time Period in minutes`	Defaults to `Yesterday` on the Recent Activity **Show** menu. For defining the time range between `Short` and `Long` within which activities are displayed on the Recent Activity list.
	
	Valid values include:
	■ **TODAY**—Activities that have occurred since midnight in the currently selected time zone display on the Recent Activity list.
	■ **YESTERDAY**—Activities that have occurred since midnight yesterday in the currently selected time zone display on the Recent Activity list.
	■ A number of minutes—Activities that have occurred within the specified number of minutes display on the Recent Activity list. For example, a value of `60` renders as **Last Hour** on the **Show** menu. A value of `1440` is rendered as **Last Day**.
	
	Example values:
	`Constant: TODAY (Displays all activity since midnight)`
	`Constant: 2880 (Displays all activity within the last 2880 minutes. This is displayed as Last 2 Days on the Show menu.)`
	`EL Expression: ${myAppBean.timePeriod} (Displays based on the value from the given Bean property "timePeriod")`

Table 71–1 (Cont.) Recent Activities Task Flow Parameters

Parameter	Description

`Long Time Period in minutes`	Defaults to `Last 7 Days` on the Recent Activity **Show** menu. Used for defining the time range between `Medium` and `Longest` within which activities are displayed on the Recent Activity list.
	
	Valid values include:
	
	■ **TODAY**—Activities that have occurred since midnight in the currently selected time zone display on the Recent Activity list.
	■ **YESTERDAY**—Activities that have occurred since midnight yesterday in the currently selected time zone display on the Recent Activity list.
	■ A number of minutes—Activities that have occurred within the specified number of minutes display on the Recent Activity list. For example, a value of `60` renders as **Last Hour** on the **Show** menu. A value of `1440` is rendered as **Last Day**.
	
	Example values:
	
	`Constant: TODAY (Displays all activity since midnight)`
	`Constant: 2880 (Displays all activity within the last 2880 minutes. This is displayed as Last 2 Days on the Show menu.)`
	`EL Expression: ${myAppBean.timePeriod} (Displays based on the value from the given Bean property "timePeriod")`

Table 71–1 (Cont.) Recent Activities Task Flow Parameters

Parameter	Description

`Longest Time Period in minutes`	Defaults to `Last 30 Days` on the Recent Activity **Show** menu. For defining the longest range of time within which activities are displayed on the Recent Activity list.
	
	Valid values include:
	
	■ **TODAY**—Activities that have occurred since midnight in the currently selected time zone display on the Recent Activity list.
	■ **YESTERDAY**—Activities that have occurred since midnight yesterday in the currently selected time zone display on the Recent Activity list.
	■ A number of minutes—Activities that have occurred within the specified number of minutes display on the Recent Activity list. For example, a value of `60` renders as **Last Hour** on the **Show** menu. A value of `1440` is rendered as **Last Day**.
	
	Example values:
	
	`Constant: TODAY (Displays all activity since midnight)`
	`Constant: 2880 (Displays all activity within the last 2880 minutes. This is displayed as Last 2 Days on the Show menu.)`
	`EL Expression: ${myAppBean.timePeriod} (Displays based on the value from the given Bean property "timePeriod")`

`Shortest Time Period in minutes`	Defaults to `Today` on the Recent Activity **Show** menu. Used for defining the shortest range of time within which activities are displayed on the Recent Activity list. **Today** is measured from midnight in your selected time zone.
	
	Valid values include:
	
	■ **TODAY**—Activities that have occurred since midnight in the currently selected time zone display on the Recent Activity list.
	■ **YESTERDAY**—Activities that have occurred since midnight yesterday in the currently selected time zone display on the Recent Activity list.
	■ A number of minutes—Activities that have occurred within the specified number of minutes display on the Recent Activity list. For example, a value of `60` renders as **Last Hour** on the **Show** menu. A value of `1440` is rendered as **Last Day**.
	
	Example values:
	
	`Constant: TODAY (Displays all activity since midnight)`
	`Constant: 2880 (Displays all activity within the last 2880 minutes. This is displayed as Last 2 Days on the Show menu.)`
	`EL Expression: ${myAppBean.timePeriod} (Displays based on the value from the given Bean property "timePeriod")`

72

Working with the Worklist Service

The Worklist service provides access to all the worklist items that require your attention. These worklist items are displayed on your application page, where you can view and act on all items in one place. These worklist items may be queried from all of the BPEL servers configured in your application.

This chapter contains the following sections:

- Section 72.1, "What You Should Know About the Worklist Service"
- Section 72.2, "Adding a Worklist Service Task Flow to a Page"
- Section 72.3, "Working with the Worklist Service Task Flow"
- Section 72.4, "Setting Worklist Service Task Flow Properties"

Audience

This chapter is intended for users interested in understanding and using the features of the Worklist service to track their tasks, notifications, and alerts.

The Spaces application administrator has the authority to expose or hide task flows from a particular service. Tasks discussed in this chapter are not available to you if the relevant service is hidden.

> **Note:** For information about seeded user roles, see "Managing Users and Roles for WebCenter Portal: Spaces" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

72.1 What You Should Know About the Worklist Service

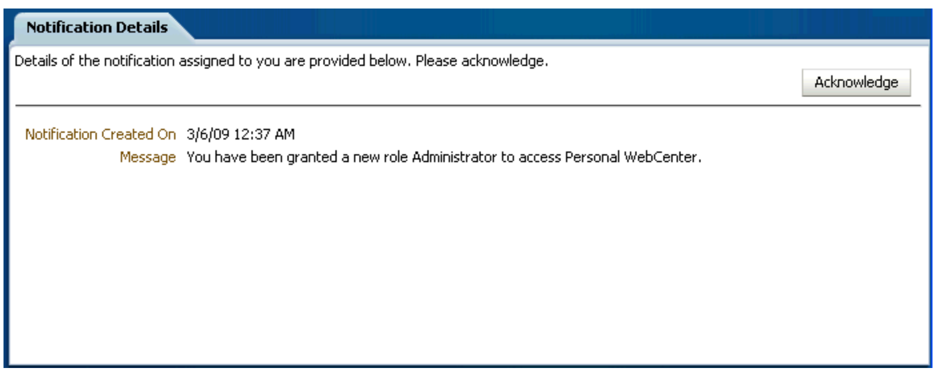
The Worklist service provides access to BPEL worklist items that are created when a BPEL workflow process is invoked or when messages are sent to the worklist channel on the Oracle User Messaging Service. The Worklist task flow (Figure 72–1) enables you to view and respond to all the worklist items that are allocated to you.

Figure 72–1 Worklist Task Flow

If BPEL workflows are enabled, you must add a Worklist task flow to a page to see your space membership notifications, invitations to join new spaces, and so on. If email if configured, you can get mail notifications and can act on that mail.

The Worklist task flow provides a fast and easy way to view and respond to messages, alerts, and notifications from the automated processes in place in your organization. You can click an item in the Worklist task flow to view details in a separate window (Figure 72–2).

Figure 72–2 Worklist Notification



For example, in Spaces, if you are selected as an approver for space membership, every time a user applies to become a member of the space a notification is sent to your Worklist. This is just one example of the types of notifications and requests that can be posted on your Worklist.

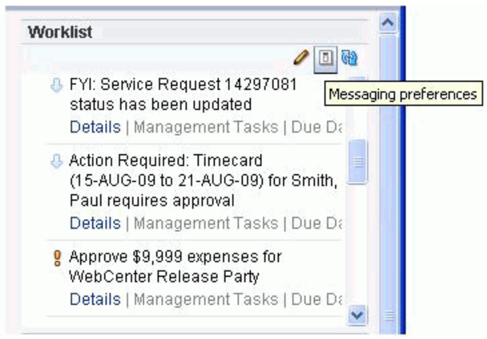
One Worklist item might be a request for space membership. Response to such a request would be to approve or reject it. Another Worklist item might be a notice of acceptance as a member of a space. Response to such a notification would be to acknowledge that you have received it. These are two small examples of a much wider range of possible messages, alerts, notifications, and responses.

The Worklist only shows items from the Oracle SOA Suite BPEL Servers. Some Worklist items are kicked off by events that are associated with an externally defined *workflow*. A workflow maps the route an item follows after an event kicks off. For example, a workflow might define the way a project assignment is routed, such as from administrator, to moderator, and then to participant. Additionally, it specifies what happens (if anything) when the assignee responds (such as with an **Acknowledge**). This type of workflow is enabled in a Workflow server that comes with Oracle SOA Suite. The definition of these workflows is an administrative or development task.

The Spaces application also has internally-defined workflows. An example of an internally-defined workflow includes the process of subscribing to a space. A user requests a subscription. The request appears on the space moderator's Worklist. If the space has multiple moderators, the first response to the Worklist item is to claim ownership of the request, so that only one moderator responds to the request itself.

Messages, alerts, and notifications might also come from the User Messaging Service. The Worklist task flow includes a control for accessing messaging preferences on this server (Figure 72–3). Clicking the Messaging preferences icon displays the User Messaging Preferences page in which you can specify the channels over which to receive User Messaging Service messages and define messaging filters.

Figure 72–3 Worklist Messaging Preferences Icon

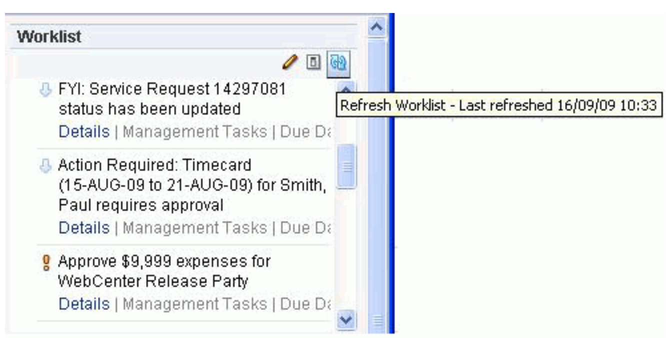


For information about setting messaging preferences for the User Messaging Service through the Spaces application, see Section 72.3.2, "Setting Messaging Preferences."

Every 15 minutes, the Worklist task flow refreshes automatically with new messages, alerts, and notifications. Optionally, you can update your view yourself by clicking the task flow's Refresh Worklist icon (Figure 72–4).

Note: The Worklist task flow does not get refreshed automatically when you perform an action on any task. You must refresh the task flow to list the latest items.

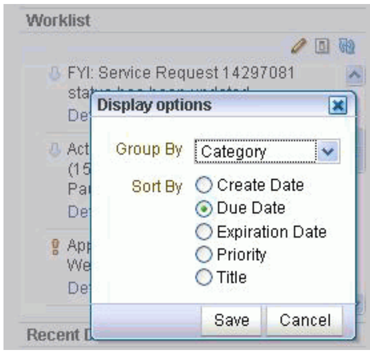
Figure 72–4 The Refresh Worklist Icon



Roll your mouse pointer over the Refresh Worklist icon to display the date and time the task flow was last refreshed.

To assist you in maintaining an organized view of your Worklist items, the Worklist task flow provides a variety of display options, accessible from the Worklist toolbar (Figure 72–5).

Figure 72–5 Worklist Display Options



Worklist display options enable you to approach responding to messages, alerts, and notifications according to timeliness and relevance.

For more information about Worklist display options, see Section 72.3.3, "Arranging Your Display of Worklist Items."

72.2 Adding a Worklist Service Task Flow to a Page

For the steps to add a Worklist service task flow to a page, see Section 18.5, "Adding a Component to a Page."

Note: You can add worklist task flows in personal pages only.

72.3 Working with the Worklist Service Task Flow

The Worklist task flow provides a fast and easy way to read and respond to items from the automated processes in place in your organization. All of the information on the Worklist is specifically relevant to you.

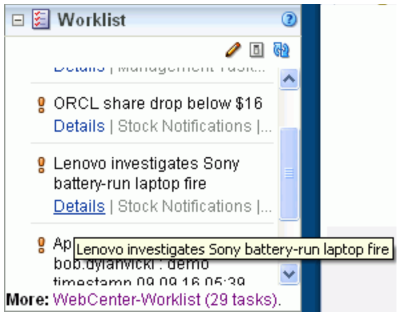
This section provides information about the Worklist task flow and describes how to use it. This section includes the following subsections:

- Section 72.3.1, "Viewing and Responding to Worklist Items"
- Section 72.3.2, "Setting Messaging Preferences"
- Section 72.3.3, "Arranging Your Display of Worklist Items"

72.3.1 Viewing and Responding to Worklist Items

To view a task, message, alert, or notification, simply click the **Details** link (Figure 72–6).

Figure 72–6 Selecting a Worklist Item for Viewing



Any Worklist item that is no longer of the `Assigned` state is removed from the Worklist during the next refresh.

72.3.2 Setting Messaging Preferences

The Worklist Messaging preferences icon provides access to controls for specifying your messaging preferences on the User Messaging Service. Use messaging preferences to specify the channels over which to receive User Messaging Service messages and to define messaging filters. User Messaging Service messages may include Worklist notifications in addition to other notifications and alerts from other consumers of the server.

Messaging channels are the channels over which messages, notifications, and alerts are received from the User Messaging Service. These include mail, voice over internet (VoIP), and the like. Messages, notifications, and alerts come from the services that are registered with the User Messaging Service.

Messaging filters define sorting conditions for messages and specify the channels through which to send messages that meet those conditions.

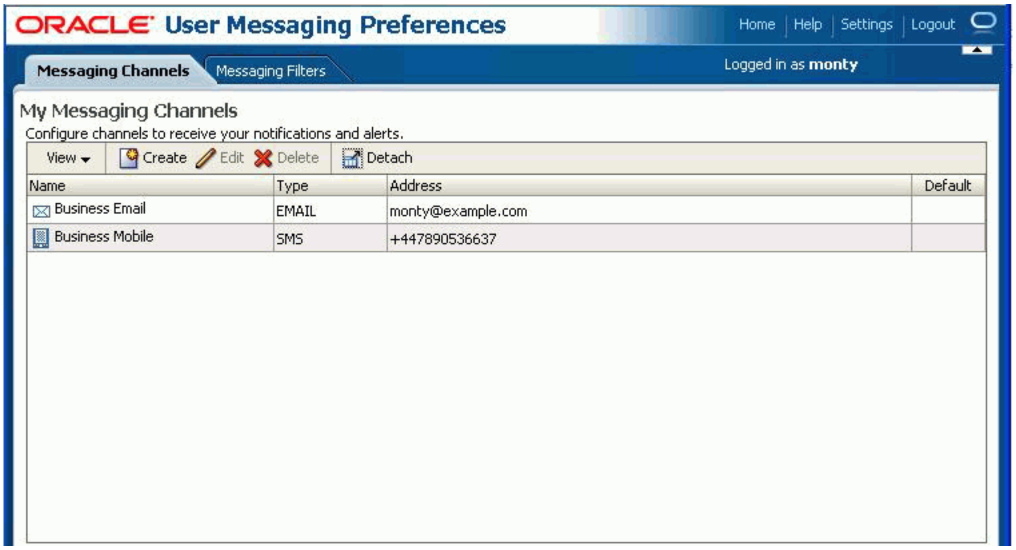
You can define messaging channels and filters using the User Messaging Preferences dialog. This section provides an overview of how to use this dialog to configure messaging channels and define messaging filters for messages generated from the User Messaging Service. For more information, see the User Messaging Service online help and the chapter "Oracle User Messaging Service Applications" in *Oracle Fusion Middleware Developer's Guide for Oracle SOA Suite*.

To access the User Messaging Preferences dialog from the Worklist task flow:

1. Log in to your application.
2. Click the **Messaging preferences** icon in the **Worklist** toolbar and specify credentials to log in to the BPEL server.

Note: In Spaces, you can access the Worklist service by expanding the **Worklist** pane.

Figure 72–7 User Messaging Preferences



A web page opens with two tabs (Figure 72–7):

- **Messaging Channels**—Configure channels (such as mail, voice, and so on) to receive your User Messaging Service notifications and alerts.
- **Messaging Filters**—Define rules for filtering your User Messaging Service notifications and alerts.

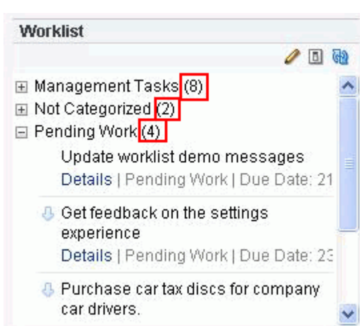
3. Configure channels and filters by referring to the User Messaging Service online help.

72.3.3 Arranging Your Display of Worklist Items

This section describes how to use Worklist sorting and grouping options to arrange your display of the Worklist. Sorting affects the display order of Worklist items. Grouping divides items into groups that share a common attribute, such as a common category, a shared priority level, or some other common attribute.

You may notice a number next to each group (Figure 72–8). These indicate the number of items contained in a particular group. To expand a group and see the items it contains, click the Expand icon to the left of the group title.

Figure 72–8 Numbers Next to Worklist Groups



To arrange your display of Worklist items:

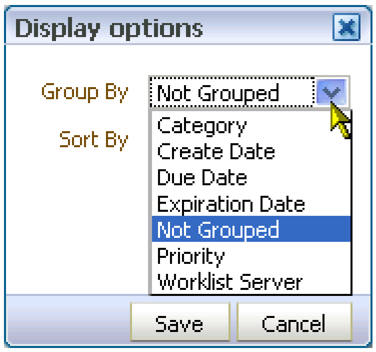
1. Log in to your application.

2. Click the Display Options icon at the top of the Worklist on your application page.

> **Note:** In Spaces, you can access the Worklist by expanding the **Worklist** pane.

3. In the Display Options dialog box, expand the **Group By** list (Figure 72–9), and select an option for grouping your Worklist items.

Figure 72–9 The Worklist Group By List



Choose from:

- **Category**—Group Worklist items into their assigned categories. Items that do not belong to a category are grouped under the heading **Not Categorized**. Whether a Worklist item includes a category is determined by the workflow developer; consequently, not all items might include categories.
- **Create Date**—Group Worklist items according to the date they were created, starting with the most recent.
- **Due Date**—Group Worklist items according to when they are due. Due dates are optional; therefore, some items may not have them. In such cases, the date the item was created is used.
- **Expiration Date**—Group Worklist items according to when they are due to expire. Expiration dates are optional; therefore, some items may not have them. In such cases, the date the item was created is used.
- **Not Grouped**—Do not group Worklist items. When you group Worklist items by **Not Grouped**, the Worklist displays items in a flat list. All other grouping options display the items in a tree format.
- **Priority**—Group Worklist items according to priority, either high, normal, or low. Table 72–1 illustrates the priority indicators that are used in the Worklist.

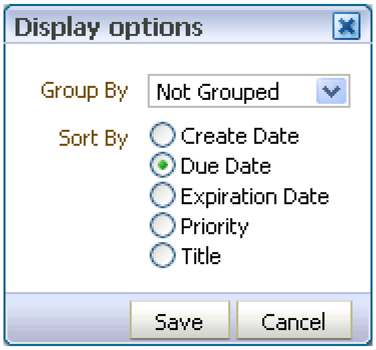
Table 72–1 Worklist Priority Indicators

High	Normal	Low
	No indicator	

- **Worklist Server**—Group Worklist items according to the server from which they originated.

4. Select a **Sort By** option (Figure 72–10).

Figure 72–10 Sort By Options in the Worklist Display Options Dialog Box



Choose from:

- **Create Date**—Sort Worklist items according to the date they were created, starting with the most recent.
- **Due Date**—Sort Worklist items according to when they are due. Due dates are optional; therefore, some items may not have them. In such cases, the date the item was created is used.
- **Expiration Date**—Sort Worklist items from the most recent expiration to the furthest away. Expiration dates are optional; therefore, some items may not have them. In such cases, the date the item was created is used.
- **Priority**—Sort Worklist items from highest to lowest priority (see Table 72–1 for illustrations of priority indicators).
- **Title**—Sort Worklist items first from 0 to 9 then from a to z.

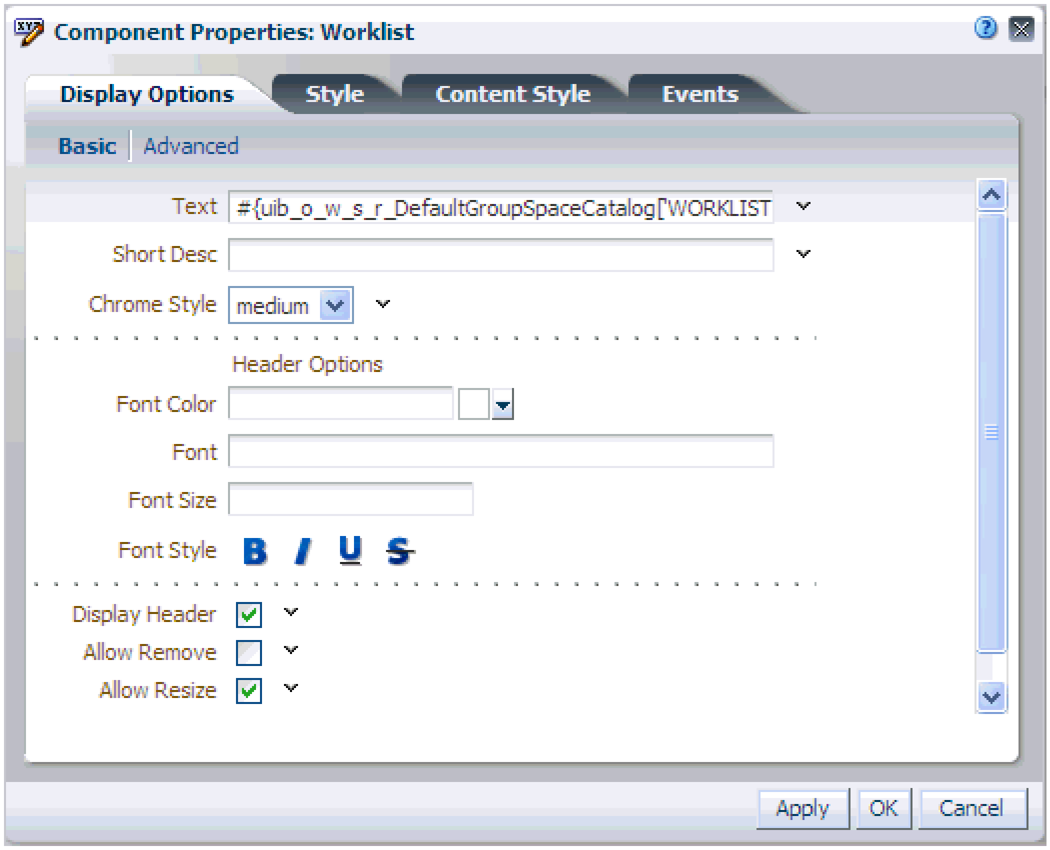
5. Click **Save** to save your changes and close the Display Options dialog box.

The Worklist displays newest created 25 items per Worklist server connection. For items exceeding the 25-item limit, follow the link to the BPEL Worklist Application, where you can view and act on a larger volume of Worklist items.

72.4 Setting Worklist Service Task Flow Properties

The Worklist service task flows have associated properties, which users with sufficient privileges can access through the Component Properties dialog in Oracle WebCenter Portal's Composer (Figure 72–11). Many properties are common to all task flows, and the method for accessing task flow properties is the same from task flow to task flow. Common task flow properties and how to access them are discussed in Section 18.6, "Modifying Page Components."

Figure 72–11 Worklist Task Flow Component Properties



Changes to the properties on the **Display Options**, **Style**, and **Content Style** tabs affect the appearance and behavior of the task flow. These properties are common to all task flows. For more information, see Section 18.6, "Modifying Page Components."

The **Child Components** tab displays all of the components contained within the current component. It provides controls for rearranging, showing, and hiding child components. Not all components contain children. So you may find this tab devoid of content. For more information, see Section 18.6.6, "Working with Style and Content Style Properties."

The contents of the **Events** tab depend on the events supported by the task flow. For more information, see Section 18.6.7, "Working with Component Contextual Events."

All properties on the **Parameters** and **Display Options** tabs provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the **Edit** icon next to a property field to open the editor. For more information about using the editor and for descriptions of common EL expressions, see Appendix B, "Expression Language (EL) Expressions."

Note: Wherever you enter EL on the generic Display Options tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

Part XVII

Appendices

Part XVII of the User's Guide catalogs short, user-friendly URLs to locations within the WebCenter Portal: Spaces UI, such as Administration pages and pages in spaces and Home spaces (pretty URLs). It also catalogs Expression Language expressions for use in a WebCenter Portal: Spaces context and provides examples of mashups you can use in a business context.

Part XVII includes the following appendices:

A

Spaces User Interface URLs

In view of the many options available for defining navigation in your portal, a consistent and reliable method for accessing pages and application user interface pages (UI) is essential. This requirement is easily met through Spaces application user interface URLs—or *pretty URLs*.

This appendix provides the syntax for the pretty URLs in WebCenter Portal: Spaces. Instead of clicking navigation links, or if navigation links do not exist to certain pages, you can enter a pretty URL in your browser to directly access user profiles, pages, and administration screens.

Pretty URLs are shorter than standard URLs, which shields users from complex application page URLs.

This appendix includes the following sections:

A.1 User Interface URLs for Application Administration Pages

Table A–1 lists and describes the URL syntax to use to access Spaces application Administration pages. These pages are accessible only to Spaces application administrators and are used for application configuration.

Table A–1 User Interface URLs to WebCenter Portal: Spaces Administration Pages

Target	Pretty URL Syntax
Application Administration page	`http://`*`host:port`*`/webcenter/spaces/admin`
General subpage of the Configuration page	`http://`*`host:port`*`/webcenter/spaces/admin/general`
Spaces subpage of the Spaces page	`http://`*`host:port`*`/webcenter/spaces/admin/spaces`
Space Templates subpage of the Spaces page	`http://`*`host:port`*`/webcenter/spaces/admin/templates`
Roles subpage of the Security page	`http://`*`host:port`*`/webcenter/spaces/admin/roles`

Table A–1 (Cont.) User Interface URLs to WebCenter Portal: Spaces Administration Pages

Target	Pretty URL Syntax
Users and Groups subpage of the Security page	`http://`*`host:port`*`/webcenter/spaces/admin/users`
Resources page	`http://`*`host:port`*`/webcenter/spaces/admin/resources`
Services subpage of the Configuration page	`http://`*`host:port`*`/webcenter/spaces/admin/services`
Business Role Pages subpage of the Pages page	`http://`*`host:port`*`/webcenter/spaces/admin/brpages`
Personal Pages subpage of the Pages page	`http://`*`host:port`*`/webcenter/spaces/admin/personalpages`
System Pages subpage of the Pages page	`http://`*`host:port`*`/webcenter/spaces/admin/systempages`

A.2 User Interface URLs for Business Role Pages and System Pages

Use the same syntax for URLs that target business role pages and system pages:

`/webcenter/spaces/system/page/`*`pageName`*

For example:

`/webcenter/spaces/system/page/Documents`

See Also: For information about business role pages and system pages, see Chapter 7, "Administering Portal Pages."

A.3 User Interface URLs for User Profiles

Use Profile pretty URLs to navigate to your own or another user's Profile page. Note that when you omit the user name or when the user name is the current user's name, the URL launches the My Profile page; but if the user name is provided and is not the current user's name, the URL launches the User Profile page.

See Also: For information about the My Profile and User Profile pages, see Table 7–2, " Seeded System Pages".

Table A–2 lists and describes the syntax for the URLs you can formulate for easy access to your own or another user's Profile.

Table A–2 User Interface URLs to a User Profile

Target	Pretty URL Syntax
My Profile or User Profile page in the context of the Home space	`http://`*`host:port`*`/webcenter/spaces/profile/`*`userName`*
My Profile or User Profile page within the context of the specified space	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/profile/`*`userName`* `http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/profile`

A.4 User Interface URLs for Home Space Pages

Table A–3 lists and describes the syntax for the URLs you can formulate for easy access to pages in the Home space.

Table A–3 User Interface URLs to Pages in the Home Space

Target	Pretty URL Syntax

Home page of the Home space	`http://`*`host:port`*`/webcenter`
	`http://`*`host:port`*`/webcenter/spaces`
	`http://`*`host:port`*`/webcenter/spaces/home`

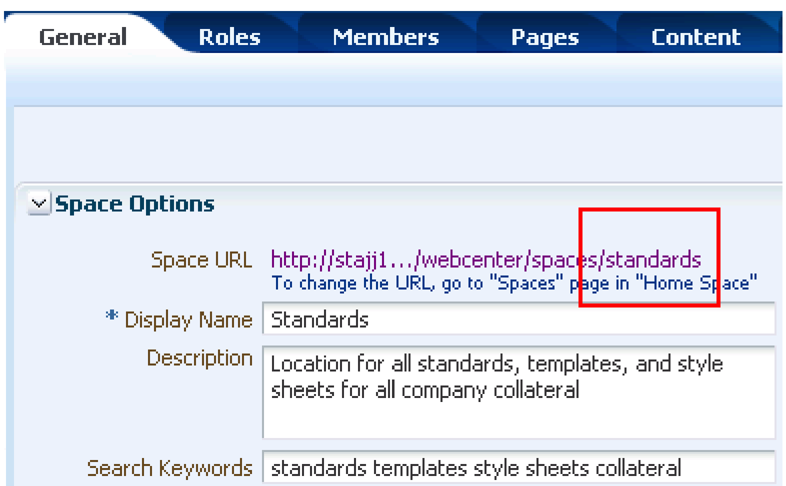
Personal page in the Home space	`http://`*`host:port`*`/webcenter/spaces/profile/`*`userName`*`/page/`*`escapedPageDisplayName`* The variable *`userName`* is your user name or the name of the user who owns the page in the Home space. The variable *`escapedPageDisplayName`* indicates the use of an escaped version of the page display name. For example, when you create a page with the name *My Page*, the URL to this page ends with `My+Page`. **Note:** There is a distinction between personal pages, which users create, and business role and system pages, which can be either seeded or created by an application administrator. For the URL formats for business role and system pages, see Section A.2, "User Interface URLs for Business Role Pages and System Pages."

A.5 User Interface URLs for Space Pages

Table A–4 lists and describes the syntax for the URLs you can use to access space pages and space administration pages. Only users assigned a role that includes the permission `Administration: Manage All` can access space administration pages.

In Table A–4, wherever the variable *`spaceName`* is indicated, use the space name that is specified for **Space URL** on the **General** page in a space's administration settings (Figure A–1).

Figure A–1 Space Internal Name on Space Settings General Page



You can also find the appropriate space name next to the **Name** label in the About Space dialog. For more information, see Section 51.6, "Viewing Information About a Space."

Table A–4 User Interface URLs to Pages in a Space

Target	Pretty URL Syntax
Specified space, where the last-accessed page is displayed	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*
First page of a space	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/home`
Specific page in a space	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/page/`*`escapedPageDisplayName`* The variable `escapedPageDisplayName` indicates the use of an escaped version of the page display name. For example, when you create a page with the name *My Page*, the URL to this page ends with `My+Page`.
General page in space administration	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin`
General page in space administration	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/general`
Roles page in space administration	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/roles` **Note:** When a subspace inherits its members and roles from the parent space, you cannot use a pretty URL to navigate to the subspace **Roles** page because it does not exist.
Members page in space administration	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/members` **Note:** When a subspace inherits its members and roles from the parent space, you cannot use a pretty URL to navigate to the subspace **Members** page because it does not exist.
Available Pages tab on Pages page in space administration	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/spacepages`
System Pages tab on Pages page in space administration	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/systempages`
Services page in space administration	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/services`
Subspaces page in space administration	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/subspaces`
Custom Attributes page in space administration	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/attributes`
Resources page in space administration	`http://`*`host:port`*`/webcenter/spaces/`*`spaceName`*`/admin/resources`

B

Expression Language (EL) Expressions

When configuring page components, you can express values as variables that take advantage of the current application context by grabbing information that happens to be true at the moment. For example, you can use variables to obtain the name of the current user, the user's assigned role, the state of the current page, and the like.

Such flexibility is made possible through the Expression Builder, a simple Expression Language (EL) editor that you can use to build EL expressions.

This appendix provides information about the Expression Builder and useful EL expressions. It includes the following subsections:

- Section B.1, "Introducing the Expression Builder"
- Section B.2, "Expression Language Example Use Case"
- Section B.3, "Desupport of Freeform JPQL WHERE and SORT Clauses"
- Section B.4, "Expression Language Expressions"

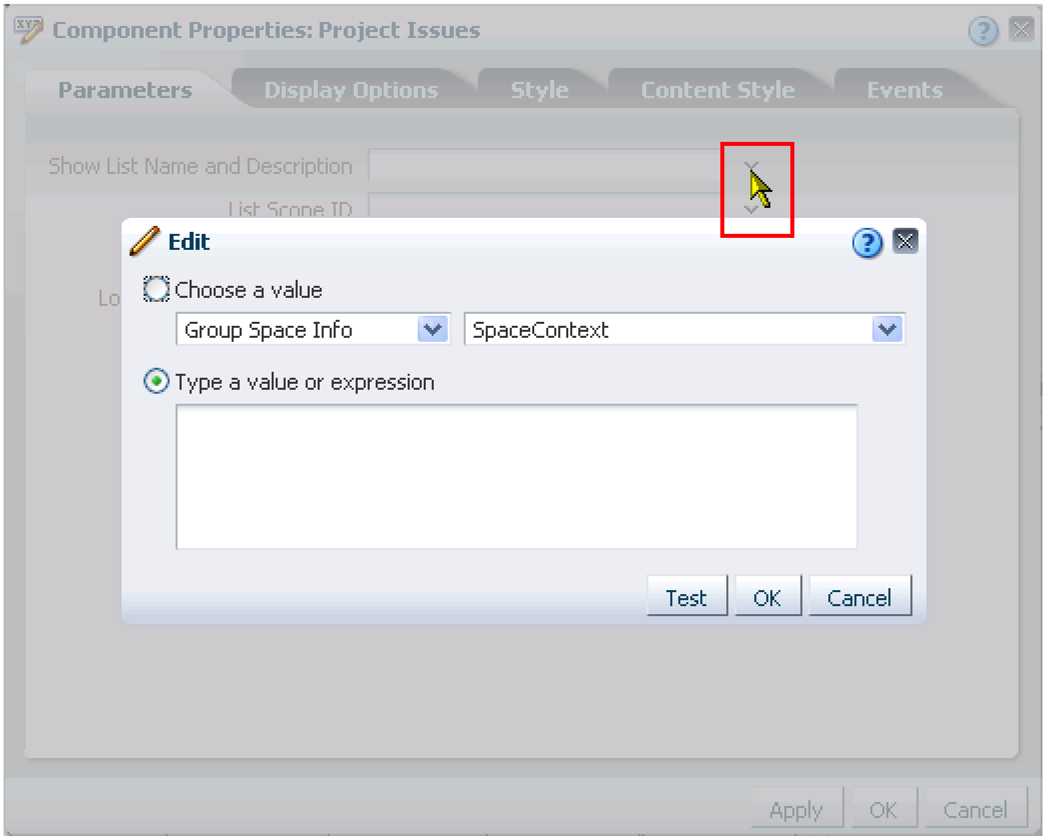
> **See Also:** For additional information about EL APIs, see *Oracle Fusion Middleware Java API Reference for Oracle WebCenter*.

B.1 Introducing the Expression Builder

All properties on the **Parameters** and **Display Options** tabs provide an **Expression Builder** icon that opens a simple Expression Language (EL) editor, called the Expression Builder. Use the Expression Builder when you want to formulate a dynamic computation for an otherwise unknown property value, for example, to specify the current user, the current page mode, and the like.

Click the **Expression Builder** icon next to a property to open the editor. (Figure B–1).

Figure B–1 Expression Builder Icon Next to a Parameter Value Field and the Resulting Editor



See Also: For information about accessing component properties, see Section 18.6, "Modifying Page Components."

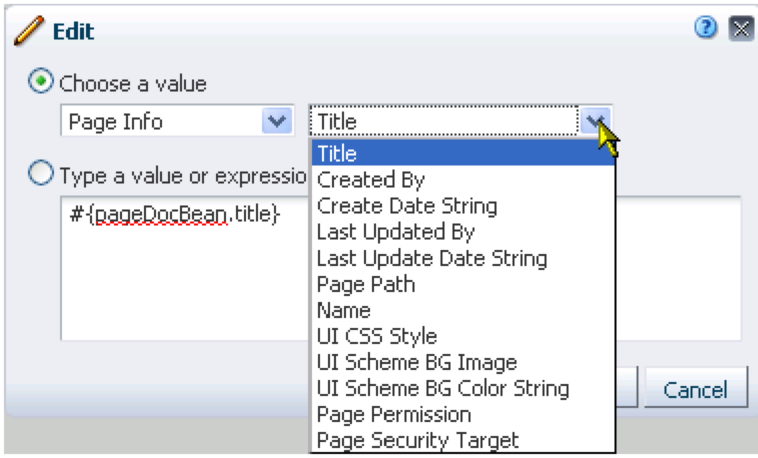
The Expression Builder is particularly useful when you want a value that is retrievable but otherwise unknown, for example, when you want a value to be the name of the current user or the current application skin.

The Expression Builder provides two options for entering expressions:

- **Choose a value**, for selecting a seeded EL expression
- **Type a value or expression**, for entering an expression manually

The options under **Choose a value** are categorized according to the type of information an expression returns. Select a category from the first menu, and then select the type of value you want returned from the second menu (Figure B–2).

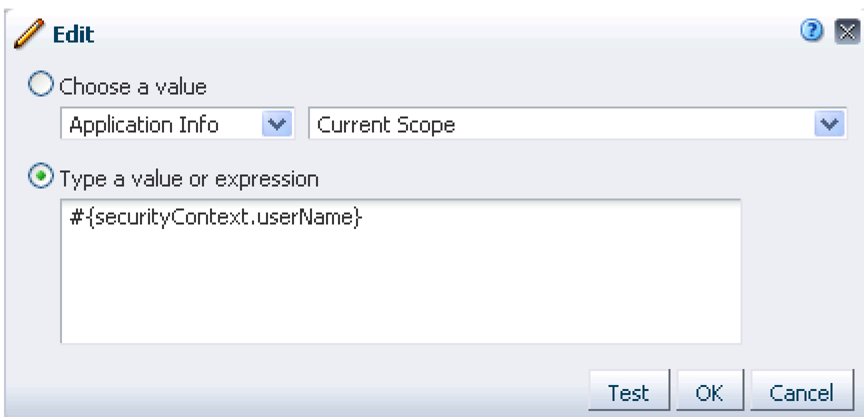
Figure B–2 Options Under Choose a value in the Expression Builder



> **See Also:** For information about seeded EL expressions, see Section B.4.1, "Seeded Expressions in the Expression Builder."

The option **Type a value or expression** is followed by a text box, which you can use to manually enter the expression you intend (Figure B–3).

Figure B–3 Text Box Under Type a value or expression in the Expression Builder



Many expressions in the tables in this appendix are building blocks for narrowing down the object or objects you want returned. That is, they are not necessarily meant to be used by themselves, but rather in an assembly of ELs to form the desired query.

For example, the following expression uses three resource-related ELs to form a single query that returns a particular space template. It retrieves the template `storesMasterTemplate` from the parent space `stores`:

```
#{srmContext.resourceScope['stores'].resourceType['siteTemplate'].displayName['sto
resMasterTemplate'].singleResult}
```

In the Expression Builder, select predefined values, under **Choose a value**, or enter a value or an Expression Language expression, under **Type a value or expression**.

Use the following formats to enter values:

- a literal number: `#{123}`

- a literal string: `#{'string'}`
- a literal Boolean: `#{true}`
- a Java Bean called to return a value: `#{generalSettings.preferredTimeStyle}`

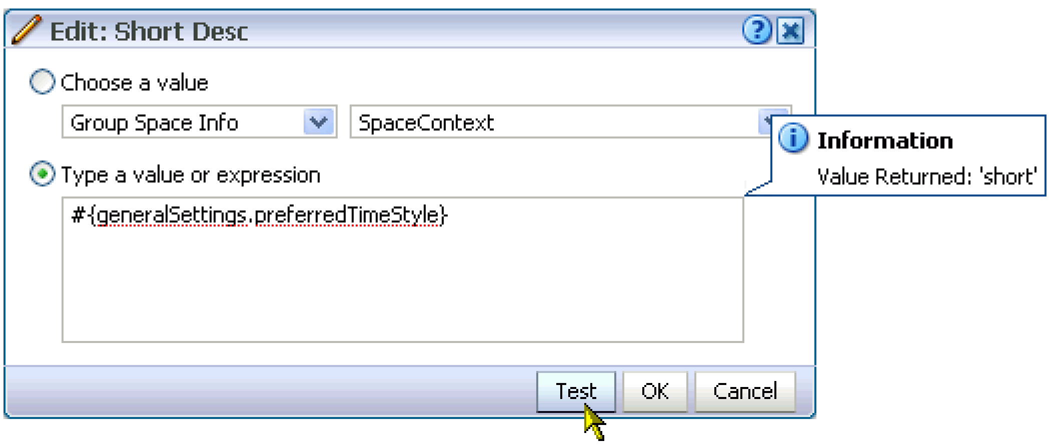
The editor provides a **Test** button for validating your EL entry. The **Test** button is available for expressions entered in the text box under **Type a value or expression**.

Validation checks the EL syntax and evaluates the expression. Because expression values vary according to the context in which they are executed, the resulting value that appears in the editor may differ from the value returned during actual use.

Note, however, that only EL is validated when you click **Test**; other types of values are not validated.

Test results are shown in a popup (Figure B–4).

Figure B–4 Test Result in EL Editor



Note: Wherever you enter EL on the generic **Display Options** tab in the Component Properties dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. Generic Display Options are those cataloged in Table 18–1.

EL validation is not performed on non-generic display options.

B.2 Expression Language Example Use Case

This section provides an example of using EL expressions to display something based on a user's role, permissions, and the like.

In this example, we will use Expression Language to reveal or hide an item in the navigation model based on the user's role. Because there is Expression Language for almost every piece of metadata maintained by Spaces, using ELs to personalize the user's experience is an extremely powerful tool.

You can use the following EL to determine a user's role:

```
#{WCSecurityContext.userInScopedRole['Role 1'] or
WCSecurityContext.userInScopedRole['Role 2']}
```

This EL compares the current user's credentials (in this case, the *role*), against what is specified in the EL. If the result is `true`, that is, if the user is assigned one of the specified roles then the navigation item is visible to the user. If the result is `false`, the navigation item is hidden from the user.

The roles referred to in the EL can be a system role, such as `Administrator`, `Moderator`, `Participant`, or a custom role.

Notice that this EL joins two conditions with the use of an `OR` clause; that is, the user must have either Role 1 OR Role 2 to be able to see the navigational item.

These steps demonstrate how to add a navigational item (a page query for another space) that is visible only to user assigned the role `Moderator`.

> **Note:** This exercise assumes you have applied a custom navigation model to your space. You cannot edit a seeded navigation model.

To personalize navigation:

1. Go to space Settings, and access the **Navigations** panel under **Resources**.

   You can use the following URL to navigate to the **Resources** subpage, from there, click **Navigations**:

   `http://host:port/webcenter/spaces/`*`spaceName`*`/admin/resources`

2. Select the navigation model that the space is using.

   > **Tip:** To find out which navigation model the current space is using, go to the **General** subpage under space Settings, and look for the value in the **Navigation** field.

3. From the **Edit** menu, select **Edit**.
4. In the Edit - *navigation model* dialog, expand the **Add** menu, and select **Pages Query**.
5. Bring the **Target** tab forward:
   - In the **Name** field, enter a name for your query, for example, `moderatorQuery`.
   - Next to **Find Page in**, select **Space**, and ensure that the current space name appears in the field.
   - Click the icon to the right of the **Visible** check box, and select **Expression Builder**.
6. Select **Choose a value**, and then select **Space Info** from the first dropdown and **CurrentSpace Role - Moderator** from the second.

   The expression `#{WCSecurityContext.userInScopedRole['Moderator']}` appears in the text field.

   > **Tip:** If you are working with a custom role, select **CurrentSpace Role - Custom**. In the text area, highlight `CustomRole`, then type in the name of your custom role.

7. Click **OK** until you return to the **Resources** tab.

To test this, add a member to the space, and assign this user any role other than `Moderator`. Log off and log back in as that user. You should not see the Pages Query navigational item.

B.3 Desupport of Freeform JPQL WHERE and SORT Clauses

If you have introduced an EL expression for querying spaces based on a JPQL `WHERE` clause, you should know that the freeform JPQL `WHERE` clause is desupported. Instead, use a structured `WHERE` clause. Freeform `SORT` clauses are also desupported. Instead, specify sort criteria on a space query in a structured way.

For example, imagine that you have used the following syntax to form a `WHERE` clause on a space query:

```
#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE'].
whereClause['sp.keywords like \'forquery%\' and not
(sp.discoverable is null or sp.discoverable =  \'N\')'].listSpaces}
```

Going forward, you must use the following syntax to form a `WHERE` clause:

```
#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE'].
where[wCond['sp.keywords']['like']['forquery']['and'][wCond['sp.discoverable']
['is']['null']['or'][wCond['sp.discoverable']['=']['N']]['not']]].listSpaces}
```

Where:

- `wCond` is an atomic condition that can be expressed as `wCond[`*`p`*`][`*`op`*`][`*`v`*`]`.

  Where:

  – *p* is a space attribute (a field in `WcSpaceHeader`, see the following bullet list).

  – *op* is one among a restricted set of JPQL comparison operators ('=', '`like`', '`!=`', '<', '>', '<=', '>=', '`is`').

  – *v* is a string whose interpretation depends on the operator *op*.

    If the operator is `is`, *v* can be the string `'null'` or `'not null'`, and the condition is understood as the attribute being checked for null or not null respectively in JPQL. If the operator is anything else, *v* is interpreted as a literal, and the condition is understood to be the attribute being compared with the literal value.

  You can use any field defined in `WcSpaceHeader` in the `WHERE` clause, including:

  – `closed`

  – `createDate`

  – `createdBy`

  – `description`

  – `discoverable`

  – `displayName`

  – `keywords`

  – `icon`

  – `logo`

  – `lastUpdateDate`

  – `selfSubEnabled`

- `rssEnabled`
- `spaceGuid`
- `spaceId`
- `spaceOffline`
- `spacePublic`
- `spacesType`
- `spacesUser`
- `updatedBy`
- `version`
- `parentGuid`
- `securityParentGuid`
- `ancestorPath`
- `seeded`
- `groupSpaceMemCount`

- `sp` represents the JPA entity for a space, `WcSpaceHeader`.

  For example, you can use the following condition to create a filter for all spaces created by users having user names starting with `monty` on which self subscription is enabled:

```
sp.createdBy like 'monty%' and not (sp.selfSubEnabled is null or
sp.selfSubEnabled = 'N')
```

- `and`, `or`, `not` (along with `wCond`) are types of conditions.

  Where:

  - `and` represents a conjunction of two conditions. You can express a conjunction condition as *`cond1`*`['and'][`*`cond2`*`]` where *`cond1`* and *`cond2`* are the expressions for the two conditions being conjoined.
  - `or` represents a disjunction condition. You can express a disjunction condition as *`cond1`*`['or'][`*`cond2`*`]` where *`cond1`* and *`cond2`* are the expressions for the two conditions being disjoined.
  - `not` represents a negation condition. You can express a negation condition as *`cond`*`['not']` where *`cond`* is the expression for the condition being conjoined.

For example, the following EL returns a list of all spaces (to which the current user has access) that are created by users having names starting with `monty` and on which self subscription is enabled:

```
#{spaceContext.spacesQuery.unionOf.ALL_QUERIABLE.where[wCond['sp.createdBy']
['like']['monty%'] ['and'] [wCond['sp.selfSubEnabled']['is']['null'] ['or']
[wCond['sp.selfSubEnabled']['=']['N']] ['not'] ] ].listSpaces}
```

Now imagine that you have used the following syntax to specify `SORT` criteria on a space query:

```
#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE'].sortCriteria
['sp.discoverabledesc, sp.keywords'].listSpaces}
```

Going forward, you must use the following syntax to specify SORT criteria on a space query:

```
#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE'].sort['sp.discoverable']
['desc'].sort['sp.keywords']['asc'].listSpaces}
```

Where:

- sp represents the JPA entity for a space, WcSpaceHeader (see previous bullet list for fields defined in WcSpaceHeader).
- desc and asc define sort order, descending and ascending, respectively.

For example, the following query returns a list of spaces to which the user has access and sorts the result set on the fields discoverable and lastUpdateDate.

```
#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE'].sort['sp.discoverable']
['asc'].sort['sp.lastUpdateDate']['desc'].listSpaces}
```

Oracle *strongly* recommends that you convert all existing freeform JPQL WHERE and SORT clauses to the new syntax.

If for any reason you must retain the existing syntax, your Spaces administrator must explicitly enable support for freeform JPQL in the webcenter-config.xml.xml file by setting the following global flag:

```
oracle.webcenter.spaces.query.DIRECT_JPQL_CLAUSE_SUPPORTED
```

Note: The webcenter-config.xml.xml file is the customization document for webcenter-config.xml.

Set this flag to true for continued support of legacy freeform WHERE and SORT clauses. When this option is set to true, Spaces log files will contain warnings.

To set this flag in webcenter-config.xml.xml:

1. Export the latest webcenter-config.xml.xml from MDS.

   For example:

   ```
   exportMetadata(application='webcenter', server='WC_Spaces',
   toLocation='/tmp/mydata',docs='/oracle/webcenter/webcenterapp/metadata/mdssys/c
   ust/site/webcenter/webcenter-config.xml.xml')
   ```

2. Open the file in a text editor and modify settings, as required.

   For example:

   ```
   <mds:insert parent="webcenter(xmlns(webcenter=http://
        xmlns.oracle.com/webcenter/webcenterapp))/webcenter:custom-attributes"
        position="last">
             <attribute name=
                  "oracle.webcenter.spaces.query.DIRECT_JPQL_CLAUSE_SUPPORTED"
                  xmlns="http://xmlns.oracle.com/webcenter/webcenterapp">
                       <description/>
                       <type>java.lang.String</type>
                       <value>true</value>
                       <visible/>
             </attribute>
   </mds:insert>
   ```

3. Save and close webcenter-config.xml.xml.

4. Import the updated `webcenter-config.xml.xml` file to Spaces.

   For example:

```
importMetadata(application='webcenter', server='WC_Spaces',
fromLocation='/tmp/mydata',
docs='/oracle/webcenter/webcenterapp/metadata/mdssys/cust/site/webcenter/webcen
ter-config.xml.xml')
```

B.4 Expression Language Expressions

This section provides a series of tables that list and describe useful EL expressions. Tables are grouped according to the context in which the expressions they contain apply.

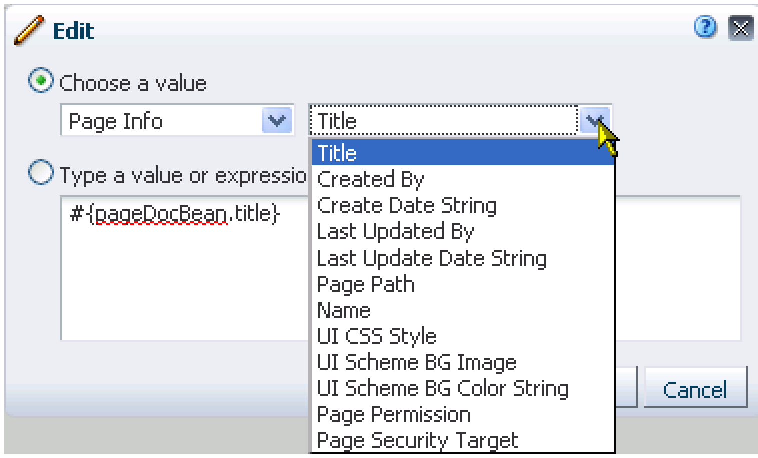
This section includes the following subsections:

- Section B.4.1, "Seeded Expressions in the Expression Builder"
- Section B.4.2, "EL Expressions Relevant to the Spaces Application"
- Section B.4.3, "EL Expressions Relevant to Application Security"
- Section B.4.4, "EL Expressions Relevant to Application Navigation"
- Section B.4.5, "EL Expressions Relevant to Resources"
- Section B.4.6, "EL Expressions Relevant to Specific Spaces"
- Section B.4.7, "EL Expressions Relevant to Specific Pages"
- Section B.4.8, "EL Expressions Relevant to Composer"
- Section B.4.9, "EL Expressions Relevant to Event Contexts"
- Section B.4.10, "EL Expressions Relevant to Services"
- Section B.4.11, "EL Expressions Relevant to the Personalization Conductor"
- Section B.4.12, "EL Expressions Relevant to the Documents Service"
- Section B.4.13, "EL Expressions Relevant to the People Connections Service"
- Section B.4.14, "EL Expressions Relevant to User Preferences"
- Section B.4.15, "Utilitarian EL Expressions"

B.4.1 Seeded Expressions in the Expression Builder

In the Expression Builder editor, when you select the option **Choose a value** you can populate the text box in the dialog with a seeded EL expression. First, select an expression category, and then select the type of information you want the expression to return. Your selection's associated EL appears in the text box at the bottom of the dialog (Figure B–5).

Figure B–5 Options Under Choose a value in the Expression Builder



This section is broken into subsections for each category. Each subsection lists and describes the ELs associated with that category.

This section includes the following subsections:

- Section B.4.1.1, "Application Info Seeded ELs"
- Section B.4.1.2, "Page Info Seeded ELs"
- Section B.4.1.3, "Page Parameter Seeded ELs"
- Section B.4.1.4, "Resource Info Seeded ELs"
- Section B.4.1.5, "Space Info Seeded ELs"
- Section B.4.1.6, "Space Page Info Seeded Paths"
- Section B.4.1.7, "System Seeded ELs"
- Section B.4.1.8, "User Info Seeded ELs"
- Section B.4.1.9, "WebCenter Events Seeded ELs"

B.4.1.1 Application Info Seeded ELs

Application Info seeded EL expressions return values related to the Spaces application. For example, the expression `#{WCAppContext.application.applicationConfig.title}`, returns the application title that is specified on the Configuration page in the Spaces Administration pages.

> **See Also:** For additional EL expressions related to the application, see Section B.4.2, "EL Expressions Relevant to the Spaces Application."

Table B–1 lists the seeded EL expressions available under the category Application Info and provides an example of the types of values each returns.

Table B–1 Seeded EL Expressions Under Application Info

Option	Expression	Example of Returned Value
Current Scope	`#{serviceCtx.scope}`	`Scope[name=standards, guid=sa78185d3_9d65_49ab_ac1d_4809380d0b30]`
Current Page Template Scope	`#{WCAppContext.currentScope}`	`Scope[name=standards, guid=sa78185d3_9d65_49ab_ac1d_4809380d0b30]`
Previously Set Page Template	`#{WCAppContext.previouslySetPageTemplate}`	`Fusion Side Navigation`
Application	`#{WCAppContext.application}`	`oracle.webcenter.webcenterapp.internal.view.shell.WCApplication`
Application URL	`#{WCAppContext.applicationURL}`	http://*host*:*port*/webcenter
Current WebCenter Portal URL	`#{WCAppContext.currentWebCenterURI}`	/oracle/webcenter/page/scopedMD/*GUID*/businessRolePages/Page3.jspx?wc.contextURL=%2Fspaces
Application Config	`#{WCAppContext.application.applicationConfig}`	`oracle.webcenter.webcenterapp.beans.WebCenterMetadataImpl@123db9d`
Application Config Title	`#{WCAppContext.application.applicationConfig.title}`	`WebCenter`
Application Config Logo	`#{WCAppContext.application.applicationConfig.logo}`	`/oracle/webcenter/webcenterapp/metadata/images/logo.gif`
Application Config HelpPage	`#{WCAppContext.application.applicationConfig.helpPage}`	`/webcenterhelp/spaces?topic=welcome_main`
Application Config CopyrightMessage CustomValue	`#{WCAppContext.application.applicationConfig.copyrightMessage.customValue}`	`http://www.example.com/html/copyright.html`
Application Config Privacy Policy URL	`#{WCAppContext.application.applicationConfig.privacyPolicyUrl}`	`http://www.example.com/html/privacy.html`
Application Config Skin	`#{WCAppContext.application.applicationConfig.skin}`	`webcenterfx`

For example, consider that you want a link to appear in all pages of a space that lets you copy and share the current page's URL. You can add an HTML Markup item to a page template, and add the EL that returns page URL.

These steps demonstrate how to use ELs to retrieve page URLs:

1. Open a custom page template in Edit mode.
2. Click **Add Content**.
3. In Resource Catalog, click **Web Development**.
4. Click **Add** next to **HTML Markup**, then click **Close**.
5. Click the Edit icon for the newly added HTML Markup.
6. In the Component Properties dialog, on the **Display Options** tab, in the **Value** field, enter the following EL:

```
<a href="javascript:{
```

```
    var returnvalue = prompt( '#{pageDocBean.title}
URL','#{WCAppContext.applicationURL}/faces#{WCAppContext.currentWebCenterURI}')
;
}">Share Link</a>
```

7. Click **OK**.
8. Apply the page template to your space.

B.4.1.2 Page Info Seeded ELs

Page Info seeded EL expressions return values related to Spaces pages. For example, the expression `#{pageDocBean.createdBy}`, returns the user name of the person who created the current page.

Table B–2 lists the seeded EL expressions available under the category Page Info and provides an example of the types of values each returns.

Table B–2 Seeded EL Expressions Under Page Info

Option	Expression	Example of Returned Value
Title	`#{pageDocBean.title}`	`Welcome Page (BRP)`
Created By	`#{pageDocBean.createdBy}`	j.doe
Create Date String	`#{pageDocBean.createDateString}`	`2010-11-17T13:27:52`
Last Updated By	`#{pageDocBean.lastUpdatedBy}`	`j.smith`
Last Update Date String	`#{pageDocBean.lastUpdateDateString}`	`2010-11-17T13:27:52`
Page Path	`#{pageDocBean.pagePath}`	`/oracle/webcenter/page/scopedMD/`*`GUID`*`/businessRolePages/Page3.jspx`
Name	`#{pageDocBean.name}`	`Page3.jspx`
UI CSS Style	`#{pageDocBean.UICSSStyle}`	`WCSchemeCustom`
UI Scheme BG Image	`#{pageDocBean.UISchemeBGImage}`	`#{facesContext.externalContext.requestContextPath}/adf/oracle/webcenter/page/images/clouds.png`
UI Scheme BG Color String	`#{pageDocBean.UISchemeBGColorString}`	null
Page Permission	`#{pageDocBean.pagePermission}`	`oracle.webcenter.page.model.security.CustomPagePermission`
Page Security Target	`#{pageDocBean.pageSecurityTarget}`	`oracle_webcenter_page_scopedMD_sa78185d3_9d65_49ab_ac1d_4809380d0b30_COIHomePageDef`

B.4.1.3 Page Parameter Seeded ELs

Page Parameter seeded EL expressions return values related to Spaces page parameters. The editor lists all parameters that are defined for the current page. If no parameters are defined, the Page Parameter category is not available.

For example, the seeded page style **Three Column** provides five seeded page parameters (see Table B–3). The `width` parameters describe the percentage of total width allotted to each column. The `show` parameters specify whether a page header and footer are rendered. Of the seeded page styles, **Blank**, **Home Page**, **Left Narrow**, and **Right Narrow** all provide the same seeded page parameters (see Table B–3). Additionally, any page may have its own custom page parameters.

Whether seeded or custom, available page parameters are exposed in the Expression Builder editor under the Page Parameter category.

> **See Also:** For more information about creating and using page parameters, see Section 22.3, "Wiring Components and Page Parameters."

Table B–3 lists the EL expressions available under the Page Parameter category for pages based on the styles Three Column, Blank, Home Page, Left Narrow, and Right Narrow. It provides an example of the types of values each returns.

Table B–3 Seeded EL Expressions Under Page Parameter

Option	Expression	Example of Returned Value
leftWidth	`#{bindings.leftWidth}`	`25%`
centerWidth	`#{bindings.centerWidth}`	`50%`
rightWidth	`#{bindings.rightWidth}`	`25%`
showHeader	`#{bindings.showHeader}`	`false`
showFooter	`#{bindings.showFooter}`	`false`

B.4.1.4 Resource Info Seeded ELs

Resource Info seeded EL expressions return values related to Spaces resources, such as templates, styles, Resource Catalogs, and the like. For example, the expression `#{srmContext.id['`*`ResourceID`*`'].singleResult}`, returns the resource with the specified GUID.

> **See Also:** For additional resource-related EL expressions, see Section B.4.5, "EL Expressions Relevant to Resources."

Table B–4 lists the seeded EL expressions available under the category Resource Info and provides an example of the types of values each returns.

Table B–4 Seeded EL Expressions Under Resource Info

Option	Expression	Example of Returned Value
Resource ID	`#{srmContext[wCond['id']['like']['`*`ResourceID`*`']].singleResult}`	`id:gsr3396194a_3a72_44d6_90b4_57fd6efe4ff7 resourceScope:Scope[name=defaultScope, guid=s8bba98ff_4cbb_40b8_beee_296c916a23ed] resourceType:siteTemplate serviceId:oracle.webcenter.siteresources.sitetemplate category: displayName:Fusion Side Navigation displayNameKey:SITE_TEMPLATE_FUS_SIDE_STRETCH_NAV_DN description:Stretching Page Layout with Side Navigation. Use Fusion FX Skin. descriptionKey:SITE_TEMPLATE_FUS_SIDE_STRETCH_NAV_DESC contentDirectory:/oracle/webcenter/siteresources/shared metadataFile: jspx:/oracle/webcenter/webcenterapp/view/templates/WCSiteTemplateSideNavStretch.jspx pageDef:/oracle/webcenter/webcenterapp/bindings/pageDefs/oracle_webcenter_webcenterapp_view_templates_WCSiteTemplateSideNavStretchPageDef.xml iconURI: excludeFrom: usesCustomSecurity:false visible:TRUE seeded:true createdBy:system createdDate:Fri Jul 02 05:44:19 PDT 2010 modifiedBy:system resourceBundle:oracle.webcenter.sitetemplate.view.resource.SiteTemplateBundle modifiedDate:Fri Jul 02 05:44:19 PDT 2010 logoUrl:/adf/webcenter/srm_dflt_logo_qualifier.png attributes:[]`
Display Name	`#{srmContext[wCond['displayName']['like']['`*`DisplayName`*`']].singleResult}`	See Resource ID for an example of a returned value.
Description	`#{srmContext[wCond['description']['like']['`*`Description`*`']].singleResult}`	See Resource ID for an example of a returned value.
Creation Date	`#{srmContext[wCond['createdDate']['like']['`*`CreationDate`*`']].singleResult}`	See Resource ID for an example of a returned value.

Table B–4 (Cont.) Seeded EL Expressions Under Resource Info

Option	Expression	Example of Returned Value
Modified By	`#{srmContext[wCond['modifiedBy']['like']['UserName']].singleResult}`	See Resource ID for an example of a returned value.
Modified Date	`#{srmContext[wCond['modifiedDate']['like']['ModifiedDate']].singleResult}`	See Resource ID for an example of a returned value.
Resource Scope	`#{srmContext[wCond['resourceScope']['like']['ResourceScope']].singleResult}`	See Resource ID for an example of a returned value.

B.4.1.5 Space Info Seeded ELs

Space Info seeded EL expressions return values related to spaces (other than the Home space). For example, the expression `#{spaceContext.space['spaceName'].children}`, returns a list of the subspaces under the named parent space.

See Also: For additional space-related EL expressions, see Section B.4.6, "EL Expressions Relevant to Specific Spaces."

Table B–5 lists the seeded EL expressions available under the category Space Info and provides an example of the types of values each returns.

Note: Use the EL expressions listed in Table B–5 only in the context of spaces other than the Home space.

Table B–5 Seeded EL Expressions Under Space Info

Option	Expression	Example of Returned Value
NamedSpace	`#{spaceContext.space['spaceName']}`	`oracle.webcenter.spaces.internal.model.SpaceImpl@15fc839`
CurrentSpace	`#{spaceContext.currentSpace}`	`oracle.webcenter.spaces.internal.model.SpaceImpl@d5e197`
CurrentSpace Name	`#{spaceContext.currentSpaceName}`	`standards`
NamedSpace Metadata Path	`#{spaceContext.space['spaceName'].metadataPath}`	`/oracle/webcenter/space/metadata/spaces/spaceName/space.xml`
CurrentSpace Metadata Path	`#{spaceContext.currentSpace.metadataPath}`	`/oracle/webcenter/space/metadata/spaces/standards/space.xml`
NamedSpace Metadata	`#{spaceContext.space['spaceName'].metadata}`	`oracle.webcenter.spaces.beans.SpaceMetadataImpl@1d7320a`
CurrentSpace Metadata	`#{spaceContext.currentSpace.metadata}`	`oracle.webcenter.spaces.beans.SpaceMetadataImpl@1096c64`
NamedSpace Metadata DisplayName	`#{spaceContext.space['spaceName'].metadata.displayName}`	`Standards`
CurrentSpace Metadata DisplayName	`#{spaceContext.currentSpace.GSMetadata.displayName}`	`Sales`

Table B–5 (Cont.) Seeded EL Expressions Under Space Info

Option	Expression	Example of Returned Value
NamedSpace Metadata Icon	`#{WCPrepareImageURL[spaceContext.space['spaceName'].metadata.icon]['']}`	`/webcenter-spaces-resources/oracle/webcenter/space/metadata/spacetemplate/PortalSite/images/portal_icon.png`
CurrentSpace Metadata Icon	`#{WCPrepareImageURL[spaceContext.currentSpace.metadata.icon]['']}`	`/webcenter-spaces-resources/oracle/webcenter/space/metadata/spaces/Test_Space/images/wc_prj_icon.png`
NamedSpace Metadata Description	`#{spaceContext.space['`*spaceName*`'].metadata.description}`	`Central point for all standards, templates, and stylesheets for company collateral`
CurrentSpace Metadata Description	`#{spaceContext.currentSpace.GSMetadata.description}`	`Sales Force Team Site`
NamedSpace Metadata CreationDate	`#{spaceContext.space['`*spaceName*`'].metadata.creationDate}`	`java.util.GregorianCalendar[time=1290103432242,areFieldsSet=true,areAllFieldsSet=false,lenient=false,zone=java.util.SimpleTimeZone[id=,offset=-28800000,dstSavings=3600000,useDaylight=false,startYear=0,startMode=0,startMonth=0,startDay=0,startDayOfWeek=0,startTime=0,startTimeMode=0,endMode=0,endMonth=0,endDay=0,endDayOfWeek=0,endTime=0,endTimeMode=0],firstDayOfWeek=1,minimalDaysInFirstWeek=1,ERA=1,YEAR=2010,MONTH=10,WEEK_OF_YEAR=?,WEEK_OF_MONTH=?,DAY_OF_MONTH=18,DAY_OF_YEAR=?,DAY_OF_WEEK=?,DAY_OF_WEEK_IN_MONTH=?,AM_PM=0,HOUR=10,HOUR_OF_DAY=10,MINUTE=3,SECOND=52,MILLISECOND=242,ZONE_OFFSET=?,DST_OFFSET=?]`
CurrentSpace Metadata CreationDate	#{spaceContext.currentSpace.metadata.creationDate}	`java.util.GregorianCalendar[time=1290103432242,areFieldsSet=true,areAllFieldsSet=false,lenient=false,zone=java.util.SimpleTimeZone[id=,offset=-28800000,dstSavings=3600000,useDaylight=false,startYear=0,startMode=0,startMonth=0,startDay=0,startDayOfWeek=0,startTime=0,startTimeMode=0,endMode=0,endMonth=0,endDay=0,endDayOfWeek=0,endTime=0,endTimeMode=0],firstDayOfWeek=1,minimalDaysInFirstWeek=1,ERA=1,YEAR=2010,MONTH=10,WEEK_OF_YEAR=?,WEEK_OF_MONTH=?,DAY_OF_MONTH=18,DAY_OF_YEAR=?,DAY_OF_WEEK=?,DAY_OF_WEEK_IN_MONTH=?,AM_PM=0,HOUR=10,HOUR_OF_DAY=10,MINUTE=3,SECOND=52,MILLISECOND=242,ZONE_OFFSET=?,DST_OFFSET=?]`

Table B–5 (Cont.) Seeded EL Expressions Under Space Info

Option	Expression	Example of Returned Value
NamedSpace Metadata CreatedBy	`#{spaceContext.space['`*`spaceName`*`'].metadata.createdBy}`	`j.doe`
NamedSpace Metadata Keywords	`#{spaceContext.space['`*`spaceName`*`'].metadata.keywords}`	`standards templates style sheets collateral`
CurrentSpace Metadata Keywords	`#{spaceContext.currentSpace.metadata.keywords}`	`sales salesReports salesNews salesTeam`
NamedSpace Metadata Offline	`#{spaceContext.space['`*`spaceName`*`'].metadata.offline}`	`false` or `true`, depending on whether the named space is offline
CurrentSpace Metadata Offline	`#{spaceContext.currentSpace.metadata.offline}`	`false` or `true`, depending on whether the current space is offline
NamedSpace Metadata Closed	`#{spaceContext.space['`*`spaceName`*`'].metadata.offline}`	`false` or `true`, depending on whether the named space is closed
CurrentSpace Metadata Closed	`#{spaceContext.currentSpace.metadata.closed}`	`false` or `true`, depending on whether the current space is closed
NamedSpace Metadata SelfRegistration	`#{spaceContext.space['`*`spaceName`*`'].metadata.selfRegistration}`	`false` or `true`, depending on whether self registration is enabled for the named space
CurrentSpace Metadata SelfRegistration	`#{spaceContext.currentSpace.metadata.selfRegistration}`	`false` or `true`, depending on whether self registration is enabled for the current space
NamedSpace Metadata Discoverable	`#{spaceContext.space['`*`spaceName`*`'].metadata.discoverable}`	`false` or `true`, depending on whether the named space is discoverable
CurrentSpace Metadata Discoverable	`#{spaceContext.currentSpace.metadata.discoverable}`	`false` or `true`, depending on whether the current space is discoverable
NamedSpace Metadata PublishRSS	`#{spaceContext.space['`*`spaceName`*`'].metadata.publishRSS}`	`false` or `true`, depending on whether the named space can be published in an RSS reader
CurrentSpace Metadata PublishRSS	`#{spaceContext.currentSpace.metadata.publishRSS}`	`false` or `true`, depending on whether the current space can be published in an RSS reader
NamedSpace Distribution List	`#{spaceContext.space['`*`spaceName`*`'].distributionList}`	`standardsGroup@myCompany.com`
CurrentSpace Distribution List	`#{spaceContext.currentSpace.distributionList}`	`salesTeam@myCompany.com`
NamedSpace Metadata CustomAttributes	`#{spaceContext.space['`*`spaceName`*`'].metadata.customAttributes['`*`attributeName`*`']}`	Returns the value provided for the named custom attribute
CurrentSpace Metadata CustomAttributes	`#{spaceContext.currentSpace.metadata.customAttributes['`*`attributeName`*`']}`	Returns the value provided for the named custom attribute
CurrentSpace Metadata Logo	`#{WCPrepareImageURL[spaceContext.currentSpace.metadata.logo]['']}`	`/webcenter-spaces-resources/oracle/webcenter/space/metadata/spacetemplate/PortalSite/images/portal_logo.png`
CurrentSpace Role - Moderator	`#{WCSecurityContext.userInScopedRole['Moderator']}`	`false` or `true`, depending whether any users in the current scope are assigned the role `Moderator`

Table B–5 (Cont.) Seeded EL Expressions Under Space Info

Option	Expression	Example of Returned Value
CurrentSpace Role - Participant	`#{WCSecurityContext.userInScopedRole['Participant']}`	`false` or `true`, depending whether any users in the current scope are assigned the role `Participant`
CurrentSpace Role - Viewer	`#{WCSecurityContext.userInScopedRole['Viewer']}`	`false` or `true`, depending whether any users in the current scope are assigned the role `Viewer`
CurrentSpace Role - Custom	`#{WCSecurityContext.userInScopedRole['`*`CustomRole`*`']}`	`false` or `true`, depending on if any users in the current scope are assigned the named custom role
NamedSpace Children	`#{spaceContext.space['`*`spaceName`*`'].children}`	`[oracle.webcenter.spaces.internal.model.SpaceImpl@5705f4, oracle.webcenter.spaces.internal.model.SpaceImpl@147d658]` **Note:** The braces ([]) denote a set.
CurrentSpace Children	`#{spaceContext.currentSpace.children}`	`[oracle.webcenter.spaces.internal.model.SpaceImpl@5705f4, oracle.webcenter.spaces.internal.model.SpaceImpl@147d658]` **Note:** The braces ([]) denote a set.
NamedSpace Parent	`#{spaceContext.space['`*`spaceName`*`'].parent}`	`oracle.webcenter.spaces.internal.model.SpaceImpl@15fc839`
CurrentSpace Parent	`#{spaceContext.currentSpace.parent}`	`oracle.webcenter.spaces.internal.model.SpaceImpl@15fc839`
NamedSpace Security Parent	`#{spaceContext.space['`*`spaceName`*`'].securityParent}`	`oracle.webcenter.spaces.internal.model.SpaceImpl@1392793`
CurrentSpace Security Parent	`#{spaceContext.currentSpace.securityParent}`	`oracle.webcenter.spaces.internal.model.SpaceImpl@1392793`
All visible root level spaces	`#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE,DISCOVERABLE,PUBLIC_ACCESSIBLE,ALLUSER_ACCESSIBLE,USER_JOINED,USER_MODERATED'].shape['ROOT_LEVEL']}`	`oracle.webcenter.spaces.query.SpacesQueryParameters@ae34c8`
All children and descendent spaces for specified Parent Space GUID	`#{spaceContext.spacesQuery.parentSpaceGuid['`*`spaceGuid`*`'].shape['RECURSIVE_FLATTENED']}`	`oracle.webcenter.spaces.query.SpacesQueryParameters@4da22f`
Immediate Sub Spaces for specified Parent Space name	`#{spaceContext.spacesQuery.parentSpaceName['`*`spaceGuid`*`'].shape['ROOT_LEVEL']}`	`oracle.webcenter.spaces.query.SpacesQueryParameters@1089971`
List of Spaces matching given Space Names	`#{spaceContext.spacesQuery.containingNames['`*`space1, space2,space3`*`']}`	`oracle.webcenter.spaces.query.SpacesQueryParameters@68e467`
List of Spaces matching given Space GUID	`#{spaceContext.spacesQuery.containingGuids['`*`spaceGuid1, spaceGuid2`*`']}`	`oracle.webcenter.spaces.query.SpacesQueryParameters@1c56009`
List of Spaces sorted based on criteria	`#{spaceContext.spacesQuery.unionOf.ALL_QUERIABLE.sort['sp.lastUpdateDate’]['desc']}`	`oracle.webcenter.spaces.query.SpacesQueryParameters@6c3def`

Table B–5 (Cont.) Seeded EL Expressions Under Space Info

Option	Expression	Example of Returned Value
List of Spaces based on search pattern	`#{spaceContext.spacesQuery.unionOf.ALL_QUERIABLE.search['`*`searchKeyword`*`']}`	`oracle.webcenter.spaces.query.SpacesQueryParameters@19b2cf3`
List of Spaces with limited page size	`#{spaceContext.spacesQuery.unionOf.USER_JOINED.itemsPerPage[`*`n`*`].pageNumber[`*`n`*`]}`	`oracle.webcenter.spaces.query.SpacesQueryParameters@4f8818`
List of Spaces matching the where clause	`#{spaceContext.spacesQuery.unionOf.USER_JOINED.where[wCond['sp.createdBy']['=']['userName']]}`	`oracle.webcenter.spaces.query.SpacesQueryParameters@1ba816d`

B.4.1.6 Space Page Info Seeded Paths

Rather than EL expressions, the selections under Space Page Info are directory paths to different application pages. Use them, for example, to provide navigation information to a specified page.

Table B–6 lists the seeded directory paths available under the category Space Page Info and provides an example of the types of values each returns. The number of values in the dropdown list depends on the template used and the pages created by users.

Table B–6 Seeded Paths Under Space Page Info

Option	Path	Destination
COIHome.jspx	`/faces/oracle/webcenter/page/scopedMD/se2dff4fb_202a_4f4c_b56d_c7cf59ad1c04/Home.jspx`	Path to the Home page of the current space
GroupSpaceDocLibMainView.jspx	`/faces/oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/businessRolePages/GroupSpaceDocLibMainView.jspx`	Path to the Documents page in the current space
ForumMainView.jspx	`/faces/oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/businessRolePages/ForumMainView.jspx`	Path to Discussions page in the current space
AnnouncementsMainView.jspx	`/faces/oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/businessRolePages/AnnouncementsMainView.jspx`	Path to Announcements page in current space

Table B–6 (Cont.) Seeded Paths Under Space Page Info

Option	Path	Destination
EventsMainView.jspx	`/faces/oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/businessRolePages/EventsMainView.jspx`	Path to Events page in current space
ListsMainView.jspx	`/faces/oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/businessRolePages/ListsMainView.jspx`	Path to Lists page in current space
GroupSpaceActivityMainView.jspx	`/faces/oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/businessRolePages/GroupSpaceActivityStreamMainView.jspx`	Path to Activity Stream page in current space

B.4.1.7 System Seeded ELs

System seeded EL expressions return values related to system settings, such as the user name of the current user or the current user's specified locale. For example, the expression `#{securityContext.userName}`, returns the name of the currently logged in user. For example, if user j.doe is viewing a page where this expression is used, the returned value in j.doe's view is `j.doe`. If user j.smith is looking at the same page, the value returned in j.smith's view is `j.smith`.

See Also: For additional utilitarian EL expressions, see Section B.4.15, "Utilitarian EL Expressions."

Table B–7 lists the seeded EL expressions available under the category System and provides an example of the types of values each returns.

Table B–7 Seeded EL Expressions Under System

Option	Expression	Example of Returned Value
User	`#{securityContext.userName}`	The current user's user name
Locale	`#{facesContext.externalContext.requestLocale}`	The current user's specified locale This may be taken from application or space-level settings or user Preferences, whichever is taking precedence. For example: `en_US`

B.4.1.8 User Info Seeded ELs

User Info seeded EL expressions return values related to a given user's Profile. For example, the expression `#{webCenterProfile[securityContext.userName].description}`, returns the content of the About Me attribute of the current user's Profile.

See Also: For additional user-related expressions, see Section B.4.13, "EL Expressions Relevant to the People Connections Service."

Table B–8 lists the seeded EL expressions available under the category User Info and provides an example of the types of values each returns.

Table B–8 Seeded EL Expressions Under User Info

Option	Expression	Example of Returned Value
About Me	`#{webCenterProfile[securityContext.userName].description}`	Returns the content of the About Me attribute of the current user's Profile
Username	`#{webCenterProfile[securityContext.userName].userName}`	The user name specified in the current user's Profile Compare this with the current user's display name.
First Name	`#{webCenterProfile[securityContext.userName].firstName}`	The current user's first name
Middle Name	`#{webCenterProfile[securityContext.userName].middleName}`	The current user's middle name
Last Name	`#{webCenterProfile[securityContext.userName].lastName}`	The current user's last name
Initials used	`#{webCenterProfile[securityContext.userName].initials}`	The current user's initials
Display Name	`#{webCenterProfile[securityContext.userName].displayName}`	The current user's display name Compare this with the current user's user name.
Email	`#{webCenterProfile[securityContext.userName].businessEmail}`	The current user's business email address
Department	`#{webCenterProfile[securityContext.userName].department}`	The current user's department
Job Title/Designation	`#{webCenterProfile[securityContext.userName].title}`	The current user's job title or designation
Manager	`#{webCenterProfile[securityContext.userName].managerDisplayName}`	The current user's manager's display name
Time zone	`#{webCenterProfile[securityContext.userName].timeZone}`	The time zone associated with the current user
Employee type	`#{webCenterProfile[securityContext.userName].employeeType}`	The current user's employee type
Employee Number	`#{webCenterProfile[securityContext.userName].employeeNumber}`	The current user's employee number
Preferred Language Code	`#{webCenterProfile[securityContext.userName].preferredLanguage}`	The current user's preferred language
Organization	`#{webCenterProfile[securityContext.userName].organization}`	The company organization to which the current user belongs

Table B–8 (Cont.) Seeded EL Expressions Under User Info

Option	Expression	Example of Returned Value
Organizational Unit	`#{webCenterProfile[securityContext.userName].organizationalUnit}`	The unit of the company organization to which the current user belongs
Expertise	`#{webCenterProfile[securityContext.userName].expertise}`	The current user's expertise, for example, `Application, system, and database administration`
Business Fax	`#{webCenterProfile[securityContext.userName].businessFax}`	The current user's business fax number
Business Mobile Number	`#{webCenterProfile[securityContext.userName].businessMobile}`	The current user's business mobile or cell phone number
Business Phone	`#{webCenterProfile[securityContext.userName].businessPhone}`	The current user's business phone number
Business Pager Number	`#{webCenterProfile[securityContext.userName].businessPager}`	The current user's business pager number
Business Street	`#{webCenterProfile[securityContext.userName].businessStreet}`	The street address of the current user's business office
Business City	`#{webCenterProfile[securityContext.userName].businessCity}`	The city where the current user's business office is located
Business State	`#{webCenterProfile[securityContext.userName].businessState}`	The state where the current user's business office is located
Business PO Box	`#{webCenterProfile[securityContext.userName].businessPOBox}`	The current user's business Post Office Box number
Business Postal Code	`#{webCenterProfile[securityContext.userName].businessPostalCode}`	The postal or ZIP code of the current user's business office
Business Country	`#{webCenterProfile[securityContext.userName].businessCountry}`	The country where the current user's business office is located
Home Address	`#{webCenterProfile[securityContext.userName].homeAddress}`	The current user's home address
Home phone	`#{webCenterProfile[securityContext.userName].homePhone}`	The current user's home phone number
Date of Birth	`#{webCenterProfile[securityContext.userName].dateofBirth}`	The current user's date of birth
Maiden Name	`#{webCenterProfile[securityContext.userName].maidenName}`	The current user's maiden name

Table B–8 (Cont.) Seeded EL Expressions Under User Info

Option	Expression	Example of Returned Value
Date of hire	`#{webCenterProfile[securityContext.userName].dateofHire}`	The date the current user was hired by the company
Name Suffix	`#{webCenterProfile[securityContext.userName].nameSuffix}`	Titles or credentials appended to the current user's name, for example, `MD`, `Esq`, and the like
Wireless Account Number	`#{webCenterProfile[securityContext.userName].wirelessAcctNumber}`	The account number for the current user's wireless internet account

B.4.1.9 WebCenter Events Seeded ELs

WebCenter Events seeded EL expressions return values related to document-related events, such as the name of the selected document, the document's creator, the date the document was last modified, and so on. For example, the expression `#{wcEventContext.events.WebCenterResourceSelected.name}`, returns the name of the currently selected document.

Table B–9 lists the seeded EL expressions available under the category WebCenter Events and provides an example of the types of values each returns.

Table B–9 Seeded EL Expressions Under WebCenter Events

Option	Expression	Example of Returned Value
Selected User Name	`#{wcEventContext.events.WebCenterUserSelected.UserName}`	The user name of the currently selected user
Selected Document Name	`#{wcEventContext.events.WebCenterResourceSelected.name}`	The name of the currently selected document
Selected Document Creator	`#{wcEventContext.events.WebCenterResourceSelected.createdBy}`	The name of the user who created the currently selected document
Selected Document Last Modified By	`#{wcEventContext.events.WebCenterResourceSelected.lastModifiedBy}`	The date the selected document was last modified

B.4.2 EL Expressions Relevant to the Spaces Application

Table B–10 lists EL expressions relevant to the Spaces application information and describes the types of functionality it provides. The **Context** column indicates whether the expression can be used in Spaces context (WCS) or in both Spaces and Framework applications built with Oracle JDeveloper (Both).

Table B–10 EL Expressions Relevant to Spaces Application

Expression	Function	Context
`#{WCAppContext}`	An *oracle.webcenter.webcenterapp.context.WCApplicationContext* object that provides an access point in the current web request for all Oracle WebCenter Portal application-related information.	WCS
`#{WCAppContext.currentWebCenterURI}`	Returns a URL representing the current web request with bookmarkable Spaces URL parameters of the request appended to the end (parameters are not necessarily in a fixed order). Example: `http://www.example.com/webcenter/faces/oracle/webcenter/page/scopedMD/someguid/SomePage.jspx?wc.contextURL=/spaces/somename&wc.pageScope=1234`	WCS
`#{WCAppContext.application.applicationConfig}`	An *oracle.webcenter.webcenterapp.beans.WebCenterType* bean with a payload of metadata from the current Spaces application.	WCS
`#{WCAppContext.application.applicationConfig.title}`	Returns the display name of the current Spaces application (as configured through Spaces Administration settings). Out of the box, this returns *WebCenter Portal*.	WCS
`#{WCAppContext.application.applicationConfig.logo}`	If an application logo was uploaded through Spaces Administration settings, this expression returns the URL to the application logo image. Out of the box, this returns *null*.	WCS
`#{WCAppContext.application.applicationConfig.helpPage}`	Returns the URL to the Help application used for the current Spaces application (as configured through Spaces Administration settings). Out of the box, this returns */webcenterhelp/spaces*.	WCS
`#{WCAppContext.application.applicationConfig.copyrightMessage.customValue}`	If a copyright message was configured through Spaces Administration settings, this expression returns the application copyright message. Out of the box, this returns *null*.	WCS

Table B–10 (Cont.) EL Expressions Relevant to Spaces Application

Expression	Function	Context
`#{WCAppContext.application.applicationConfig.privacyPolicyUrl}`	Returns the URL to the document that contains the application's privacy policy (as configured through Spaces Administration settings). Out of the box, this returns *http://www.oracle.com/html/privacy.html*	WCS
`#{WCAppContext.application.applicationConfig.skin}`	Returns the name of the default ADF Faces skin family to use for rendering pages in the application (as configured through Spaces Administration settings). This expression represents only the application-level setting that may not necessarily be used in all web requests. For example, you cannot use it successfully if a user has chosen to override the skin through application Preferences (for more information, see Chapter 38, "Setting Your Personal Preferences").	WCS
`#{requestContext.skinFamily}`	Returns the name of the ADF Faces skin family being used for the current web request, depending on factors such as what has been configured at the application level, the current user's preference setting, and so on. Returns the same value as `#{adfFacesContext.skinFamily}`.	Both

B.4.3 EL Expressions Relevant to Application Security

Table B–11 lists EL expressions relevant to application security and describes the types of functionality it provides. The **Context** column indicates whether the expression can be used in the Spaces context (WCS) or in both the Spaces application and Framework applications built with Oracle JDeveloper (Both).

> **See Also:** For example implementations of expressions related to component-level security, see Section 26.2, "Setting Access on a Page Component."

Table B–11 EL Expressions Relevant to Security

Expression	Function	Context
`#{security.authenticated}`	Returns `true` when the current user is authenticated in the context in which the EL is being invoked, otherwise `false`.	Both
`#{securityContext.userName}`	Returns the user name of the currently logged in user. If the current user is not logged in, this expression returns no value.	Both
`#{security.pageContextCommunityModerator}`	Returns the value *true* if the current user is a moderator of the current space.	WCS

Table B–11 (Cont.) EL Expressions Relevant to Security

Expression	Function	Context
`#{WCSecurityContext.userInScopedRole['role']}`	Returns the value *true* if the current user is assigned the specified role in the current scope. Role can be `Moderator`, `Participant`, `Viewer`, or a custom role defined in that scope. The scope is implicitly resolved to be the current scope. If you use this EL in the Home space, it resolves to Home space GUID and roles defined at the application level. If you use this EL in a space scope, it resolves to roles defined for the space.	WCS
`#{WCSecurityContext.userInGroup['group']}`	Returns the value *true* if the current user is assigned the specified group, for example, `Administrators`.	Both
`#{WCSecurityContext.currentUser['userName']}`	Returns the value *true* if the current user is the specified user.	Both

B.4.3.1 Example: Restricting Access to Composer's Source View Using EL Expressions

This section provides an example of using EL expressions to display something based on a user's role. In the example, you will create a page style and edit its source code to add an EL expression that allow only users granted the `AdvancedEdit` role to be able to access Source view of Composer in Home space.

To restrict access to Composer's Source view in Home space:

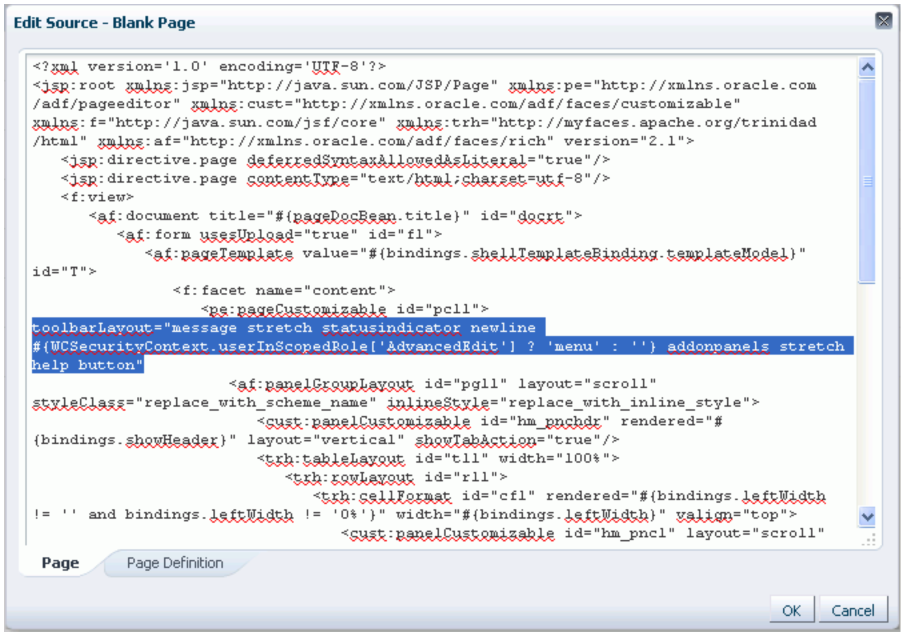
1. Log on to Spaces with administrative privileges, and navigate to the **Security** tab in Spaces Administration.
2. Create a new role called `AdvancedEdit`, and assign it to the user, `weblogic`. (For information, see Section 24.2, "Managing Application Roles and Permissions.")

   The user `weblogic` will now have two roles: `Administrator` and `AdvancedEdit`.
3. Create a new page style, say Blank Page (For information, see Section 15.2, "Creating a Custom Page Style.")
4. To grant access to Composer's Source view only to the users with the `AdvancedEdit` role, edit the source code of the page style and add the following attribute to the `<pe: pageCustomizable>` tag (Figure B–6):

   ```
   toolbarLayout="message stretch statusindicator newline
   #{WCSecurityContext.userInScopedRole['AdvancedEdit'] ? 'menu' : ''} addonpanels
   stretch help button"
   ```

   For information about editing the source code, see Section 11.3.2, "Editing the Source Code of a Resource."

Figure B–6 Editing Source Code of a Page Style



5. Log in as a user other than `weblogic`, and in Home space create a page using the Blank Page page style. When you open the page in Composer, the page appears in Design view, and no View menu is available because the user is not granted the `AdvancedEdit` role.

   Applying this technique to all page styles available to users in Home space completely controls access to Source view. You can follow the same technique for various spaces.

B.4.4 EL Expressions Relevant to Application Navigation

Table B–12 lists EL expressions relevant to Spaces navigation and describes the types of functionality it provides. All navigation ELs can be used in both the Spaces application and Framework applications built with Oracle JDeveloper.

Table B–12 EL Expressions Relevant to Navigation

Expression	Function
Navigation Context Expressions	
`#{navigationContext.defaultNavigationModel}`	Returns default navigation model. It gets the value from the preference bean. The preference bean gets the value based on the preference setting in `adf-config.xml`, `static value`. The following example returns the specified default tree model: `#{navigationContext.defaultNavigationModel.defaultTreeModel}` You can also use `defaultMenuModel` and `defaultListModel` (see next listing).
`#{navigationContext.currentNavigationModel}`	Returns the navigation model used to navigate to the current view (that is, the current page) There may be a number of navigation models on the page. Only the one used to navigate to the page is the current navigation model. The current navigation model is set only when the `processAction` is called. The following example returns the default tree model for the current navigation model: `#{navigationContext.currentNavigationModel.defaultTreeModel}` You can also use `defaultMenuModel` and `defaultListModel`. **See Also:** `#{navigationContext.processAction}`.

`#{navigationContext.navigationModel['`*`model_path`*`']}`	Returns the navigation model specified by path.
	Example:
	`#{navigationContext.navigationModel['/oracle/webcenter/portalapp/navigations/default-navigation-model']}`
	User can simply enter the path in the square bracket without having to remember the parameter name. For backward compatibility, comma-separated parameters are also supported. Available parameters (with examples) are:
	■ `modelPath=/oracle/webcenter/portalapp/navigations/default-navigation-model`
	■ `modelScope=/oracle/webcenter/portalapp/navigation`
	■ `modelId=default-navigation-model`
	Note: `modelScope` and `modelId` are used together, for example:
	`#{navigationContext.navigationModel['modelScope=/oracle/webcenter/portalapp/navigations,modelId=default-navigation-model']}`

Table B–12 (Cont.) EL Expressions Relevant to Navigation

<table>
<tr><th>Expression</th><th>Function</th></tr>
<tr><td><code>#{navigationContext.processAction}</code></td><td>
Returns the default navigation method for binding to UI component’s <code>actionListener</code> attribute. This assumes that the target resource to navigate to is passed in through the action UI component's <code>node</code> or <code>path</code> attribute.
The <code>node</code> attribute is typically used for the iterative case; while the <code>path</code> attribute is typically used to create a static link. If both are specified, the <code>node</code> attribute is used. Note that when using the <code>path</code> attribute, you must also specify the <code>model</code> attribute to pass in the navigation model object. If the <code>model</code> attribute is not specified, the current navigation model is used.
Example using the <code>node</code> attribute:
<pre>
<af:forEach var="node" varStatus="vs"
  items="#{navigationContext.defaultNavigationModel.roo
tNode.children}">
    <af:subform id="pt_sfm1">
      <af:commandLink id="pt_cl1"
        text="#{node.title}"
        inlineStyle="font-size:small;color:White;"
        actionListener="#{navigationContext.processActio
n}"
        action="pprnav">
      <f:attribute name="node" value="#{node}"/>
        <af:showPopupBehavior popupId="menuPopup"
          align="afterStart"
          triggerType="mouseOver"/>
    </af:commandLink>
</pre>
Example using the <code>path</code> attribute:
<pre>
<af:commandLink id="pt_cl1" text="Prescriptions"
    inlineStyle="font-size:small; color:White;"
    actionListener="#{navigationContext.processAction}"
    action="pprnav">
<f:attribute name="path" value="/prescriptions"/>
<f:attribute name="model"
    value="#{navigationContext.defaultNavigationModel}"
/>
</af:commandLink>
</pre>
</td></tr>
<tr><td colspan="2">Navigation Model Expressions</td></tr>
<tr><td>
<code>#{navigationContext.defaultNavigationModel.defaultTreeModel}</code>
<code>#{navigationContext.defaultNavigationModel.defaultMenuModel}</code>
<code>#{navigationContext.defaultNavigationModel.defaultListModel}</code>
<code>#{navigationContext.defaultNavigationModel.defaultSiteMap}</code>
</td><td>
Returns a tree/menu/list model based on the default settings
The default values for the settings are specified in the next row. For example, the default value for <code>depth</code> is <code>0</code>.
For <code>defaultSiteMap</code>, it returns the XML for the sitemap of the navigation based on the default settings.
This expression returns a model of type:

<code>ChildPropertyTreeModel</code>—used in <code><af:tree></code> component
<code>ChildPropertyMenuModel</code>—used in <code><af:breadcrumbs></code> or <code><af:menu></code> component
<code>List<<i>NavigationResource</i>></code>—used in <code><af:foreach></code>

</td></tr>
</table>

Table B–12 (Cont.) EL Expressions Relevant to Navigation

Expression	Function

`#{navigationContext.defaultNavigationModel.treeModel['`*`parameters`*`']}`
 	
`#{navigationContext.defaultNavigationModel.menuModel['`*`parameters`*`']}`
 	
`#{navigationContext.defaultNavigationModel.listModel['`*`parameters`*`']}`
 	
`#{navigationContext.defaultNavigationModel.siteMap['`*`parameters`*`']}`
	Returns tree/menu/list model based on the specified comma-separated parameters. Available parameters (with default values as examples) are:
	▪ `startNode=/`—specify the starting node of the model (do not need "/" prefix unless requesting the root node, for example, `home`).
	▪ `includeStartNode=true`—specify `true` if you want to include the starting node (for example, the root node above) or `false` to start from its children.
	▪ `depth=0`—defines the initial depth of fetching. "0" means fetch the entire tree, which may take a long time. In which case, use "1" to fetch on demand (when users click the **Expand** icon).
	▪ `prefetchOnly=false`—by default (`true`), it returns nodes up to the depth level requested initially; deeper level nodes are returned on demand. Use `false` if you want only the initial sets of nodes. In which case, it does not return deeper nodes later on when requested, even when there are deeper nodes.
	For `siteMap`, the available parameters are `startNode` and `includeStartNode`.
	Example:
	`#{navigationContext.defaultNavigationModel.treeModel['`
	`startNode=home,includeStartNode=false,depth=2']}`

`#{navigationContext.defaultNavigationModel.rootNode}`	Returns a root node (of type `NavigationResource`) of the navigation model.
	Example:
	`<af:commandLink id="pt_cl1" text="Prescriptions"`
	`   inlineStyle="font-size:small; color:White;"`
	`   actionListener="#{navigationContext.processAction}"`
	`   action="pprnav">`
	`  <f:attribute name="node"`
	`      value="#{navigationContext.`
	`      defaultNavigationModel.`
	`      rootNode.children[2]"/>`
	`</af:commandLink>`

`#{navigationContext.defaultNavigationModel.node['`*`path`*`']}`	Returns a node (of type `NavigationResource`) based on the path specified (you do not need "/" prefix unless you are requesting the root node, for example, `'/'`)
	Example:
	`#{navigationContext.defaultNavigationModel.node['home/`
	`page1']}`

`#{navigationContext.defaultNavigationModel.currentSelection}`	Returns currently selected navigation resource.

Table B–12 (Cont.) EL Expressions Relevant to Navigation

Expression	**Function**

#{navigationContext.defaultNavigationModel.newCurrentSelection['*path*']}	Sets the current selection to a node specified by the given path (you do not need "/" prefix unless you are requesting the root node, for example, '/'). If successful, returns the newly selected node of type NavigationResource.
	The user must have the ability to explicitly set the current selection without having to actually navigate to a node.
	This can be used where the user enters a page directly, and no selection is set. It provides a mechanism for the user to control what is the default when there is no current selection.
	Example:
	<c:set
	  value="${navigationContext.defaultNavigationModel.newCurrentSelection['home/page1']}"
	  var="currSel" scope="session"/>
	<c:if test="${currSel!=null}">
	  <af:forEach items="#{currSel.children}"
	    var="cnode" varStatus="cnodestatus">
	...
	</c:if>

#{navigationContext.defaultNavigationModel.attributes.*Description*} #{navigationContext.defaultNavigationModel.attributes['*Description*']}	Returns the value of the specified attribute of the navigation model.
Navigation Resource Expressions	
#{*node*.attributes.*Description*} #{*node*.attributes['*Description*']}	Returns the value of the specified attribute of the navigation resource.
#{*node*.parameters.*StockSymbol*} #{*node*.parameters['*StockSymbol*']}	Returns the value of the specified parameter of the navigation resource.
#{*node*.parametersRaw.*StockSymbol*} #{*node*.parametersRaw['*StockSymbol*']}	Returns the raw value of the specified parameter of the navigation resource (before it is evaluated).
#{*node*.title}	Returns the title of the navigation resource.
#{*node*.path}	Returns the path to the navigation resource.
#{*node*.externalURL}	Returns the URL for the navigation resource of type External Link.
#{*node*.prettyUrl}	Returns the identifying path for this navigation resource.
#{*node*.prettyUrlPath} #{*node*.prettyUrlPath[*N*]}	Returns a collection of identifying paths by depth to enable its use as a starting path to drive another navigation view. For example, assuming the currentSelection is home/company/products/applications, the following EL returns home/company/products: #{*node*.prettyUrlPath[3]}

Table B–12 (Cont.) EL Expressions Relevant to Navigation

Expression	Function

`#{`*`node`*.goLinkPrettyUrl}	Returns the identifying path for this navigation resource suitable for `goLink` destination
	`<af:goLink id="pt_gl2" text="#{node.title}"`
	`destination="#{node.goLinkPrettyUrl}"`
	`targetFrame="#{node.attributes['Target']}"`
	`inlineStyle="font-size:small;#{node.selected ?`
	`'font-weight:bold;' : ''}"/>`
	
	Any link to a page within Spaces also needs certain context parameters, but `goLinkPrettyUrl` is not designed to supply those parameters. Therefore, the use of `goLinkPrettyUrl` does not work correctly for links within Spaces, but works properly for links that point outside of Spaces.

`#{`*`node`*.separator ? ... : ...}	Returns whether this resource is a separator item.
`#{`*`node`*.navigable ? ... : ...}	Returns whether it is possible to navigate to this resource.
`#{`*`node`*.selected ? ... : ...}	Returns whether this resource is currently selected.
`#{`*`node`*.currentlySelected ? ... : ...}	Returns whether the resource is the currently selected resource and the model is the currently selected model.

`#{`*`node`*.onSelectedPath ? ... : ...}	Returns whether this node lies on the selected path. This is useful for highlighting the selected tab, for example.
	For example, assuming the currently selected node is `home/company/products/applications`, the following EL highlights the `home` tab.
	`<c:set`
	`value="${navigationContext.defaultNavigationModel.nod`
	`e['home']}"`
	`var="home" scope="session"/>`
	`<af:commandImageLink id="cil1"`
	`icon="#{(home.onSelectedPath) ?`
	`'/images/caremark/nav/HomeSelected.png' :`
	`'/images/caremark/nav/HomeIcon.png'}"`
	`actionListener="#{navigationContext.processActio`
	`n}"`
	`action="pprnav">`
	`<f:attribute name="node" value="#{home}"/>`
	`</af:commandImageLink>`

`#{`*`node`*.leaf ? ... : ...}	Returns whether this resource is a leaf node.
`#{`*`node`*.parent}	Returns the parent node (of type `NavigationResource`) of this node. For the root node, `null` is returned.
`#{`*`node`*.ancestors}	Returns the hierarchy list of ancestors of this node (of type NavigationResource) starting with the root node. For example, assuming the current node is `home/company/products/applications`, the following ELs return the following values: ■ `#{node.ancestors[1]}` returns the node for `home` ■ `#{node.ancestors[3]}` returns the node for home/company/products
`#{`*`node`*.depth}	Returns the depth of this node from the root node. Root node has a depth of zero.

Table B–12 (Cont.) EL Expressions Relevant to Navigation

Expression	Function
#{*node*.siblings}	Returns the list of siblings (of type `NavigationResource`) of this node (inclusive).

#{*node*.nextSibling}	Returns the next sibling in the list (of type NavigationResource) of this node.
	For example, the following code ensures that you do not output two separators in a row:
	`<c:if test="${(node.separator) && (!node.nextSibling.separator}">`
	`   <af:separator id="s166"/>`
	`</c:if>`

#{*node*.previousSibling}	Returns the previous sibling in the list (of type `NavigationResource`) of this node.
#{*node*.index}	Returns the zero-relative index of this node relative to its siblings.
#{*node*.children} #{*node*.children[*N*].title} #{*node*.children[*N*].children[*N*].title}	Returns a collection of child resources.
#{*node*.childCount}	Returns the number of children of this node.
#{*node*.childByIndex['index']}	Returns the child node (of type `NavigationResource`) specified by the zero-relative index If not found, this returns `null`.
#{*node*.childByPath['admin']}	Returns the child node (of type `NavigationResource`) specified by the path relative to this node The path can be deeper than one level and does not need the `'/'` prefix. If not found, this returns `null`.

B.4.4.1 Example: Using EL Expressions for Navigation

This section provides an example of using a navigation model to monitor activities of two subspaces from a shared page in the parent space. In this example, you use a page containing the Activity Stream task flow. The content of the task flow is determined by a parameter passed to the page. The navigation model includes two links that link to the page. The first link passes `subspace1` as the parameter so that the Activity Stream task flow shows activities of `subspace1`. The second link passes `subspace2` as the parameter. So, the content of the page is different depending on which link you click in the navigation.

To build a navigation model that uses ELs to monitor subspace activity from a parent space:

1. Create a space, and two subspaces. While creating subspaces, note down the internal name used (for example, `subspace1` and `subspace2`).
2. In your space, create a page called `Subspace Activity`, and add the Activity Stream task flow to the page. For information about adding a task flow, see Section 18.5, "Adding a Component to a Page."
3. Create a page parameter, say `subspaceName`, for the newly created page. For information, see Section 22.3.1, "Creating Page Parameters."

   Use the following EL as the value of the parameter:

```
#{empty
navigationContext.currentNavigationModel.currentSelection.parameters.subspaceNa
me ? 'subspace1' :
navigationContext.currentNavigationModel.currentSelection.parameters.subspaceNa
me}
```

Where, '`subspace1`' is the value to be used for the page parameter if none is passed to it from the navigation.

4. Edit the settings of the Activity Stream task flow. In the Component Properties dialog, on the **Parameters** tab, for the **Spaces** parameter, open the Expression Builder, and for **Page Parameter**, select **subspaceName**.
5. On the **Display Options** tab, for the **Text** field, specify a value that shows the name of the subspace whose activity is shown. For example, use the following EL:

   ```
   #{bindings.subspaceName} Activity
   ```

6. Build a navigation that passes the space to show your page:
   a. Create a navigation based on **Spaces Default Navigation Model**.
   b. Edit the navigation by adding a Link navigation item.
   c. On the **Target** tab, in the **Name** field, specify the name of the Link item as `Sub Space 1`.
   d. In the **Path** field, select the `Subspace Activity` page.
   e. On the **Parameters** tab, for the `subspaceName` field, specify the internal name of the first subspace, `subspace1`.
7. Copy the newly created link, and edit it to make a link for the second subspace, `subspace2`.

   While editing, on the **Target** tab you only need to change the **Name** of the link. On the **Parameters** tab, you only need to change the value of the **subspaceName** parameter to `subspace2` (the internal name of the second subspace).
8. Make sure the newly created navigation is set as the current navigation for your space.
9. You now have two links that take you to the shared `Subspace Activity` page, passing different values for the space depending on the link you click.

B.4.5 EL Expressions Relevant to Resources

Use the expressions in this section to query for resources. Querying for a resource through an EL expression is similar to querying for it through an API call. That is, you must set query parameters in the format `['property']['like']['value']`, where *`property`* is the name of the property, for example, `id`, `resourceScope`, and the like, and *`value`* is the search value for the attribute.

A query can result in single or multiple results. The query designer must decide what is wanted. The query designer determines whether to return one or multiple results by encountering one of the following values in the expression:

- `singleResult`—Returns a single resource. When no matching resource is found, null is returned.
- `resultList`—Returns a list of resources. When no matching resources are found, an empty list is returned.

Note: Occurrences of singleResult or resultList in the expression are used internally as the query end point, and, after this, the query is executed immediately. Anything set after the end point can result in unexpected behavior.

The following example returns the first template resource found with a display name that contains myPage:

```
#{srmContext[wCond['resourceType']['like']['siteTemplate']]['and'][wCond['displayN
ame']['like']['myPage']].singleResult}
```

The following example returns a list of template resources residing in the directory resourceDir, with a description that contains sampleDesc:

```
#{srmContext[wCond['resourceType']['like']['siteTemplate']]['and'][wCond['descript
ion']['like']['sampleDesc']]['and'][wCond['contentDirectory']['like']['resourceDir
'].resultList}
```

A property of this class includes any attribute of this class. Example properties include: Id, DisplayName, iconURI, contentDirectory, and the like.

The property value can be an explicit value or an EL expression that returns that type of value. For example, the following two queries return the same result:

```
#{srmContext[wCond['id']['like']['resourceId']].singleResult}

#{srmContext[wCond['id']['like']['spacesContext.currentSpace.uiMetadata.siteTempla
teId']].singleResult}
```

You can use any property of this class in an EL-based query in the format *property*['*value*'] and in any order. For example, the following two queries return the same result:

```
#{srmContext[wCond['resourceScope']['like']['scopeName']]['and'][wCond['id]['like'
]['resourceId']].singleResult}

#{srmContext[wCond['id']['like']['resourceId']]['and'][wCond['resourceScope']['lik
e']['scopeName']].singleResult}
```

Table B–13 lists EL expressions relevant to resources and describes the types of functionality each provides. You can use all resource EL expressions in both the Spaces application and Framework applications built with Oracle JDeveloper.

Table B–13 ELs Relevant to Resources

EL	Function
#{srmContext[wCond['id']['like']['*resourceGUID*']]}	Returns the resource with the specified ID
#{srmContext[wCond['displayName']['like']['*resourceDisplayName*']]}	Returns any resources with the specified display name
#{srmContext[wCond['displayNameKey']['like']['*displayNameKey*']]}	Returns any resources with the specified display name key
#{srmContext[wCond['description']['like']['*resourceDescription*']].singleResult}	Returns one result of a resource that contains the specified value in its description To get multiple results, use resultList in lieu of singleResult.

Table B–13 (Cont.) ELs Relevant to Resources

EL	Function
`#{srmContext[wCond['descriptionKey']['like']['` *`descriptionKey`* `']].singleResult}`	Returns one result of a resource with the specified description key The description key is the key in the `xsrt` file for the resource description. To get multiple results, use `resultList` in lieu of `singleResult`.
`#{srmContext[wCond['createdDate']['like']['` *`resourceCreationDate`* `']]}`	Returns any resource with the specified creation date
`#{srmContext[wCond['modifiedBy']['like']['` *`resourceLastModifiedBy`* `']]`	Returns any resource that was last modified by the user with the specified user name
`#{srmContext[wCond['modifiedDate']['like']['` *`resourceLastModifiedDate`* `']]}`	Returns any resource that was last modified by the specified date
`#{srmContext[wCond['resourceScope']['like']['` *`resourceScope`* `']]}`	Returns any resource that falls within the specified scope
`#{srmContext[wCond['category']['like']['` *`categoryName`* `']]}`	Returns any resource that falls within the specified category For example: `#{srmContext[wCond['category']['like']['siteTemplates']]}`
`#{srmContext[wCond['contentDirectory']['like']['` *`contentDirectory`* `']]}`	Returns any resource that is stored within the specified directory
`#{srmContext[wCond['metadataFile']['like']['` *`metadataFileLocation`* `']]}`	Returns resource metadata from the specified metadata file For example, the following expression returns resource metadata from the following file `/home/metadata/data.xml`: `#{srmContext[wCond['metadataFile']['like']['/home/metadat/data.xml']]}`
`#{srmContext[wCond['jspx']['like']['` *`jspxFileLocation`* `']]}`	Returns any `jspx` file in the specified location For example, the following expression returns the `page.jspx` file: `#{srmContext[wCond['jspx']['like']['/home/web/page.jspx']]}`
`#{srmContext[wCond['pageDef']['like']['` *`pageDefinition`* `']]}`	Returns any `jspx` file with the specified page definition
`#{srmContext[wCond['iconURI']['like']['` *`iconURI`* `']]}`	Returns the icon at the specified icon URI
`#{srmContext[wCond['excludeFrom']['like']['` *`excludeFromScopes`* `']]}`	In a larger expression, returns all specified resources except those available in the excluded scopes

Table B–13 (Cont.) ELs Relevant to Resources

EL	Function
`#{srmContext[wCond['usesCustomSecurity']['like']['`*`usesCustomSecurity`*`']]}`	In a larger expression, returns any resource the either does or does not use custom security Set *`usesCustomSecurity`* to `TRUE` or `FALSE`. For example: `#{srmContext[wCond['usesCustomSecurity']['like']['TRUE']]}`
`#{srmContext[wCond['seeded']['like']['`*`seeded`*`']]}`	In a larger expression, returns any resource that is or is not seeded, depending on the provided value Set *`seeded`* to `TRUE` or `FALSE`. For example: `#{srmContext[wCond['seeded']['like']['TRUE']]}`
`#{srmContext[wCond['visibleType']['like']['`*`visibleType`*`']]}`	In a larger expression, returns any resource that is of the specified type of visibility Set *`visibleType`* to `TRUE`, `FALSE`, or `NEVER` to indicate that the resource is never shown. For example, the following expression returns resources that are visible, that is, resources that are set to **Show**: `#{srmContext[wCond['visibleType']['like']['TRUE']]}`
`#{srmContext[wCond['visible']['like']['`*`visible`*`']]}`	In a larger expression, returns one or multiple resources with visibility set to either `TRUE` or `FALSE`
`#{srmContext[wCond['createdBy']['like']['`*`resourceCreator`*`']]}`	In a larger expression, returns any resource created by the specified user
`#{srmContext[wCond['resourceType']['like']['`*`resourceType`*`']]}`	In a larger expression, returns one or multiple resources of the specified type For example, the following expression searches for a resource of the type `SITE_TEMPLATE`: `#{srmContext[wCond['resourceType']['like']['SITE_TEMPLATE']]}` Note that all resource types are listed in *Oracle Fusion Middleware Java API Reference for Oracle WebCenter*, in the `GenericSiteResourceTypes` class.

Table B–13 (Cont.) ELs Relevant to Resources

EL	Function
`#{srmContext[wCond['version']['like']['`*`version`*`']]}`	In a larger expression, returns one or multiple resources available in the application of the specified version
`#{srmContext[wCond['resourceScope']['like']['`*`scopeName`*`']]}`	In a larger expression, returns one or multiple resources available in the specified scope For example, the following expression searches for resources in the scope (in this instance, the space) `MySpace`: `#{srmContext[wCond['resourceScope']['like']['MySpace']]}` To search in the default scope, that is, the application scope, use `defaultScope`.
`#{srmContext[wCond['searchType']['like']['`*`searchType`*`']]}`	In a larger expression, returns one or multiple resources that contain or equal the values set by other included expressions Set *`searchType`* to `CONTAINS` or `EQUALS`.

B.4.5.1 Example: Using EL Expressions for Resources

This section provides an example of using an EL expression to display a page template based on a user's role.

In this example, you will use an EL expression to enable a specific page template to be displayed for moderators so that only they can access the features or links available in that page template.

To display a page template based on a user role:

1. Go to the desired space.
2. Go to **Manage** > **General Settings**.
3. In the **Display Setting** section, for **Page Template** click the Expression Builder icon, and click **Expression Builder**.
4. In the **Type a value or expression**, enter the following expression:

```
#{srmContext[wCond['resourceType']['like']['siteTemplate']][wCond['displayName']['like'][WCSecurityContext.userInScopedRole['Moderator'] ? 'Fusion Side Navigation' : 'WebCenter Spaces Top Navigation']].singleResult.id}
```

   Where:

   - `srmContext[wCond['resourceType']['like']['siteTemplate']]`

     Gets a list of all page templates in the scope

   - `[wCond['displayName']['like'][WCSecurityContext.userInScopedRole['Moderator'] ? 'Fusion Side Navigation' : 'WebCenter Spaces Top Navigation']]`

     Reduces the list down to one depending on whether the current user is a moderator. If the user is a moderator, the Fusion Side Navigation page template is applied. For all other user roles, the space is rendered using the WebCenter Spaces Top Navigation page template.

   - `singleResult.id`

Returns the GUID of the required entry.

5. Click **OK**.

B.4.6 EL Expressions Relevant to Specific Spaces

Table B–14 lists EL expressions relevant to spaces and describes the types of functionality each provides. All of the listed ELs are for use in Spaces.

Note: The space *internal name* is the name specified by the **Space URL** on the **General** page of a space's administration settings. The space *display name* is specified by **Display Name**. Many of the EL expressions in Table B–14 call for the space internal name.

Table B–14 EL Expressions Relevant to Specific Spaces

Expression	Function
`#{spaceContext}`	An `oracle.webcenter.spaces.context.SpacesContext` object that provides an access point in the current web request for all space-related information. The value of this expression is whatever is returned on invoking the java API: `SpacesContext.getCurrentInstance()`
`#{spaceContext.currentSpace}`	An `oracle.webcenter.spaces.Space` object that represents the space associated with the current web request. If the current web request is in the Home space context, it returns a value of `null`. The value of this expression is whatever is returned on invoking the Java API: `SpacesContext.getCurrentInstance().getCurrentSpace()`
`#{spaceContext.currentSpaceName}`	The name of the space associated with the current web request. If the current web request is in a Home space context, it returns a value of `null`. The value of this expression is whatever is returned on invoking the java API: `SpacesContext.getCurrentInstance().getCurrentSpace()`

`#{spaceContext.space['`*`spaceName`*`']}`
 	
`#{spaceContext.currentSpace}`
	An `oracle.webcenter.spaces.Space` object that represents the space that is named *`spaceName`* or the current space (`currentSpace`). For example, `#{spaceContext.space['FinanceProject']}` returns the space object for the space called `FinanceProject`.
	
	The value of this expression is whatever is returned in Java on invoking `.getSpace(...)` on the current `SpacesManager` passing in the `MDSSession` of the current `ADFContext`.

Table B–14 (Cont.) EL Expressions Relevant to Specific Spaces

Expression	Function

`#{spaceContext.space['`*`spaceName`*`'].metadataPath}`
 	
`#{spaceContext.currentSpace.metadataPath}`
	The MDS path of the space metadata document for the space with specified name *`spaceName`* or the current space (`currentSpace`). For example, `#{spaceContext.space['FinanceProject'].metadataPath}` evaluates to `/oracle/webcenter/space/metadata/spaces/FinanceProject/space.xml`
	
	The value of this expression is whatever is returned in java on invoking `.getMetadataPath()` on the space object for the space.

`#{spaceContext.space['`*`spaceName`*`'].metadata}`
 	
`#{spaceContext.currentSpace.metadata}`
	An `oracle.webcenter.spaces.beans.SpaceType` bean that carries metadata about the space that is named *`spaceName`* or the current space (`currentSpace`).
	
	The value of this expression is whatever is returned in java on invoking `.getMetadata()` on the space object for the space passing in the `MDSSession` of the current `ADFContext`.

`#{spaceContext.space['`*`spaceName`*`'].metadata.displayName}`
 	
`#{spaceContext.currentSpace.metadata.displayName}`
	The display name of the space that is named *`spaceName`* or the current space (`currentSpace`). For example, if a space called `Web20Space` has the display name `web 2.0 Space`, then `#{spaceContext.space['Web20Space'].metadata.displayName}` evaluates to `web 2.0 Space`.

`#{spaceContext.space['`*`spaceName`*`'].GSMetadata.groupSpaceURI}`
 	
`#{spaceContext.currentSpace.GSMetadata.groupSpaceURI}`
	The URL of the space that is named *`spaceName`* or the current space (`currentSpace`).

`#{WCPrepareImageURL[spaceContext.space['`*`spaceName`*`'].metadata.icon]['']}`
 	
`#{WCPrepareImageURL[spaceContext.currentSpace.metadata.icon]['']}`
	A URL to the icon associated with the space that is named *`spaceName`* or the current space (`currentSpace`).

`#{spaceContext.space['`*`spaceName`*`'].metadata.description}`
 	
`#{spaceContext.currentSpace.metadata.description}`
	The description of the space that is named *`spaceName`* or the current space (`currentSpace`). For example, `#{spaceContext.space['FinanceProject'].metadata.description}` evaluates to *Conglomeration of all teams involved in financial activities*.

`#{spaceContext.space['`*`spaceName`*`'].metadata.creationDate}`
 	
`#{spaceContext.currentSpace.metadata.creationDate}`
	A *java.util.Calendar* object representing the date-time on which the space with specified name *`spaceName`* or the current space (`currentSpace`) was created.

`#{spaceContext.space['`*`spaceName`*`'].metadata.createdBy}`
 	
`#{spaceContext.currentSpace.metadata.createdBy}`
	The user-name of the person who created the space that is named *`spaceName`* or the current space (`currentSpace`).

`#{spaceContext.space['`*`spaceName`*`'].metadata.keywords}`
 	
`#{spaceContext.currentSpace.metadata.keywords}`
	A comma-delimited list of searchable keywords associated with the space with the name *`spaceName`* or the current space (`currentSpace`). For example, if the space *FinanceProject* has the keywords `finance, project, money`, then `#{spaceContext.space['FinanceProject'].metadata.keywords}` evaluates to *finance, project, money*.

Table B–14 (Cont.) EL Expressions Relevant to Specific Spaces

Expression	Function
`#{spaceContext.space['`*`spaceName`*`'].metadata.offline}` `#{spaceContext.currentSpace.metadata.offline}`	Boolean value that indicates whether the space that is named *`spaceName`* or the current space (`currentSpace`) is offline.
`#{spaceContext.space['`*`spaceName`*`'].metadata.closed}` `#{spaceContext.currentSpace.metadata.closed}`	Boolean value that indicates whether the space that is named *`spaceName`* or the current space (`currentSpace`) is closed.
`#{spaceContext.space['`*`spaceName`*`'].metadata.selfRegistration}` `#{spaceContext.currentSpace.metadata.selfRegistration}`	Boolean value that indicates whether users are allowed to register themselves with the space that is named *`spaceName`* or the current space (`currentSpace`).
`#{spaceContext.space['spaceName'].metadata.discoverable}` `#{spaceContext.currentSpace.metadata.discoverable}`	Boolean value that indicates whether users can discover the existence of the space that is named *`spaceName`* or the current space (`currentSpace`) by searching for it or seeing it listed on the My spaces page.
`#{spaceContext.space['`*`spaceName`*`'].metadata.publishRSS}` `#{spaceContext.currentSpace.metadata.publishRSS}`	Boolean value indicating whether the space that is named *`spaceName`* or the current space (`currentSpace`) publishes RSS feeds.
`#{spaceContext.space['`*`spaceName`*`'].distributionList}` `#{spaceContext.currentSpace.distributionList}`	The email address of the mailing list associated with the space that is named *`spaceName`* or the current space (`currentSpace`).
`#{spaceContext.space['`*`spaceName`*`'].metadata.customAttributes['`*`attributeName`*`']}` `#{spaceContext.currentSpace.metadata.customAttributes['`*`attributeName`*`']}`	The value of a specific custom attribute of the name *`attributeName`* for the space that is named *`spaceName`* or the current space (`currentSpace`). For example, if the *FinanceProject* space has a custom attribute called `stockPrice` with a value of `13.9`, then `#{spaceContext.space['FinanceProject'].metadata.customAttributes['stockPrice']}` evaluates to *13.9*.
`#{WCPrepareImageURL[spaceContext.space['spaceName'].metadata.logo]['']}` `#{WCPrepareImageURL[spaceContext.currentSpace.metadata.logo]['']}`	Returns the logo URL for the space named *`spaceName`* or the current space (`currentSpace`).

Table B–14 (Cont.) EL Expressions Relevant to Specific Spaces

Expression	Function

`#{spaceContext.spacesQuery.`*`property`*`['`*`value`*`']}`
 	
`#{spaceContext.spacesQuery.`*`property`*`['`*`value`*`'].listSpaces}`
	A means of querying a space using a query parameter in the form of *`property`*`['`*`value`*`']`, where *`property`* means the name of the property, for example, `unionOf`, `shape`, and the like; and *`value`* means the criteria to use in fetching the list of all spaces, discoverable spaces, and the like.
	
	If `listSpaces` is appended to the expression, the query returns the list of spaces of type `GSMetadata`. (For more information, see `Interface GSMetadata` in *Oracle Fusion Middleware Java API Reference for Oracle WebCenter*.)
	
	For example, the following EL expression returns a list of all discoverable spaces.
	
	`#{spaceContext.spacesQuery.unionOf['DISCOVERABLE'].listSpaces}`
	
	If `listspaces` is not appended to the EL, then the EL evaluates to an object of type `SpacesQueryParameter`. This object type must be evaluated using `SpacesManager.getSpaces(SpacesQueryParameters)`, which in turn returns a list of spaces of type `GSMetadata`.
	
	For example, the following EL expression returns an instance of type `SpacesQueryParameters` with all the query conditions populated.
	
	`#{spaceContext.spacesQuery.unionOf['DISCOVERABLE']}`

`#{spaceContext.spacesQuery.unionOf['USER_JOINED'].shape['ROOT_LEVEL'].listSpaces}`	Returns a list of all top-level spaces of which the current user is a member This EL returns only those spaces that do not have a parent, that is, it does not return subspaces.
`#{spaceContext.spacesQuery.unionOf['USER_JOINED'].shape['RECURSIVE_FLATTENED'].listSpaces}`	Returns a list of all spaces of which the current user is a member This EL also returns all the subspaces under each of the parent spaces to which the current user has access. To see an example, refer to Section B.4.6.1, "Example: Using EL Expressions for Various Spaces".
`#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE'].sort[’`*`sortBy field picked from WcSpaceHeader`*`’]}`	Returns spaces sorted into the order specified by the sort criteria For example, the following query returns a list of spaces to which the user has access sorted by `discoverable` and `lastUpdateDate` fields. Note that in the following example, the idenitifier `sp` represents the JPA entity for a space, `WcSpaceHeader`. `#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE'].sort['sp.discoverable’]['asc']['sp.lastUpdateDate’]['desc'].listSpaces}`

Table B–14 (Cont.) EL Expressions Relevant to Specific Spaces

Expression	Function
`#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE'].pageNumber[`*page_num*`].listSpaces}`	Allows specifying the page number (0-based) to select from the results matching the query criteria For example, the following expression returns a list of all spaces to which a user has access and returns the third page of the result set: `#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE'].pageNumber[2].listSpaces]}`
`#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE'].itemsPerPage[`*page_num*`].listSpaces}`	Allows specifying the number of results to be included in each page when breaking down the result space into pages For example, the following expression returns a list of all spaces to which a user has access, listing 10 records per page. `#{spaceContext.spacesQuery.unionOf['ALL_QUERIABLE'].pageNumber[10].listSpaces]}`
`#{spaceContext.spacesQuery.unionOf.ALL_QUERIABLE.where[wCond['sp.createdBy']['like']['monty%'] ['and'] [wCond['sp.selfSubEnabled']['is']['null'] ['or'] [wCond['sp.selfSubEnabled']['=']['N']] ['not'] ] ].listSpaces}`	Returns a list of all spaces a user has access which are created by a specified user, and on which self subscription is enabled. (For more information, see `SpacesQueryParameters` and `SpacesQueryFilter` in *Oracle Fusion Middleware Java API Reference for Oracle WebCenter*.)

B.4.6.1 Example: Using EL Expressions for Various Spaces

This section provides an example of using EL expressions to query various spaces.

In this example, you will use the following EL to display a list of all spaces of which you are a member:

```
"#{spaceContext.spacesQuery.unionOf['USER_JOINED'].shape['RECURSIVE_
FLATTENED'].listSpaces}"
```

You will also use the following methods to display the logo, name, description, and number of members of a space.

- `iconURI` - to display the space logo
- `displayName` - to display the space name
- `description` - to display the space description
- `memberCount` - to display the number of space members

To query a space:

1. Create a new task flow, and mark it as available for use, as described in Section 29.3.1, "Creating a Task Flow."
2. Edit the source code of the task flow. On the **Resources** tab, select the task flow. From the **Edit** menu, select **Edit Source**.
3. In the Edit Source dialog, on the **Fragment** tab, replace the existing code with the following code:

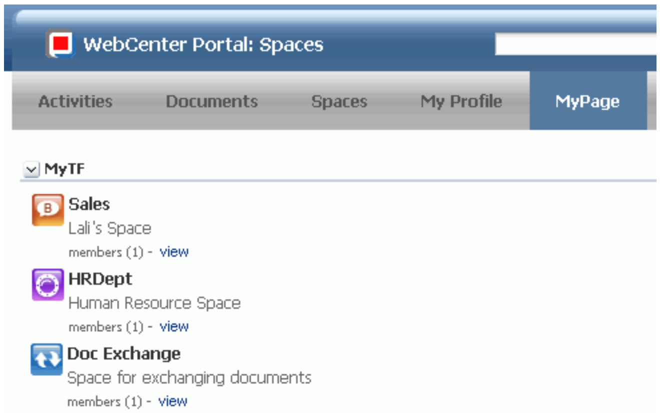
```
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
```

```
xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable"
xmlns:f="http://java.sun.com/jsf/core"
xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
xmlns:c="http://java.sun.com/jsp/jstl/core"
xmlns:fn="http://java.sun.com/jsp/jstl/functions">
   <af:panelGroupLayout id="pgl1">
      <cust:panelCustomizable id="pc1">
         <table border="0" width="100%">
            <af:iterator id="it1" var="row"
value="#{spaceContext.spacesQuery.unionOf['USER_JOINED'].shape['RECURSIVE_
FLATTENED'].listSpaces}">
                  <c:set var="iconURI"
value="#{fn:split(row.iconURI,'}')[1]}"/>
                  <c:set var="displayName" value="#{row.displayName}"/>
                  <c:set var="description" value="#{row.description}"/>
                  <c:set var="numMembers" value="#{row.memberCount}"/>
                       <tr class="PortletText1">
                              <td width="16px" rowspan="3" valign="top">
                                      <af:image id="img1"
source="/webcenter-spaces-resources/oracle/webcenter/siteresources/scopedMD/sha
red#{iconURI}/ICON16"/>
                               </td>
                               <td>
                                    <af:outputText id="otCol1"
                                             value="#{displayName}"

inlineStyle="color:#333333; font-size:12px; font-weight:bold;"/>


                                </td>
                         </tr>
                          <tr>
                              <td>
                                  <af:outputText id="otCol3"
                                                   value="#{description}"

inlineStyle="color:#666666; font-size:12px;"/>
                                </td>
                          </tr>
                          <tr>
                             <td>
                                <af:outputText id="otCol4"
                                              value="members (#{numMembers}) -"

inlineStyle="color:#666666; font-size:10px;"/>
                                     <af:spacer id="spacer1" width="5px"/>
                                     <af:goLink id="gl1"

destination="/spaces/#{row.name}"
                                                     targetFrame="_blank"
                                                     text="view"/>
                              </td>
                          </tr>
            </af:iterator>
         </table>
      </cust:panelCustomizable>
   </af:panelGroupLayout>
</jsp:root>
```

4. Add the task flow to a page. In the Resource Catalog, the custom task flow is available under **Mash-Ups** > **Task Flows**.

   The page should now show a list of all the spaces of which you are is a member (Figure B–1).

Figure B–7 Space Query



B.4.7 EL Expressions Relevant to Specific Pages

Table B–15 lists EL expressions relevant to application pages and describes the types of functionality it provides.

Table B–15 EL Expressions Relevant to Application Pages

Expression	Function
`#{pageDocBean.title}`	Returns the page display name, for example: *FinanceProject*
`#{pageDocBean.createdBy}`	Returns the user name of the person who created the page, for example: *monty*
`#{pageDocBean.createDateString}`	Returns the date and time the page was created, for example: *2008-11-19T10:18:36*
`#{pageDocBean.lastUpdatedBy}`	Returns the user name of the person who last updated the page, for example: *monty*
`#{pageDocBean.lastUpdateDateString}`	Returns the date and time the page was last updated, for example: *2008-11-19T10:18:36*
`#{pageDocBean.pagePath}`	Returns the file directory path to the page relative to the application root directory, for example: */oracle/webcenter/page/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/user/Umonty/Page4.jspx*
`#{pageDocBean.name}`	Returns the file name of the page, for example: *Page4.jspx*
`#{pageDocBean.UICSSStyle}`	Returns the name of the style scheme used on the page, for example: *WCSchemeEggShell*

Table B–15 (Cont.) EL Expressions Relevant to Application Pages

Expression	Function
`#{pageDocBean.UISchemeBGImage}`	Returns the directory path and file name of the page scheme background image.
`#{pageDocBean.UISchemeBGColorString}`	Returns the hexadecimal value of the page scheme background color, for example: *#ffa500*
`#{pageDocBean.pagePermission}`	Returns the permission the current user has on the page, for example: *oracle.webcenter.page.model.security.CustomPagePermission*
`#{pageDocBean.pageSecurityTarget}`	A string of 60 or so characters that uniquely identifies the current page to the security system, for example: *oracle_webcenter_page_scopedMD_s8bba98ff_4cbb_40b8_beee_296c916a23ed_user_Umonty_Page4PageDef*

B.4.8 EL Expressions Relevant to Composer

Table B–16 lists EL expressions relevant to Composer. The **Context** column indicates that the expression can be used both in the Spaces application and Framework applications built with Oracle JDeveloper.

Table B–16 EL Expressions Relevant to Composer

Expression	Function	Context
#{composerContext.inEditMode}	Determines whether the current page is in View mode or Edit mode, for example: `<af:outputText id="ot1" value="#{composerContext.inEditMode ne true ? 'View mode' : 'Edit mode'} />` This example shows an ADF Faces `outputText` component that returns `View mode` when the page is in View mode and `Edit mode` when the page is in Edit mode.	Both

B.4.8.1 Example: Using EL Expressions for Composer

This section provides an example of using an EL expression to display different pages in View mode and Edit mode. Consider that you want one of your pages, `Page1`, to display another page, `Page2`, in View mode. However, while editing `Page1`, instead of `Page2`, you want to display a website, `www.example.com`. You can use the EL of the following format:

```
#{ composerContext.inEditMode ? 'http://www.example.com' : 'url_of_Page2' }
```

This EL displays the specified website when your page is in Edit mode, and shows `Page2` when in View mode.

The following steps demonstrate how to display different pages depending on the page mode.

1. Open a page named `Page1` in Edit mode.
2. Click **Add Content**.
3. In Resource Catalog, click **Web Development**.
4. Click **Add** next to **Web Page**, then click **Close**.

5. Click the Edit icon for the newly added Web Page.
6. In the Component Properties dialog, on the **Display Options** tab, in the **Source** field, enter the value as per the following format:

```
#{ composerContext.inEditMode ? 'website_url' : 'url_of_Page2' }
```

7. Click **OK**.

   In Edit mode, `Page1` should now display the website you specified. Save and close the page. `Page1` should now show `Page2`.

B.4.9 EL Expressions Relevant to Event Contexts

Table B–17 lists EL expressions relevant to the types of events that can trigger the passing of payloads (rather than events relevant to the Events service).

You can access all or part of the event payloads provided in Table B–17 once they have been raised.

For example, for the whole payload, use the following EL:

```
#{wcEventContext.events.<eventName>}
```

For example:

```
#{wcEventContext.events.WebCenterUserSelected}
```

All of the payloads for the ELs in Table B–17 are Maps. To dereference a map entry, use the standard EL for Maps:

```
#{wcEventContext.events.WebCenterUserSelected.UserName}
```

> **See Also:** For more information about event wiring, see Chapter 22, "Wiring Pages, Task Flows, Portlets, and UI Components."

Table B–17 EL Expressions Relevant to Event Contexts

Expression	Function

Event Context
`#{wcEventContext.events.WebCenterResourceSelected}`
Document Name
`#{wcEventContext.events.WebCenterResourceSelected.name}`
Document Creator
`#{wcEventContext.events.WebCenterResourceSelected.createdBy}`
Document Last Modified By
`#{wcEventContext.events.WebCenterResourceSelected.lastModifiedBy}`
	Use in context wiring between producer and consumer task flows. Returns a map that relates some piece of metadata from the producer to some piece of metadata from the consumer, for example, from a document creator to the creator's Profile.
	Producer task flows include:
	■ Document Manager
	■ Recent Documents
	■ Document List Viewer
	Consumer task flows include:
	■ Activity Graph - Similar Items (show other documents that may be of interest to the user)
	■ Links (show the items that are linked to the selected document)
	■ Profile (view the Profile of the document's author)
	■ Activity Stream (view activities related to this document)
	■ Tags (tags on this document and a means of accessing the Tag Center)

Event Context
`#{wcEventContext.events.WebCenterUserSelected}`
User Name
`#{wcEventContext.events.WebCenterUserSelected.userName}`
User GUID
`#{wcEventContext.events.WebCenterUserSelected.userGUID}`
space Name
`#{wcEventContext.events.WebCenterUserSelected.spaceName}`
space GUID
`#{wcEventContext.events.WebCenterUserSelected.spaceGUID}`
	Use in context wiring between producer and consumer task flows. Returns a map that relates some piece of metadata from the producer to some piece of metadata from the consumer, for example, from a user to the user's connections.
	Producer task flows include:
	■ Connections
	■ Space Members
	Consumer task flows include:
	■ Connections (show connections of the selected user)
	■ Documents task flows (show documents created by the selected user)
	■ Activity Stream (view this user's activities)
	■ Tags (tags created by this user)
	■ Profile (show this user's Profile)

Table B–17 (Cont.) EL Expressions Relevant to Event Contexts

Expression	Function

Event Context
`#{wcEventContext.events.WebCenterConnectionSelected}`
 	
Profile User Name
`#{wcEventContext.events.WebCenterConnectionSelected.profileUserName}`
 	
Profile User GUID
`#{wcEventContext.events.WebCenterConnectionSelected.profileUserGUID}`
 	
Connected User Name
`#{wcEventContext.events.WebCenterConnectionSelected.userName}`
 	
Connected User GUID
`#{wcEventContext.events.WebCenterConnectionSelected.userGUID}`
	--

`#{wcEventContext.events.WebCenterSpaceSelected.}`*spaceName*	Returns the name of the selected space
`#{wcEventContext.events.WebCenterSpaceSelected.SpaceGUID}`	Returns the GUID of the selected space

B.4.10 EL Expressions Relevant to Services

Table B–18 lists EL expressions relevant to services and describes the types of functionality it provides. All listed ELs can be used in both Spaces and WebCenter Portal: Framework.

Table B–18 EL Expressions Relevant to Services

Expression	Function
`#{webcenterService['`*`serviceId`*`']}`	An `oracle.webcenter.framework.service.Service` object representing the WebCenter Portal service with the service ID `serviceId`. For example, the following EL returns *Documents Service*. `#{webcenterService['oracle.webcenter.doclib']}` For service IDs, see Table B–19.
`#{webcenterService['`*`serviceId`*`'].configured}`	Returns a Boolean value that indicates whether the WebCenter Portal service with the service ID *`serviceId`* is configured for use in the Spaces application. For example, the following EL returns `true` if Discussions service can be used in the application, `false` otherwise: `#{webcenterService['oracle.webcenter.collab.forum'].configured}` For service IDs, see Table B–19.
`#{sessionContext['oracle.webcenter.collab.forum'].groupInfo['`*`spaceName`*`'].forumId}`	Returns the forum ID of the specified space discussion forum. Enter the space name in lieu of *`spaceName`*.
`#{sessionContext['oracle.webcenter.collab.forum'].groupInfo['`*`spaceName`*`'].categoryId}`	Returns the category ID of the specified space discussion forums. Enter the space name in lieu of *`spaceName`*.

Table B–19 lists service IDs associated with services at runtime.

Table B–19 Service IDs

Service	ID
Announcements	oracle.webcenter.collab.announcement
Discussions	oracle.webcenter.collab.forum
Documents and Wikis	oracle.webcenter.doclib
Events	oracle.webcenter.collab.calendar.community
Space Management	oracle.webcenter.community
Instant Messaging and Presence (IMP)	oracle.webcenter.collab.rtc
Links	oracle.webcenter.relationship
Lists	oracle.webcenter.list
Mail	oracle.webcenter.collab.mail
Notes	oracle.webcenter.note
Notifications	oracle.webcenter.notification
Page	oracle.webcenter.page
People Connections: Activity Stream	oracle.webcenter.activitystreaming
People Connections: Connections	oracle.webcenter.peopleconnections.connections
People Connections: Feedback	oracle.webcenter.peopleconnections.kudos
People Connections: Message Board	oracle.webcenter.peopleconnections.wall
People Connections: Profile	oracle.webcenter.peopleconnections.profile

Table B–19 (Cont.) Service IDs

Service	ID
Polls	oracle.webcenter.collab.survey
Recent Activities	oracle.webcenter.recentactivity
Activity Graph	oracle.webcenter.activitygraph
RSS	oracle.webcenter.rss
Search	oracle.webcenter.search
Tags	oracle.webcenter.tagging
Blogs	oracle.webcenter.blog
Worklist	oracle.webcenter.worklist

B.4.11 EL Expressions Relevant to the Personalization Conductor

Table B–20 lists EL expressions relevant to the Personalization Conductor and describes the types of functionality it provides. All listed ELs can be used in both the Spaces application and Framework applications built with Oracle JDeveloper.

Table B–20 EL Expressions Relevant to the Personalization Conductor

Expression	Function

`#{p13nContext.reset}`	Clears the state of the context object in which it is invoked.
	Other examples:
	`#{p13nContext.conductor['ConductorConnection'].reset}`
	`#{p13nContext.conductor['ConductorConnection'].namespaces['MyNamespace'].reset}`
	`#{p13nContext.properties['PropertiesConnection'].namespaces['MyNamespace'].setDefinitions['MyPropertySetDefinition'].set['MyPropertySet'].reset}`

`#{p13nContext.properties['PropertiesConnection'].namespaces['MyNamespace'].setDefinitions['MyPropertySetDefinition'].set['MyPropertySet'].update}`	Updates the property set with new values if bound to a form. The `update` method applies only to the context `PropertySetContext`, and can be called only as part of a form-based action.

`#{p13nContext.properties['PropertiesConnection'].namespaces['MyNamespace'].setDefinitions['MyPropertySetDefinition'].set['MyPropertySet'].results}`	Retrieves the results of the context object. In the case of `PropertySetContext`, it retrieves the property set by name and property set definition, if they exist.
	In the case of `ScenarioExecutionContext` and `ParameterizedScenarioExecutionContext`, the scenario results are retrieved.
	Other examples:
	`#{p13nContext.conductor['ConductorConnection'].namespaces['MyNamespace'].scenario['MyScenario'].results}`
	`#{p13nContext.conductor['ConductorConnection'].namespaces['MyNamespace'].scenario['MyScenario'].withInput['input1=val1;input2=value2;input3=value3'].results}`

`#{p13nContext.conductor['PropertiesConnection'].namespaces['MyNamespace'].scenario['MyScenario'].results}`	Executes a scenario by name.

Table B–20 (Cont.) EL Expressions Relevant to the Personalization Conductor

Expression	Function
`#{p13nContext.conductor['ConductorConnection'].namespaces['MyNamespace'].scenario['MyScenario'].withInput['input1=val1;input2=value2;input3=value3'].results}`	Executes a scenario by name with input parameters. Input parameters must be in the following format: *`<paramOne>=<valueOne>;<paramTwo>=<valueTwo>;<paramThree>=<valueThree>`* Where each parameter name and value is separated by semicolon. The `withInput` method applies only to the context `ScenarioExecutionContext`.
`#{p13nContext.conductor['ConductorConnection'].namespaces[myManagedBean.namespace].scenario[myManagedBean.scenario].isError}`	Determines if an error has occurred in the current context object. The `isError` method applies only to `PropertySetContext` and `~ScenarioExecutionContext`. Other examples: `#{p13nContext.properties['PropertiesConnection'].namespaces['MyNamespace'].setDefinitions['MyPropertySetDefinition'].set['MyPropertySet'].isError}`
`#{p13nContext.conductor['ConductorConnection'].namespaces['myManagedBean.namespace'].scenario['myManagedBean.scenario'].errorMessage}`	Returns the error message if an error has occurred in the current context object. The errorMessage method applies only to `PropertySetContext` and `~ScenarioExecutionContext`. Other examples: `#{p13nContext.properties['PropertiesConnection'].namespaces['MyNamespace'].setDefinitions['MyPropertySetDefinition'].set['MyPropertySet'].errorMessage}`

B.4.12 EL Expressions Relevant to the Documents Service

Table B–21 lists EL expressions relevant to the Documents service and describes the types of functionality it provides. The **Context** column indicates whether the expression can be used in the Spaces context (WCS) or in both the Spaces application and Framework applications built with Oracle JDeveloper (Both).

Table B–21 EL Expressions Relevant to the Documents Service

Expression	Function	Context
`#{documentsService.currentGroupSpace}`	Provides information on the space's documents. Returns a bean that provides access to documents-related information for the space.	WCS
`#{documentsService.currentUser}`	Provides information about the current user's documents.	WCS
`#{documentsService.defaultConnectionName}`	Gets the default content repository connection name. Returns `null` if no connection name is defined.	Both

Table B–21 (Cont.) EL Expressions Relevant to the Documents Service

Expression	Function	Context
`#{documentsService.groupSpaceByGUID['GUID']}`	Provides a way to look up a given space's documents information by the space's GUID. Returns a bean that provides documents-related information for the space.	WCS
`#{documentsService.groupSpaceByName['space Name']}`	Provides a way to look up a given space's documents information by the space's name. Returns a bean that provides access to documents-related information for the space. Enter the space *internal name*. The space internal name is the name specified by the **space URL** on the **General** page of a space's administration settings. The space *display name* is specified by **Display Name**, and is the name that appears in the banner at the top of a space. Many of the EL expressions in Table B–14 call for the space internal name.	WCS
`#{documentsService.userByName['userName']}`	Provides a way to look up user documents information by user name. Returns a bean that provides access to documents-related information for the user.	WCS
`#{documentsService.configured}`	Checks whether the Documents service is configured. Returns `true` if the Documents service is configured, otherwise `false`.	Both

B.4.13 EL Expressions Relevant to the People Connections Service

Table B–22 lists EL expressions relevant to the Profile feature of the People Connections service and describes the types of functionality it provides. All listed ELs can be used in both the Spaces application and Framework applications built with Oracle JDeveloper.

Note: The entry `securityContext.userName`, included in every Profile expression, returns the name of the current user. Note also that information is returned only if it is present in the user's profile. If the information is not included in the profile, a null value is returned.

Table B–22 EL Expressions Relevant to the People Connections Service (Profile)

Expression	Function
#{WebCenterProfile[*userName*].ManagerDisplayName} #{WebCenterProfile[securityContext.userName].ManagerDisplayName}	The display name of the specified user's manager if the current user is allowed to know it.
#{WebCenterProfile[*userName*].employeeNumber} #{WebCenterProfile[securityContext.userName].employeeNumber}	The specified user's employee number if the current user is allowed to know it.
#{WebCenterProfile[*userName*].businessPOBox} #{WebCenterProfile[securityContext.userName].businessPOBox}	The post office box number associated with the specified user if the current user is allowed to know it.
#{WebCenterProfile[*userName*].timeZone} #{WebCenterProfile[securityContext.userName].timeZone}	The time zone in which the specified user's home office is located if the current user is allowed to know it.
#{WebCenterProfile[*userName*].description} #{WebCenterProfile[securityContext.userName].description}	A description of the specified user (from Profile "About Me") if the current user is allowed to know it.
#{WebCenterProfile[*userName*].department} #{WebCenterProfile[securityContext.userName].department}	The department to which the specified user belongs if the current user is allowed to know it.
#{WebCenterProfile[*userName*].businessPager} #{WebCenterProfile[securityContext.userName].businessPager}	The specified user's business pager number if the current user is allowed to know it.
#{WebCenterProfile[*userName*].businessCity} #{WebCenterProfile[securityContext.userName].businessCity}	The city in which the specified user is located if the current user is allowed to know it.
#{WebCenterProfile[*userName*].maidenName} #{WebCenterProfile[securityContext.userName].maidenName}	The specified user's surname or last name before marriage if the current user is allowed to know it.
#{WebCenterProfile[*userName*].businessFax} #{WebCenterProfile[securityContext.userName].businessFax}	The specified user's business fax number if the current user is allowed to know it.
#{WebCenterProfile[*userName*].dateofHire} #{WebCenterProfile[securityContext.userName].dateofHire}	The specified user's date of hire if the current user is allowed to know it.
#{WebCenterProfile[*userName*].nameSuffix} #{WebCenterProfile[securityContext.userName].nameSuffix}	Additional information appended to the user's name, such as `Esq.`, `Jr.`, and so on if the current user is allowed to know it.
#{WebCenterProfile[*userName*].middleName} #{WebCenterProfile[securityContext.userName].middleName}	The specified user's middle name if the current user is allowed to know it.

Table B–22 (Cont.) EL Expressions Relevant to the People Connections Service (Profile)

Expression	Function
`#{WebCenterProfile[`*userName*`].homePhone}` `#{WebCenterProfile[securityContext.userName].homePhone}`	The specified user's home phone number if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].employeeType}` `#{WebCenterProfile[securityContext.userName].employeeType}`	The specified user's employee type classification, for example, `IC4` if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].lastName}` `#{WebCenterProfile[securityContext.userName].lastName}`	The specified user's surname or last name if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].dateofBirth}` `#{WebCenterProfile[securityContext.userName].dateofBirth}`	The specified user's birthday if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].businessState}` `#{WebCenterProfile[securityContext.userName].businessState}`	The state in which the specified user's home office is located if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].homeAddress}` `#{WebCenterProfile[securityContext.userName].homeAddress}`	The specified user's home street address if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].businessStreet}` `#{WebCenterProfile[securityContext.userName].businessStreet}`	The street on which the specified user's home office is located if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].businessPostalCode}` `#{WebCenterProfile[securityContext.userName].businessPostalCode}`	The specified user's postal or ZIP code if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].initials}` `#{WebCenterProfile[securityContext.userName].initials}`	The specified user's initials if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].firstName}` `#{WebCenterProfile[securityContext.userName].firstName}`	The specified user's first name if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].organizationalUnit}` `#{WebCenterProfile[securityContext.userName].organizationalUnit}`	The organizational unit to which the specified user belongs, for example, `D10`, if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].wirelessAcctNumber}` `#{WebCenterProfile[securityContext.userName].wirelessAcctNumber}`	The specified user's wireless account number if the current user is allowed to know it.
`#{WebCenterProfile[`*userName*`].businessPhone}` `#{WebCenterProfile[securityContext.userName].businessPhone}`	The specified user's business telephone number if the current user is allowed to know it.

Table B–22 (Cont.) EL Expressions Relevant to the People Connections Service (Profile)

Expression	Function
`#{WebCenterProfile[userName].businessCountry}` `#{WebCenterProfile[securityContext.userName].businessCountry}`	The country in to which the specified user is assigned if the current user is allowed to know it.
`#{WebCenterProfile[userName].preferredLanguage}` `#{WebCenterProfile[securityContext.userName].preferredLanguage}`	The specified user's preferred language if the current user is allowed to know it.
`#{WebCenterProfile[userName].displayName}` `#{WebCenterProfile[securityContext.userName].displayName}`	The specified user's display name if the current user is allowed to know it.
`#{WebCenterProfile[userName].userName}` `#{WebCenterProfile[securityContext.userName].userName}`	The specified user's actual name if the current user is allowed to know it.
`#{WebCenterProfile[userName].title}` `#{WebCenterProfile[securityContext.userName].title}`	The specified user's job title if the current user is allowed to know it.
`#{WebCenterProfile[userName].businessEmail}` `#{WebCenterProfile[securityContext.userName].businessEmail}`	The specified user's business email address if the current user is allowed to know it.
`#{WebCenterProfile[userName].organization}` `#{WebCenterProfile[securityContext.userName].organization}`	The organization to which the specified user belongs, for example, `Sales`, if the current user is allowed to know it.
`#{WebCenterProfile[userName].businessMobile}` `#{WebCenterProfile[securityContext.userName].businessMobile}`	The specified user's cell or mobile phone number if the current user is allowed to know it.
`#{WebCenterProfile[userName].expertise}` `#{WebCenterProfile[securityContext.userName].expertise}`	The specified user's business expertise if the current user is allowed to know it.

B.4.14 EL Expressions Relevant to User Preferences

Table B–23 lists EL expressions relevant to user preferences and describes the types of functionality they provide. All listed ELs can be used in both the Spaces application and Framework applications built with Oracle JDeveloper.

Table B–23 EL Expressions Relevant to User Preferences

Expression	Function
`#{generalSettings.userTimeZone}`	Returns the time zone the current user has selected in application Preferences. For more information, see Section 38.3, "Setting Date and Time Preferences."
`#{generalSettings.preferredDateStyle}`	Returns the date format the current user has selected in application Preferences. For more information, see Section 38.3, "Setting Date and Time Preferences."
`#{generalSettings.preferredDatePattern}`	Returns the current user's preferred date format pattern if it has been set, else, returns `null`. Note that date + pattern is applicable only to Framework applications, where they take precedence over date + style if they are set.
`#{generalSettings.preferredTimeStyle}`	Returns the time format the current user has selected in application Preferences. For more information, see Section 38.3, "Setting Date and Time Preferences."
`#{generalSettings.preferredTimePattern}`	Returns the current user's preferred time format pattern if it has been set, else, returns `null`.
`#{generalSettings.preferredDateTimePattern}`	Returns the current user's preferred date and time format pattern if it has been set, else, returns `null`.
`#{generalSettings.preferredAccessibilityMode}`	Returns the current user's preferred accessibility mode (either `default`, `inaccessible`, or `screenReader`)
`#{generalSettings.preferredSkinName}`	The current user's preferred skin name if one is specified, otherwise the default value.
`#{generalSettings.formattedCurrentDate}`	Returns the current date in the current user's selected locale.
`#{generalSettings.formattedCurrentTime}`	Returns the current time in the current user's selected locale.
`#{generalSettings.formattedCurrentDateTime}`	Returns the current date and time in the current user's selected locale.
`#{requestContext.skinFamily}`	Returns the name of the ADF Faces skin family being used for the current web request, depending on factors such as what has been configured at the application level, the current user's preference setting, and so on.

B.4.14.1 Example: Using EL Expressions for User Preferences

This section provides an example of using EL expressions to personalize a page through user preferences. Consider that you want to display the current date and time in one of your pages. You can use the following EL:

```
#{generalSettings.formattedCurrentDateTime}
```

This EL uses the current user's locale to displays the current date and time.

The following steps demonstrate how to display current date and time in a page:

1. Open the required page in Edit mode.
2. Click **Add Content**.
3. In Resource Catalog, click **Web Development**.

4. Click **Add** next to **HTML Markup**, then click **Close**.
5. Click the **Edit** icon for the newly added HTML Markup.
6. In the Component Properties dialog, on the **Display Options** tab, in the **Value** field, enter the following EL:

   ```
   #{generalSettings.formattedCurrentDateTime}
   ```
7. Click **OK**.

   Your page should now display the current date and time.

B.4.15 Utilitarian EL Expressions

Table B–24 lists utilitarian EL expressions and describes the types of functionality it provides.

Table B–24 Utilitarian EL Expressions

Expression	Function
`#{userPreferences.currentDate}`	Returns the current date in the format specified in the current user's preferences.
`#{WCTruncator['`*`text`*`']['`*`numberOfChars`*`']}`	Returns a truncation of the string specified as `text` to the number of characters specified as `numberOfChars`, followed by a trailing ellipsis, for example: `#{WCTruncator['abracadabra']['5']}` evaluates to *abrac...*
`#{facesContext.viewRoot.locale}` `#{facesContext.externalContext.requestLocale}`	Both of these expressions return the request locale (that is, the browser locale setting).
`#{changeModeBean.inEditMode}`	Returns *true* if current application page is in Composer mode. Returns *false* if current application page is not in Composer mode
`#{adfFacesContext.skinFamily}`	Returns the current application skin family. Returns the same value as `#{requestContext.skinFamily}`.

C

Business Mashup Examples

To help you leverage most of the mashup building capabilities in WebCenter Portal: Spaces, this appendix describes a variety of business scenarios that require creation of business mashups, and explains how to meet those requirements. It includes the following sections:

- Section C.1, "Creating Mashups with Data from the Analytics Service"
- Section C.2, "Creating a Mashup that Displays Employee Data from SQL Data Control"
- Section C.3, "Creating a Mashup with Data from the Spaces MDS Repository"
- Section C.4, "Creating a Mashup with Data from a Spaces Web Service Data Source"
- Section C.5, "Creating a Mashup with Data from a Siebel Data Source"
- Section C.6, "Building and Using a Custom Mashup Style with Predefined Columns"
- Section C.7, "Building and Using a Custom Mashup style with Date Fields"
- Section C.8, "Creating a Mashup with a Graph That Is Wired to the Page Navigation"
- Section C.9, "Creating a Mashup with a Graph that Is Wired to the Inherited Page Navigation"
- Section C.10, "Creating a Master-Detail Mashup that Contains a Google Maps Task Flow"
- Section C.11, "Creating a Mashup with a Customized RSS Feed OmniPortlet"

Note: This appendix describes only the high level steps to perform a task. For the detailed steps, you are pointed to Chapter 29, "Creating Business Mashups."

Sample Applications on OTN

Sample applications created for some of the examples in this appendix are available on Oracle Technology Network (OTN). The following page on OTN provides links to business mashup-specific samples and other sample applications that illustrate the different WebCenter Portal: Spaces capabilities:

```
http://www.oracle.com/technetwork/middleware/webcenter/ps3-sampl
es-176806.html
```

A readme file available with each sample describes what the application illustrates and provides guidance for extending or customizing the application for real life use cases.

C.1 Creating Mashups with Data from the Analytics Service

The Analytics service displays metrics, such as community traffic, portlet traffic, searched keywords, response times, and usage behavior, for the entire Spaces application. This section describes how to create a mashup with date retrieved from the Analytics service data source. It includes the following sections:

- Section C.1.1, "Creating a Graph to Display Page Hits"
- Section C.1.2, "Using a Parameterized Task Flow to Display a Graph of Page Hits in a Space"
- Section C.1.3, "Creating a Graph to View Portal Site Traffic"
- Section C.1.4, "Creating a Mashup with Two Task Flows in a Master-Detail Relationship"
- Section C.1.5, "Creating a Table with Hyperlinks to Download Documents"

If you have configured WebCenter Portal services, Spaces provides an Analytics service connection, `ActivitiesDS`, out-of-the-box. You can use this connection to create a SQL data control and consume that data control as a graph to display statistics for the Spaces application.

For information about configuring the Analytics service, see "Managing the Analytics Service" in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*.

C.1.1 Creating a Graph to Display Page Hits

To create a graph that displays statistics for pages in your application:

1. Create a SQL data control, `PageStats`, using the `ActivitiesDS` connection. Specify the following SQL query and bind parameters:

   Query:

   ```
   SELECT space.name_ spaceName, page.name_ pageName, space.id, page.id, count(1),
   fact.page_, page.resourceid_ FROM asfact_wc_pagevie_0 fact ,
   asdim_wc_groupsp_0 space , asdim_wc_pages_0 page, asdim_wc_applica_0 app
   WHERE space.id = fact.groupspace_ and page.id = fact.page_ and app.id =
   fact.application_ and fact.occurred between to_date(:startdate, :dateformat)
   and to_date(:enddate, :dateformat) and app.name_ = :appname and page.personal_
   = :ispersonal and space.name_ is not null and page.name_ is not null and
   space.id is not null and page.id is not null
   and fact.page_ is not null and page.resourceid_ is not null GROUP BY
   space.name_, page.name_, space.id, page.id, fact.page_, page.resourceid_ ORDER
   BY count(1) desc
   ```

   Bind Parameters:

   `startdate` - 01/01/2008

   `dateformat` - MM/DD/YYYY

   `appname` - webcenter

   `ispersonal` - 1

   `enddate` - 01/01/2011

For the detailed steps, see Section 29.2.1.3, "Creating the Data Control."

2. Expose the data control in the Resource Catalog by selecting **Show** from the **Edit** menu.

3. Create a task flow, `Page Hits`, based on the blank mashup style.

   For detailed steps, see Section 29.3.1, "Creating a Task Flow."

4. Edit the task flow, click **Add Content**, and in the catalog, locate the `PageStats` data control and drill down to the `Analytics_PageViews_DC` accessor.

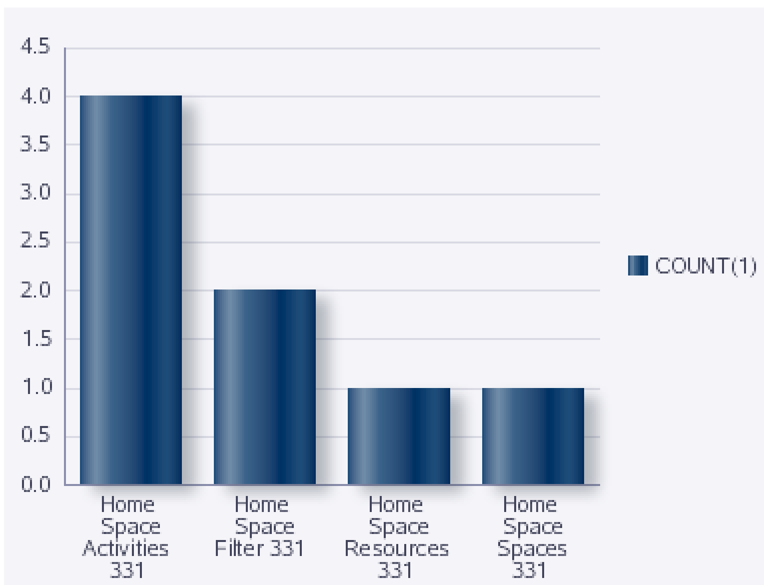
5. Add the accessor as a graph. In the Create Graph dialog, select the following options:

   - Select the Bar graph type.
   - On the Placement page, select the Space Name, Page Name and Page ID data columns to be mapped along the X-axis, and Count to be mapped as Bars.
   - Accept the default values on all other pages of the dialog.

   For the detailed steps, see Section 29.4.1.3, "Adding a Data Control as a Graph."

   The graph is displayed as shown in Figure C–1.

Figure C–1 Bar Graph Displaying Page Hits



C.1.2 Using a Parameterized Task Flow to Display a Graph of Page Hits in a Space

In the previous example, you saw how to view page hits in your Spaces application. This section describes a similar example, but with the ability to display page hits for a specific space only. In this case, the data control is added as a graph to a parameter form task flow. The input parameter allows users to specify a space name and display statistics for that space in the graph. This section includes the following subsections:

- Section C.1.2.1, "Creating the Page Hits Data Control"
- Section C.1.2.2, "Creating a Custom Mashup Style with a Parameter to Specify the Space Name"
- Section C.1.2.3, "Creating a Task Flow Using the Custom Mashup Style"

- Section C.1.2.4, "Consuming the Data Control in the Task Flow"

C.1.2.1 Creating the Page Hits Data Control

If you have configured WebCenter Portal services in your application, an Analytics service connection, `ActivitiesDS`, is available out-of-the-box. You can use this connection to create a SQL data control. This section describes how to create a data control to view the top five page hits for the last 7 days for a given space.

To create the data control:

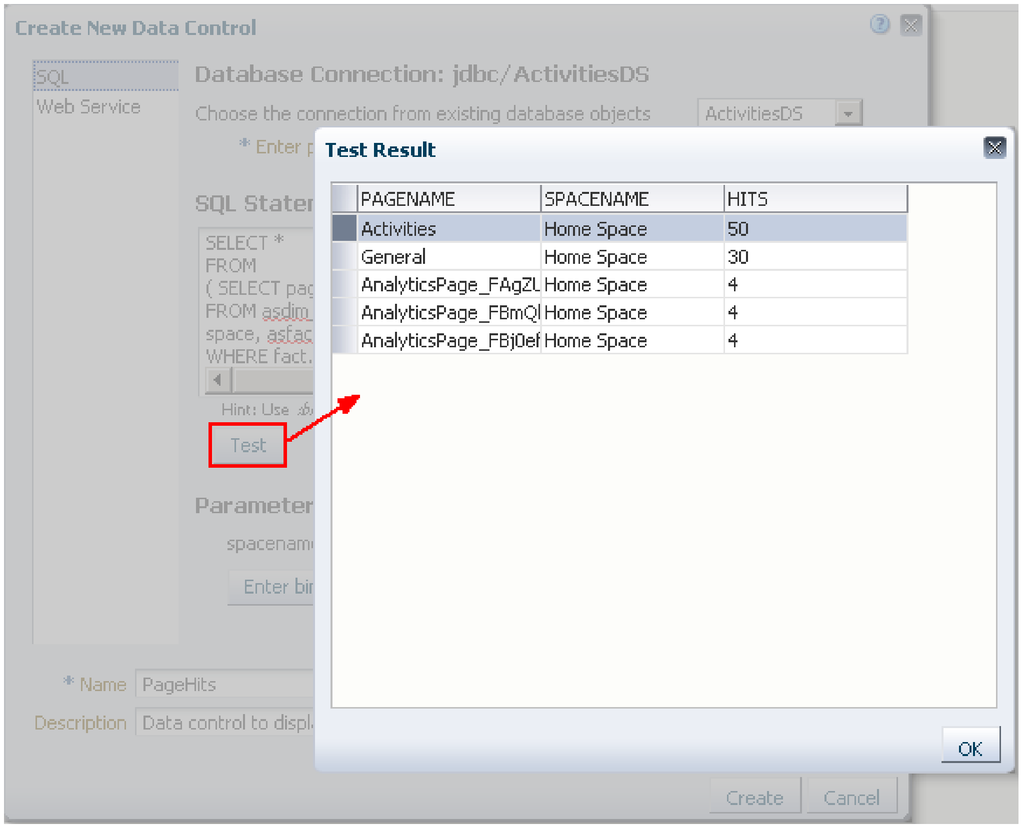
> **See Also:** Section 29.2.1.3, "Creating the Data Control" for the detailed steps to create a data control.

1. Use the `ActivitiesDS` connection and create a SQL data control named `PageHits`.
2. Specify the following SQL query:

   ```
   SELECT * FROM
   (SELECT page.name_ pageName, space.name_ spaceName, COUNT(1) hits
   FROM asdim_users u, asdim_wc_pages_0 page, asdim_wc_applica_0 app, asdim_wc_
   groupsp_0 space, asfact_wc_pagevie_0 fact
   WHERE fact.page_ = page.id AND fact.userid = u.id AND fact.application_ =
   app.id
   AND fact.groupspace_ = space.id AND fact.occurred BETWEEN
   (SYSDATE-6) AND (SYSDATE+1) AND app.name_ = 'webcenter'
   AND u.userid <> 'anonymous'
   AND  upper(space.name_) LIKE upper(:spacename) AND space.name_ IS NOT NULL
   AND page.name_  IS NOT NULL AND space.id IS NOT NULL AND page.id IS NOT NULL
   AND fact.page_  IS NOT NULL AND page.resourceid_ IS NOT NULL
   GROUP BY page.name_, space.name_ ORDER BY hits DESC)
   WHERE rownum <= 5 ORDER BY rownum
   ```

   The data control is created with the `spacename` bind variable.
3. Set the `spacename` bind variable to `Home space`.
4. Test the query and view the data retrieved from the data source, as shown in Figure C–2.

Figure C–2 SQL Data Control Query Test Result



C.1.2.2 Creating a Custom Mashup Style with a Parameter to Specify the Space Name

This section describes how to create a custom mashup style, `Input Space Name`, with an input text field that can be wired to the SQL data control's bind variable. With this type of wiring, users can provide a space name to view page hits for that space.

To create the custom mashup style:

1. Copy an existing mashup style in the Resource Manager and name it `Input Space Name`.
2. Edit the source of the task flow, click the **Fragment** tab, and replace the entire code with the following:

```
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
          xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
          xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable"
          xmlns:f="http://java.sun.com/jsf/core"
          xmlns:af="http://xmlns.oracle.com/adf/faces/rich">
  <af:panelGroupLayout id="pgl">
    <af:panelGroupLayout id="pg2" layout="horizontal" halign="center"
inlineStyle="padding-bottom:5px;">
      <af:inputText id="ip1" value="#{pageFlowScope.bindVarId}" label="Space
Name"
                    shortDesc="Enter a Space name. The default value is Home
space."/>
      <af:commandButton text="#{dataComposerBundle.MASHUP_STYLES_GO}"
id="cb1"/>
```

```
        </af:panelGroupLayout>
        <cust:panelCustomizable id="pc1" halign="center"/>
      </af:panelGroupLayout>
    </jsp:root>
```

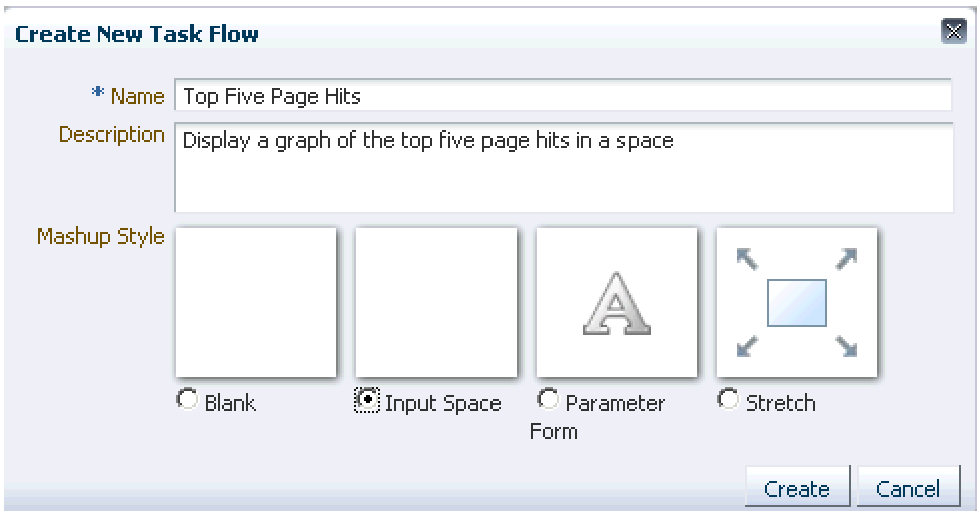
3. Select the mashup style in the Resource Manager, and from the Edit menu, click **Show**.

For the detailed steps to create and edit a mashup style, see Section 29.3.4, "Managing Mashup Styles."

C.1.2.3 Creating a Task Flow Using the Custom Mashup Style

In the Resource Manager, create a task flow, `Top Five Page Hits for a Space`, based on the new mashup style, as shown in Figure C–3.

Figure C–3 Create New Task Flow Dialog Displaying the New Mashup Style



For the detailed steps, see Section 29.3.1, "Creating a Task Flow."

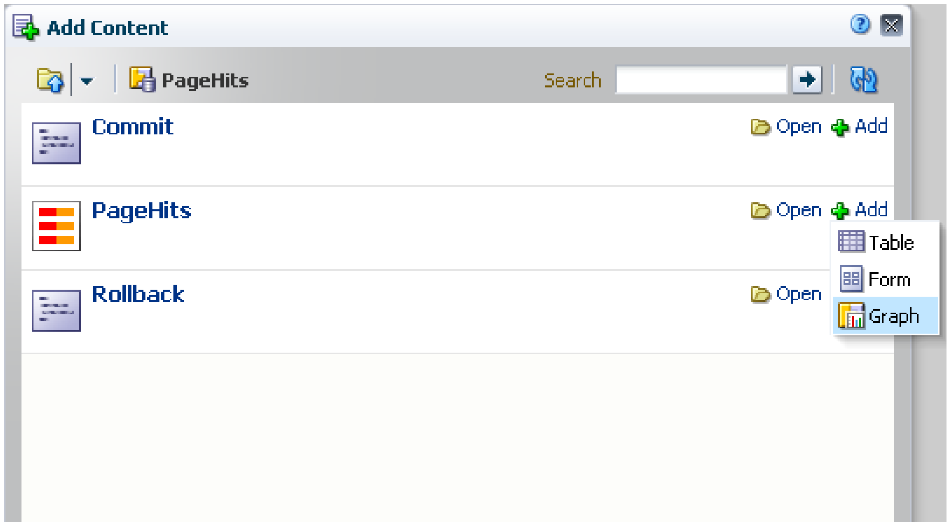
From the Edit menu, select **Show** to include the task flow in the Resource Catalog.

C.1.2.4 Consuming the Data Control in the Task Flow

To add the page hits data control to the new task flow:

1. Edit the `Top Five Page Hits for a Space` task flow, and add the `PageHits` data control accessor as a graph, as shown in Figure C–4.

Figure C–4 Graph Option on the PageHits Data Control Accessor



2. In the Create Graph dialog, on the Type page, select **Bar**.
3. On the Placement page, place **PAGENAME** and **SPACENAME** on the X Axis, and **HITS** as the Bars.
4. On the DC Parameters page, specify the following value for the `spacename` parameter:

```
#{empty pageFlowScope.bindVarId ? 'Home space' :
pageFlowScope.bindVarId}
```

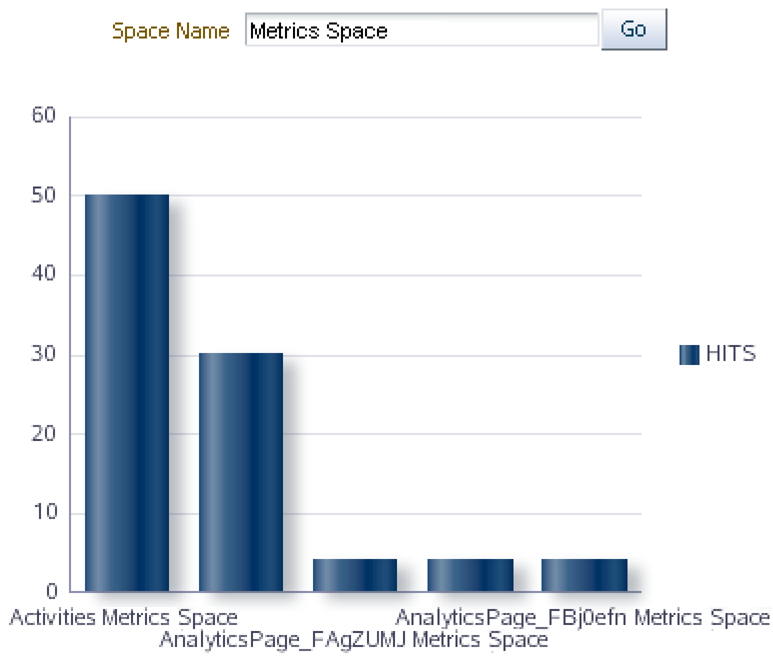
C.1.2.5 Testing the Parameter Wiring in the Task Flow

This section describes the steps you must perform to test whether the graph in the task flow displays data specific to the space name you provide.

To test the task flow:

1. Create a test page and add the task flow from the Add Content dialog.
2. To ensure that the graph displays properly on the page:
   a. Edit the task flow.
   b. In the Component Properties dialog, on the **Basic** page of the **Display Options** tab, deselect the **Allow Resize** option.
   c. On the **Advanced** page of the **Display Options** tab, set **Stretch Content** to `Auto`.
3. Specify a different space name in the input text field. The graph displays data specific to that space, as shown in Figure C–5.

Figure C–5 Bar Graph Displaying Page Hits for a Given Space



C.1.3 Creating a Graph to View Portal Site Traffic

This section explains how to retrieve the site traffic data from the Analytics service and display it as a Pie graph.

To create a mashup with the portal site traffic data:

1. Create a SQL data control, `PortalStats`, using the `ActivitiesDS` connection. Specify the following SQL query and bind parameters:

   Query:

   ```
   SELECT 'Spaces' Name, count(1) Hits
   FROM asfact_wc_groupsp_0 fact , asdim_wc_groupsp_0 space , asdim_wc_applica_0
   app
   WHERE space.id = fact.groupspace_ and app.id = fact.application_ and
   fact.occurred between
   to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and
   app.name_ = :appname and
   space.personal_ = :ispersonal
   UNION ALL
   SELECT 'Pages' Name, count(1) Hits
   FROM asfact_wc_pagevie_0 fact , asdim_wc_pages_0 page , asdim_wc_applica_0 app
   WHERE page.id = fact.page_ and app.id = fact.application_ and fact.occurred
   between
   to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and
   app.name_ = :appname and
   page.personal_ = :ispersonal
   UNION ALL
   SELECT 'Portlets' Name, count(1) Hits
   FROM asfact_wc_portlet_0 fact , asdim_wc_applica_0 app
   WHERE app.id = fact.application_ and fact.occurred between to_date(:startdate,
   :dateformat) and
   to_date(:enddate, :dateformat) and app.name_ = :appname
   UNION ALL
   ```

```
SELECT 'Logins' Name, count(1) Hits
FROM asfact_wc_logins_0 fact , asdim_wc_applica_0 app
WHERE app.id = fact.application_ and fact.occurred between to_date(:startdate,
:dateformat) and
to_date(:enddate, :dateformat) and app.name_ = :appname
UNION ALL
SELECT 'Searches' Name, count(1) Hits
FROM asfact_wc_searche_0 fact , asdim_wc_applica_0 app
WHERE app.id = fact.application_ and fact.occurred between to_date(:startdate,
:dateformat) and
to_date(:enddate, :dateformat) and app.name_ = :appname
UNION ALL
SELECT 'Wikis' Name, count(1) Hits
FROM asfact_wc_doclib__0 fact , asdim_wc_documen_0 doc , asdim_wc_applica_0 app
WHERE app.id = fact.application_ and fact.document_ = doc.id and fact.occurred
between
to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and
app.name_ = :appname and
doc.objecttype_ like '%WIKI%'
UNION ALL
SELECT 'Blogs' Name, count(1) Hits
FROM asfact_wc_doclib__0 fact , asdim_wc_documen_0 doc , asdim_wc_applica_0 app
WHERE app.id = fact.application_ and fact.document_ = doc.id and fact.occurred
between
to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and
app.name_ = :appname and
doc.objecttype_ like '%BLOG%'
UNION ALL
SELECT 'Documents' Name, count(1) Hits
FROM asfact_wc_doclib__0 fact , asdim_wc_documen_0 doc , asdim_wc_applica_0 app
WHERE app.id = fact.application_ and fact.document_ = doc.id and fact.occurred
between
to_date(:startdate, :dateformat) and to_date(:enddate, :dateformat) and
app.name_ = :appname and
doc.objecttype_ like '%DOCUMENT%'
UNION ALL
SELECT 'Discussions' Name, count(1) Hits
FROM asfact_wc_discuss_1 fact , asdim_wc_applica_0 app
WHERE app.id = fact.application_ and fact.occurred between to_date(:startdate,
:dateformat) and
to_date(:enddate, :dateformat) and app.name_ = :appname
```

Bind Parameters:

`startdate` - 01/01/2008

`dateformat` - MM/DD/YYYY

`appname` - webcenter

`ispersonal` - 1

`enddate` - 01/01/2011

For the detailed steps, see Section 29.2.1.3, "Creating the Data Control."

2. Expose the data control in the Resource Catalog by selecting **Show** from the **Edit** menu.

3. Create a task flow, `Portal Traffic`, based on the blank mashup style.

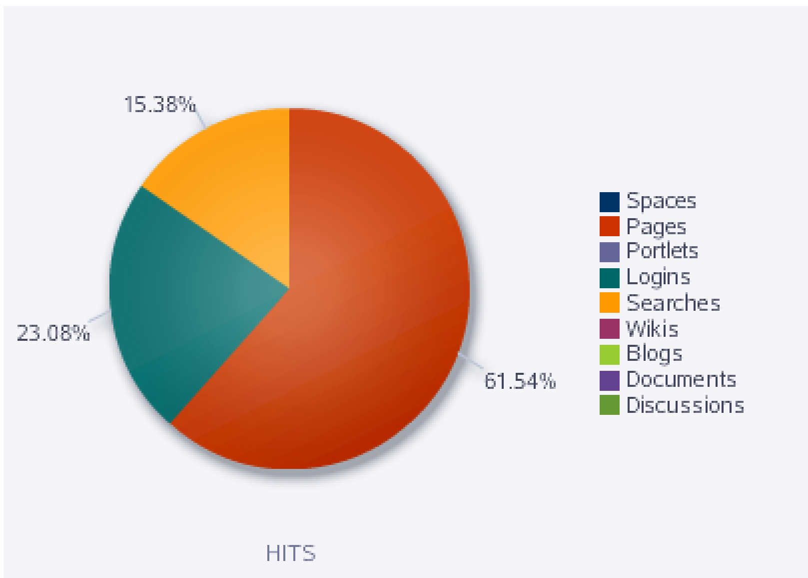
   For detailed steps, see Section 29.3.1, "Creating a Task Flow."

4. Edit the task flow, click **Add Content**, and in the catalog, locate the `PortalStats` data control and drill down to the `Site_Traffic_DC` accessor.
5. Add the accessor as a graph. In the Create Graph dialog, select the following options:
   - Select the Pie graph type.
   - On the Placement page, select Name data column to be plotted as slices and Hits as the pie.
   - Accept the default values on all other pages of the dialog.

   For the detailed steps, see Section 29.4.1.3, "Adding a Data Control as a Graph."

   The graph is displayed as shown in Figure C–6.

Figure C–6 Graph Displaying Portal Traffic Statistics



C.1.4 Creating a Mashup with Two Task Flows in a Master-Detail Relationship

The example in this section describes how to wire two task flows in a master-detail relationship so that a selection in one task flow results in an action on the second one. The various tasks involved are described in the following subsections:

- Section C.1.4.1, "Creating the Master Data Control and Task Flow"
- Section C.1.4.2, "Creating the Details Data Control and Task Flow"
- Section C.1.4.3, "Wiring the Master and Details Task Flows"

After performing the above configurations, if you click a user name in the master table, the details are displayed in a popup window.

C.1.4.1 Creating the Master Data Control and Task Flow

The master task flow displays a table with the top five page views for a given space during the last seven days.

To create the task flow:

1. Create a SQL data control, `TopFiveDocViewsForSelectedSpace`, using the `ActivitiesDS` connection. Specify the following SQL query:

   ```
   select * from
    (select  u.id id , u.userid userid, count(fact.userid)  pageviews
   from asdim_users u , asfact_wc_pagevie_0 fact,asdim_wc_applica_0 app
   where fact.userid=u.id
   and u.userid <> 'anonymous'
   and fact.application_ = app.id
   and app.name_ = 'webcenter'
   and fact.occurred
   BETWEEN (SYSDATE-7) and ( SYSDATE+1)
   group by u.id,u.userid
   order by pageviews desc )
   where rownum<11
   ```

   For the detailed steps, see Section 29.2.1.3, "Creating the Data Control."

   This query returns the top five page hits for a given space for the last seven days.

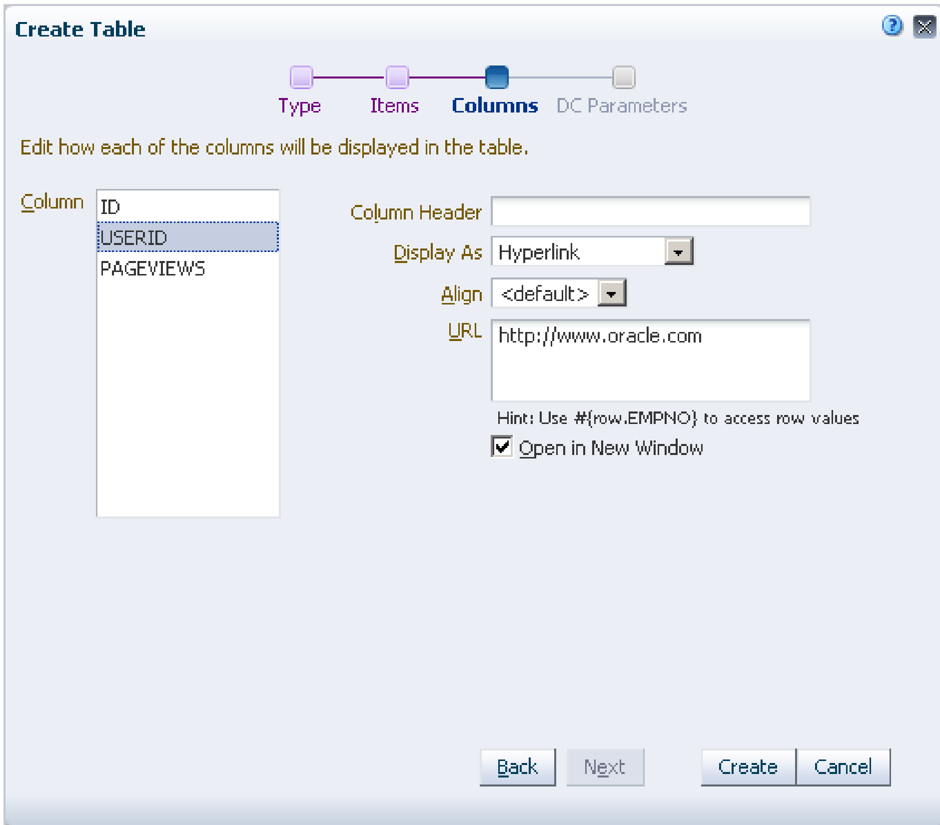
2. Select the new data control, and from the Edit menu, click **Show**.
3. Create a task flow, `Top 10 Visitor Page Hits`, based on the Blank mashup style.

   For the detailed steps, see Section 29.3.1, "Creating a Task Flow."

4. Edit the task flow and add the `TopFiveDocViewsForSelectedSpace` data control accessor as a table.

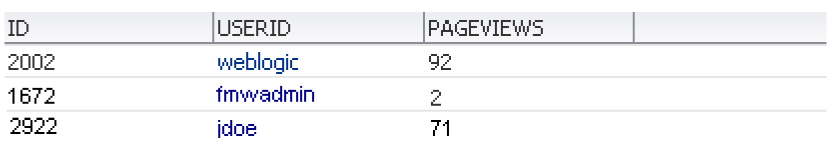
   Create a read-only table. On the Columns page in the Create Table dialog, choose to display the USERID column as hyperlinks, and specify the URL to be `http://www.oracle.com`, as shown in Figure C–7.

Figure C–7 Display Columns as Hyperlinks



The table displays a user-wise listing of the top page hits. The USERID column displays users names as hyperlinks, as shown in Figure C–8.

Figure C–8 Master Task Flow Displaying Top Page Hits



ID	USERID	PAGEVIEWS
2002	weblogic	92
1672	fmwadmin	2
2922	jdoe	71

5. Select the new task flow, and from the Edit menu, click **Show**.

C.1.4.2 Creating the Details Data Control and Task Flow

You have seen how to create a master task flow that displays the top page hits in a table, in which the user names are hyperlinked. The next step is to create a details task flow that must be displayed on clicking a user name in the master task flow. This section describes how to create a details task flow that displays a graph of all page hits for a given user.

To create the details data control and task flow:

1. Create a SQL data control, `PageHitsForSelectedUser`, using the `ActivitiesDS` connection. Specify the following SQL query and bind variable:

```
SELECT page.name_ pageName, space.name_ spaceName, COUNT(1) hits
```

```
FROM asdim_users u, asdim_wc_pages_0 page, asdim_wc_applica_0 app,
asdim_wc_groupsp_0 space, asfact_wc_pagevie_0 fact
WHERE fact.page_          = page.id AND fact.userid = u.id
AND u.userid=(:userid) AND fact.application_ = app.id
AND fact.groupspace_  = space.id AND fact.occurred
BETWEEN (SYSDATE-7) and SYSDATE and app.name_ = 'webcenter'
AND u.userid <> 'anonymous' AND space.name_ IS NOT NULL
AND page.name_  IS NOT NULL AND space.id         IS NOT NULL
AND page.id IS NOT NULL AND fact.page_  IS NOT NULL
AND page.resourceid_ IS NOT NULL GROUP BY page.name_, space.name_
```

Set the `userid` bind variable to `weblogic`.

For the detailed steps, see Section 29.2.1.3, "Creating the Data Control."

2. Select the new data control, and from the Edit menu, click **Show**.
3. Create a task flow, `Page Hits for Selected User`, based on the Blank mashup style.

   For the detailed steps, see Section 29.3.1, "Creating a Task Flow."
4. Edit the task flow and add the `PageHitsForSelectedUser` data control accessor as a graph.

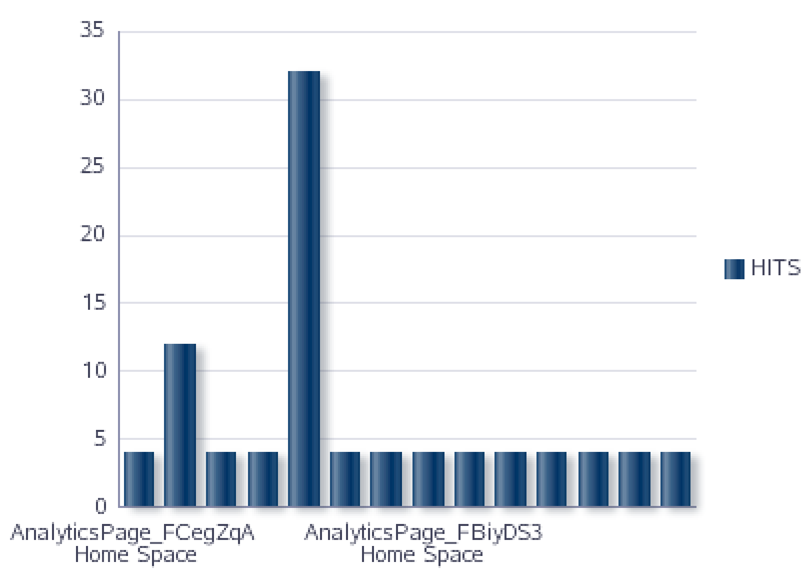
   Create a bar graph, and plot SPACENAME and PAGENAME along the X-Axis and HITS as Bars.

   On the DC Parameters page in the Create Graph dialog, specify the following value for the `userid` parameter:

   ```
   #{empty pageFlowScope.userid ?'weblogic':
   pageFlowScope.userid}
   ```

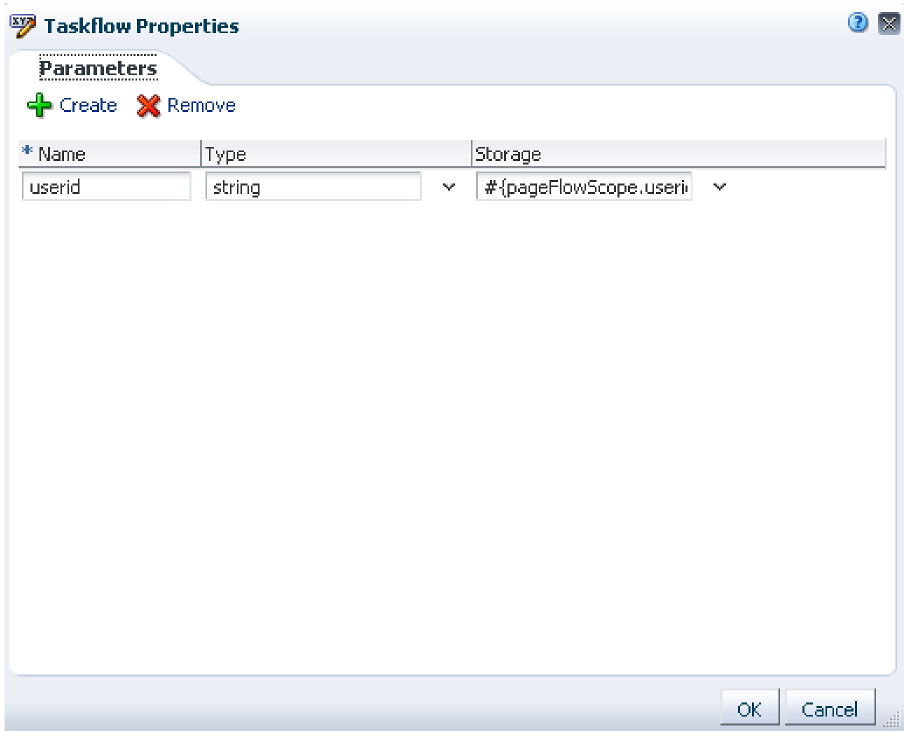
   This ensures that `weblogic` is selected as the default user if no user name is specified for the parameter. The graph displays as shown in Figure C–9.

Figure C–9 Bar Graph Displaying Page Hits for a Selected User



5. Create a task flow parameter called `userid`, and set its value to the `pageFlowScope`, as shown in Figure C–10.

Figure C–10 Parameter Defined on the Details Task Flow



6. Select the new task flow, and from the Edit menu, click **Show**.

C.1.4.3 Wiring the Master and Details Task Flows

This section describes how to wire the master and details task flows so that a user can click a user name in the master task flow to pop up the details task flow displaying the page hits graph for that user.

To wire the master and details task flows:

1. Edit the source of the master task flow, `Top 10 Visitor Page Hits`. Click the **Fragment** tab in the Edit Source dialog, and paste the following code below `<af:panelGroupLayout id="pgl1">` to reference the details task flow in a popup:

```
<af:popup id="popup1" launcherVar="source" eventContext="launcher"
contentDelivery="lazyUncached">
  <af:dialog>
    <af:region xmlns:af="http://xmlns.oracle.com/adf/faces/rich" id="oc_
449838760region1"
               value="#{bindings.popTaskflow.regionModel}"/>
  </af:dialog>
  <af:setPropertyListener from="#{source.attributes.userid}"
                          to="#{viewScope.userid}" type="popupFetch"/>
</af:popup>
```

2. Find the `<af:goLink>` code segment and replace it with the following so that the USERID column displays command links that invoke a popup dialog:

```
<af:commandLink text="#{row.bindings.USERID.inputValue}" id="userLink">
  <af:clientAttribute name="userid" value="#{row.bindings.USERID.inputValue}"/>
  <af:showPopupBehavior popupId="::popup1" alignId="userLink"
align="afterEnd"/>
```

```
</af:commandLink>
```

3. Click the **Page Definition** tab, and add a reference to the details task flow. Paste the following code within the `<executable>` tag and below the `<iterator>` tag:

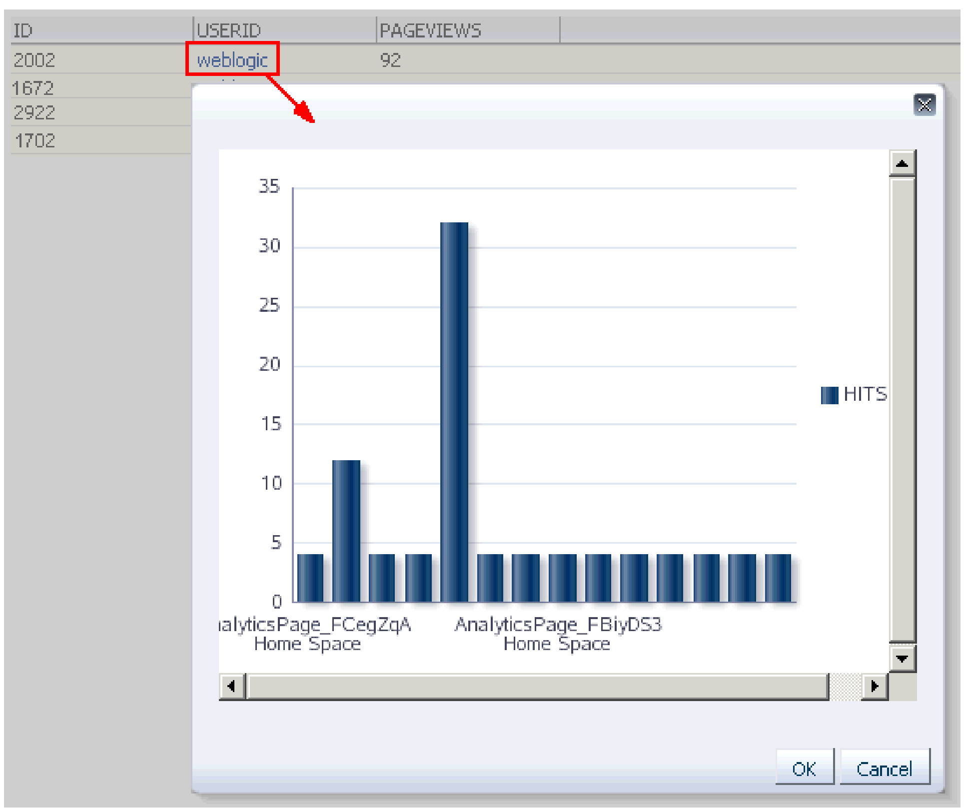
```
<taskFlow id="popTaskflow" taskFlowId="details_taskflow_definition_
path#blanktaskflow"
          xmlns="http://xmlns.oracle.com/adf/controller/binding"
Refresh="ifNeeded">
  <parameters>
    <parameter id="userid" value="#{viewScope.userid}"/>
  </parameters>
</taskFlow>
```

where ***`details_taskflow_definition_path`*** is the path to the task flow in your instance, for example, `/oracle/webcenter/siteresources/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/taskFlow/gsr34e6278e_9e9a_45eb_bbbf_31aa5ae34381/taskflow-definition.xml`.

You can get this path by selecting the task flow in the Resources Manger, and clicking the **Edit** menu and choosing **Edit Properties**. The `Metadata File` attribute provides the complete path to the task flow.

4. Test the master-detail relationship. Preview the `Top 10 Visitor Page Hits` task flow in the Resources Manager. When you click a user name link, the page hits graph for that user is displayed in a popup window, as shown in Figure C–11.

Figure C–11 Master-Detail Relationship Between Two Task Flows



C.1.5 Creating a Table with Hyperlinks to Download Documents

This section describes how to create a mashup with a table listing the top five documents viewed in a space. The document names in the table are displayed as hyperlinks so that a user can click a link to open the selected document in a new window. The data for the table comes from a SQL data control to the Spaces Analytics service. This section includes the following sections:

- Section C.1.5.1, "Creating the Document Views Data Control"
- Section C.1.5.2, "Creating a Custom Mashup Style with a Parameter to Specify the Space Name"
- Section C.1.5.3, "Creating a Task Flow Using the Custom Mashup Style"
- Section C.1.5.4, "Consuming the Data Control in the Task Flow"
- Section C.1.5.5, "Testing the Parameter Wiring in the Task Flow"

C.1.5.1 Creating the Document Views Data Control

This section describes how to create a data control to view the top five document hits for the last 7 days for a given space.

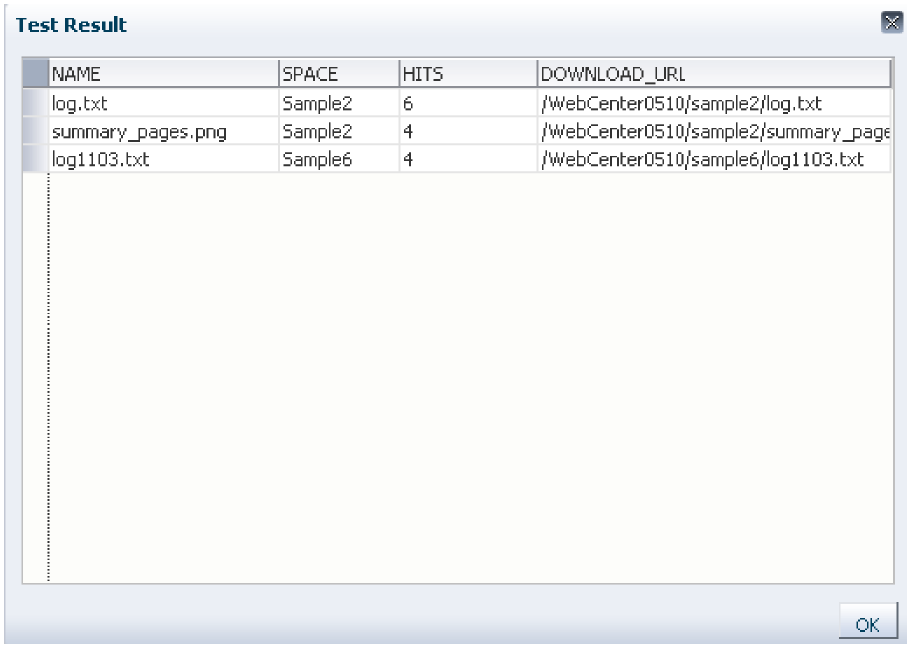
1. Use the `ActivitiesDS` connection and create a SQL data control named `Top Five Doc Views for Given Space in the Past Week` and specify the following SQL query:

```
SELECT *
FROM
( SELECT  doc.name_ name,space.name_ space,count(1) hits,doc.path_  download_
url
FROM asfact_wc_doclib__0 fact , asdim_wc_documen_0 doc , asdim_wc_applica_0
app,asdim_wc_groupsp_0 space
WHERE
app.name_ = 'webcenter'
AND  app.id = fact.application_
AND fact.document_ = doc.id
AND fact.occurred BETWEEN (SYSDATE-6)  AND (SYSDATE+1)
AND doc.name_ is not null
AND doc.id is not null
AND fact.document_ is not null
AND doc.resourceid_ is not null
AND  fact.GROUPSPACE_ = space.id
AND  upper(space.name_) LIKE upper(:spacename)
AND space.name_ IS NOT NULL
GROUP BY doc.name_, doc.id,space.name_ ,doc.path_
ORDER BY hits  DESC)
WHERE rownum <= 5
ORDER BY rownum
```

   The data control is created with the `spacename` bind variable.

2. Set the `spacename` bind variable to `Home space`.
3. Test the query and view the data retrieved from the data source, as shown in Figure C–12.

Figure C–12 New Data Control Query Test Results



C.1.5.2 Creating a Custom Mashup Style with a Parameter to Specify the Space Name

This section describes how to create a custom mashup style, `Input Space Name`, with an input text field that can be wired to the SQL data control's bind variable. With this type of wiring, users can provide a space name to view page hits for that space.

To create the custom mashup style:

1. Copy an existing mashup style in the Resource Manager and name it `Input Space`.
2. Edit the source of the task flow, click the **Fragment** tab, and replace the entire code with the following:

```
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
          xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
          xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable"
          xmlns:f="http://java.sun.com/jsf/core"
          xmlns:af="http://xmlns.oracle.com/adf/faces/rich">
  <af:panelGroupLayout id="pgl">
    <af:panelGroupLayout id="pg2" layout="horizontal" halign="center"
inlineStyle="padding-bottom:5px;">
      <af:inputText id="ip1" value="#{pageFlowScope.bindVarId}" label="Space
                    Name" shortDesc="Enter A Space Name, by default it's all
spaces"/>
      <af:commandButton text="#{dataComposerBundle.MASHUP_STYLES_GO}"
id="cb1"/>
    </af:panelGroupLayout>
    <cust:panelCustomizable id="pc1" halign="center"/>
  </af:panelGroupLayout>
</jsp:root>
```

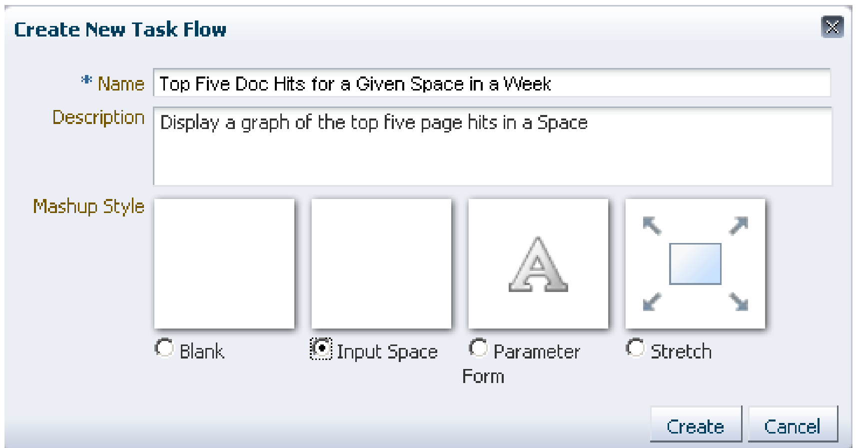
3. Select the mashup style in the Resource Manager, and from the **Edit** menu, select **Show**.

C.1.5.3 Creating a Task Flow Using the Custom Mashup Style

To create a task flow using the custom style:

1. In the Resource Manager, create a task flow, `Top Five Doc Hits for a Given Space in a Week`, based on the new mashup style, as shown in Figure C–13.

Figure C–13 New Mashup Style in the Create New Task Flow Dialog



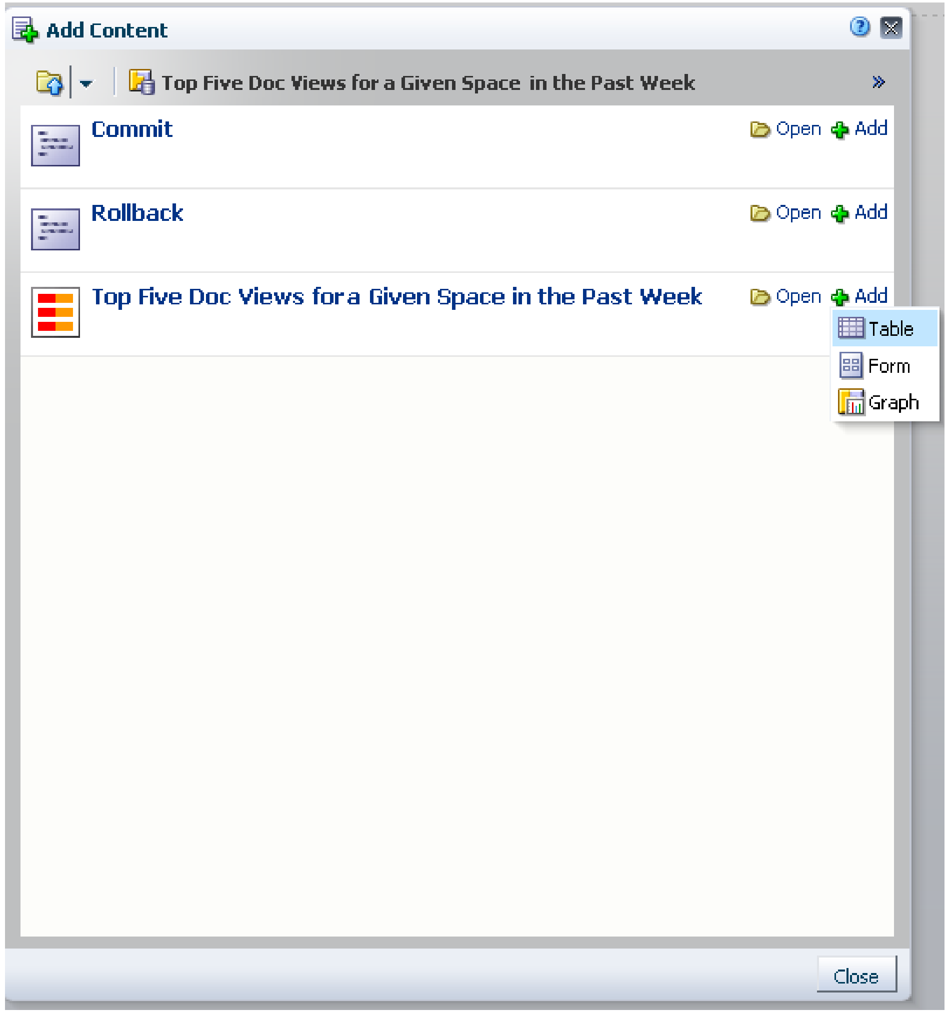
2. Select the task flow in the Resource Manager, and from the Edit menu, click **Show**.

C.1.5.4 Consuming the Data Control in the Task Flow

To consume the page hits data control in the new task flow:

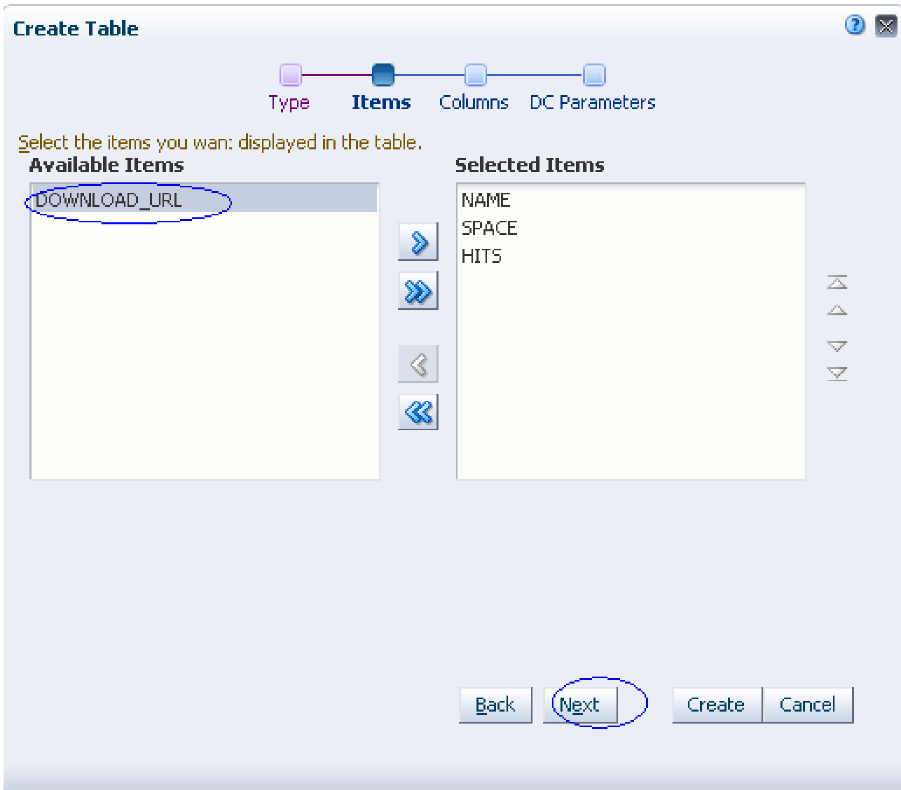
1. Edit the `Top Five Doc Hits for a Given Space in a Week` task flow and add the `Top Five Doc Views for Given Space in the Past Week` data control accessor as a table, as shown in Figure C–14.

Figure C–14 Table Option on the Data Control Accessor



Create a read-only table. On the Items page in the Create Table dialog (shown in Figure C–15), ensure that the DOWNLOAD_URL column is not displayed.

Figure C–15 Items Page of the Create Table Dialog



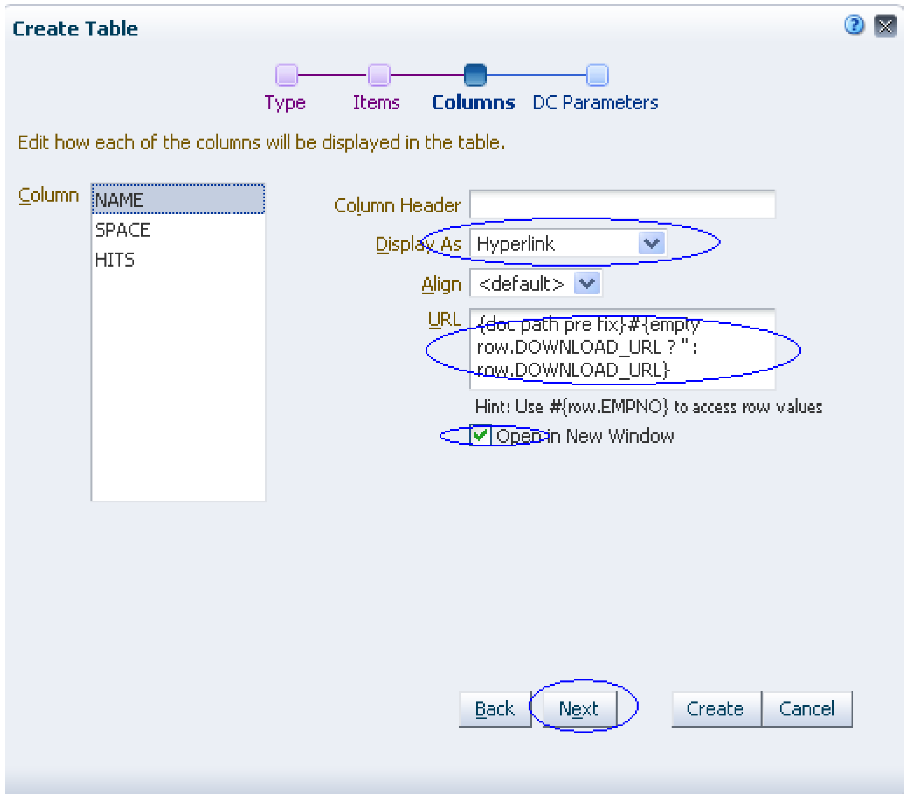
On the Columns page, choose to display the Name column as hyperlinks, and specify the URL to be the following (as shown in Figure C–16):

`{`*`doc path pre fix`*`}#{empty row.DOWNLOAD_URL ? '' : row.DOWNLOAD_URL}`

where

`doc path pre fix` is the prefix to be used for the document URL. To find the prefix for a document path, select a document on the Documents page and click **Get a Link** from the View menu. The first part of the Download URL (ending in path) is the prefix to be used. For example, `http://my.company.com:8889/webcenter/content/conn/xyz18-ucm11g/path`.

Figure C–16 Name Column Defined as a Hyperlink



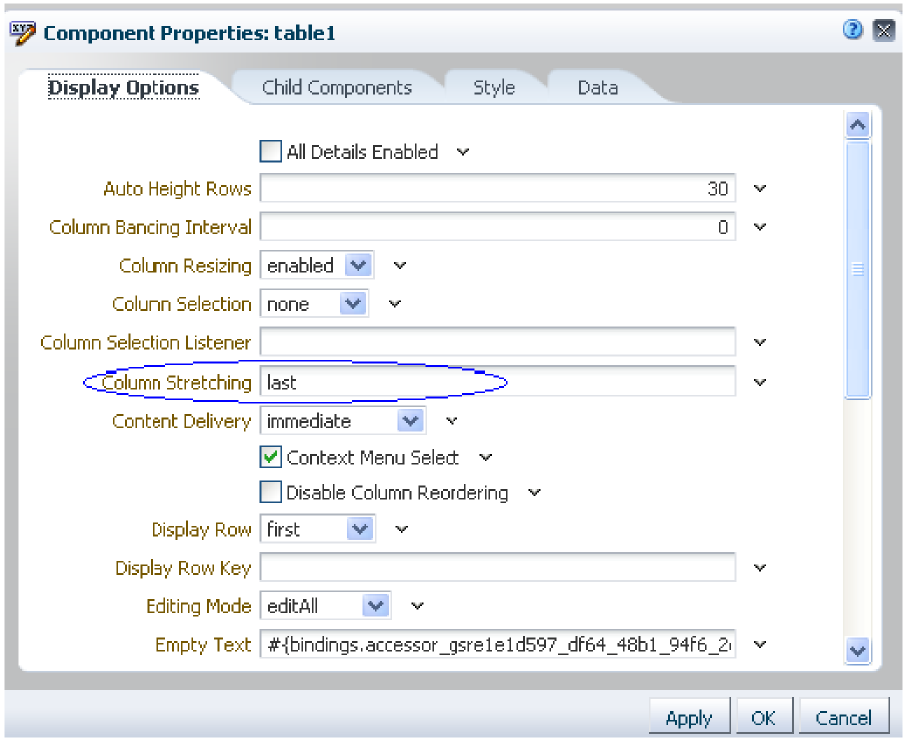
2. On the DC Parameters page, specify the following value for the `spacename` parameter:

   ```
   spacename: #{empty pageFlowScope.bindVarId ? '%' :
   pageFlowScope.bindVarId}
   ```

   The data control is now shown as a table in the task flow.

3. Optionally, edit the table. In the Component Properties dialog, change the value of the Column Stretching field to `last`, as shown in Figure C–17. This ensures that the last column is stretched when required.

Figure C–17 Component Properties Dialog for the Table



4. To ensure that the table displays properly on the page:
   a. Edit the task flow.
   b. In the Component Properties dialog, on the **Basic** page of the **Display Options** tab, deselect the **Allow Resize** option.
   c. On the **Advanced** page of the **Display Options** tab, set **Stretch Content** to `Auto`.

C.1.5.5 Testing the Parameter Wiring in the Task Flow

This section describes the steps you must perform to test whether the table in the task flow displays data specific to the space name you provide.

To test the task flow:

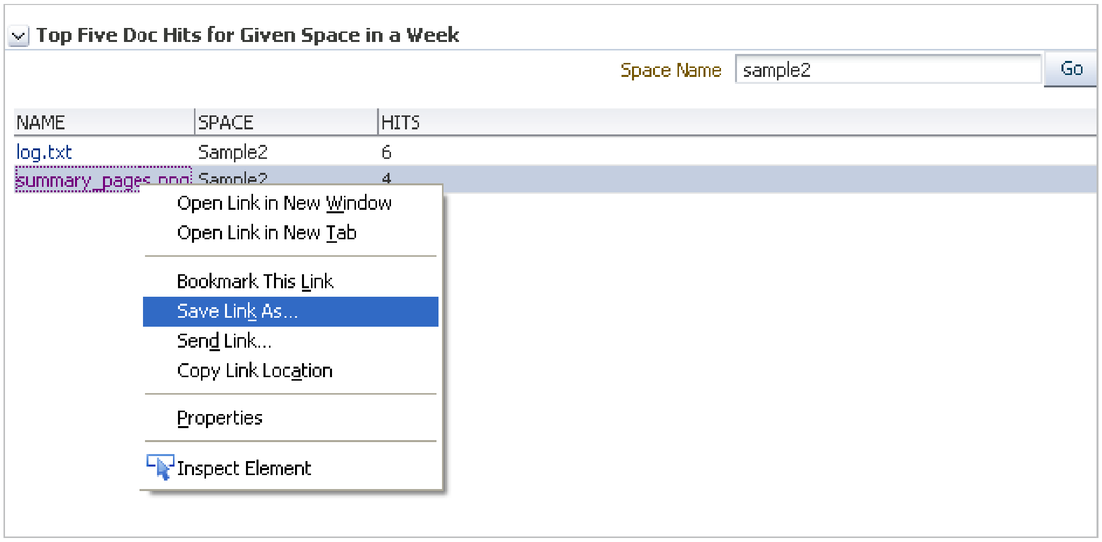
1. Create a test page and add the task flow from the Resource Catalog.

   The task flow displays the table.

2. Specify a different space name in the input text field. The table displays data specific to that space.

   The NAME column displays hyperlinks that enable you to download the documents, as shown in Figure C–18.

Figure C–18 Table with Hyperlinked Document Names



C.2 Creating a Mashup that Displays Employee Data from SQL Data Control

The tasks in this section use examples based on an employee database. This section describes how to add a visualization for the retrieved employee data and customize this visualization by performing a few simple configurations. This section describes how to add the `EmpDetails` data control as a table to the `Employee Details` task flow and perform different customizations on the table, such as showing or hiding columns and sorting rows. It includes the following sections:

- Section C.2.1, "Creating the SQL Data Control"
- Section C.2.2, "Adding the Data Control and Binding Task Flow Parameters to Data Control Parameters"
- Section C.2.3, "Showing a Hidden Column in the Table"
- Section C.2.4, "Adding the Data Control in a Parameter Form Task Flow"

C.2.1 Creating the SQL Data Control

Perform the following tasks to create a data control for the employee database:

1. Create a connection to the employee database. For the detailed steps, see Section 29.2.1.2, "Creating a Database Connection."
2. Create a SQL data control, `EmpDetails`, to retrieve data using this database connection. Use the following query to retrieve data:

   ```
   select ename, empno, mgr, deptno from emp where job in (:jobId) order by empno
   asc
   ```

   For the detailed steps, see Section 29.2.1.3, "Creating the Data Control."

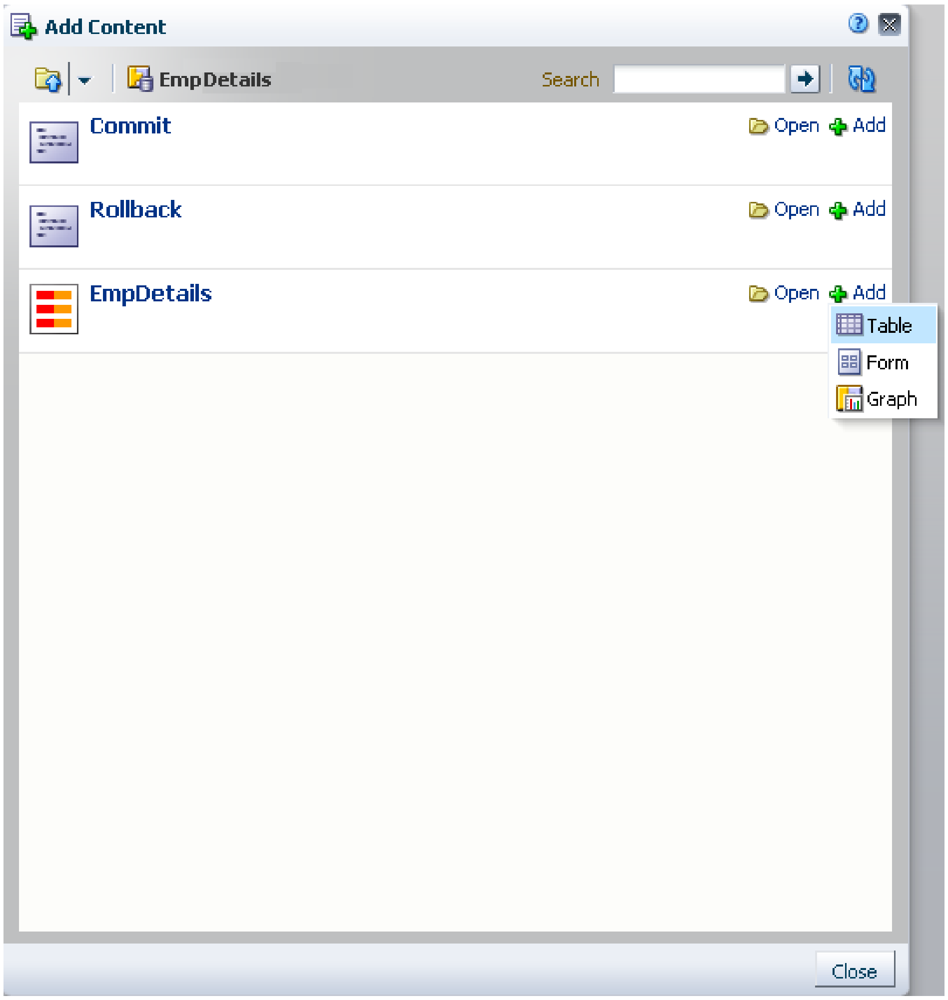
   This data control returns records for all employees whose designation matches the value of `jobId`. The records are sorted by employee number.
3. Create a task flow, `Employee Details`, based on the Blank mashup style. For the detailed steps, see Section 29.3.1, "Creating a Task Flow."

C.2.2 Adding the Data Control and Binding Task Flow Parameters to Data Control Parameters

Perform the following steps to add the data control as a table:

1. Edit the `Employee Details` task flow in Composer.
2. In the Add Content dialog, navigate to the `EmpDetails` data control's accessor, click **Add**, and select **Table**, as shown in Figure C–19.

Figure C–19 Employee Details Data Control Accessor



3. Create an editable table, enable row selection, filtering and sorting, and select columns `ename`, `empno`, and `deptno` to be displayed in the table.

   For the detailed steps, see Section 29.4.1.1, "Adding a Data Control as a Table."

   The table displays with an empty field at the top of each column, as shown in Figure C–20. You can use those fields to specify filter criteria for the columns.

Figure C–20 Table in the Employee Details Task Flow

ENAME	EMPNO	DEPTNO	
ALLEN	7499	30	
WARD	7522	30	
JONES	7566	20	
MARTIN	7654	30	
BLAKE	7698	30	
CLARK	7782	10	
TURNER	7844	30	

4. Create a task flow parameter, `designation`.

   For the detailed steps, see Section 29.4.2, "Creating Task Flow Parameters."

5. To use the `designation` parameter to drive the data displayed in the table, copy the storage value of the parameter, `#{pageFlowScope.designation}`, and paste it as the value for the bind variable, `jobId`, on the **Data** tab of the table's Component Properties dialog.

   For the detailed steps, see Section 29.4.3, "Binding Data Control Parameters to Task Flow Parameters."

6. Create a page and add the `Employee Details` task flow to the page.

   For the detailed steps, see Section 29.4.5, "Consuming Task Flows that Contain Visualizations."

7. Edit the `Employee Details` task flow on the page, and on the **Parameters** tab, specify a designation to view corresponding details in the table.

C.2.3 Showing a Hidden Column in the Table

In your SQL query, you specified that the data control must retrieve the columns `ename`, `empno`, `deptno`, and `mgr`. However, you chose to display only the `ename`, `empno`, and `deptno` columns. In this case, the data control retrieves data from all four data columns, but displays only three. You can render the fourth column in the table but editing the table's source code. To do this:

1. On the Resource Manager - Task Flows page, select the Employee Details task flow.

2. Click **Edit Source**, then the **Fragments** tab, and locate the code for the hidden column. It would be similar to the code in the following example:

```
<column sortProperty="MGR" filterable="true" sortable="true"
        headerText="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9dbe7c35.hints.MGR.label}"
        id="column4" rendered="false">
  <af:inputText value="#{row.bindings.MGR.inputValue}"
                label="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9dbe7c35.hints.MGR.label}"
                required="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9dbe7c35.hints.MGR.mandatory}"
                columns="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9dbe7c35.hints.MGR.displayWidth}"
                maximumLength="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
eb2b9dbe7c35.hints.MGR.precision}"
                shortDesc="#{bindings.accessor_gsrf2d136f7_d907_481d_ad3a_
```

```
eb2b9dbe7c35.hints.MGR.tooltip}"
                id="inputText4">
    <f:validator binding="#{row.bindings.MGR.validator}"/>
    <af:convertNumber groupingUsed="false" pattern="#{bindings.accessor_
gsrf2d136f7_d907_481d_ad3a_eb2b9dbe7c35.hints.MGR.format}"
                   id="convertNumber3"/>
  </af:inputText>
</column>
```

3. Set the `rendered` attribute to `true`.

   The table now displays all four columns, as shown in Figure C–21.

Figure C–21 Table Displaying Four Columns

ENAME	EMPNO	DEPTNO	MGR
ALLEN	7499	30	7698
WARD	7522	30	7698
JONES	7566	20	7839
MARTIN	7654	30	7698
BLAKE	7698	30	7839
CLARK	7782	10	7839
TURNER	7844	30	7698

Similarly, you can hide a visible column by setting its `rendered` attribute to `false`.

C.2.4 Adding the Data Control in a Parameter Form Task Flow

The Parameter Form task flow provides an input text field where a user can specify a value. This value is passed to a data control accessor parameter so that the accessor displays data based on the user input.

You can add a data control as a table inside a Parameter Form task flow so that users can specify a value in the field to view corresponding details in the table.

To add a data control inside a Parameter Form task flow:

1. Create a task flow based on the `Parameter Form` mashup style.

   For the detailed steps, see Section 29.3.1, "Creating a Task Flow."

2. Edit the task flow in Composer and add the `EmpDetails` data control as a table inside the task flow.

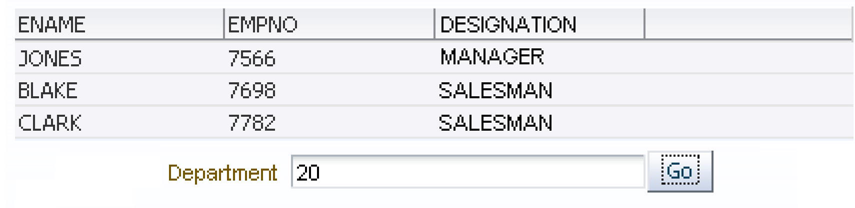
   For the steps, see Section C.2.2, "Adding the Data Control and Binding Task Flow Parameters to Data Control Parameters."

3. Wire the `jobId` parameter on the data control to the `Input Text` component in the Parameter Form task flow, by specifying the `jobId` value to be `#{pageFlowScope.bindVarId}`.

   For detailed steps, see Section 29.4.4, "Wiring a Data Control to a Parameter Form Task Flow."

You can now specify a value in the input text field to view the corresponding records in the table, as shown in Figure C–22.

Figure C–22 Data Control in a Parameter Form Task Flow



C.3 Creating a Mashup with Data from the Spaces MDS Repository

Spaces applications are seeded with the following repository connections:

- WebCenterDS
- mds-owsm
- mds-SpacesDS
- ActivitiesDS

You can create data controls for any of these connections and consume them in pages and task flows. This section describes how to create a data control to connect to the Spaces repository and display details about the spaces and pages in the application and so on. It includes the following subsections:

- Section C.3.1, "Creating the Data Control"
- Section C.3.2, "Adding the Data Control as a Graph Inside a Task Flow"

C.3.1 Creating the Data Control

Create a data control, `WebCenter Pages`, to retrieve page-related data from the Spaces data source. Use the **mds-SpacesDS** connection and enter the following SQL query:

```
select 'Home space Pages' metric, count(*) value from mds_paths where path_type =
'DOCUMENT'
and path_name like '%.jspx' and path_high_cn is null and path_fullname like
'%/user/%'
union select 'Business Role Pages' metric, count(*) value  from mds_paths where
path_type = 'DOCUMENT'
and path_name like '%.jspx' and path_high_cn is null and path_fullname like
'%/businessRolePages/%'
union select 'Space Template Pages' metric, count(*) value from mds_paths where
path_type = 'DOCUMENT'
and path_name like '%.jspx' and path_high_cn is null and path_fullname like
'%/spacetemplate/%'
union select 'Group Space Pages' metric, count(*) value from mds_paths where path_
type = 'DOCUMENT'
and path_name like '%.jspx' and path_high_cn is null and (path_fullname not like
'%/user/%'
and path_fullname not like '%/businessRolePages/%' and path_fullname not like
'%/spacetemplate/%')
```

This query retrieves information about the different type of pages and the count of each page type, as shown in Figure C–23.

Figure C–23 Data Control with Page Information from the Spaces Repository

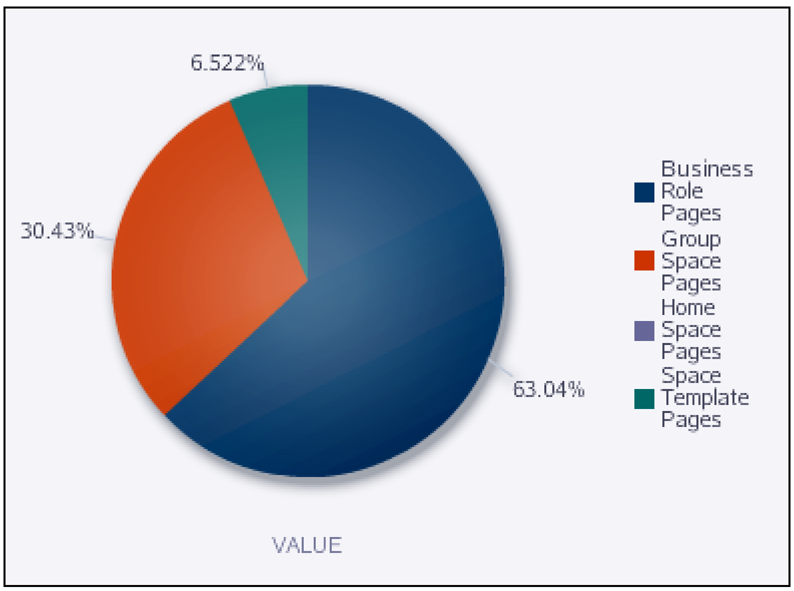
METRIC	VALUE
Business Role Pages	29
Group Space Pages	14
Home Space Pages	0
Space Template Page	3

This type of information can be represented either in a table or a graph. The following section describes how to add this data control as a graph.

C.3.2 Adding the Data Control as a Graph Inside a Task Flow

Create a blank task flow and add the data control as a Graph. Select the Pie graph type, and place the METRIC column as slices and the VALUE column as the Pie. The graph is added to the task flow as shown in Figure C–24.

Figure C–24 Page Metrics Displayed as a Pie Graph



C.4 Creating a Mashup with Data from a Spaces Web Service Data Source

You can create a data control to the Spaces Web Service and retrieve information about the application and spaces, for example, list the spaces in the instance. However, you must first prepare your Spaces instance to expose Web Services.

Getting Started

Before you begin with the configurations in this section, you must configure WS-Security for your Spaces instance. For the detailed steps, see the "Configuring WS-Security" chapter in *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter Portal*. If you create a mashup without configuring WS-Security, an error occurs when retrieving data from the data source.

This section describes the following use cases:

- Section C.4.1, "Creating a Mashup to List the Spaces in the Application"
- Section C.4.2, "Creating a Mashup with a Form to Rename Spaces"

C.4.1 Creating a Mashup to List the Spaces in the Application

This section describes how to create a mashup to display a list of spaces. The space names are displayed as hyperlinks so that a user can click a link to view the selected space.

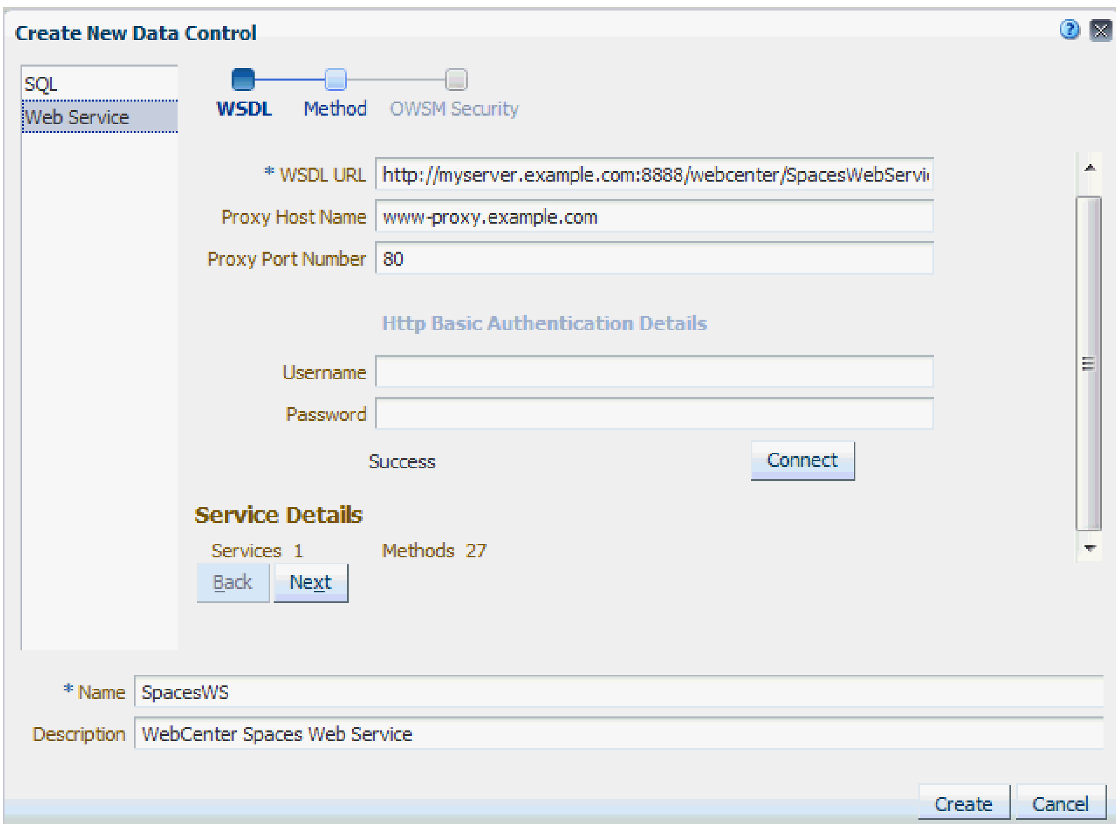
To create a data control and task flow to display the list of spaces:

1. Create a Web Service data control, `SpacesWS`, (Figure C–25) using a WSDL URL with the appropriate machine name and port number, as shown in the following example:

   ```
   http://myserver.example.com:8888/webcenter/SpacesWebService?WSDL
   ```

   For the detailed steps, see Section 29.2.2, "Creating a Web Service Data Control."

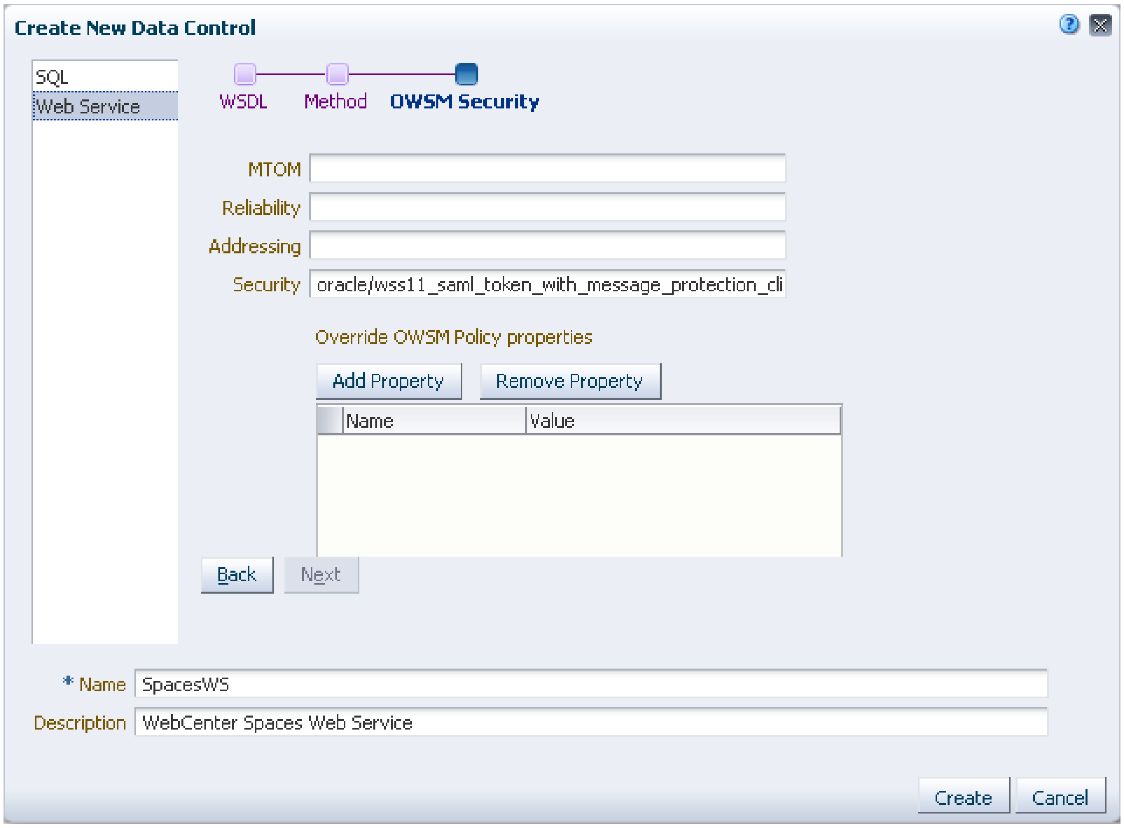
Figure C–25 Spaces Web Service Data Control



2. On the OWSM Security page, apply the following additional policy, as shown in Figure C–26:

   ```
   oracle/wss11_saml_token_with_message_protection_client_policy
   ```

Figure C–26 Spaces Web Service Data Control - OWSM Security



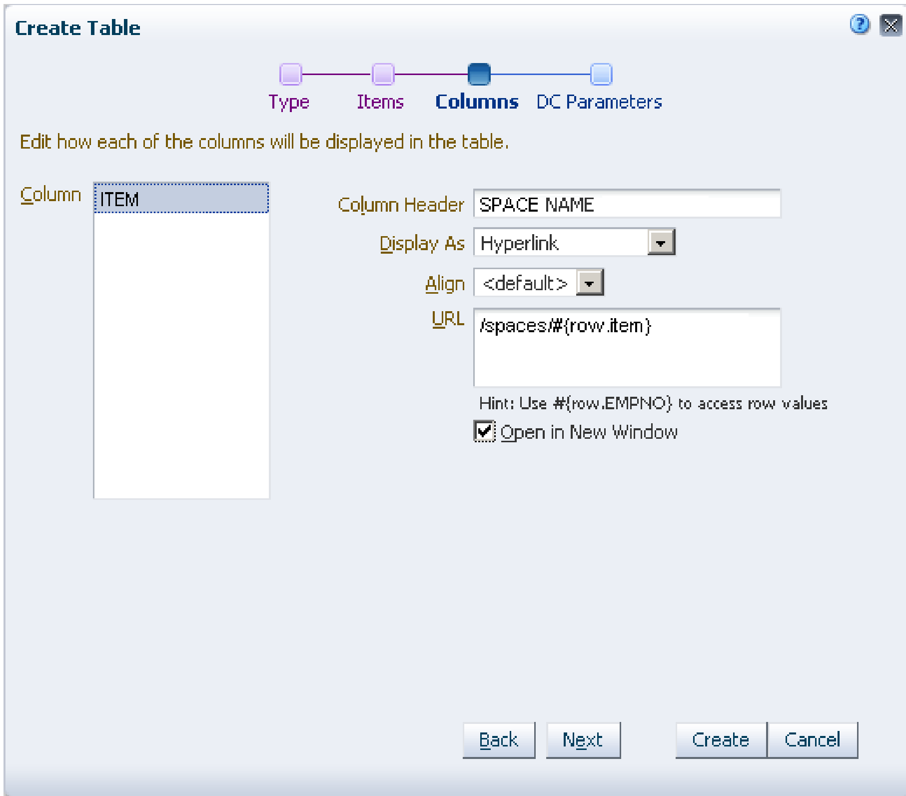
3. Click **Create**.
4. Select the data control, and from the Edit menu, select **Show**.
5. Create a blank task flow, `Spaces`, to consume the data control.

   For the detailed steps, see Section 29.3.1, "Creating a Task Flow."
6. Edit the `Spaces` task flow and add the `SpacesWS` data control accessor as a table.

   For the detailed steps, see Section 29.4.1.1, "Adding a Data Control as a Table."

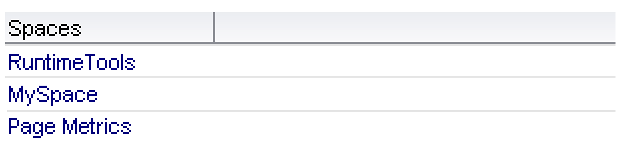
   To display the space names as links, on the Columns page in the Create Table dialog, select **Hyperlink** in the Display As field. Then in the URL field (Figure C–27), specify the URL to which the space name must be appended so that it opens the space in a separate window, for example `/spaces/#{row.item}`.

Figure C–27 Hyperlink Option on the Table Create - Columns Page



The table displays as shown in Figure C–28

Figure C–28 Mashup Displaying a List of Spaces



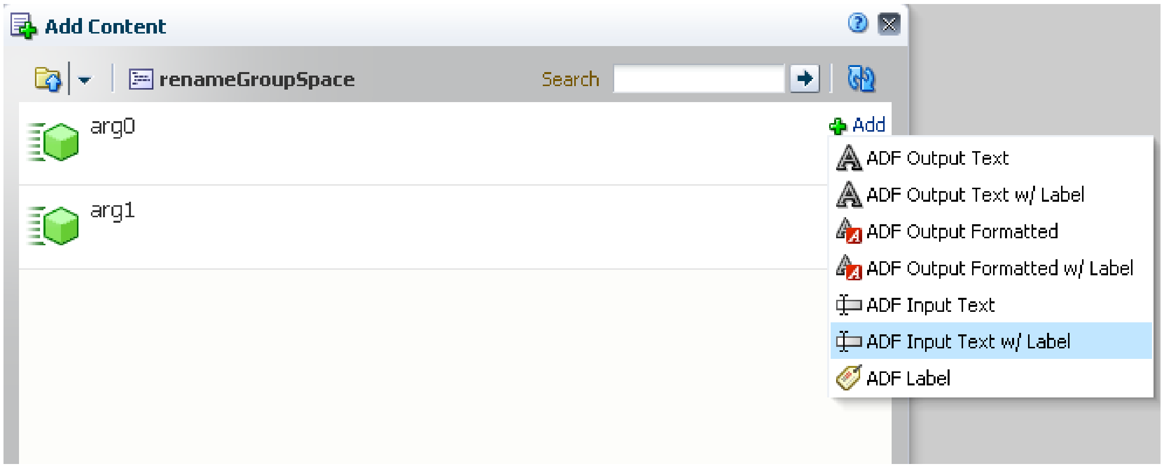
C.4.2 Creating a Mashup with a Form to Rename Spaces

This section references the `SpacesWS` Web Service data control created in the previous section and describes how to create a form that can be used to rename a given space.

To create a custom form:

1. Create a task flow, `Rename Space`, using the Blank mashup style.
2. Edit the task flow and click **Add Content**.
3. Drill down to view the `SpacesWS` data control, and add the `renameGroupSpace` method.
4. Open the `renameGroupSpace` method and add `arg1` and `arg0` attributes as `ADF Input Text w/Label`, as shown in Figure C–29. This step adds two input text fields, where users can specify the old space name and new space name.

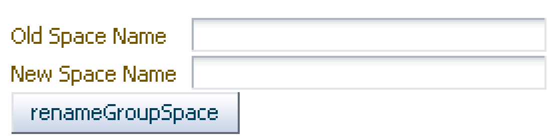
Figure C–29 Options to Add renameGroupSpace Attributes



5. Save and close the task flow.
6. Change the labels for the input text fields:
   a. Select the task flow, and from the Edit menu, select **Edit Source**.
   b. Replace the `label` value for the first `inputText` component (`#{bindings.arg0.hints.label}`) to `Old Space Name`.
   c. Replace the `label` value for the second `inputText` component (`#{bindings.arg1.hints.label}`) to `New Space Name`.
   d. Click **OK**.

   The task flow now appears as shown in Figure C–30.

Figure C–30 Task Flow to Change a Space Name



7. In the Resources Manager, select the task flow, and click **Show** from the Edit menu.

   You can now add this task flow to any page and provide the capability to change space names.

C.5 Creating a Mashup with Data from a Siebel Data Source

This section describes how to create a mashup with data from a Siebel data source using a Web Service data control. It includes the following sections:

- Section C.5.1, "Creating a Web Service Data Control"
- Section C.5.2, "Adding a Data Control Method as a Table to a Task Flow"
- Section C.5.3, "Querying the Data Source"
- Section C.5.4, "Updating Data Source Records"

Prerequisites

To create a Web Service data control to the Siebel data source, you must first create an inbound Web Service and generate a WSDL for the service. For more information, see the "Integrating Siebel Applications as Web Services" section in the *Oracle Fusion Middleware Developer's Guide for Oracle WebCenter Portal*.

C.5.1 Creating a Web Service Data Control

On the Resource Manager - Data Controls page, create a Web Service data control, `CustData`, using the WSDL for the Siebel Web Service.

For the detailed steps, see Section 29.2.2, "Creating a Web Service Data Control."

This example shows a connection to a Web Service that provides two methods, `MyQueryById` and `MyInsertOrUpdate`. `MyQueryById` takes a complex parameter, `MyQueryById_Input`, and `MyInsertOrUpdate` takes a parameter, `MyInsertOrUpdate_Input`. `MyInsertOrUpdate_Input` is an array parameter, which can be used to update multiple records in the table.

Note: The parameter names used in this section are examples only. You can provide parameter names of your choice while creating the Web Service.

Expose the `CustData` data control in the Resource Catalog by selecting **Show** from the Edit menu.

C.5.2 Adding a Data Control Method as a Table to a Task Flow

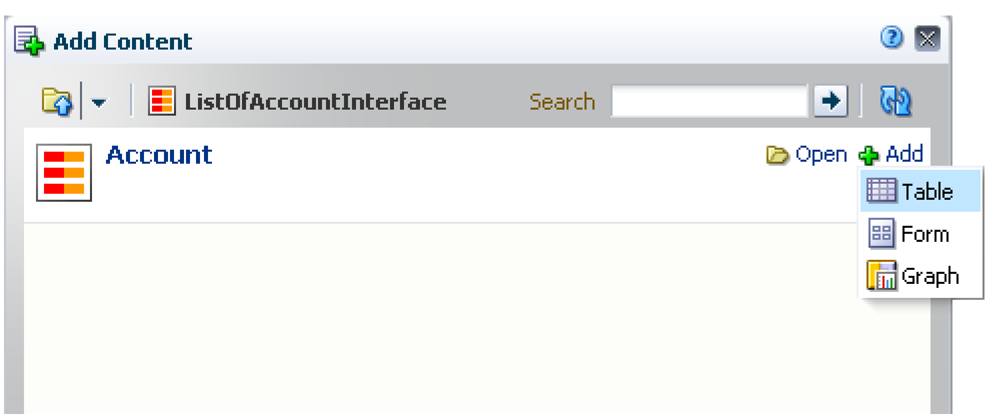
To consume the `CustData` data control in a task flow:

1. On the Resource Manager - Task Flows page, create a task flow based on the Parameter Form style.

   For the detailed steps, see Section 29.3.1, "Creating a Task Flow."

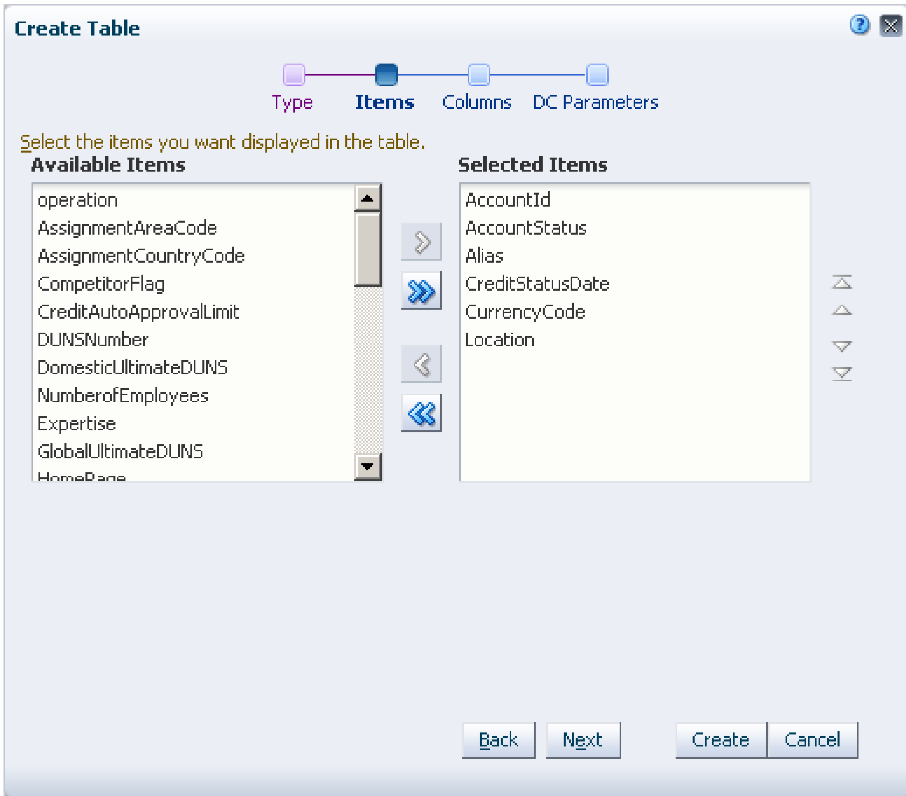
2. Edit the task flow and click **Add Content**.
3. Locate the `CustomerData` data control and expand it to view its contents. Open **MyQueryById**, **Return**, then **ListOfAccountInterface**.
4. Add **Account**, shown in Figure C–31, as an editable table.

Figure C–31 Table Option on the Account Method



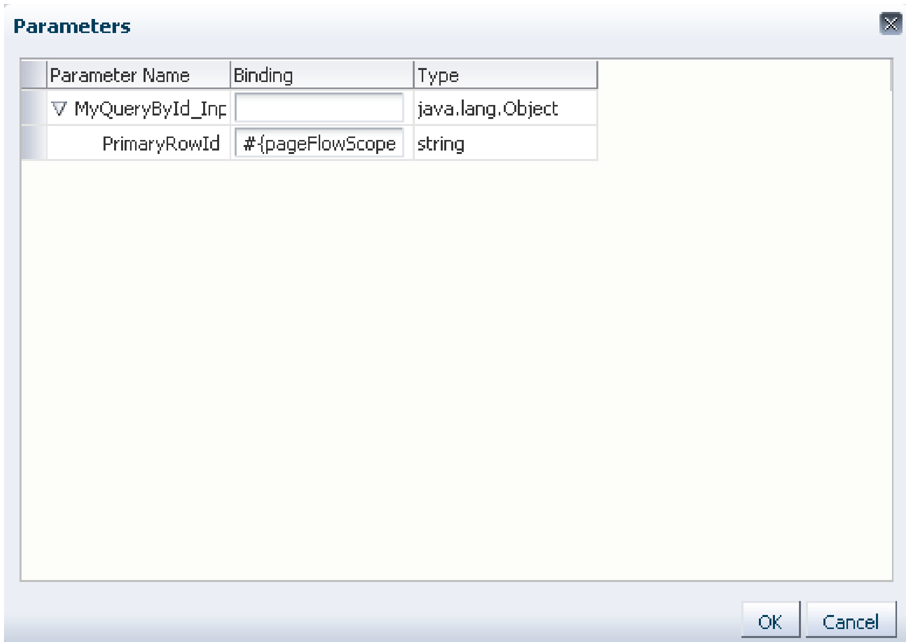
5. In the Create Table dialog, select the columns to be displayed, as shown in Figure C–32.

Figure C–32 Items Page in the Create Table Dialog



6. On the DC Parameters page of the wizard, from the context menu next to the `MyQueryById_Input` field, click **Parameter Structure**.
7. In the Parameters dialog, expand the complex parameter to view the `PrimaryRowId` parameter, specify the binding for this parameter as `#{pageFlowScope.id}`, as shown in Figure C–33, then click **OK**.

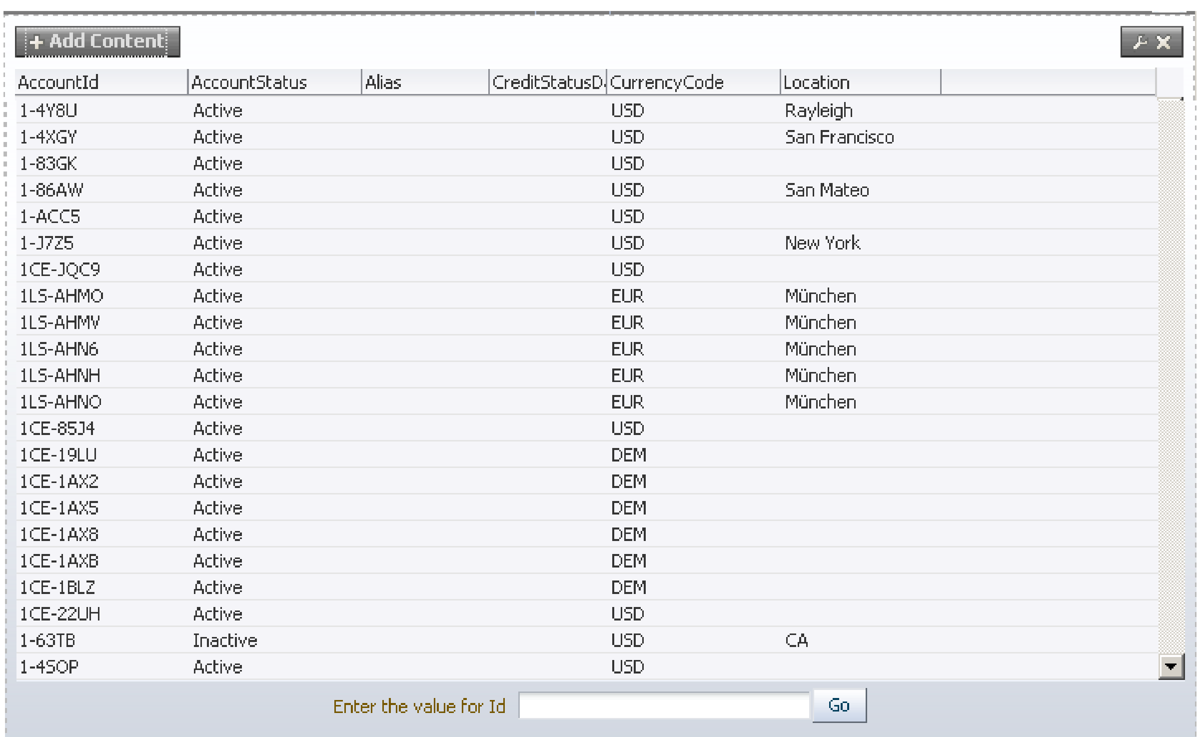
Figure C–33 Parameters Dialog



8. Click **Create**.

   At this point, as the parameter passes a null value, the table displays all available records, as shown in Figure C–34.

Figure C–34 Table Inside a Parameter Form Task Flow



AccountId	AccountStatus	Alias	CreditStatusD	CurrencyCode	Location
1-4Y8U	Active			USD	Rayleigh
1-4XGY	Active			USD	San Francisco
1-83GK	Active			USD	
1-86AW	Active			USD	San Mateo
1-ACC5	Active			USD	
1-J7Z5	Active			USD	New York
1CE-JQC9	Active			USD	
1LS-AHMO	Active			EUR	München
1LS-AHMV	Active			EUR	München
1LS-AHN6	Active			EUR	München
1LS-AHNH	Active			EUR	München
1LS-AHNO	Active			EUR	München
1CE-85J4	Active			USD	
1CE-19LU	Active			DEM	
1CE-1AX2	Active			DEM	
1CE-1AX5	Active			DEM	
1CE-1AX8	Active			DEM	
1CE-1AXB	Active			DEM	
1CE-1BLZ	Active			DEM	
1CE-22UH	Active			USD	
1-63TB	Inactive			USD	CA
1-4SOP	Active			USD	

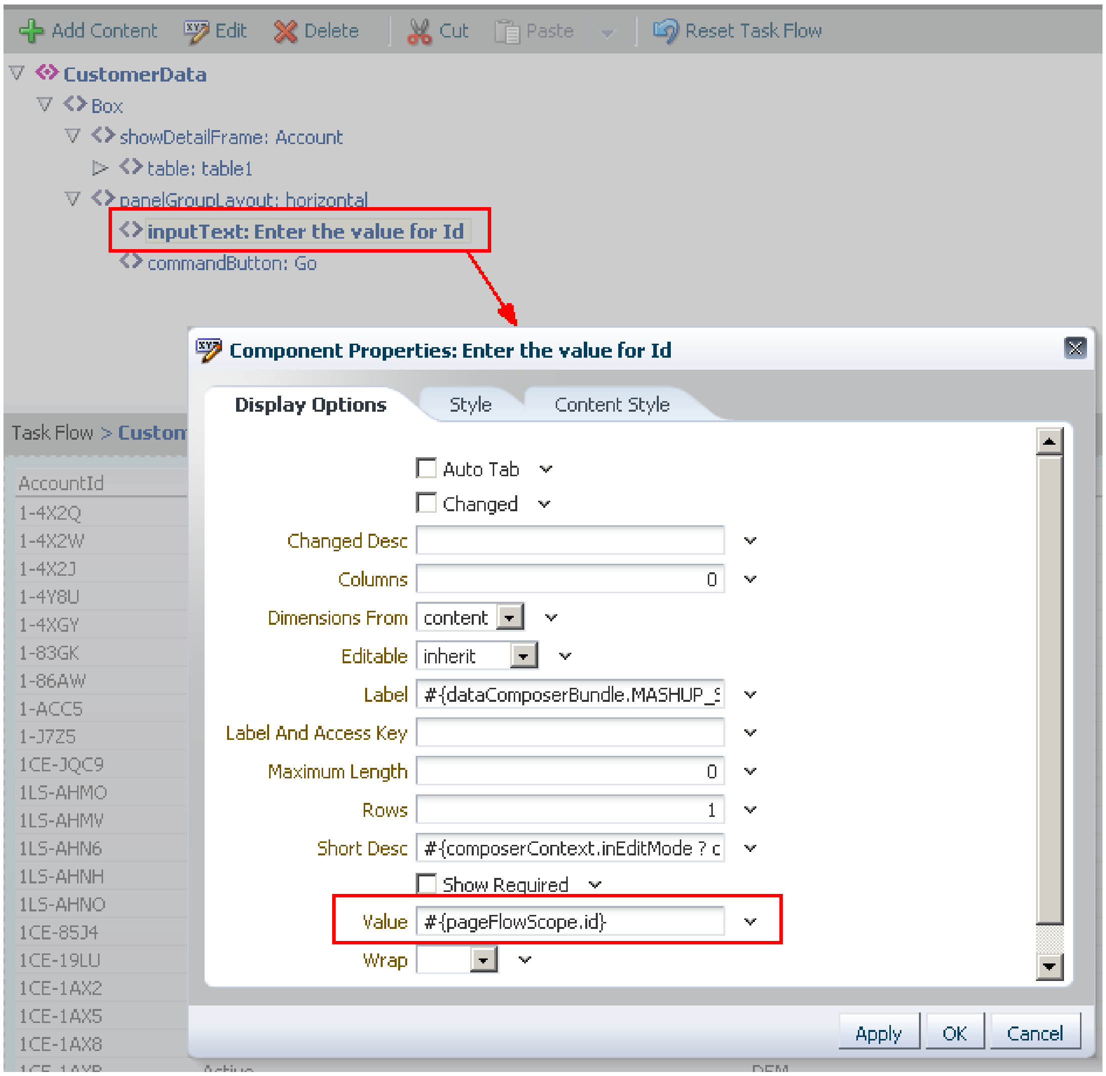
9. As the table is inside a parameter form task flow, you must wire the task flow parameter to the data control parameter. To do this:

a. From the View menu, select **Source**.

b. In Source view, select the `inputText` component at the bottom of the page and click **Edit** on the toolbar.

c. Change its Value attribute to `#{pageFlowScope.id}`, as shown in Figure C–35.

Figure C–35 Component Properties Dialog for Input Text Field



d. Click **OK**.

e. Additionally, delete the `commandButton` component with the title `GO`.

As an alternative to this button, you will learn how to use one of the Web Service methods to query the data source.

10. Switch back to Design mode of the page.

As you deleted the `GO` button in the parameter form task flow, there is currently no way to query the data source from the task flow. Therefore, the next step is to add a Web Service method to query the data source.

C.5.3 Querying the Data Source

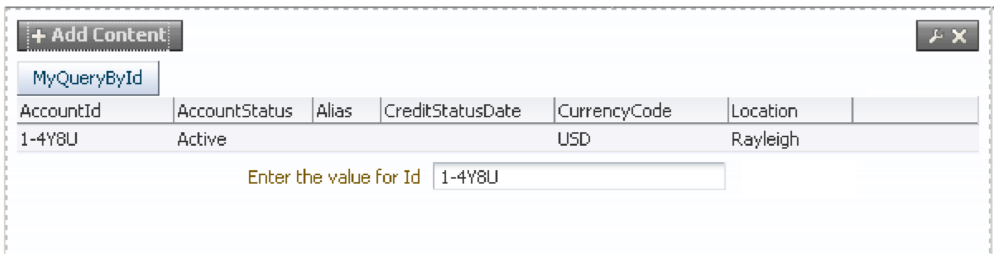
The Siebel Web Service in this example provides the `MyQueryById` method, which supports a single parameter, `MyQueryById_Input`. Add this method as a button to the task flow. As you already wired the `MyQueryById_Input` parameter to the task flow parameter in the previous step, the button is automatically wired to the task flow parameter.

To enable querying using the `MyQueryById` method:

1. Edit the task flow and click **Add Content**.
2. In the catalog, locate the `CustData` data control and expand it.
3. Add the **MyQueryById** method as an ADF Button.

   You can now specify an account ID in the parameter field to view details for that account in the table, as shown in Figure C–36.

Figure C–36 Table and Query Button inside the Parameter Form Task Flow



C.5.4 Updating Data Source Records

If a data source allows writing into it, Web Service data controls provide array parameters to update multiple records simultaneously. The Siebel Web Service in this example allows writing back to the data source. It provides the `MyInsertorUpdate_Input` parameter, which is a complex parameter that can be used to populate multiple records at a time. This section describes how to use array parameters to update records in the table. `Input Text` fields added to the bottom of the page are used to update table columns.

To update records in the table:

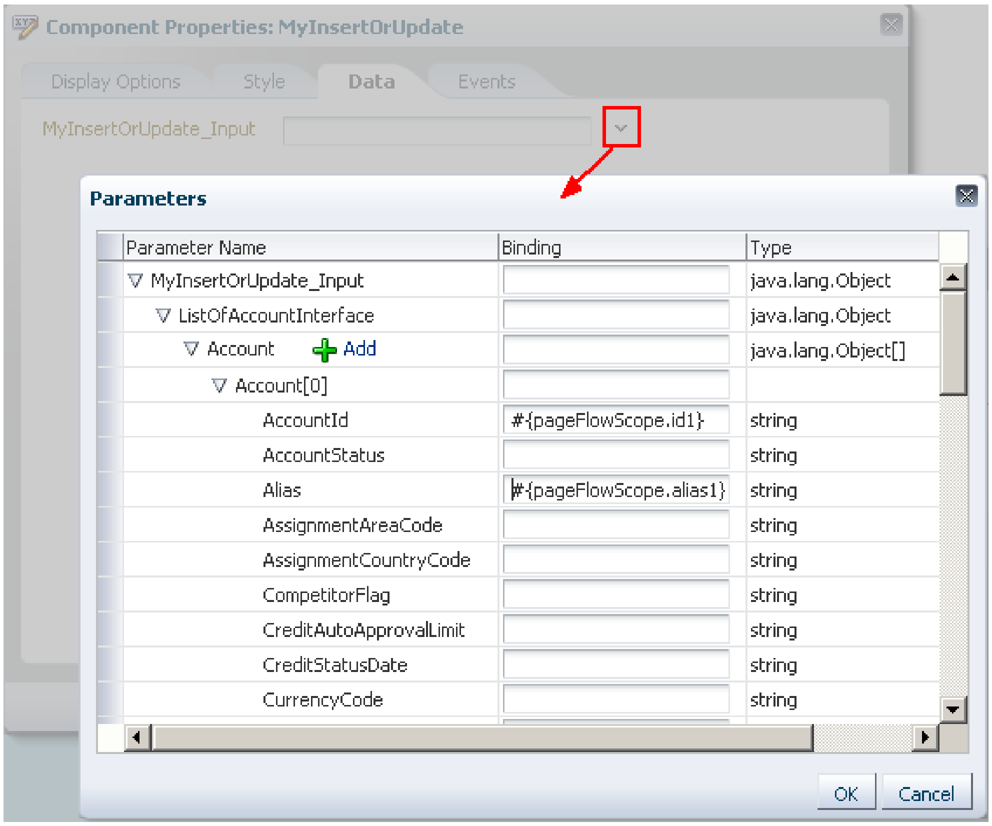
1. Edit the task flow and click **Add Content**.
2. In the catalog, locate the `CustData` data control and expand it.
3. Add the **MyInsertOrUpdate** method as an ADF Button.
4. Switch to Source view of the page, select the new button, and click **Edit** to view its properties.
5. Click the **Data** tab, and from the context menu on the `MyInsertOrUpdate_Input` field, select **Parameter Structure**.
6. In the Parameter dialog, expand **MyInsertOrUpdate_Input**, **ListOfAccountInterface**, and **Account**.

   The `Account` parameter is an array type parameter and therefore displays an **Add** link.
7. In each row, define a bind parameter value for each column that you want to update, as shown in Figure C–37. For example, `#{pageFlowScope.id1}` and

`#{pageFlowScope.alias1}` in the first row, and `#{pageFlowScope.id2}` and `#{pageFlowScope.alias2}` in the second row.

> **Tip:** To delete any of the columns you just added, leave the columns empty. Empty columns are deleted before passing the values back as Web Service parameter values.

Figure C–37 Array Parameter Definition in the Parameter Dialog



8. You can update values for two rows, `Account[0]` and `Account[1]`, by default. Click **Add** to add more rows.
9. Click **OK** in the Parameters dialog, then again in the Component Properties dialog.
10. Save and close the task flow.
11. To update values in the table, at the bottom of the page, add one Input Text field for each table cell that you want to update. To do this:
    a. Select the task flow in the Resource Manager and click **Edit Source** from the Edit menu.
    b. Copy the source code for the parameter form's `inputText` component and paste it four times.
    c. Change the `id` attribute value so that each ID is unique.
    d. Change the `value` attribute to contain the values you defined in the Parameters dialog in step 7, for example, `#{pageFlowScope.id1}`.

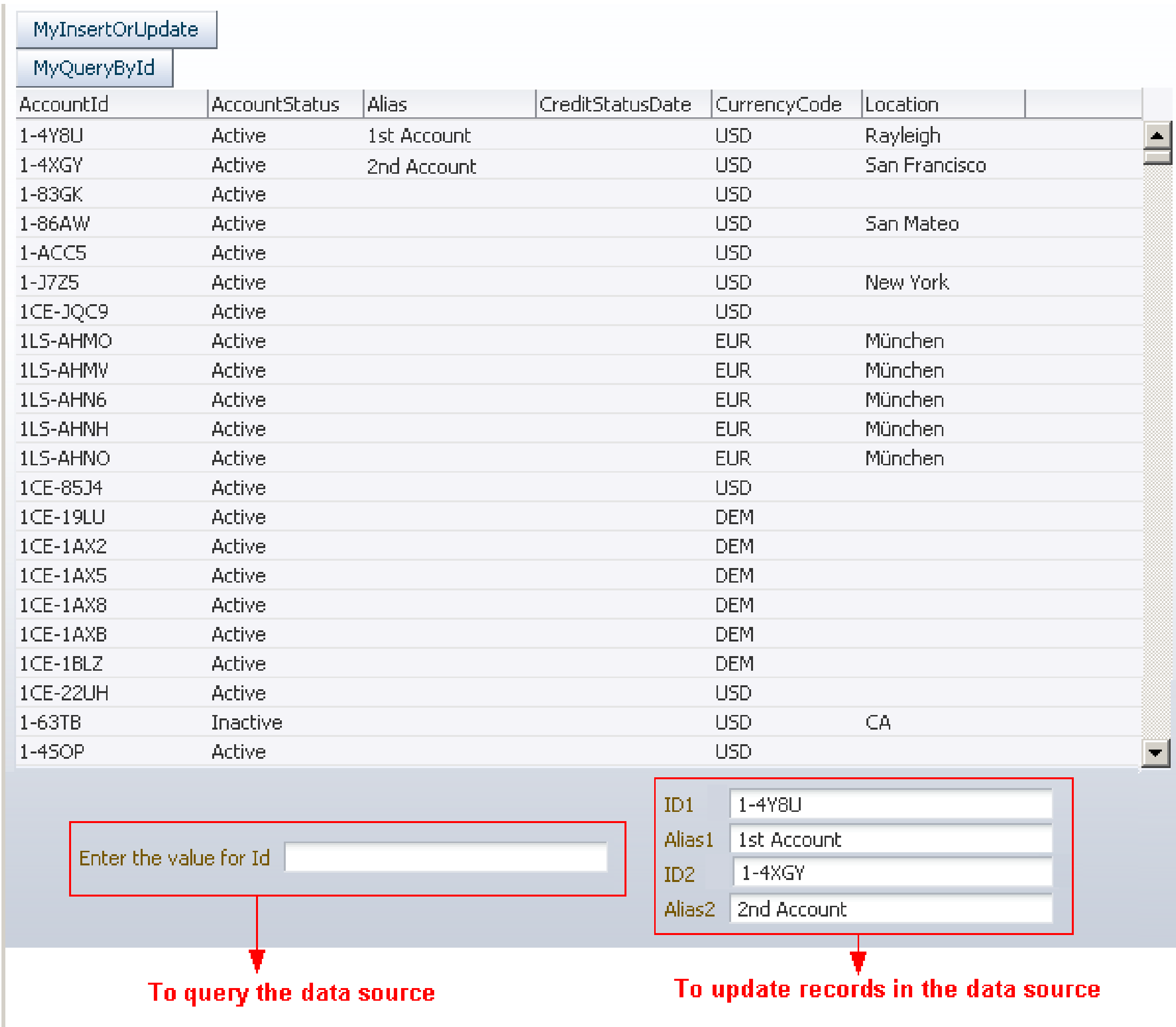
    Figure C–38 shows the source code for the new components.

Figure C–38 Source Code of the New Input Text Components

12. Optionally, to organize the page components better, group the four `inputText` components in a Box component.

    The task flow is now wired to write back to the data source. Figure C–39 shows how the task flow appears. The first field is wired to the `MyQueryById` button and the remaining fields are used to provide values for the table. The new values are written to the data source when you click the `MyInsertOrUpdate` button.

Figure C–39 Task Flow with a Table and Options to Query and Update



AccountId	AccountStatus	Alias	CreditStatusDate	CurrencyCode	Location
1-4Y8U	Active	1st Account		USD	Rayleigh
1-4XGY	Active	2nd Account		USD	San Francisco
1-83GK	Active			USD	
1-86AW	Active			USD	San Mateo
1-ACC5	Active			USD	
1-J7Z5	Active			USD	New York
1CE-JQC9	Active			USD	
1LS-AHMO	Active			EUR	München
1LS-AHMV	Active			EUR	München
1LS-AHN6	Active			EUR	München
1LS-AHNH	Active			EUR	München
1LS-AHNO	Active			EUR	München
1CE-85J4	Active			USD	
1CE-19LU	Active			DEM	
1CE-1AX2	Active			DEM	
1CE-1AX5	Active			DEM	
1CE-1AX8	Active			DEM	
1CE-1AXB	Active			DEM	
1CE-1BLZ	Active			DEM	
1CE-22UH	Active			USD	
1-63TB	Inactive			USD	CA
1-4SOP	Active			USD	

C.6 Building and Using a Custom Mashup Style with Predefined Columns

This section describes how to create a custom mashup style in the Resource Manager and use that style to create a task flow. The custom style is designed to list the top five page hits in a space in a layout similar to the Spaces Activity Stream layout. An input text field allows users to specify a space name to view page hits for that space. This section includes the following subsections:

- Section C.6.1, "Building the Custom Mashup Style"
- Section C.6.2, "Creating a Task Flow Based on the Custom Style"

C.6.1 Building the Custom Mashup Style

As the Resource Manager does not provide a Create option on the Mashup Styles page, the only way to build a new mashup style is by copying an out-of-the-box mashup style and replacing its source code.

To build the custom mashup style:

1. Create a copy of the blank mashup style and name it `PageHitsStyle`.

2. Edit the source of `PageHitsStyle` and replace the code on the **Fragment** tab with the following:

```
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
          xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
          xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable"
          xmlns:f="http://java.sun.com/jsf/core"
          xmlns:af="http://xmlns.oracle.com/adf/faces/rich">
  <af:panelGroupLayout id="pgl1">
    <af:panelGroupLayout id="pg2" layout="horizontal" halign="center"
                         inlineStyle="padding-bottom:5px;">
      <af:inputText id="ip1" value="#{pageFlowScope.bindVarId}" label="Space
Name"
                    shortDesc="Enter A Space Name, by default it's all
spaces"/>
      <af:commandButton text="#{dataComposerBundle.MASHUP_STYLES_GO}"
id="cb1"/>
    </af:panelGroupLayout>
    <cust:panelCustomizable id="pc1">
      <table border="0" width="100%">
       <af:iterator id="i1" value="#{dataPresenter.dummyData.collectionModel}"
var="row">
        <tr class="PortletText1">
          <td width="12px">
            <af:image id="img1" source="/adf/webcenter/star_sm_ena.png"/>
          </td>
          <td>
            <af:outputText id="otCol1" value="#{empty row.USERNAME ?
'#{row.USERNAME}' : row.USERNAME}"
                           inlineStyle="color:#333333; font-size:12px;
font-weight:bold;"/>
            <af:spacer id="spacer1" width="5px"/>
            <af:outputText id="otCol2" value="viewed"
inlineStyle="color:#333333; font-size:12px;"/>
            <af:spacer id="spacer2" width="5px"/>
            <af:goLink id="gl1" destination="{doc path pre fix}#{empty
row.DOWNLOAD_URL ? '#{row.DOWNLOAD_URL}' : row.DOWNLOAD_URL}"
                       targetFrame="_blank" text="#{empty row.DOCNAME ?
'#{row.DOCNAME}' : row.DOCNAME}"/>
          </td>
        </tr>
        <tr>
          <td/>
          <td>
           <af:outputText id="otCol3" value="#{empty row.HITS? '#{row.HITS}' :
row.HITS}"
                           inlineStyle="color:#666666; font-size:12px;"/>
            <af:spacer id="spacer3" width="5px"/>
            <af:outputText id="otCol4" value="TIMES"
inlineStyle="color:#666666; font-size:12px;"/>
            <af:spacer id="spacer4" width="5px"/>
            <af:outputText id="otCol5" value="in the last 7 days"
inlineStyle="color:#333333; font-size:12px;"/>
          </td>
        </tr>
        <tr>
          <td/>
          <td>
            <af:outputText id="otCol6" value="Last Visit at "
inlineStyle="color:#333333; font-size:12px;"/>
```

```
            <af:outputText id="otCol7" value="#{empty row.LASTVIEWED ?
'#{row.LASTVIEWED}' : row.LASTVIEWED}"
                           inlineStyle="color:#666666; font-size:12px;">
            <af:convertDateTime type="both"/>
            </af:outputText>
          </td>
        </tr>
        </af:iterator>
      </table>
    </cust:panelCustomizable>
  </af:panelGroupLayout>
</jsp:root>
```

where,

`#{pageFlowScope.bindVarId}` is a reference that provides the input space name

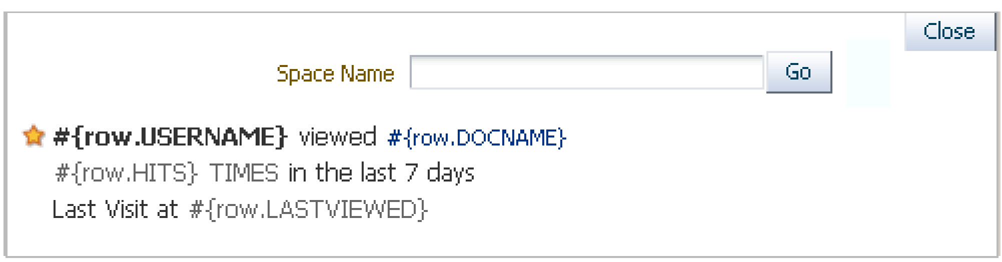
`#{dataPresenter.dummyData.collectionModel}` is a dummy reference that gets replaced when you use the mashup style

`#{row.`*`COLUMN`*`}` are placeholders that will reference data from data controls when the mashup style is used

`{`*`doc path pre fix`*`}` is the prefix to be used for the document URL. To find the prefix for a document path, select a document on the Documents page and click `Get a Link` from the View menu. The first part of the Download URL (ending in `path`) is the prefix to be used. For example, `http://my.company.com:8889/webcenter/content/conn/xyz18-ucm11g/path`.

If you preview the mashup style, it displays as shown in Figure C–40.

Figure C–40 Preview of the Custom Mashup Style



You can use this mashup style to build mashups that display page hits.

C.6.2 Creating a Task Flow Based on the Custom Style

This section describes how to use the `PageHits` mashup style to create a mashup that displays page hits in an Activity Stream layout. To illustrate this, you must create a SQL data control using the `ActivitiesDS` database connection, then consume the data control in a task flow based on the `PageHits` mashup style. However, to display the data from the data control in an Activity Stream layout instead of the typical table or graph layout, you must perform the following tasks:

- Create a SQL data control.
- Create a task flow based on the new `PageHits` mashup style.
- Add the data control as a table.

- Copy the data control's accessor ID from the table's properties.
- Hide the table.
- Wire the input text field in the task flow to the data control using the accessor ID.

To use the custom mashup style:

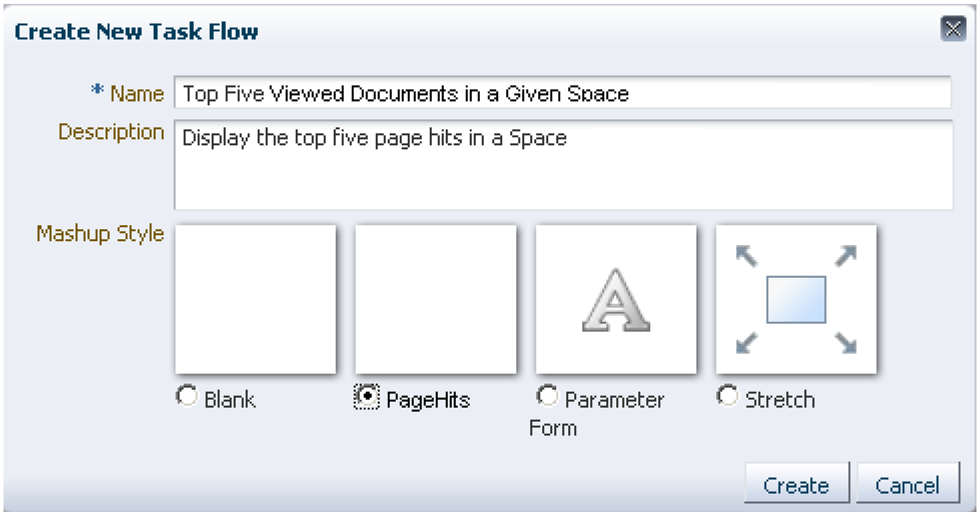
1. Create a SQL data control, `Top Five Viewed Documents in a Given Space`, using the `ActivitiesDS` connection. Specify the following query:

```
SELECT * FROM
(SELECT users.userid  username, doc.name_  docname,doc.path_  download_url,
count(1) hits,max(fact.occurred) lastviewed
FROM asfact_wc_doclib__0 fact , asdim_wc_documen_0 doc , asdim_wc_applica_0
app,asdim_wc_groupsp_0 space , asdim_users users
WHERE app.id = fact.application_
AND app.name_ = 'webcenter'
AND fact.occurred BETWEEN (SYSDATE-7) AND SYSDATE
AND fact.document_ = doc.id
AND doc.name_ is not null
AND doc.id is not null
AND fact.document_ is not null
AND doc.resourceid_ is not null
AND  fact.GROUPSPACE_ = space.id
AND  upper(space.name_) LIKE upper(:spacename)
AND space.name_ IS NOT NULL
AND fact.userid=users.id
GROUP BY users.userid, doc.name_,doc.path_
ORDER BY hits  DESC)
WHERE rownum <= 5
ORDER BY rownum
```

   See Also: Section C.1.2.1, "Creating the Page Hits Data Control"

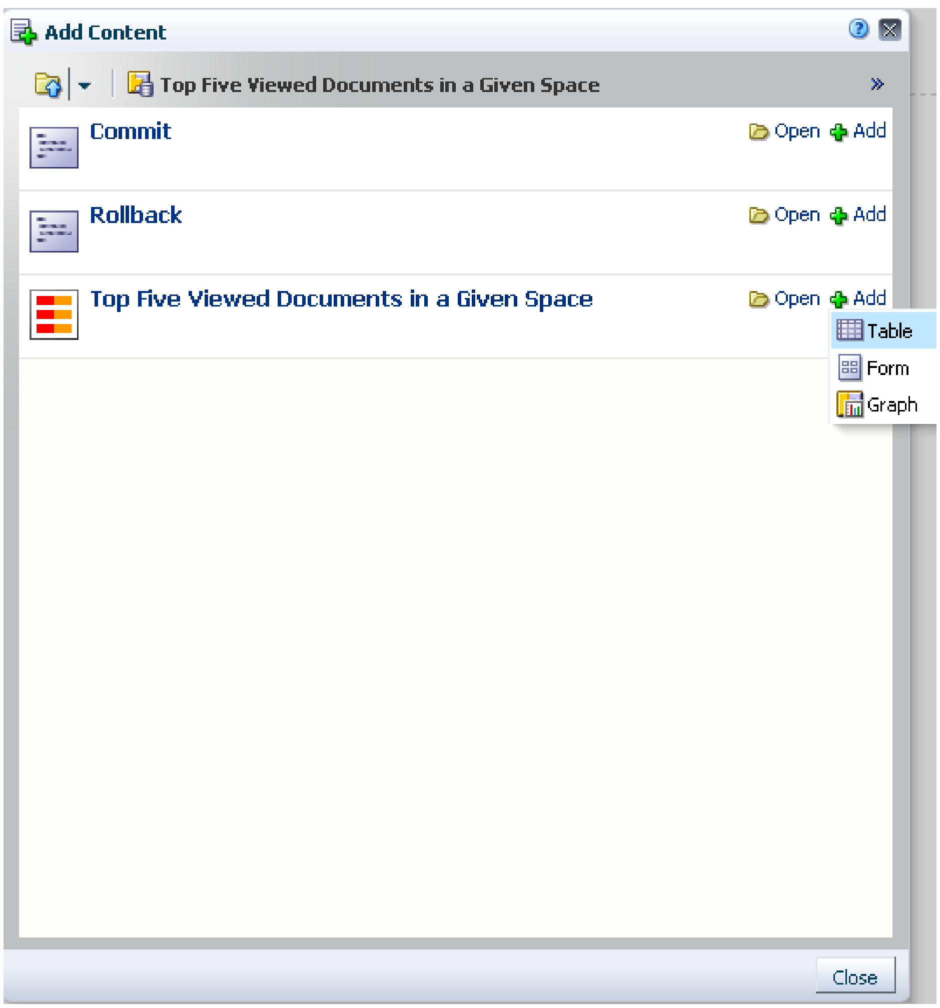
2. Set the `spacename` bind parameter value to `Home space`.
3. Select the data control in the Resources Manager and click **Show** on the Edit menu.
4. Create a task flow, `Top Five Viewed Documents in a Given Space`, using the `PageHits` mashup style, as shown in Figure C–41.

Figure C–41 Create New Task Flow Dialog with PageHits Style



5. Edit the task flow and add the data control as a table, as shown in Figure C–42.

Figure C–42 Top Five Viewed Documents in a Given Space



Create a read-only table, and accept the defaults on Items and Columns pages of the Create Table dialog.

On the DC Parameters page, specify the following as the parameter value for `spacename`:

```
#{empty pageFlowScope.bindVarId ? '%' :
pageFlowScope.bindVarId}
```

6. To get the accessor ID:

   a. Switch to Source view of the task flow, and select the Table component.

   b. Click **Edit** to view the table's properties.

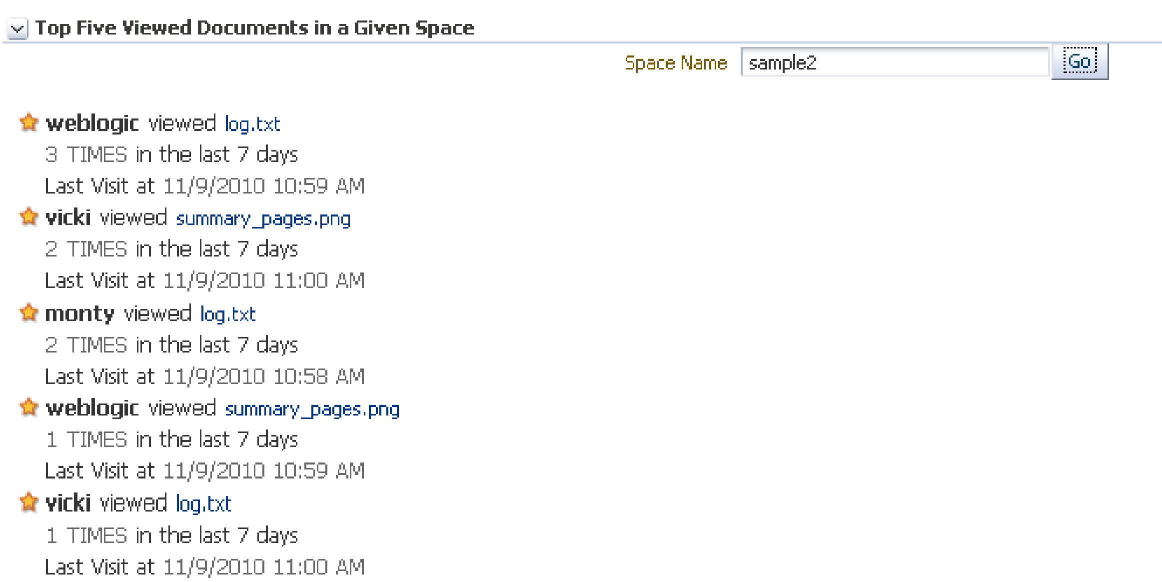
   c. In the Component Properties dialog, copy the value of the `Value` attribute. This is the accessor ID for the data control. The value may be as shown in the following example:

   ```
   #{bindings.accessor_gsraffebf20_b500_480f_bf92_
   a9d33922a0a7.collectionModel}
   ```

7. Select the **showDetailFrame** component wrapping the table and click **Hide** on the context menu.
8. Right-click the **iterator** component, and click **Edit**.
9. Replace the value in the `Value` attribute with the accessor ID you copied from the table's properties.

   You now have a task flow with the Activity Stream-like seeded layout.
10. Save the task flow and exit Composer.
11. In the Resources Manager, select the task flow and click **Show** on the Edit menu.
12. Consume the task flow in a page. It appears as shown in Figure C–43.

Figure C–43 Page Displaying Top Five Page Hits in a Space

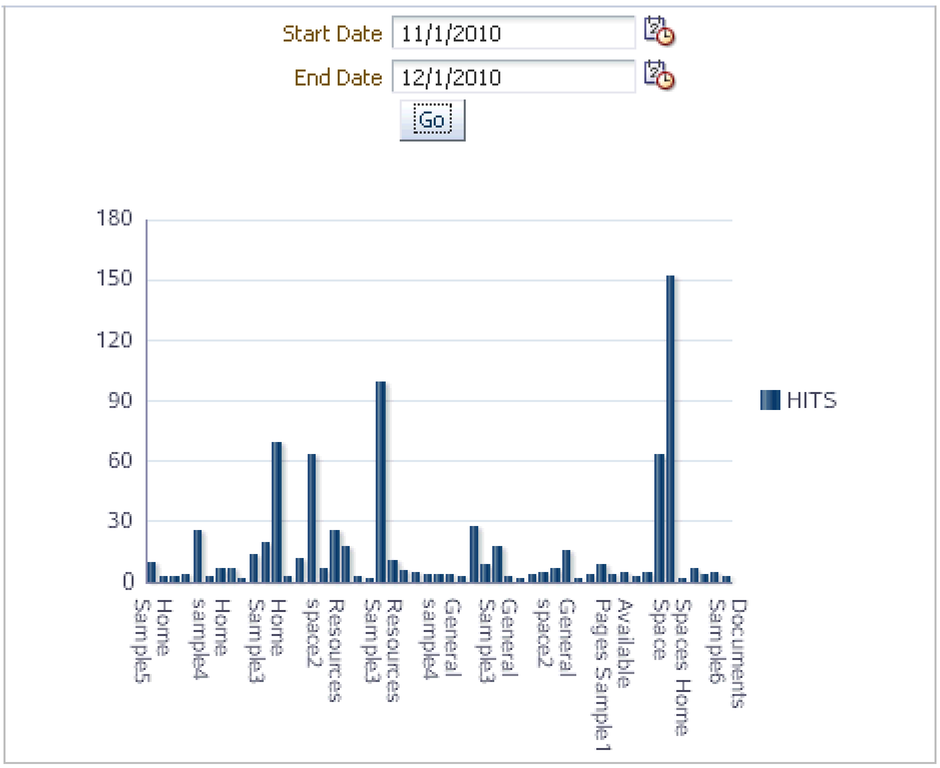


C.7 Building and Using a Custom Mashup style with Date Fields

This section describes how to create a custom mashup style with fields to specify a date range and a content area to display a visualization of data for the specified date range. Figure C–44 shows a task flow created using such a mashup style. This section also describes how to create a task flow using the custom style. It includes the following subsections:

- Section C.7.1, "Building the Custom Mashup Style"
- Section C.7.2, "Creating a Task Flow Based on the Custom Style"

Figure C–44 Task Flow Using Custom Mashup Style with Date Fields



C.7.1 Building the Custom Mashup Style

As the Resource Manager does not provide a Create option on the Mashup Styles page, the only way to build a new mashup style is by copying an out-of-the-box mashup style and replacing its source code.

To build the custom mashup style:

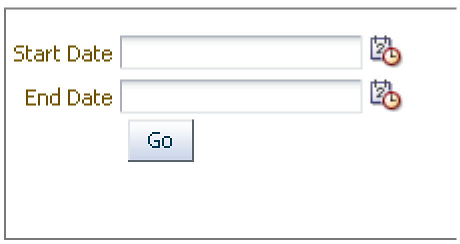
1. Create a copy of the blank mashup style and name it `Input Dates`.
2. Edit the source of `Input Dates` and replace the code on the **Fragment** tab with the following:

```
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
          xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
          xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable"
          xmlns:f="http://java.sun.com/jsf/core"
          xmlns:af="http://xmlns.oracle.com/adf/faces/rich">
  <af:panelGroupLayout id="pgl">
```

```
    <af:panelGroupLayout id="pg2" layout="horizontal" halign="center"
inlineStyle="padding-bottom:5px;">
      <af:panelFormLayout id="pfl1" partialTriggers="ip1"
inlineStyle="padding-bottom:5px;">
        <af:inputDate id="ip1" value="#{pageFlowScope.bindVarId1}" label="Start
Date" autoSubmit="true"/>
        <af:inputDate id="ip2" value="#{pageFlowScope.bindVarId2}" label="End
Date"/>
        <af:commandButton text="#{dataComposerBundle.MASHUP_STYLES_GO}"
id="cb1"/>
      </af:panelFormLayout>
    </af:panelGroupLayout>
    <cust:panelCustomizable id="pc1" halign="center"/>
  </af:panelGroupLayout>
</jsp:root>
```

The `inputDate` components provide the two date fields, and the `panelCustomizable` provides the content area. When previewed, the mashup style appears as shown in Figure C–45.

Figure C–45 Preview of Custom Style with Date Fields



You can use this mashup style to build a mashup and populate the content area with a visualization of your choice.

C.7.2 Creating a Task Flow Based on the Custom Style

This section describes how to use the `Input Dates` mashup style to create a mashup that displays a graph of the page hits for a specified date range. To illustrate this, you must create a SQL data control using the `ActivitiesDS` database connection, then consume the data control in a task flow based on the `Input Dates` mashup style.

To use the custom mashup style:

1. Create a SQL data control, `Page Usage Between Two Dates`, using the `ActivitiesDS` connection. Specify the following query:

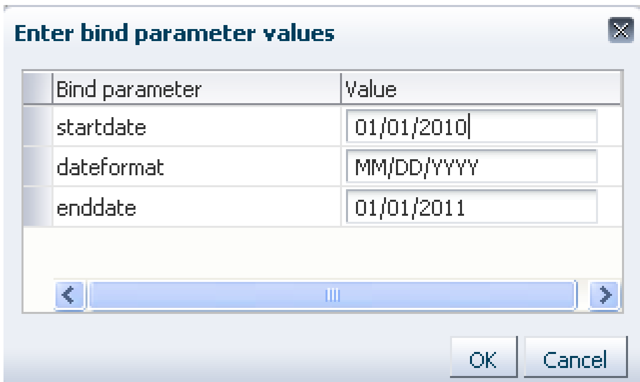
```
SELECT page.name_ pageName, space.name_ spaceName, COUNT(1) hits
FROM asdim_users u, asdim_wc_pages_0 page, asdim_wc_applica_0 app, asdim_wc_
groupsp_0 space, asfact_wc_pagevie_0 fact
WHERE
 app.name_ = 'webcenter'
AND fact.page_ = page.id
AND fact.userid = u.id
AND fact.application_ = app.id
AND fact.groupspace_  = space.id
AND fact.occurred BETWEEN to_timestamp_tz(to_char(:startdate), :dateformat)
AND to_timestamp_tz(to_char(:enddate), :dateformat)
AND space.name_ IS NOT NULL
AND page.name_ IS NOT NULL
AND space.id IS NOT NULL
```

```
AND page.id IS NOT NULL
AND fact.page_ IS NOT NULL
AND page.resourceid_ IS NOT NULL
GROUP BY page.name_, space.name_
```

The data control is created with the bind variables `startdate`, `dateformat`, and `enddate`.

2. Set the bind parameter values as required, for example, to query the usage of all pages in the year 2010, as shown in Figure C–46.

Figure C–46 Bind Parameter Values for the Data Control

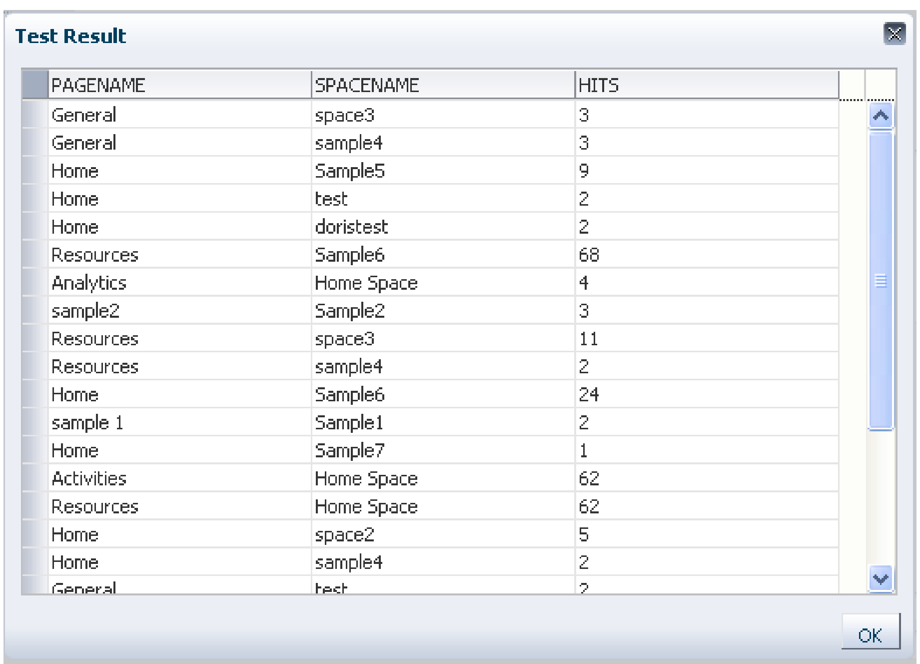


Enter bind parameter values

Bind parameter	Value
startdate	01/01/2010
dateformat	MM/DD/YYYY
enddate	01/01/2011

3. Test the query and view the data retrieved from the data source, as shown in Figure C–47.

Figure C–47 Data Control Query Test Results



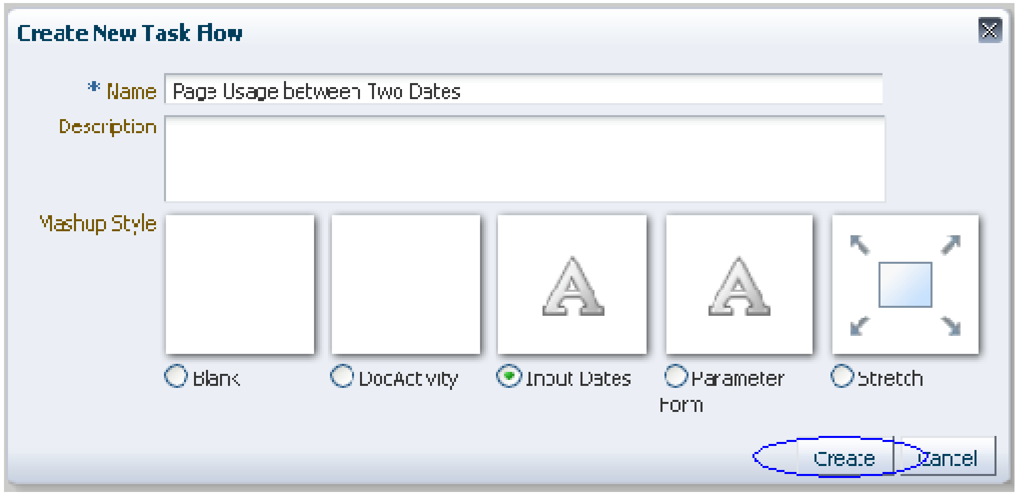
Test Result

PAGENAME	SPACENAME	HITS
General	space3	3
General	sample4	3
Home	Sample5	9
Home	test	2
Home	doristest	2
Resources	Sample6	68
Analytics	Home Space	4
sample2	Sample2	3
Resources	space3	11
Resources	sample4	2
Home	Sample6	24
sample 1	Sample1	2
Home	Sample7	1
Activities	Home Space	62
Resources	Home Space	62
Home	space2	5
Home	sample4	2
General	test	2

4. Select the data control in the Resources Manager and click **Show** on the Edit menu.

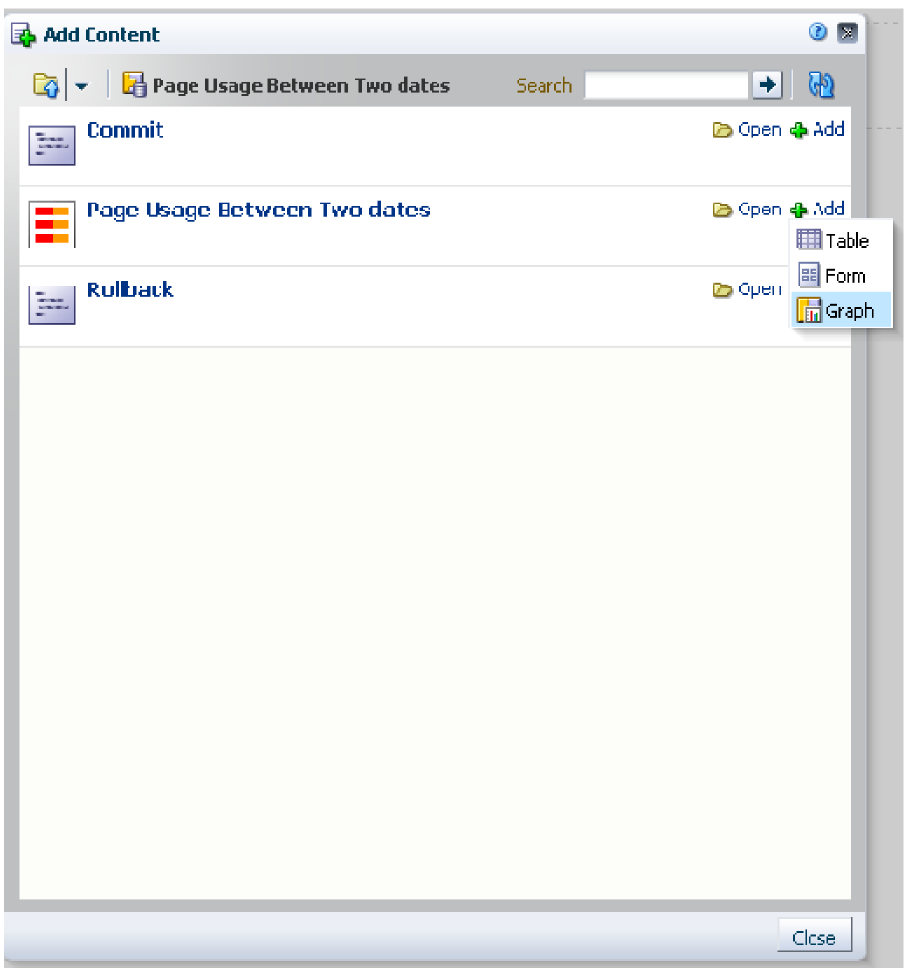
5. Create a task flow, `Page Usage Between Two Dates`, using the `Input Dates` mashup style, as shown in Figure C–48.

Figure C–48 Input Dates Mashup Style in the Create New Task Flow Dialog



6. Edit the task flow and add the data control as a graph (Figure C–49).

Figure C–49 Graph Option on the Data Control Accessor



- In the Create Graph dialog, on the Type page, select **Bar**.
- On the Placement page, place `PAGENAME` and `SPACENAME` on the X Axis, and `HITS` as the Bars.
- On the DC Parameters page, specify the following values for the bind parameters:

  `startdate`:

  ```
  #{empty pageFlowScope.bindVarId1 ? '01' :
  pageFlowScope.bindVarId1.month+1}/#{empty pageFlowScope.bindVarId1 ? '01' :
  pageFlowScope.bindVarId1.date}/#{empty pageFlowScope.bindVarId1 ? '2010' :
  pageFlowScope.bindVarId1.year+1900}
  ```

  (`01/01/2010` is set as the default initial start date value if no date selected)

  `dateformat`: `MM/DD/YYYY`

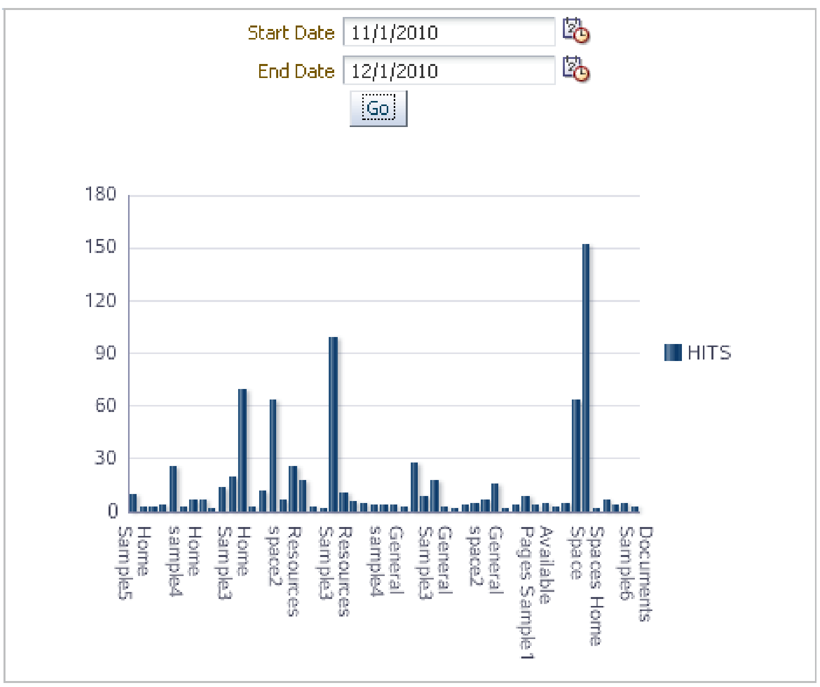
  `enddate`:

  ```
  #{empty pageFlowScope.bindVarId2 ? '01' :
  pageFlowScope.bindVarId2.month+1}/#{empty pageFlowScope.bindVarId2 ? '01' :
  pageFlowScope.bindVarId2.date}/#{empty pageFlowScope.bindVarId2 ? '2011' :
  pageFlowScope.bindVarId2.year+1900}
  ```

  (`01/01/2011` is set as the default initial end date value if no date selected)

7. Create the graph, save the task flow, then exit Composer.
8. In the Resources Manager, select the task flow and click **Show** on the Edit menu.
9. Consume the task flow in a page. It appears as shown in Figure C–50.

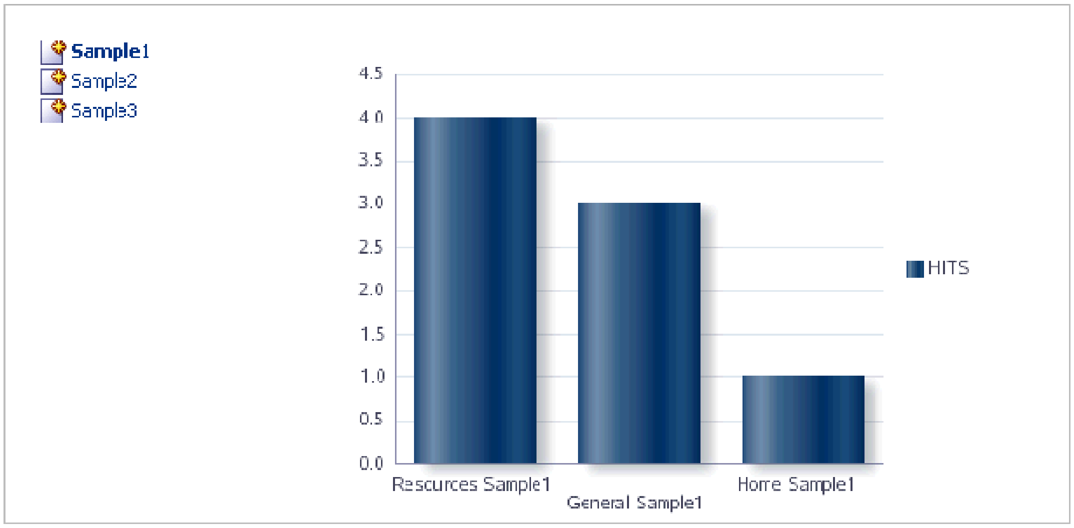
Figure C–50 Mashup Showing Graph for Specified Date Range



C.8 Creating a Mashup with a Graph That Is Wired to the Page Navigation

This section describes how to create a sample page that contains a navigation tree and a mashup wired in such a way that clicking a space name displays the page hits for that space in the graph, as shown in Figure C–51.

Figure C–51 Mashup with Left Navigation and a Page Hits Graph



The steps to build such a mashup include:

- Section C.8.1, "Creating the Page Hits Data Control"
- Section C.8.2, "Consuming the Data Control in a Page with a Navigation Tree"

C.8.1 Creating the Page Hits Data Control

If you have configured WebCenter Portal services in your application, an Analytics service connection, `ActivitiesDS`, is available out-of-the-box. You can use this connection to create a SQL data control. This section describes how to create a data control to view the top five page hits for the last 7 days for a given space.

To create the data control:

> **See Also:** Section 29.2.1.3, "Creating the Data Control" for the detailed steps to create a data control.

1. Use the `ActivitiesDS` connection and create a SQL data control named `PageHits`.
2. Specify the following SQL query:

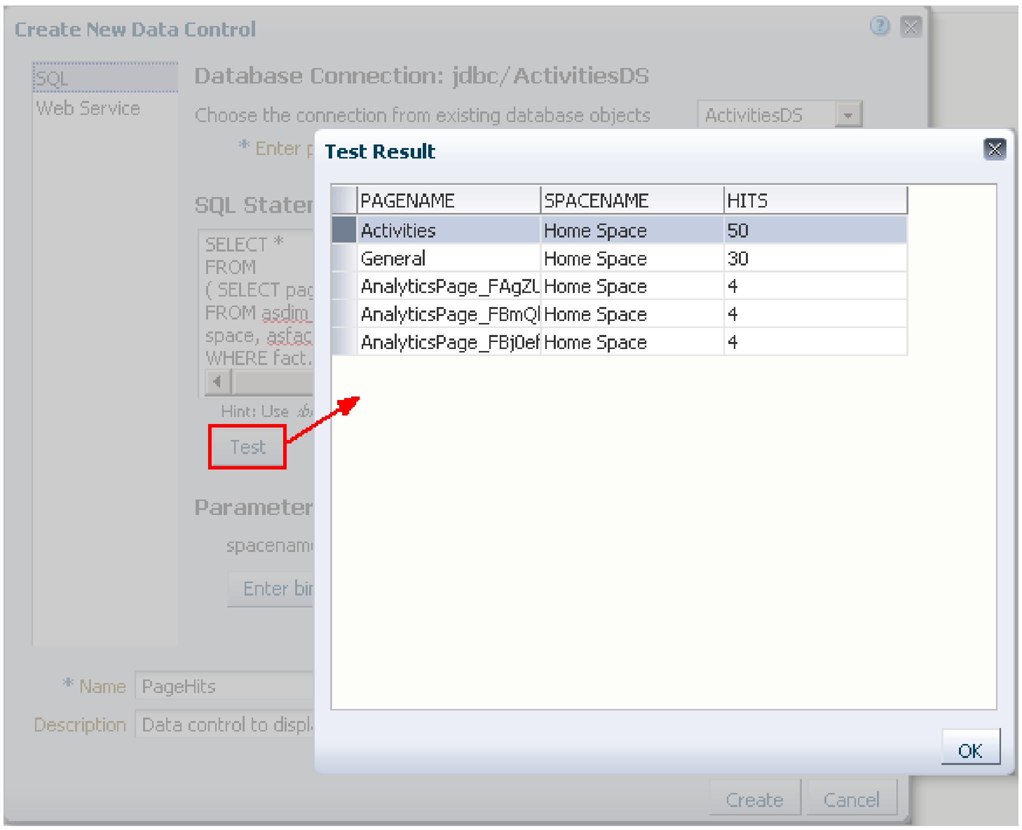
```
SELECT * FROM
(SELECT page.name_ pageName, space.name_ spaceName, COUNT(1) hits
FROM asdim_users u, asdim_wc_pages_0 page, asdim_wc_applica_0 app, asdim_wc_
groupsp_0 space, asfact_wc_pagevie_0 fact
WHERE fact.page_ = page.id AND fact.userid = u.id AND fact.application_ =
app.id
AND fact.groupspace_ = space.id AND fact.occurred BETWEEN
(SYSDATE-6) AND (SYSDATE+1) AND app.name_ = 'webcenter'
AND u.userid <> 'anonymous'
AND  upper(space.name_) LIKE upper(:spacename) AND space.name_ IS NOT NULL
AND page.name_  IS NOT NULL AND space.id IS NOT NULL AND page.id IS NOT NULL
```

```
AND fact.page_  IS NOT NULL AND page.resourceid_ IS NOT NULL
GROUP BY page.name_, space.name_ ORDER BY hits DESC)
WHERE rownum <= 5 ORDER BY rownum
```

The data control is created with the `spacename` bind variable.

3. Set the `spacename` bind variable to `Home space`.
4. Test the query and view the data retrieved from the data source, as shown in Figure C–52.

Figure C–52 SQL Data Control Query Test Result



5. Select the data control in the Resource Manager and click **Show** on the Edit menu.

C.8.2 Consuming the Data Control in a Page with a Navigation Tree

This section describes how to create a navigation tree to list the available spaces, consume it in a JSPX page, then add the page hits data control to the page.

To create a page with a navigation and page hits graph:

1. Create a page, `Top Five Page Views for Given Space Within Past Week`, using the Left Narrow page style.

   The new page opens in Composer.

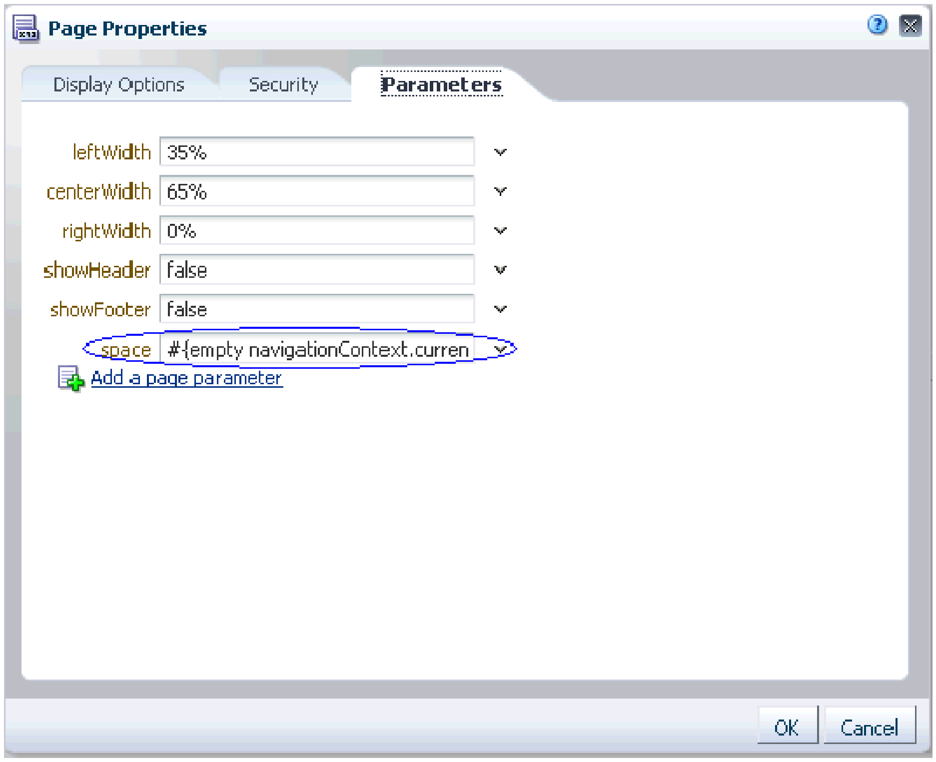
2. Click **Page Properties** and create a new page parameter, `space`, with the following value (Figure C–53):

```
#{empty
navigationContext.currentNavigationModel.currentSelection.par
```

```
ameters.space ? 'Space_Name' :
navigationContext.currentNavigationModel.currentSelection.par
ameters.space}
```

Replace *Space_Name* with `sample1` or the name of any other space for which you want to display details by default.

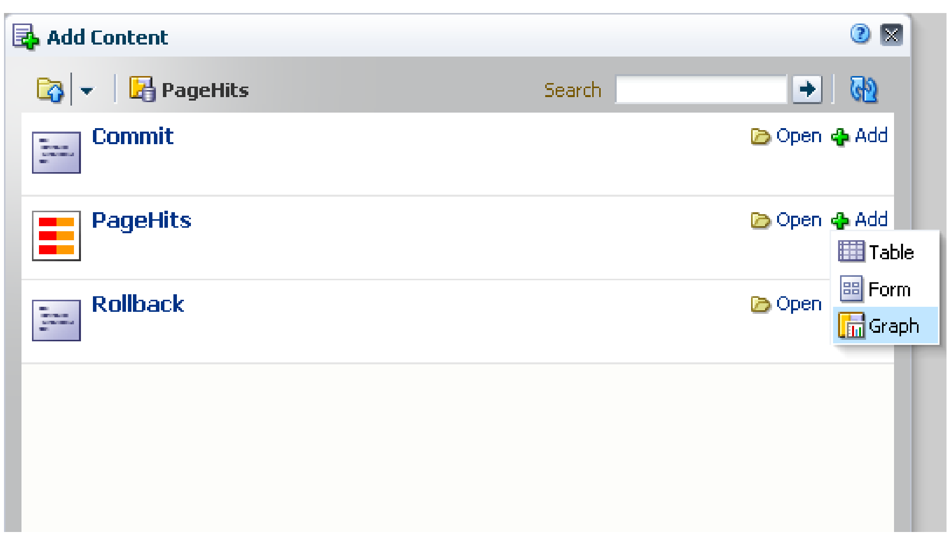
Figure C–53 Page Properties Dialog with New Parameter



3. Click **OK**.

4. Add the `PageHits` data control accessor as a graph, as shown in Figure C–54.

Figure C–54 Graph Option on the PageHits Data Control Accessor



In the Create Graph dialog, on the Type page, select **Bar**.

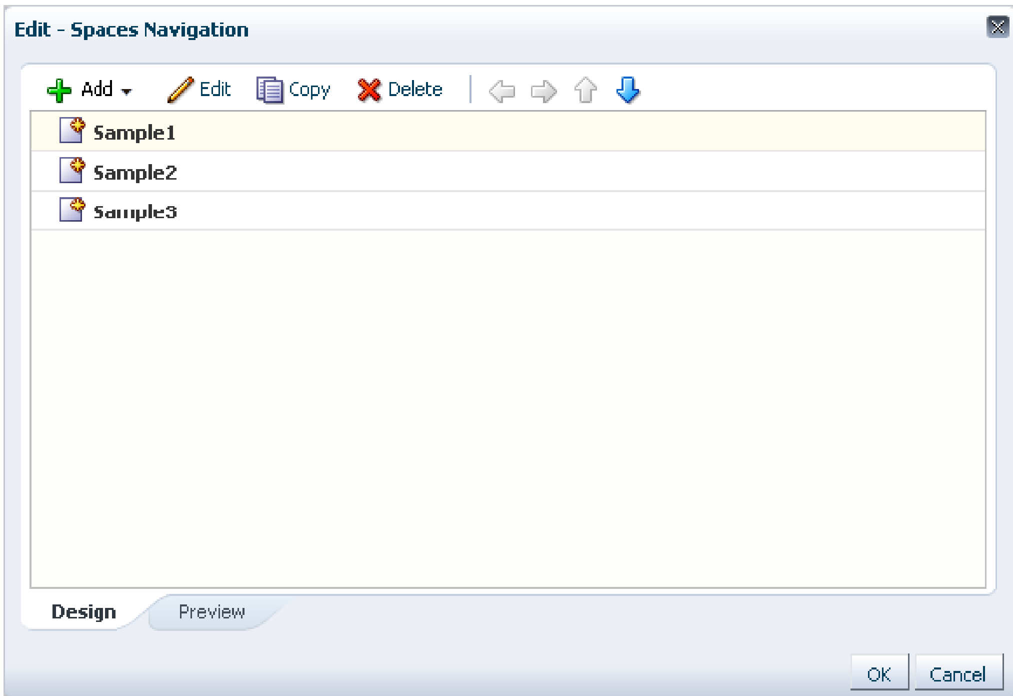
On the Placement page, place `PAGENAME` and `SPACENAME` on the X Axis, and `HITS` as the Bars.

On the DC Parameters page, wire the data control parameter, `spacename`, to the page parameter, `space`, as follows:

```
#{empty bindings.space ? 'sample1' : bindings.space}
```

5. In the Resource Manager, create a navigation model called `Spaces Navigation` with three Link navigation items, `Sample1`, `Sample2`, and `Sample3`, as shown in Figure C–55.

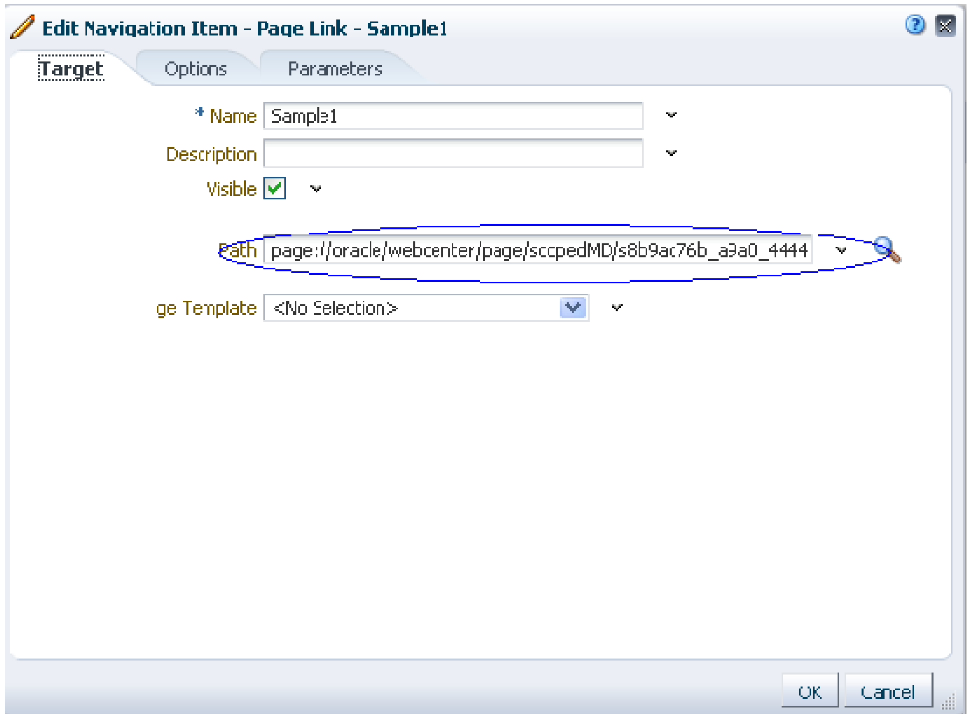
Figure C–55 Navigation Component with Three Link Navigation Items



6. Select `Sample1` and click **Edit**.

7. In the Edit Navigation Item dialog, specify the path to the `Top Five Page Views for Given Space Within Past Week` page, as shown in Figure C–56.

Figure C–56 Navigation Item Properties Dialog

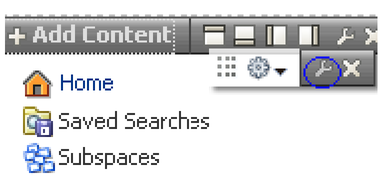


8. Click the **Parameters** tab and specify the `space` parameter value to be `Sample1`.
9. Similarly, edit the `Sample2` and `Sample3` links in the navigation model by repeating the previous three steps.

   In these steps, you are wiring the same task flow to the three links in the navigation, but by specifying different space names for each link.
10. Click **OK** to close the navigation editor.
11. Select `Spaces Navigation` in the Resource Manager and click **Show** on the Edit menu.
12. Edit the `Five Page Views for Given Space Within Past Week` page and add a Navigation Tree component in the left column of the page.

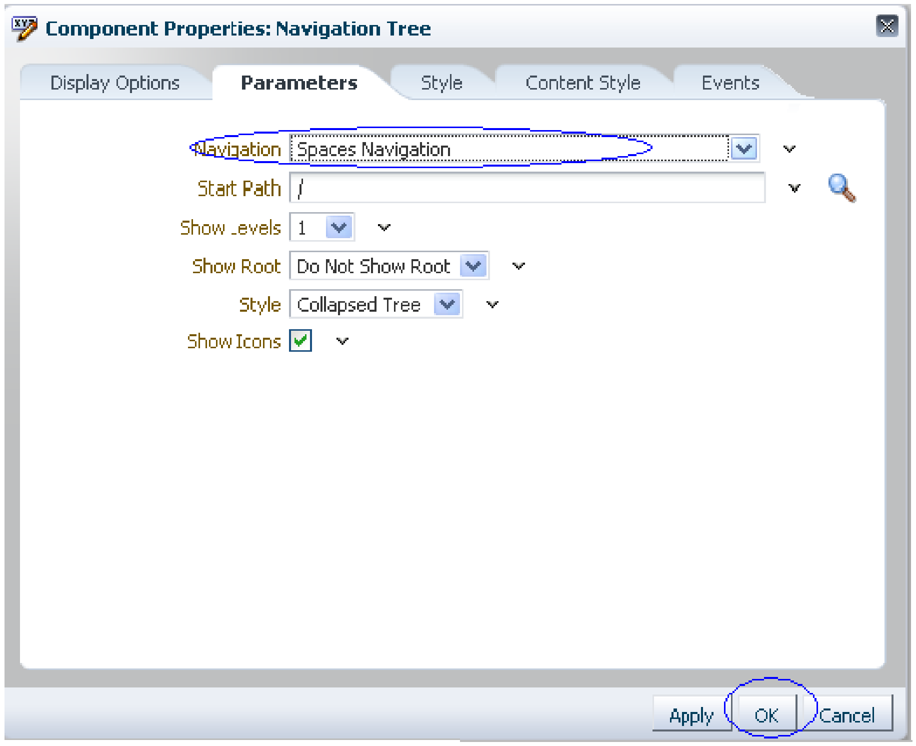
    A default navigation displays on the left of the page.
13. Click the **Edit** icon on the default navigation, as shown in Figure C–57.

Figure C–57 Edit Icon on the Default Navigation Tree Component



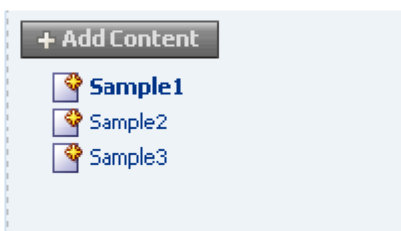
14. On the **Parameters** tab, specify `Spaces Navigation` in the **Navigation** field, as shown in Figure C–58, then click **OK**.

Figure C–58 Navigation Tree Component Properties Dialog



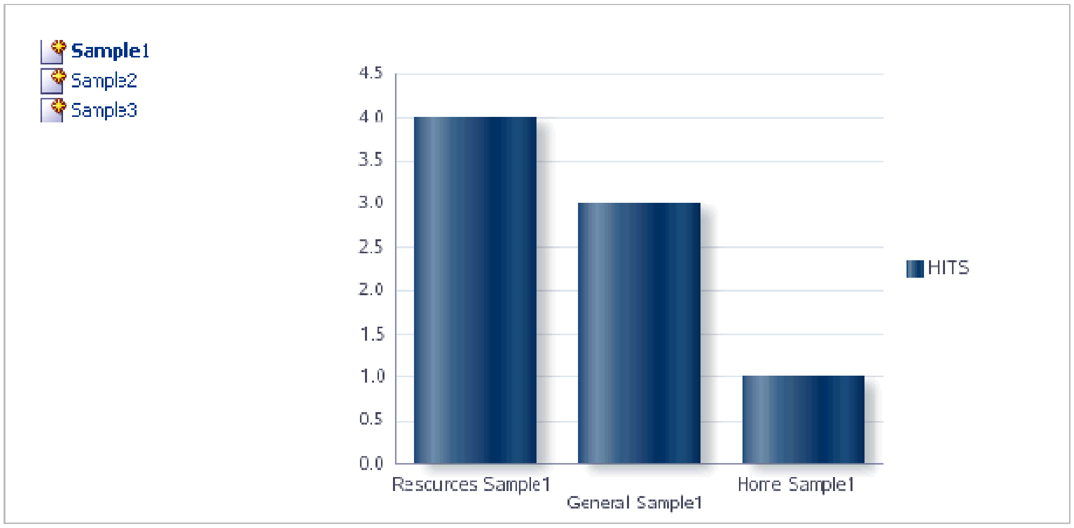
15. The new navigation model now displays on the left side of the page, as shown in Figure C–59.

Figure C–59 Navigation Model with Space Name Links



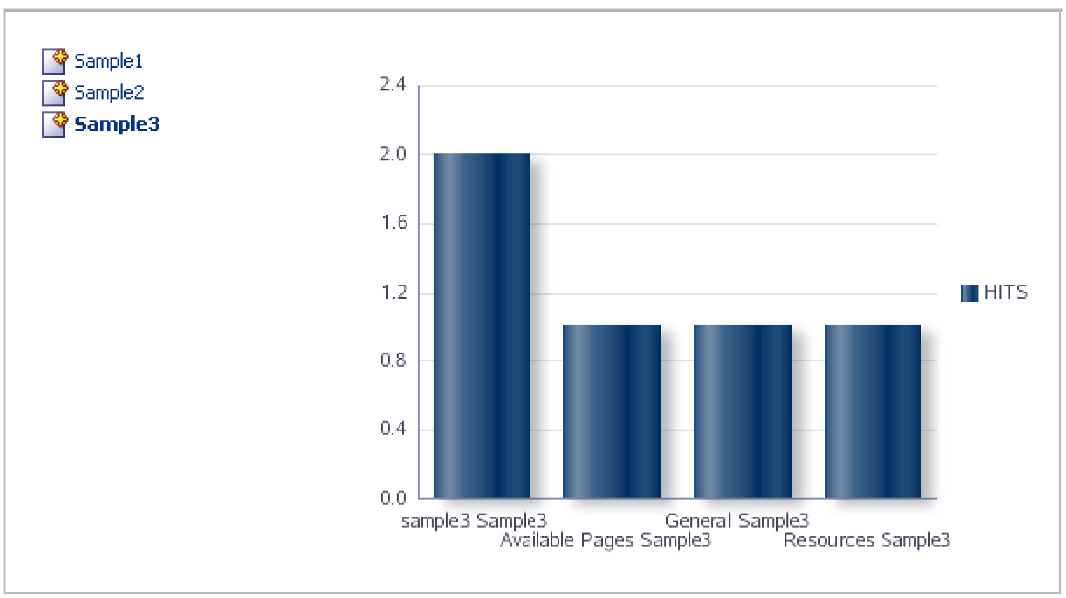
16. Click **Save** and **Close** to exit page edit mode.
17. When you view the page, it displays the navigation tree and the graph as shown in Figure C–60.

Figure C–60 Mashup with Left Navigation and Page Hits Graph for Sample1



18. Click a different space in the navigation to view the page hits graph for that space, as shown in Figure C–61.

Figure C–61 Mashup with Left Navigation and Page Hits Graph for Sample2



C.9 Creating a Mashup with a Graph that Is Wired to the Inherited Page Navigation

The previous example described how to create a graph of page hits for a given space and wire it to a page containing a navigation tree. Taking this one step further, this section describes how to wire the page hits graph to the navigation tree inherited from a page template.

The steps to build such a mashup include:

- Section C.9.1, "Creating the Page Hits Data Control"

- Section C.9.2, "Consuming the Page Hits Data Control"
- Section C.9.3, "Creating and Applying a Custom Page Template"
- Section C.9.4, "Testing the Wiring Between the Page Hits Graph and the Inherited Navigation"

C.9.1 Creating the Page Hits Data Control

Perform the steps in Section C.8.1, "Creating the Page Hits Data Control."

C.9.2 Consuming the Page Hits Data Control

This section describes how to consume the data control in a task flow, then consume the task flow in a page that displays the inherited navigation tree.

To consume the data control:

1. Create a task flow, `Top Five Page Views for Given Space Within Past Week`, using the Blank mashup style.
2. Add the `PageHits` data control accessor as a graph.

   In the Create Graph dialog, on the Type page, select **Bar**.

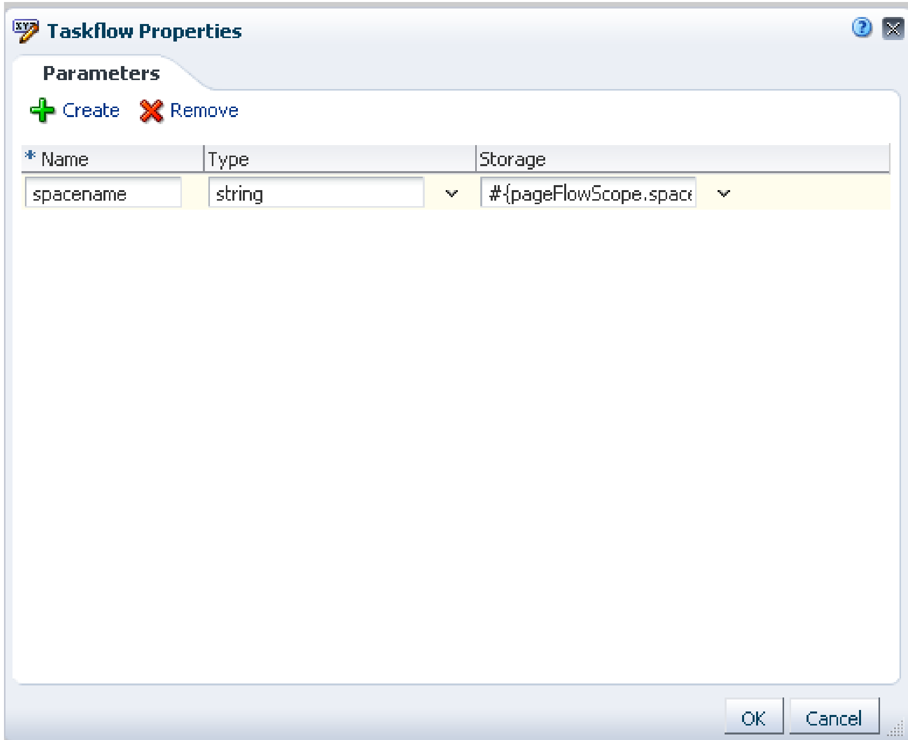
   On the Placement page, place `PAGENAME` and `SPACENAME` on the X Axis, and `HITS` as the Bars.

   On the DC Parameters page, set the data control parameter, `spacename`, to the following:

   ```
   #{empty pageFlowScope.spacename ? 'Home space' :
   pageFlowScope.spacename}
   ```

   Click Create.
3. Click **Task Flow Properties** and create a string parameter, `spacename`, in `pageFlowScope`, as shown in Figure C–62.

Figure C–62 New Parameter in the Taskflow Properties Dialog



4. Click **Save** and **Close** to exit edit mode.
5. Select the task flow in the Resource Manager and click **Show** on the Edit menu.
6. Create a page, `Sample8b`, and add the new task flow inside the page.

   This ensures that the task flow displays the page hits graph for the Home space by default.

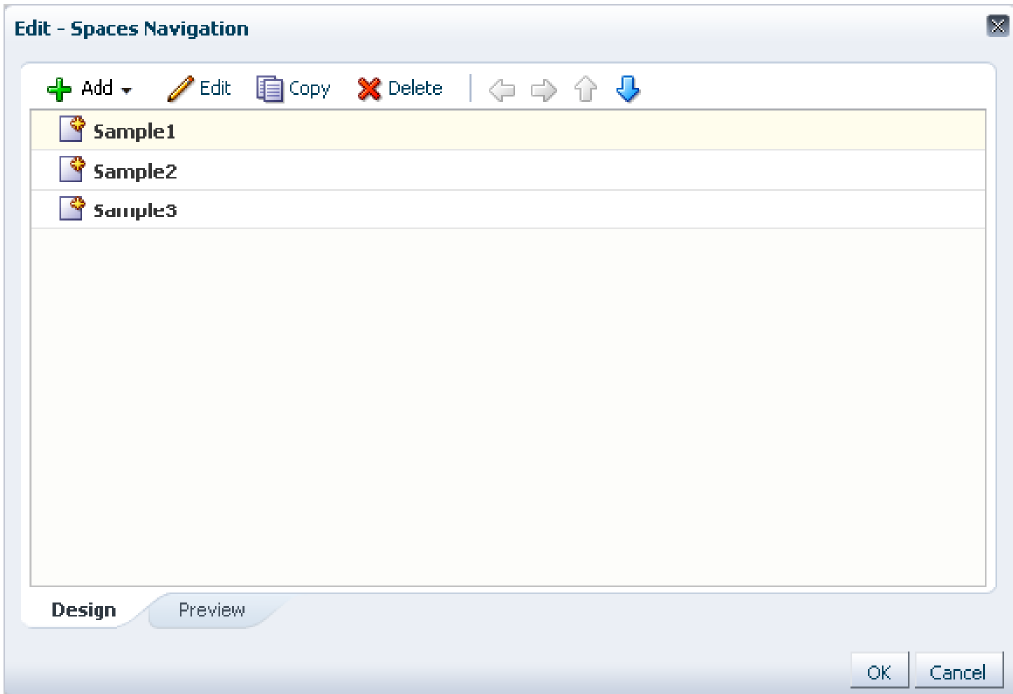
C.9.3 Creating and Applying a Custom Page Template

This section describes how to create a custom navigation component and a page template containing a navigation tree, and how to apply the new page template.

To create a custom navigation component:

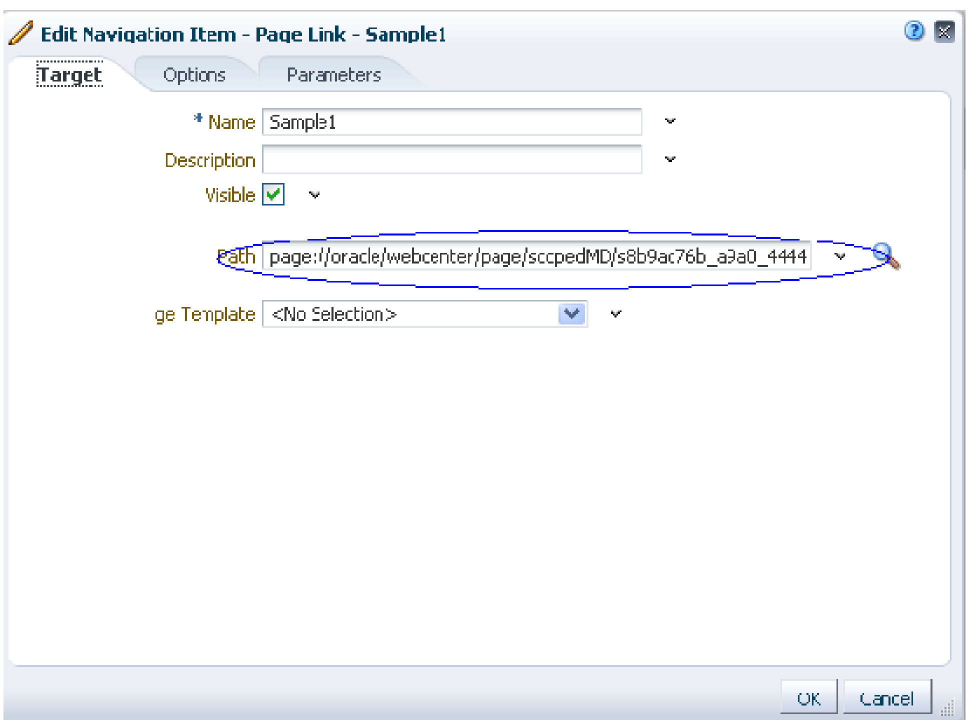
1. In the Resource Manager, create a navigation model called `Spaces Navigation` with three Link navigation items, `Sample1`, `Sample2`, and `Sample3`, as shown in Figure C–63.

Figure C–63 Navigation Component with Three Link Navigation Items



2. Select `Sample1` and click **Edit**.
3. In the Edit Navigation Item dialog, specify the path to the `Top Five Page Views for Given Space Within Past Week` page, as shown in Figure C–64.

Figure C–64 Navigation Item Properties Dialog



4. Click the **Parameters** tab and specify the `space` parameter value to be `Sample1`.
5. Similarly, edit the `Sample2` and `Sample3` links in the navigation model by repeating the previous three steps.

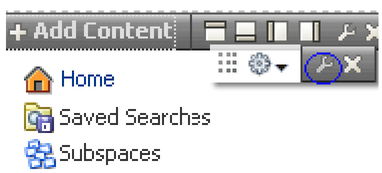
   In these steps, you are wiring the same task flow to the three links in the navigation, but by specifying different space names for each link.
6. Click **OK** to close the navigation editor.
7. Select `Spaces Navigation` in the Resource Manager and click **Show** on the Edit menu.

To create and apply a custom page template:

1. Create a custom page template, `Sample Template`, based on the out-of-the-box Side Navigation – Flow template.
2. Add a Navigation Tree component to the template.

   A default navigation displays on the left of the page.
3. Click the **Edit** icon on the default navigation, as shown in Figure C–65.

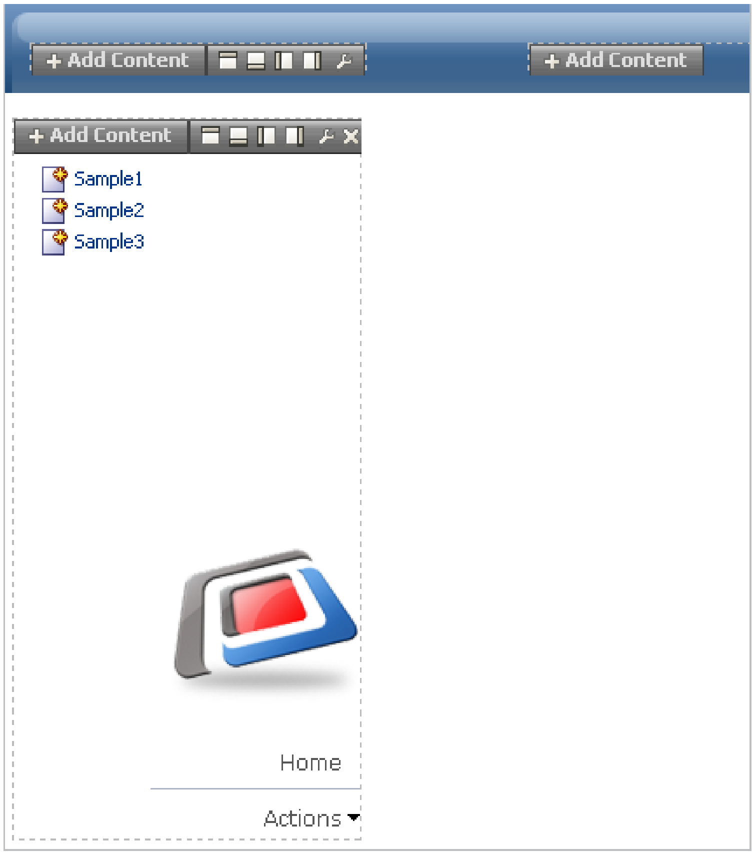
Figure C–65 Edit Icon on the Default Navigation Tree Component



4. On the **Parameters** tab, specify `Spaces Navigation` in the **Navigation** field, then click **OK**.

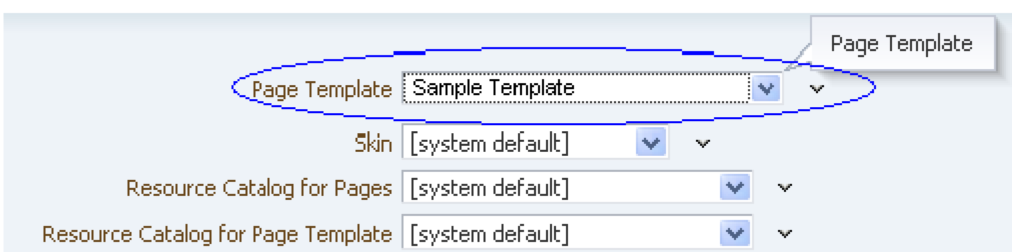
   The new navigation model now displays on the left side of the template, as shown in Figure C–66.

Figure C–66 Custom Page Template with a Navigation Tree



5. Click **Save** and **Close** to exit page edit mode.
6. Select the new template in the Resource Manager and click **Show** on the Edit menu.
7. Navigate to the Spaces administration page, then click the **Configuration** tab.
8. On the General page, in the Default Page Template field, select the new sample template that you created (Figure C–67), then click **Apply**.

Figure C–67 Default Page Template Configuration



The navigation tree in the template now displays on all application pages.

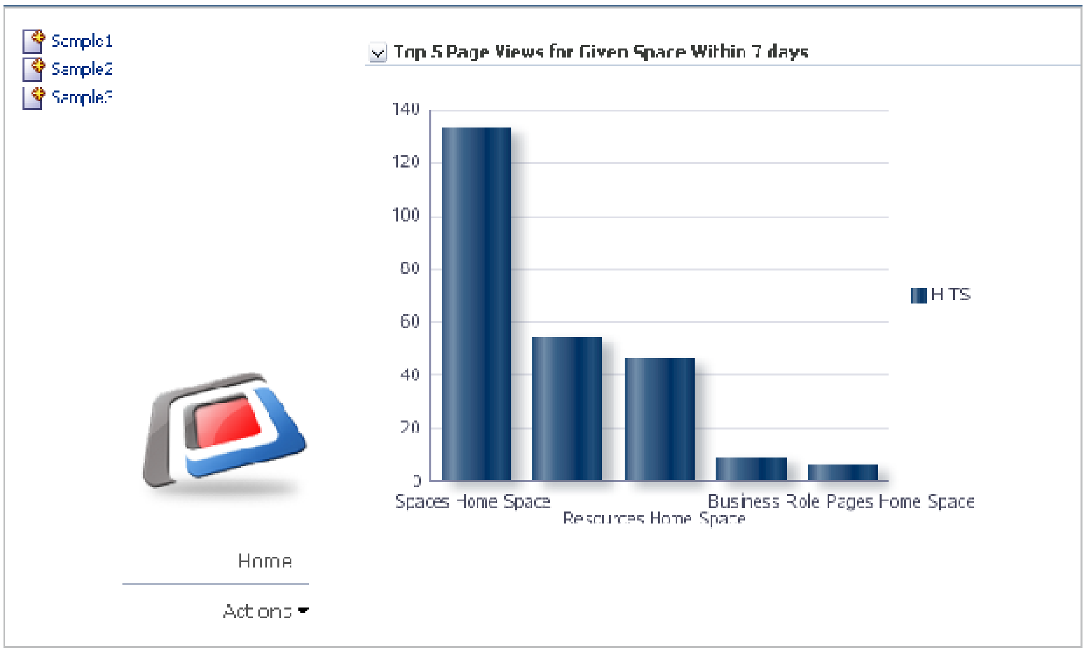
C.9.4 Testing the Wiring Between the Page Hits Graph and the Inherited Navigation

To verify that the graph is wired to the navigation correctly:

1. Open the page, `Sample8b`.

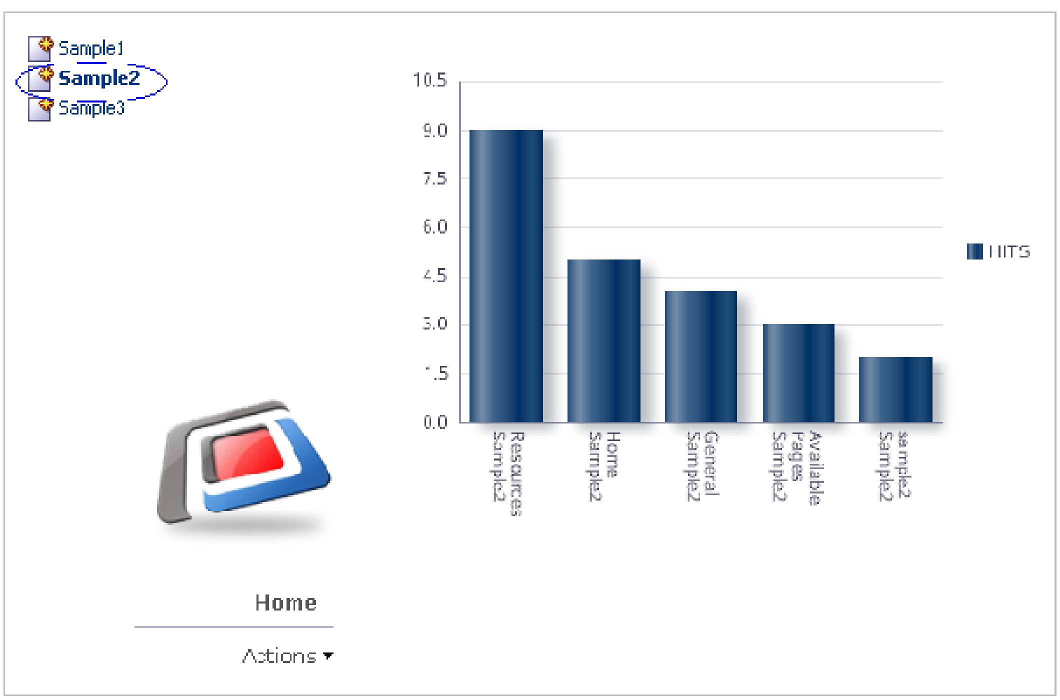
It displays the navigation tree and the page hits graph for the Home space, as shown in Figure C–68.

Figure C–68 Page Hits Graph for Sample1 Selected in the Navigation



2. Click a different space in the navigation to view the page hits graph for that space, as shown in Figure C–69.

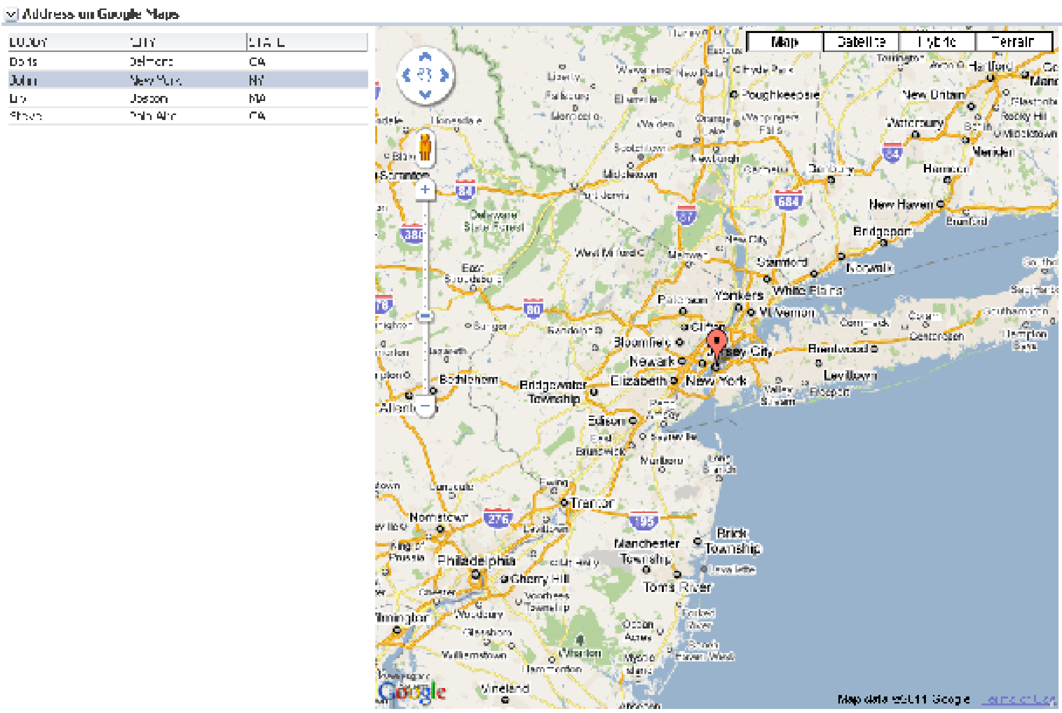
Figure C–69 Page Hits Graph for Sample2 Selected in the Navigation



C.10 Creating a Master-Detail Mashup that Contains a Google Maps Task Flow

This section describes how to create a mashup that displays two task flows wired in a master-detail relationship so that a selection in the master task flow results in an update to the Google Map address in the details task flow, as shown in Figure C–70.

Figure C–70 Mashup Displaying a Table and Google Map



The steps to create a similar mashup include:

- Creating a SQL data control to retrieve static data for the purpose of the demo.
- Creating a master task flow that consumes this data control as a static table.
- Adding hyperlinks in the user names column in the table.
- Creating a details task flow to integrate the latest Google Maps API Version 3.
- Wiring the master and detail task flows so that clicking a record in the master table results in a location change in the Google Map.

This section describes how to perform these tasks. It includes the following subsections:

- Section C.10.1, "Creating the Data Control"
- Section C.10.2, "Creating the Details Task Flow"
- Section C.10.3, "Creating the Master Task Flow"
- Section C.10.4, "Wiring the Master and Details Task Flows"

C.10.1 Creating the Data Control

For the purpose of this example, create a data control to get address data using `select * from dual` statements. You can use any existing data source connection to create the data control. In real time, you must replace it with the required SQL data source connection.

To create the data control:

1. Create a SQL data control, addresses, using any available database connection, and specify the following query:

```
SELECT 'Steve' Buddy, 'Palo Alto' City, 'CA' State
FROM dual
UNION
SELECT 'Doris' Buddy, 'Belmont' City, 'CA' State
FROM dual
UNION
SELECT 'John' Buddy, 'New York' City, 'NY' State
FROM dual
UNION
SELECT 'Lily' Buddy, 'Boston' City, 'MA' State
FROM dual
```

2. Select the new data control in the Resource Manager, and from the Edit menu, click **Show**.

C.10.2 Creating the Details Task Flow

This section describes how to create a details task flow that will display the Google map.

To create the details task flow:

1. Create a task flow, `Basic Maps`, based on the Blank mashup style.
2. Select the task flow and click **Edit Source** on the **Edit** menu.
3. Replace the code on the **Fragment** tab with the following:

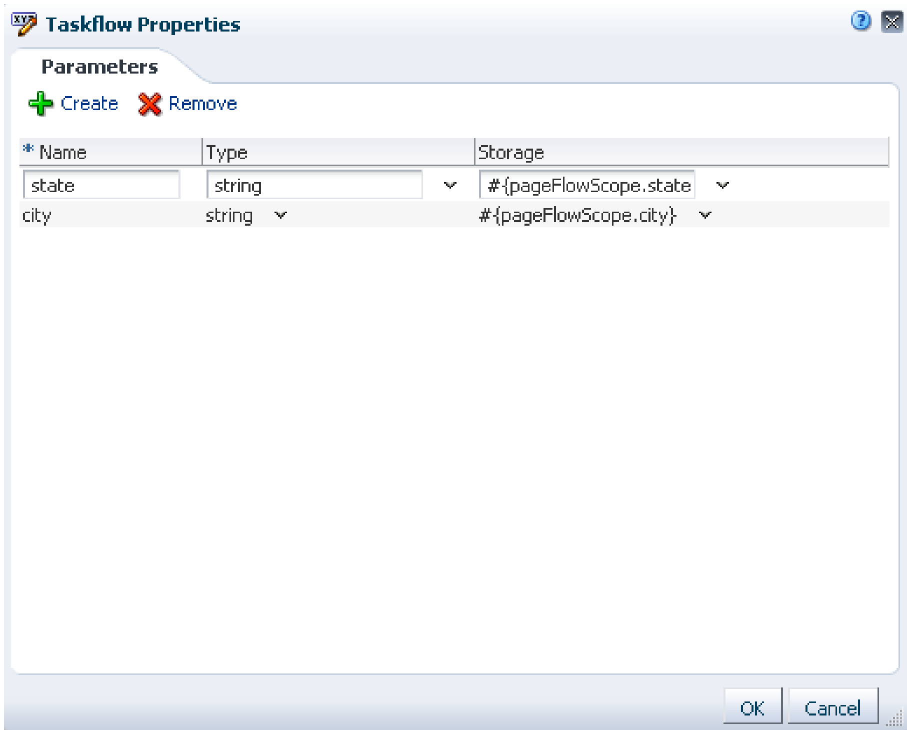
```
<?xml version='1.0' encoding='UTF-8'?>
<jsp:root xmlns:jsp="http://java.sun.com/JSP/Page" version="2.1"
          xmlns:pe="http://xmlns.oracle.com/adf/pageeditor"
          xmlns:cust="http://xmlns.oracle.com/adf/faces/customizable"
          xmlns:f="http://java.sun.com/jsf/core"
          xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
          xmlns:trh="http://myfaces.apache.org/trinidad/html">
  <af:resource type="javascript"
source="http://maps.google.com/maps/api/js?sensor=true"/>
  <af:resource type="javascript">
  var geocoder;
  var map;
function initialize(){
  geocoder = new google.maps.Geocoder();
  var latlng = new google.maps.LatLng(37.529526, -122.263969);
  var myOptions = {
      zoom: 3,
      center: latlng,
      mapTypeId: google.maps.MapTypeId.ROADMAP
    };
  map = new google.maps.Map(document.getElementById("map_canvas"),myOptions);
}
function navigate(event) {
initialize();
var city= event.getSource().getProperty('city')+"";
var state= event.getSource().getProperty('state')+"";
var address;
```

```
if(city== "undefined"||state== "undefined"||city== "NULL"||state== "NULL"){
address="CA, USA";
} else {
map.setZoom(8);
address=city+" "+state+" USA";
}
  geocoder.geocode( { 'address': address}, function(results, status)
{
 if (status == google.maps.GeocoderStatus.OK) {
     map.setCenter(results[0].geometry.location);
     var marker = new google.maps.Marker({
        map: map,
        position: results[0].geometry.location
        });
      }
else {
        alert("Geocode was not successful for the following reason: " +
status);
      }
    });
}
</af:resource>
  <af:panelGroupLayout id="pgl1">
    <af:group id="g1">
      <div id="map_canvas" style="width: 600px; height: 600px"/>
    </af:group>
    <af:inlineFrame source="">
      <af:clientListener type="inlineFrameLoad" method="navigate"/>
      <af:clientAttribute name="city" value="#{empty pageFlowScope.city? '' :
pageFlowScope.city}"/>
      <af:clientAttribute name="state" value="#{empty pageFlowScope.state ? ''
: pageFlowScope.state}"/>
    </af:inlineFrame>
  </af:panelGroupLayout>
</jsp:root>
```

The code in bold, **`<af:inline>`**, calls the `navigate` Google Map javascript method each time the page is loaded, and it parses two `pageFlowScope` parameters to the `navigate` method to update the address on the map.

4. Click **OK** to exit the source editor.
5. Ensure that the task flow is selected in the Resource Manager and click **Edit** on the Edit menu.
6. Click **Task Flow Properties** and create two string task flow parameters, `city` and `state`, in `pageFlowScope`, as shown in Figure C–71.

Figure C–71 New Parameters on the Basic Maps Task Flow



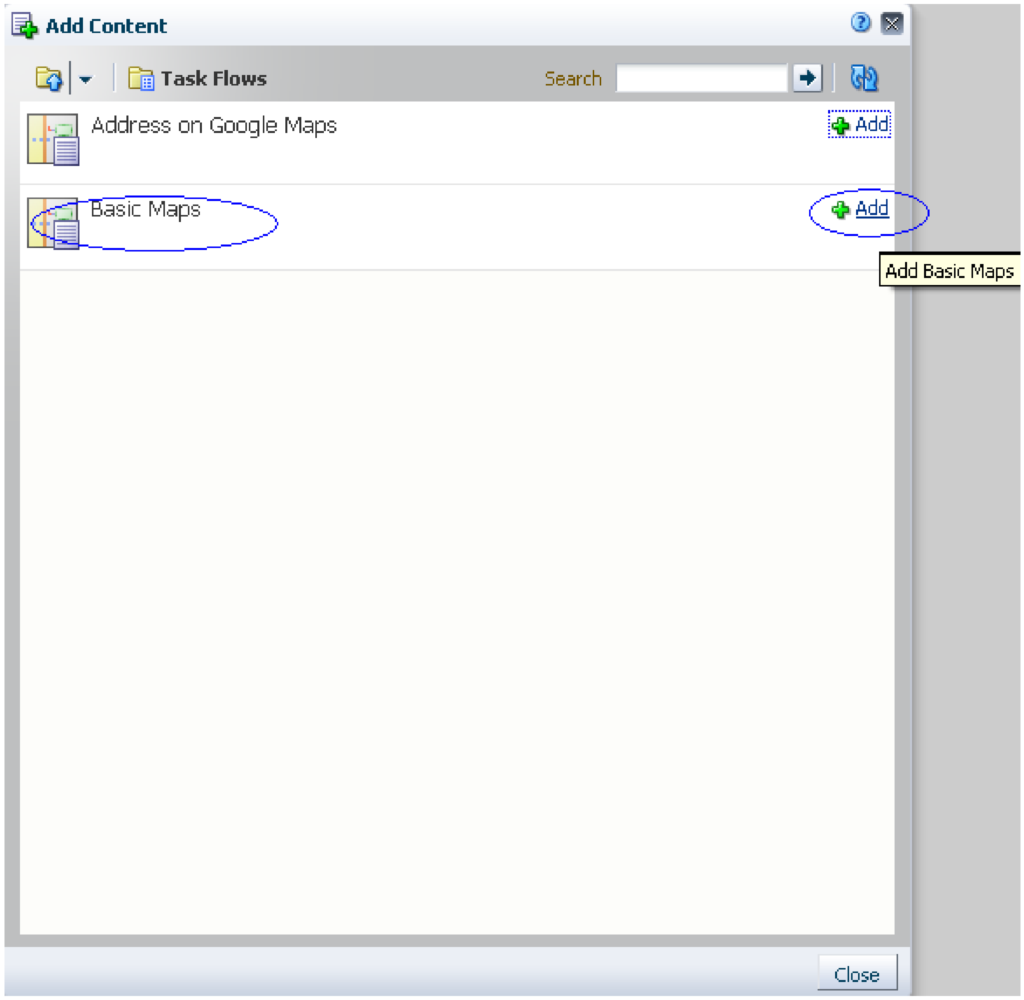
C.10.3 Creating the Master Task Flow

This section describes how to create the master task flow to consume the `addresses` data control as a table and the `Basic Maps` task flow.

To create the master task flow:

1. Create a task flow, `Address on Google Maps`, based on the Blank mashup style.
2. Edit the task flow and add the `Basic Maps` task flow, as shown in Figure C–72.

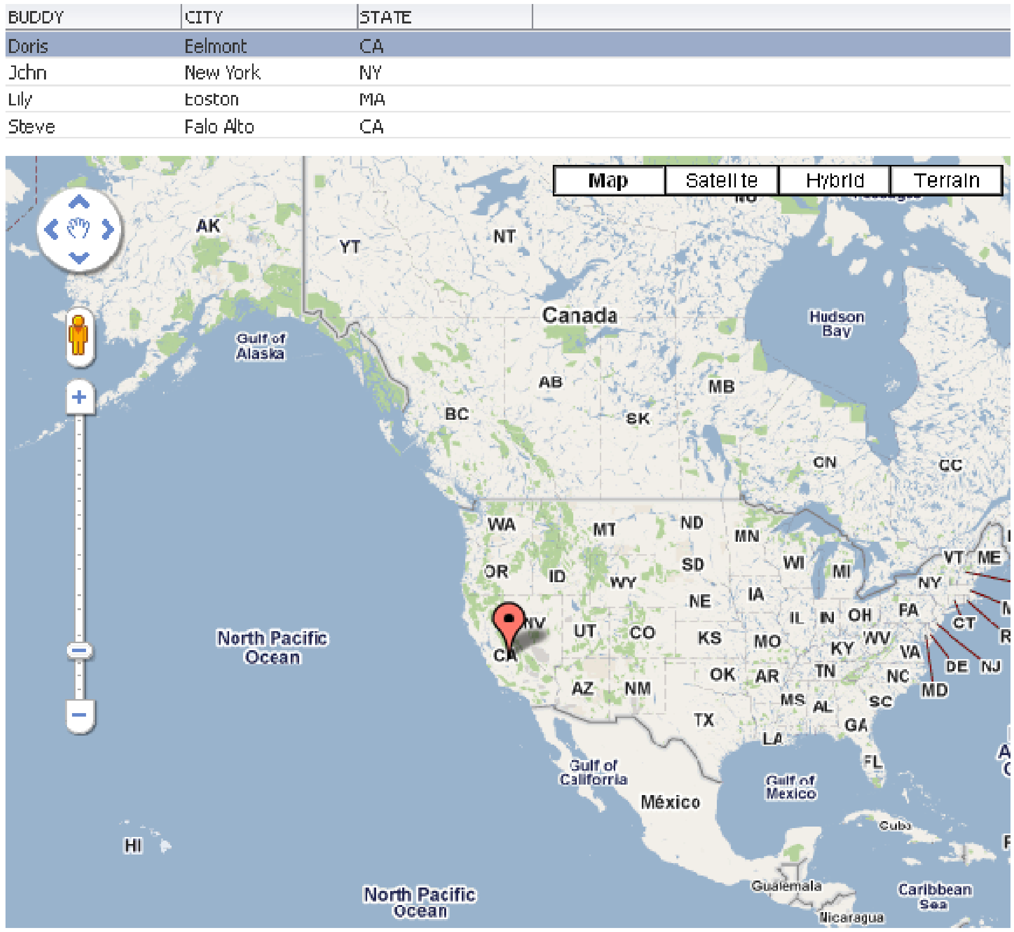
Figure C–72 Basic Maps Task Flow in the Resource Catalog



3. Add the `Address on Google Maps` data control accessor as a read-only table with row selection enabled.

   The master task flow displays the addresses table on top and the map below it, as shown in Figure C–73.

Figure C–73 Master-Detail Task Flow with Table and Google Map



C.10.4 Wiring the Master and Details Task Flows

This section describes how to wire the master and details task flows so that a user can click a name in the table to show the corresponding location in the map.

To wire the master and details task flows:

1. Click the **Edit** icon on the `Basic Maps` task flow.
2. In the Component Properties dialog, modify the values for the two task flow parameters, `city` and `state`, as follows:

   city: `#{empty dataComposerViewContext.dataSelection.CITY ? 'NULL' : dataComposerViewContext.dataSelection.CITY}`

   state: `#{empty dataComposerViewContext.dataSelection.CITY ? 'NULL' : dataComposerViewContext.dataSelection.CITY}`
3. To hide the header on the map, click the **Display Options** tab and deselect the **Display Header** check box.
4. Click the **Advanced** link on the **Display Options** tab, then set **Stretch Content** to `Auto`.

   This ensures that the map displays a scroll bar only when required.
5. Click **OK** to save your changes.

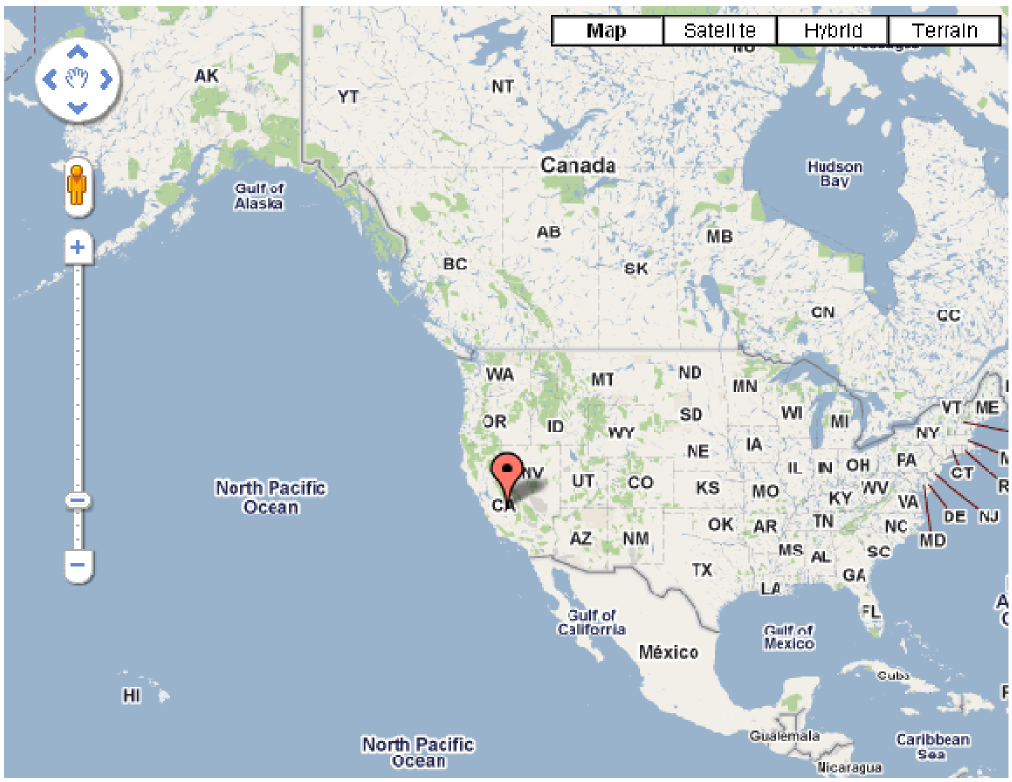
The map displays the location corresponding to the currently selected name in the table.

6. Click **Save** and **Close** to exit edit mode.

   The task flow displays as shown in Figure C–74.

Figure C–74 Master-Detail Task Flow with Table and Google Map

BUDDY	CITY	STATE
Doris	Eelmont	CA
Jchn	New York	NY
Lily	Eoston	MA
Steve	Falo Alto	CA



7. Optionally, you can change the layout of the task flow so that the table displays to the left of the map. To refine the layout of the master task flow:

   a. Edit the source of the master task flow, and on the **Fragment** tab, replace the following lines:

   ```
   <af:panelGroupLayout id="pgl1">
   <cust:panelCustomizable id="pc1">
   ```

   with

   ```
   <af:panelGroupLayout id="pgl1" layout="horizontal" valign="top">
   <cust:panelCustomizable id="pc1" layout="vertical" valign="top">
   ```

   b. Move the end tag of `</cust:panelCustomizable>` to the right, after the first `</showDetailFrame>` tag and before the second `<showDetailFrame>` tag.

c. To disable default selection in the table, remove the `selectedRowKeys` attribute on the `<table>` tag.

d. To ensure that the map stretches when required, change the `columnStretching` attribute to `last`.

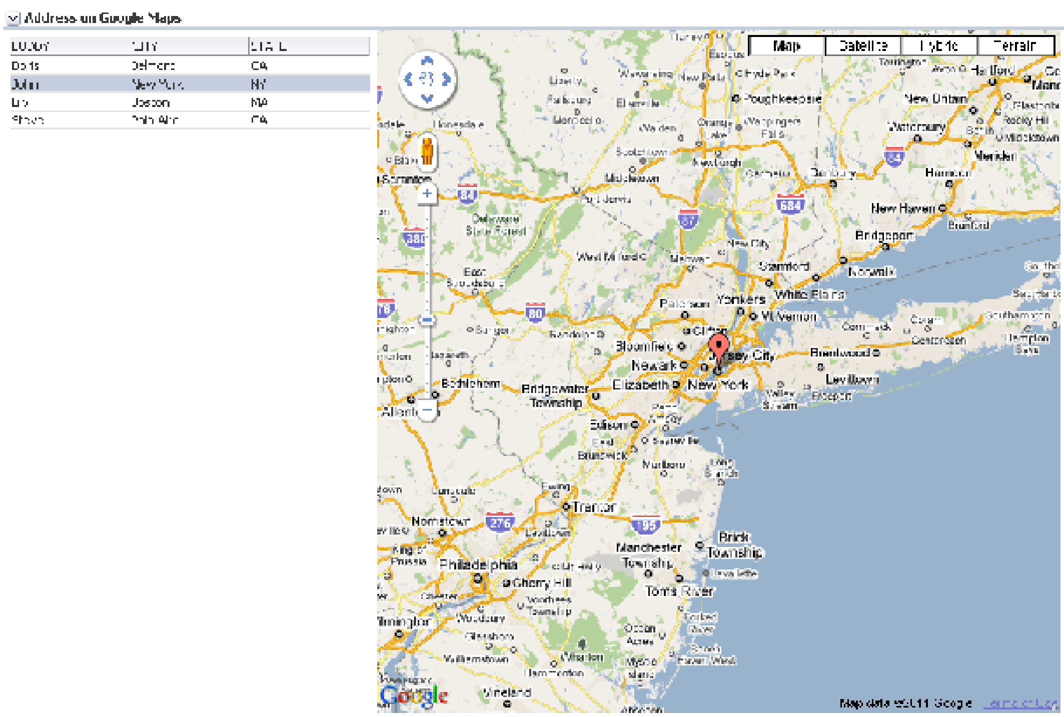
8. To test the master-detail task flow further, create a page and add the `Address on Google Maps` task flow to it.

   Edit the task flow on the page and set the Stretch Content option to `auto`.

   Note: To ensure that the page reflects your recent changes, you may need to directly use the URL to open the page afresh, as against clicking the Refresh button.

   The task flow displays as shown in Figure C–75.

Figure C–75 Mashup Displaying a Table and Google Map



Click a name in the table; the map points the location corresponding to that name.

C.11 Creating a Mashup with a Customized RSS Feed OmniPortlet

This section describes how to create a mashup with an OmniPortlet instance that displays live, scrolling news information to users from a Really Simple Syndication (RSS) news feed, such as Oracle Technology Network Headlines. It also describes how to share the portlet across Spaces instances.

Registering the Producer

To consume an OmniPortlet in a task flow, you must first register the portlet producer with the application. For the detailed steps, see Section 6.5, "Registering Portlet Producers."

This section includes the following subsections:

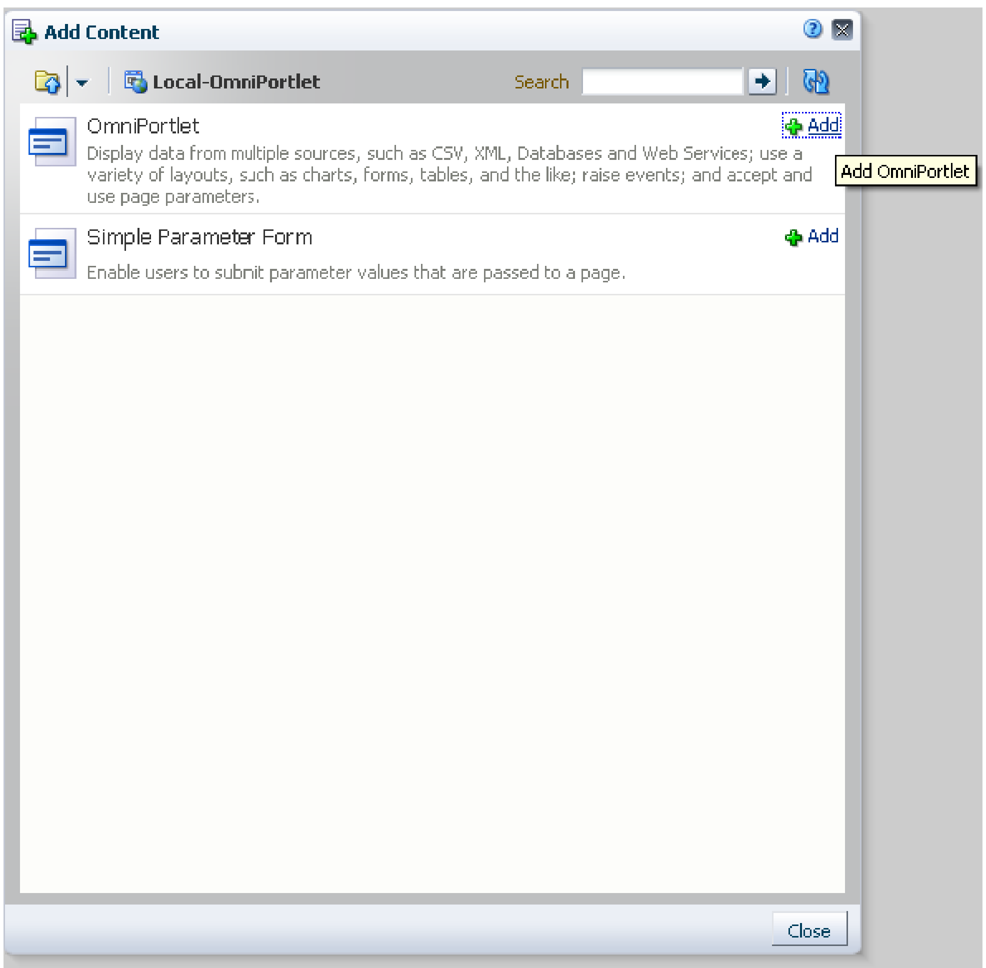
- Section C.11.1, "Creating a Task Flow with an OmniPortlet"
- Section C.11.2, "Testing the Task Flow"
- Section C.11.3, "Sharing the Task Flow with the Customized Portlet"

C.11.1 Creating a Task Flow with an OmniPortlet

To create a mashup with an Omniportlet instance:

1. Create a new task flow based on the Blank mashup style.
2. Add the Omniportlet to the task flow from the Resource Catalog, shown in Figure C–76.

Figure C–76 OmniPortlet in the Resource Catalog



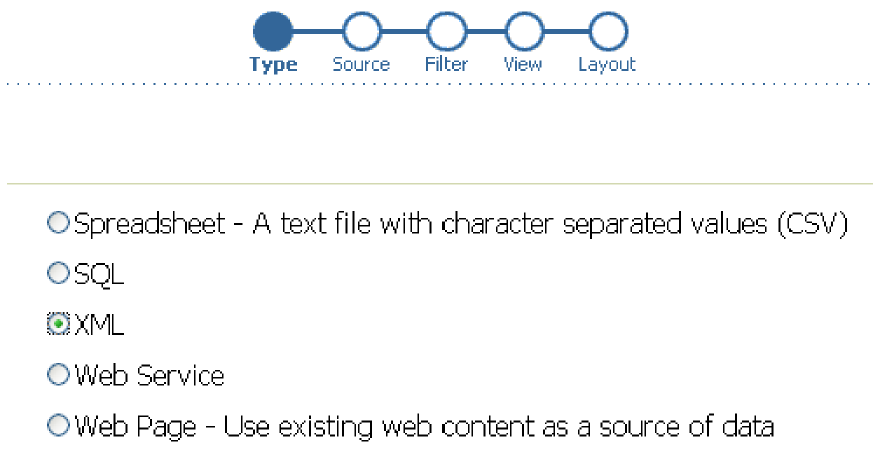
3. Click the Customize icon on the top right corner of the portlet header, shown in Figure C–77.

Figure C–77 Customize Icon on the OmniPortlet Header

See Also: Section 30.2, "Working with the OmniPortlet Wizard" for detailed information.

4. On the Type page of the OmniPortlet wizard, shown in Figure C–78, select **XML** as the data source type, then click **Next**.

Figure C–78 OmniPortlet Wizard Type Page

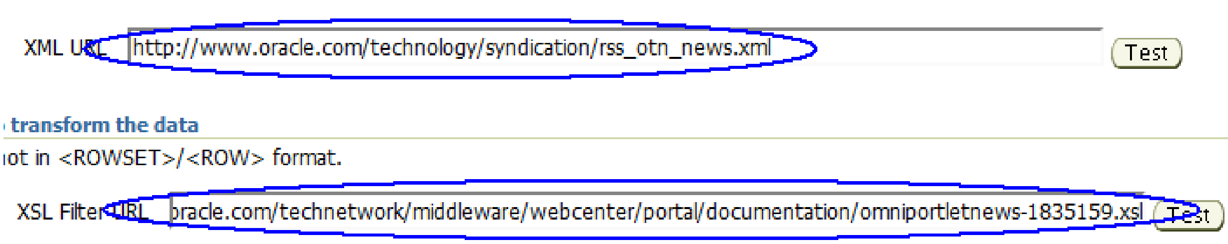


5. On the Source page, specify the XML URL and the XSL Filter URL to be the following, as shown in Figure C–79:

   XML URL: `http://www.oracle.com/technology/syndication/rss_otn_news.xml`

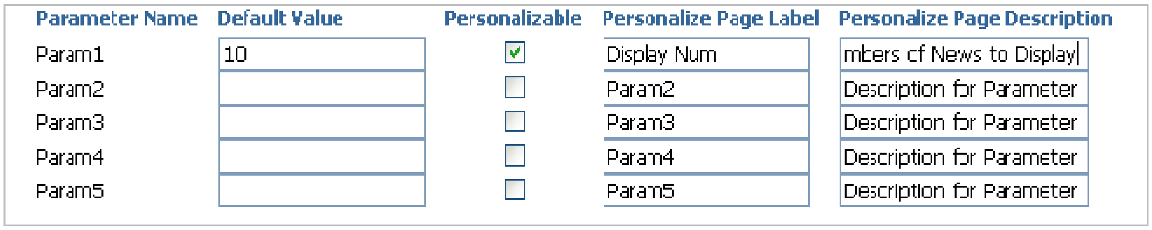
   XSL Filter URL: `http://www.oracle.com/technetwork/middleware/webcenter/portal/documentation/omniportletnews-1835159.xsl`

Figure C–79 Source Page of the OmniPortlet Wizard



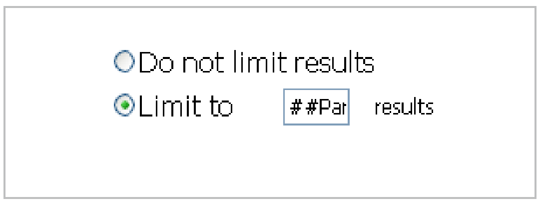
6. In the Portlet Parameters section, define a new parameter, `Display Num`, as shown in Figure C–80, then click **Next**.

Figure C–80   Portlet Parameters Section of the OmniPortlet Wizard Source Page



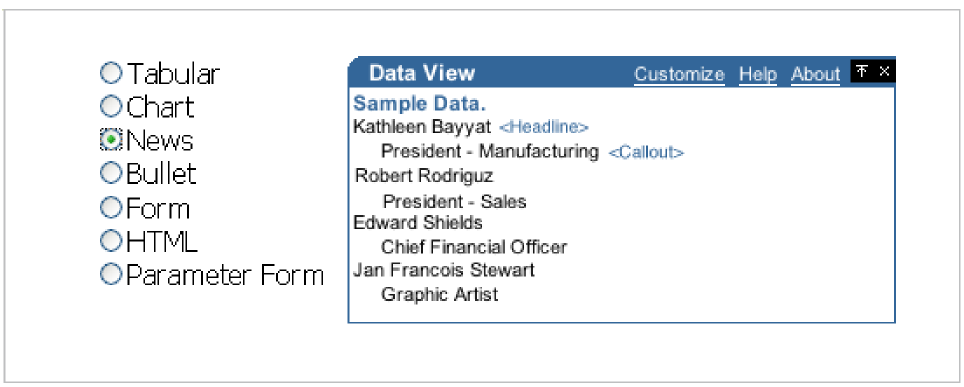
7. On the Filter page, shown in Figure C–81, set the filter limit to `##Param1##`, then click **Next**.

Figure C–81   Limit Section on the Filter Page of the OmniPortlet Wizard



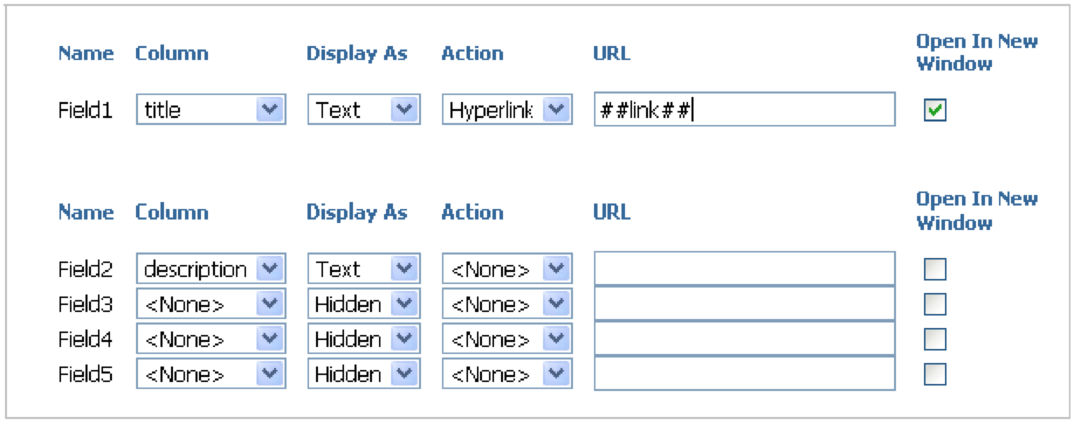
8. On the View page, in the Layout Style section, select **News**, as shown in Figure C–82.

Figure C–82   Layout Style Section on the View Page of the OmniPortlet Wizard



9. On the Layout page, under the Column Layout section, use two fields to specify a title and description as shown in Figure C–83.

Figure C–83 Column Layout Section on the Layout Page of the OmniPortlet Wizard



10. Click **Finish** to exit the wizard.
11. Click **Save** and **Close** to exit Composer.
12. Select the new task flow in the Resource Manager, and from the Edit menu, click **Show**.

C.11.2 Testing the Task Flow

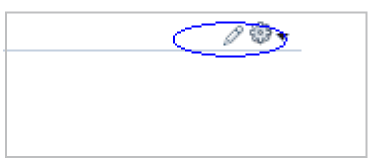
To verify that the portlet in the task flow renders correctly:

1. Preview the task flow or consume it in an application page.

   The portlet displays ten news items.

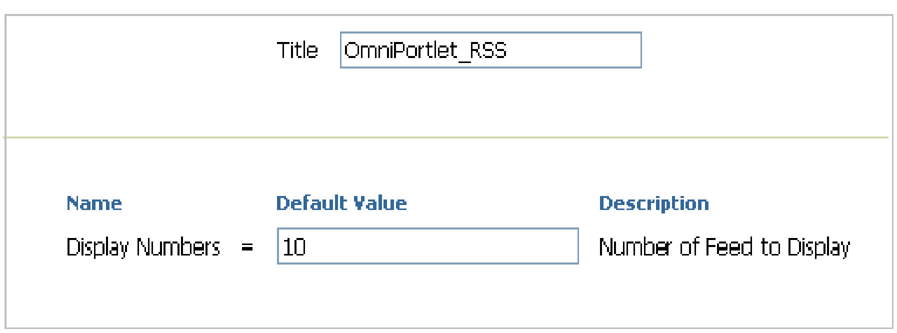
2. Click the **Personalize** icon, shown in Figure C–84, on the top right corner of the task flow.

Figure C–84 Personalize Icon on the Task Flow Header



3. In the resulting screen, shown in Figure C–85, change the value of the `Display Num` variable to a number of your choice.

Figure C–85 Portlet Parameter Customization Screen



The portlet displays the specified number of news items.

C.11.3 Sharing the Task Flow with the Customized Portlet

You can share the task flow containing the portlet with another Spaces instance by exporting it from your instance and importing it in that instance. However, the imported task flow renders the portlet only if the producer for the OmniPortlet is registered with the same name on the other instance also.

To share the task flow with another Spaces instance:

1. On the target instance, register the OmniPortlet producer with the same name that was used for the producer registration on your instance.

   For the detailed steps, see Section 6.5, "Registering Portlet Producers."

2. Export the task flow from the Resource Manager on the source instance.

   For the detailed steps, see Section 11.5.2, "Downloading a Resource."

3. Import the task flow in the Resource Manager of the target instance. For the detailed steps, see Section 11.5.3, "Uploading a Resource."

   The portlet is now available with all customizations made on the source instance.

Glossary

About mode

A **portlet mode** that typically displays information such as copyright, version, and author of the portlet.

Activity Stream

In the **People Connections service**, a feature for viewing the application activities tracked for you and other users.

Activity Graph

A WebCenter Portal service that provides suggestions of people, items, and spaces that users may be interested in interacting with.

The engine used by the Activity Graph service to provide a central repository for actions that are collected by enterprise applications. The data stored in the activity graph is analyzed to calculate ranks for nodes, predict new actions, and make recommendations.

Activity Rank

Determines the relevance of a search result.

administrator

In the Spaces application there are two types of administrator:

- Fusion Middleware administrator: Also referred to as systems administrator. A user with complete administrative capabilities. This administrator can perform the complete range of security-sensitive administrative duties, and all installation, configuration, and audit tasks.
- Spaces administrator: A user responsible for customizing Spaces out of the box, managing and granting application roles, and maintaining the application when it is in use.

Ajax

A combination of asynchronous JavaScript, dynamic HTML (DHTML), XML, and XmlHttpRequest communication channel that enables requests to be made to the server without fully re-rendering the page. Ajax enables rich client-like applications to use standard internet technologies.

Analytics service

A WebCenter Portal service offers real-time usage and activity reporting for your portal. In the Spaces application, users can track and analyze Spaces traffic and usage.

Announcements service

A WebCenter Portal service that offers a quick, convenient way to create and widely distribute messages instantly or at a specific time.

API

Application Programming Interface. A set of exposed data structures and functions that an application can use to invoke services on an application object, such as a **portlet**.

application customization

Performed by an administrator, all users see the change. These are static changes to an application that affect a site or sites that do not involve changes to the application's code or schema.

See also **user customization** and **personalization**

Application Development Framework

See **Oracle ADF**.

Application Programming Interface

See **API**.

application role

Roles that are specific to a particular application and are stored in an application-specific stripe of the policy store.

application skin

Specifies the application background color, screen fonts, and, with some skins, the shapes and images used for application buttons and icons. In the Spaces application, the administrator chooses the default application skin and Spaces users may change the application skin on the **General** tab of the Preferences dialog.

application templates

WebCenter Portal provides templates for creating two kinds of applications: Framework applications and Portlet Producer applications. Templates ensure that the right technology scopes are set, tag libraries added, and required Java classes are added to the class path. Once you do this, relevant components are included to the Component Palette and relevant context menus become available in JDeveloper.

See also **Framework application template** and **Portlet Producer Application template**.

authenticated user

A user who is logged into a WebCenter portal application. Credentials of this user are verified against the identity store. By default, an authenticated user can access public information. To access secured information, such as pages and **portlet**s, this user must be authorized through the policy and credential store.

Contrast with **public user**s, who are not logged in, and can access public content only.

authentication

Identification of a user through an identity management system. You can require ADF authentication to enforce credentials for users to access the Framework application only (all ADF resources in the application remain accessible), or authentication *and* authorization to enforce credentials for users to access the Framework application and any ADF resources that have been secured in the application.

authorization

The policies that define the access rights of an individual or group to a secured resource. This resource may be a page or component within a page.

authorized user

An individual who has access to a secured resource. For non-public resources, this individual is also an **authenticated user**.

AviTrust Portal Demonstration for WebCenter Portal

An enterprise banking application built using Oracle Fusion Middleware, including Oracle WebCenter Portal: Framework and WebCenter Portal: Spaces, used to provide examples of WebCenter Portal functionality.

blog page

A page that provides a personal record of an individual user's experience and opinions. There are two kinds of blog: personal blogs are written by an individual; group blogs are written by several users.

Box component

A component available through Oracle WebCenter Portal’s Composer. A container that enables the placement of content on a page created in the Spaces application. In Composer, a Box is rendered as a rectangle comprised of dashed lines. In a Framework application, this is the runtime equivalent of a Panel Customizable component.

BPEL

Business Process Execution Language. An XML-based markup language for composing a set of discrete web services into an end-to-end process flow.

business role page

A page, created by the administrators in the Spaces application, specifically provided for a given role in an organization. Business role pages provide a targeted environment for users of a particular role by delivering information that is timely and relevant to individual roles without the noise of irrelevant information from other lines of business. Business role pages appear in the Home space of users classified under the specified role.

caching

The act of storing frequently accessed information, typically web pages, in a location where it can be accessed quickly to avoid frequent content generation.

See also **expiry-based caching** and **validation-based caching**.

calendar overlay

The ability to display multiple calendars in a single Events task flow.

Change Mode Button component

In the Composer tag library that enables users to change from page View mode to page Edit mode.

Change Mode Link component

A component provided in the Composer tag library that enables users to change from page View mode to page Edit mode.

check out/check in

A mechanism that enables a user to lock information, by checking it out, so that other users cannot modify that same piece of information. This prevents users from overwriting each other's changes. After making modifications, the user releases it by checking it back in, making it available again for other users to modify.

Child Components

The components contained within a parent component. For example, the task flows contained within a Box component are the child components of the Box.

See also **Box component** and **parent component**.

chrome

Visual elements surrounding a portlet or task flow that provide an access point for actions, such as those on the Actions menu and those embedded in the chrome itself, such as the minimize icon or resize handles.

CMIS

Content Management Interoperability Services (CMIS) standard defines a domain model and Web services and Restful AtomPub bindings that can be used by applications to work with one or more Content Management repositories or systems.

component

An individual piece of an application, for example, a task flow, portlet, page, or layout element such as a box or image.

Component Catalog

A dialog, accessed from Composer, that provides access to all the content you can add to a WebCenter Portal application page.

component developer

The developer who builds components (such as portlets, **JavaServer Faces** components, and web services).

Component Properties

A dialog, accessed from Composer, that provides access to a component's parameters, display options, child components, style settings, and associated events.

Connections

In the **People Connections service**, a feature for establishing a social network with other application users.

Composer

A seamlessly integrated environment for populating, revising, and configuring portal pages. It enables users to easily build or revise page layout and content. It also provides the means of adding different components, such as task flows, portlets, content, and other objects, onto a page and then linking those components for a more relevant or personalized view of the information.

container

An application program or subsystem in which the program building block, known as a **component**, is run.

container runtime option

A JSR 286 feature that provides a way to customize the behavior of the portlet container and therefore customize the runtime environment.

content integration services

Services provided by **Oracle WebCenter Portal** to enable developers to display content from a **content repository**, such as by creating **data controls**.

Content Presenter

A feature of the **Documents service** that enables end users to select and search content items and then display those items using available display templates. Oracle WebCenter Portal provides out-of-the-box templates for displaying single and multiple content items on your pages. You can also define custom templates for the content that you want to display in your **Framework application**, or for selection by end users at runtime.

content repository

A specialized storage and management mechanism that provides such features as author-based versioning, full text searching, and content categorization and attribution. A content repository is optimized for storing unstructured information, which differentiates it from a data repository.

content repository data control

A **data control** sourced though a content repository. In a **Framework application**, you can create content repository data controls for the following content repositories: **Oracle Portal**, **Oracle WebCenter Content**, third-party repositories that support the Java Content Repository (JCR) standard, and your local file system.

credential provisioning page

A **JSF** (`*.jspx`) page used for authenticating to an **external application**. At runtime, the Credential Provisioning page displays login data fields consisting of the data fields specified through external application registration. Login information is passed to the producer, which in turn passes the login values to the external application. The application provides the producer with the requested portlets.

After authentication, the user's login credentials are preserved in a **credential store**, which subsequently supplies that information at future sessions. Unless his information changes, the user supplies his credentials only one time.

credential store

Provides storage for login credentials for its associated domain. It also preserves the login credentials that a user provides for authentication to an **external application**. Credential store is usually combined with the policy store as a single logical store.

Although the credentials stored in the credential store are used during subsequent logins for authentication, the main function of this store is to provide authorization for those accounts.

CSS

Cascading Style Sheet. A simple mechanism for ensuring a consistent look and feel or adding style, such as fonts, colors, and spacing, to web documents.

custom action

Icons or menu items rendered on the header or the Actions menu of a Show Detail Frame component surrounding a task flow. Custom actions can represent actions that were defined in the task flow when it was created. For example, at design time a developer can build a task flow with custom personalization settings. At runtime, users can access these settings through icons or Actions menu items provided in the task flow's surrounding chrome (or Show Detail Frame).

custom attribute

In the Spaces application, custom attributes specify information in addition to that provided by the built-in attributes. Custom attributes can be used to determine the content of the components in a space based on the parameter passed in. For example, a component can display data for a specific customer by passing in the customer ID. A custom attribute is simply a name value pair, for example customerId=400, orderId=11, userName=Smith, and so on. Custom attributes are stored within the space template.

custom page

Any page created by a user rather than one provided out of the box.

custom display template

A Content Presenter display template is a JSFF file (JSF page fragment) that defines how Content Presenter renders content items on a Framework application page. WebCenter Portal provides several out-of-the-box display templates to get you started, or, you can create your own templates.

custom Resource Catalog

A Resource Catalog that has been customized to control the components that are visible to specific users.

Contrast with **default Resource Catalog**.

custom role

A user role created by an administrator or a space moderator to meet a specific Home space or space requirement.

Customize mode

A **portlet mode** that enables users to set the default values for portlet preferences for all users.

customizable component

A WebCenter Portal component that can be added to a page at runtime to enable end users to perform personalizations such as move, minimize, restore, or remove on content within those components. Customizable components are the **Panel Customizable component** and the **Show Detail Frame component**.

data control

A mechanism that provides an abstraction of the business service's data model. The ADF data controls provide a consistent mechanism for clients and web application controllers to access data objects, collections, methods, and operations.

default language (application-level)

A display language specified by the Spaces administrator that is used when users log in to the Spaces application. The Spaces administrator sets the application-level default language on the **General** tab of the **Administration** page. Individual users can set their own user-level default language on the **General** tab of the Preferences dialog.

default language (user preference)

A user-specified display language that is rendered when the user logs in to the Spaces application. This language selection lasts until the user specifies a different default language. It can be overridden by a session language, but returns as the default when the session cookie is purged or expires. This value is set on the **General** tab of the Preferences dialog.

default Resource Catalog

The Resource Catalog that is provided by default for an application. It contains all of the Oracle ADF components and portlets available to the application.

Contrast with **custom Resource Catalog**.

Default Server

See **Integrated WLS**.

delegated administration

Provides a mechanism for securing portal resources based on user roles. You apply delegated administration to a page hierarchy, and the specific security assignments are automatically propagated down through the hierarchy through pages and sub pages.

deployment profile

A file used in application deployment that specifies the following types of information:

- The source files, deployment descriptors, and other auxiliary files that are packages
- The type and name of the archive file to be created
- Dependency information
- Platform-specific instructions
- Other information

Oracle WebCenter Portal services provides a special deployment profile, the **Framework application** WAR deployment profile, that includes an option to export project metadata.

Design view (JDeveloper)

A view, in **Oracle JDeveloper**, that provides a WYSIWYG representation of a file.

See also **Source view (JDeveloper)**.

Design view (Spaces)

A view, in **Composer**, that provides a WYSIWYG representation of a page and its components.

See also **Source view (Spaces)**.

discoverable space

A space that can be found by anyone logged into the Spaces application, for example through a search. Any **Public** or **Private** space is discoverable. Discoverable spaces are listed on the **Spaces** page when **All Spaces** is selected from the **Show** list. Users wishing to join the space can request membership through self-service (if enabled) or by contacting the space moderator.

Discussions service

A WebCenter Portal service that provides a means of creating and participating in discussion forums.

display language

Controls the language in which application user interface elements, such as buttons, field labels, and screen text, are rendered in the browser. The order of precedence for Framework application display language settings from weakest to strongest is: browser setting, application setting, user preference setting, session setting, space setting.

Documents page

A predefined page provided in every Spaces group and Home space that includes the Document Manager task flow for managing content.

Documents service

A WebCenter Portal service that provides several task flows that offer a variety of formats to display folders and files on a page. You can choose the task flows appropriate for your application to provide features for accessing, adding, and managing folders and files; configuring and viewing file and folder properties; and searching file and folder content in the connected content repositories.

domain

Any tree or subtree within the Domain Name System (DNS) namespace. Domain most commonly refers to a group of computers whose host names share a common suffix: the domain name.

dynamically-generated page

A page that displays as the result of a user action, such as a search or a click on a tag. As the name suggests, dynamically-generated pages are not stored, but rather are created as and when needed.

EAR

Enterprise Archive file. A **Java EE** archive file that is used in deploying applications on a **Java EE** application server. **Framework application**s are deployed using both a generic EAR file, which contains the application and the respective runtime customization, and a targeted EAR file, which contains only the application for deployment to the application server. EAR files simplify application deployment by reducing the possibility of errors when moving an application from development to test, and test to production.

See also **WAR**.

ECMA-262 specification

A standardization of scripting programming languages, such as **ECMAScript** and JavaScript.

ECMAScript

A scripting programming language, standardized by Ecma International according to the **ECMA-262 specification**. Frequently referred to as JavaScript or JScript, which are both extensions of the ECMA-262 specification.

Edit Defaults mode

(**JSR 286** portlets only.) A **portlet mode** that enables personalization of a JSR 286 portlet. Edit Defaults mode is a display mode for the JSR 286 portlet's properties. In a **Framework application**, the Edit Defaults mode displays on the portlet's Actions menu as the Customize command.

See also **Edit mode**.

Edit mode

A **portlet mode** that enables personalization of the portlet for each user, for each instance.

See also **Edit Defaults mode**.

edit mode

A view mode that enables users to modify the content, style, and layout of a page. Access edit mode by choosing Edit Page from the Page Actions menu.

EL

Expression Language. Provides a shorthand way of working with web application data by providing operators for retrieving and manipulating application data residing in a **Java EE** web container. In a **Framework application**, EL expressions are encapsulated in the characters "#{" and "}" and typically come in the form #{object.data} where *object* represents any Java object or **Oracle ADF** component placed in the **Java EE** web container's page, request, session, or application's scope.

Enterprise Archive file

See **EAR**.

enterprise mashup

An application that enables users to bring all sorts of content and services together in a single place.

Events service

A WebCenter Portal service that provides calendars for scheduling meetings, appointments, and so on. In the Spaces application, it provides calendars to record events relevant to the specific space. You can also integrate the Events service with Microsoft Exchange Server to enable individual users to access their personal calendars in their Home space. Personal calendars are also available in Framework application.

expiry-based caching

A **caching** method that uses a retention period to specify how long the item is valid in the cache before a refresh is required. When there is a request for the item beyond the retention period, it is refreshed in the cache.

See also **validation-based caching**.

Expression Language

See **EL**.

external application

Applications that do not delegate authentication to the single sign-on server. Instead, they display HTML login forms that ask for application user names and passwords. At the first login, users can choose to have the single sign-on server retrieve these credentials for them. Thereafter, they are logged in to these applications transparently.

farm

A collection of components managed by Fusion Middleware Control. A farm can contain a Managed Server domain and other Oracle Fusion Middleware system components that are installed, configured, and running on the domain.

favorites

A personal list of links to favorite pages in the Spaces application and external web sites.

Federated Portal Adapter

See **FPA**.

Feedback

In the **People Connections service**, a feature for posting informal appraisals for and receiving informal appraisals from other application users.

FPA

Federated Portal Adapter. A component of **Oracle Portal** that enables Oracle Portal instances to share their database portlets through the web portlet interface. Using the FPA, Oracle Portal database portlets, including PL/SQL portlets, Portlet Builder portlets, and page portlets can be made available for use in Framework applications.

Framework application

A Framework application is built on top of the ADF using the **WebCenter Portal's Extension for Oracle JDeveloper**. This application combines web content, portlets, content integration, and collaborative services for the end user. Developers and administrators can create a Framework application based on their roles and skill levels in the organization.

A portal also includes page hierarchies, navigation models, and delegated administration.

Framework application administrator

The administrator responsible for maintaining the **Framework application**. For example, in Spaces, the administrator performs tasks such as implementing the branding for the Framework application, making new content available, modifying pages, and granting and revoking privileges.

Contrast with systems administrator who has administrative rights for entire Fusion Middleware functions. The Fusion Middleware administrator is also responsible for deploying, setting up, and configuring the Framework application, and performing on-going administrative tasks for the Framework application and other WebCenter Portal components through Fusion Middleware Control.

Framework application developer

The developer who plans, builds, and maintains a **Framework application** using the Oracle Application Development Framework, **Oracle JDeveloper**, and **Oracle WebCenter Portal**.

Framework application end user

The runtime user of the **Framework application**, who accesses pages, portlets, and content, and personalizes portlets (assuming the appropriate privileges).

Framework application life cycle

The process of creating and testing a Framework application in a design time environment, deploying it to a production system, and then performing routine maintenance, such as monitoring performance and migrating customization data. The life cycle of an application also includes performing further enhancements, restaging, and then redeploying the application to the production system.

Framework application template

A JDeveloper template which includes WebCenter Portal: Framework features like site navigation, page hierarchies, delegated administration, and page templates.

See also **application templates** and **Portlet Producer Application template**.

Full Screen Mode (Spaces)

A view mode that opens the space to occupy the entire screen, thus maximizing the display space. The Sidebar is not displayed in Full Screen Mode.

Full Screen mode (Portlets)

(**PDK-Java** portlets only.) A **portlet mode** that provides more content than can be shown in the portlet when it is sharing a page with other portlets.

Fusion Middleware Control

A browser-based management application that is deployed when you install Oracle WebCenter Portal. From Fusion Middleware Control, you can monitor and administer a **farm** (such as Oracle WebCenter Portal).

Fusion Order Demo (FOD)

See **AviTrust Portal Demonstration for WebCenter Portal**.

HA

High Availability. A collection of solutions to ensure that your applications meet the required availability to achieve your business goals, eliminating single points of failure with no or minimal outage in service.

Help mode

A **portlet mode** that displays usage information about the functionality of the portlet.

High Availability

See **HA**.

Home space

A work area within Spaces that provides individual users with a private space for storing personal content, keeping notes, viewing and responding to assignments, maintaining a list of online buddies, and performing many other tasks relevant to their unique working day. Users can also extend this environment by creating additional personal pages and custom content.

HTML Markup component

A component available through Composer. A simple HTML component that renders raw HTML and JavaScript mark-up inline on the page.

Hyperlink component

A component available through Composer. A link to an internal or external web page. For designers of Framework applications, this is the runtime equivalent of a Go Link component.

IDE

Integrated Development Environment. A visual application development tool containing editors, debuggers, screen painters, object browsers, and the like. **Oracle JDeveloper** is an example of an IDE.

Identity Propagation

For a Framework application and associated content repositories, selecting this option allows propagation of current user's identity across the application and processes. The propagated identity is verified on the receiver's side, and then it is used to make decisions such as assigning role based access control.

Image component

A component available through Composer. An illustration that can include a hyper link. For designers of Framework applications, this is the runtime equivalent of an Image Link component.

IMP service

See **Instant Messaging and Presence service**.

initialization parameters

The parameters initialized upon the start-up of a standard JSR 286 portlet. Initialization parameters provide an alternative to JNDI (Java Naming and Directory Interface) variables. Use initialization parameters instead of JNDI to configure the behavior of all of the different components of the portlet—for example, servlets and other portlets—in a compatible way. In **Oracle WebCenter Portal**, initialization parameters are entered into the `portlet.xml` file.

Instant Messaging and Presence service

A WebCenter Portal service that enables users to observe the presence status of other authenticated users and provides instant access to interaction options, such as instant messages and emails.

Integrated Development Environment

See **IDE**.

Integrated WLS

Integrated WebLogic Server. A WLS instance used as a platform for pretesting Framework application deployments on a local computer. Integrated WLS also contains preconfigured portlet producers and several useful prebuilt portlets.

Iterative development

Iterative development lets you make changes to your Framework application while it is running on the Integrated WebLogic Server and immediately see the effect of those changes simply by refreshing the current page in your browser. The iterative development feature works by disabling certain optimization features. Iterative development allows developers to work more quickly and efficiently when building a Framework application.

JAAS

Java Authentication and Authorization Service (JAAS) is a Java package that enables applications to authenticate and enforce access controls upon users. JAAS is designed to complement Java 2 security and implements a Java version of the standard Pluggable Authentication Module (PAM) framework. This enables an application to remain independent from the authentication service, and supports the use of custom authentication modules.

JAAS extends the access control architecture of the Java 2 Security Model to support subject-based authorization. It also supports declarative security settings in deployment descriptors instead of being limited to code-based security settings.

Java Authentication and Authorization Service

See **JAAS**.

Java Content Repository

See **JCR 1.0**.

Java EE

Also known as Java EE 5. Java Enterprise Edition 5 Platform. A platform that enables application developers to develop, deploy, and manage multitier, server-centric, enterprise-level applications. The Java EE platform offers a multitiered distributed application model, integrated XML-based data interchange, a unified security model, and flexible transaction control. You can build your own Java EE portlets and expose them through web producers.

Java Enterprise Edition 5 Platform

See **Java EE**.

Java Portlet Specification

Standardizes how components for portal servers are to be developed. This specification defines a common portlet **API** and infrastructure that provides facilities for personalization, presentation, and security. Portlets using this **API** and adhering to the specification are product-agnostic, and can be deployed to any portal product that conforms to the specification. See also **JSR 286**.

Java Specification Request

See **JSR 286**.

JavaServer Faces

See **JSF**.

JavaServer Page

See **JSP**.

JCR 1.0

Java Content Repository 1.0. Also known as JSR 170. It proposes a standard access and interaction **API** for content repositories, much like JDBC does for databases.

JDeveloper

See **Oracle JDeveloper**.

JSF

JavaServer Faces. A standard Java framework for building web applications. It simplifies development by providing a component-centric approach to developing Java web user interfaces. JSF offers rich and robust **APIs** that provide programming flexibility and ensures that applications are well designed with greater maintainability by integrating the Model-View-Controller (**MVC**) design pattern into its architecture. As JSF is a Java standard developed through Java Community Process, development tools like **Oracle JDeveloper** are fully empowered to provide easy to use, visual, and productive development environments for JSF.

JSF JSP

JavaServer Faces JavaServer Page. JSF JSPs differ from plain JSPs through their support of **Oracle ADF Faces** components for the user interface and JSF technology for page navigation. JSF JSP pages leverage the advantages of the Oracle **Application Development Framework** (Oracle ADF) by using the ADF Model binding capabilities for the components in the pages.

JSP

JavaServer Page. An extension to servlet functionality that provides a simple programmatic interface to web pages. JSPs are HTML pages with special tags and embedded Java code that is executed on the web or application server. JSPs provide dynamic functionality to HTML pages. They are actually compiled into servlets when first requested and run in the servlet container.

See also **JSP tags**.

JSP tags

Tags that can be embedded in **JSP**s to enclose Java code. These tags use the `<jsp:` syntax and enclose action elements in the JSP with `begin` and `end` tags similar to XML elements.

JSR 286

Java Specification Request (JSR) 286. Defines a set of **API**s for building standards-based portlets using Java. Portlets built to this specification can be rendered to a portal locally or deployed to a WSRP container for rendering portlets remotely. For more information, see `http://jcp.org/en/jsr/detail?id=286`.

JSR 170

See **JCR 1.0**

JSR 329

See **Oracle JSF Portlet Bridge**.

keystore

A file that provides information about available public and private keys that are used for authentication and data integrity. User certificates and the trust points needed to validate the certificates of peers are also stored securely in the keystore.

layout box

A container that enables placement of content on a page created in the Spaces application.

component

An object for enhancing the usefulness and appearance of a given page. components include layout boxes, a rich text editor, images, hyperlinks, and so on.

Layout Customizable component

A component provided in the Composer tag library that enables users to select from a set of predefined layouts (for example, two column, three column, two row, and so on) and apply it to the page. Users can apply these layouts to a particular area of the page or to the entire page.

LDAP

Lightweight Directory Access Protocol. A standard, extensible directory access protocol. It is a common language that LDAP clients and servers use to communicate. The framework of design conventions supporting industry-standard directory products, such as the Oracle Internet Directory.

life cycle

See **Framework application life cycle**.

Lightweight Directory Access Protocol (LDAP)

See **LDAP**.

Links service

A WebCenter Portal service that provides a means of creating a bidirectional association between two objects, thus setting up easy access between those objects.

Lists service

A WebCenter Portal service that provides a means of creating lists and exposing them for placement on application pages at runtime. At design time, you can make the Lists task flow available in your runtime Resource Catalog. At runtime, users can add the task flow from the Catalog to a page and use the task flow to create lists.

Lists page

A predefined page that displays the space's current lists.

Look and feel

A look and feel file determines the appearance of your application, from the placement and behavior of elements on a portal page to the colors used in the portlet title bars. The look and feel is determined by skins, navigations, page templates, layouts, content display templates, and other similar components.

Mail service

A WebCenter Portal service for exposing familiar email functionality in applications.

Managed Server

In a production environment, a Managed Server hosts applications and the resources needed by those applications. A domain, which is a logically related group of Oracle WebLogic Server resources, can have any number of Managed Servers. An Administration Server manages these servers.

mashup

A web application that enables end users to pull information from different sources to create a personalized application that exactly meets their individual requirements.

See also **enterprise mashup**.

MBean Browser

In Fusion Middleware Control, MBean browsers enable the administrator to perform specific monitoring and configuration tasks and browse MBeans for an Oracle WebLogic Server or a selected application.

MDS

Oracle Metadata Services. A core technology of the **Application Development Framework**. MDS provides a unified architecture for defining and using metadata in an extensible and customizable manner.

MDS repository

An application server and Oracle relational database that keep metadata in these areas: a file-based repository, dictionary tables accessed by build-in functions, and a metadata registry. One of the primary uses of MDS is to store customizations and persisted personalization for Oracle applications.

Message Board

In the **People Connections service**, a feature for posting messages to and receiving messages from other application users.

metadata

Information about a content item, such as title, author, or security group. Metadata is used to describe, find, and group content items. Also referred to as content information.

Model-View-Controller

See **MVC**.

moderator

A Spaces user who is responsible for managing a particular space. A space moderator can add and remove members, invite new members, enable self registration, provide and update space metadata, and manage the services available to the space.

Movable Box component

A component available through Composer. A container that enables the placement of content on a page created in the Spaces application. Movable Boxes, along with their content, can be moved around on the page. For designers of Framework applications, this is the runtime equivalent of Show Detail Frame component.

MVC

Model-View-Controller. A classic design pattern often used by applications that need the ability to maintain multiple views of the same data. The MVC pattern hinges on a clean separation of objects into one of three categories: models for maintaining data, views for displaying all or a portion of the data, and controllers for handling events that affect the model or views. Because of this separation, multiple views and controllers can interface with the same model. Even new types of views and controllers that never existed before, such as portlets, can interface with a model without forcing a change in the model design.

My Spaces page

A predefined page that displays a list of all the spaces available to the currently logged in user. The user can select from the **Show** menu to display **All Spaces**, only spaces of which the user is a member (**Joined by Me**), or only spaces of which the user is the moderator (**Moderated by Me**).

navigation

WebCenter Portal provides three navigation components to create portal navigation. These components are: Breadcrumb navigation, menu navigation, and tree navigation.

navigation model

Navigation models provide data to the navigation user interface and enable navigation to resources in your application, such as pages, page hierarchies, task flows, external sites, portlets, and other entities. You can configure navigation models at both design time and runtime.

Notes service

A WebCenter Portal service that provides useful features for writing personal notes and reminders. This service is available only in Spaces, and not in Framework applications.

Notifications service

A WebCenter Portal service that provides an automated means of triggering notices across different messaging channels, such as phone, mail, Worklist, and so on. Messages are triggered when the spaces and application objects to which you have subscribed change.

Oracle ADF

Oracle Application Development Framework. A range of technologies aimed at making **Java EE** application development faster and simpler for developers while at the same time taking advantage of proven software patterns to ensure that the developed application is scalable, performant, and the like.

OAM

See **Oracle Access Manager (OAM)**.

OHS

See **Oracle HTTP Server (OHS)**.

OmniPortlet

A component of **Oracle WebCenter Portal** that enables you to inject portal-like capabilities, such as portlets, content integration, and customization, into your **Oracle ADF Faces** applications.

Oracle Access Manager (OAM)

Part of Oracle's enterprise class suite of products for identity management and security, Oracle Access Manager provides a wide range of identity administration and security functions, including several single sign-on options for Spaces and Framework applications. OAM is the recommended single sign-on solution for Oracle WebCenter Portal 11g installations.

Oracle ADF Faces

Oracle **Oracle ADF** Faces is a rich set of user interface components based on the new **JavaServer Faces** JSR (JSR 127). Oracle ADF Faces provide various user interface components with built-in functionality, such as data tables, hierarchical tables, and color and date pickers, that can be customized and reused in an application.

Oracle WebCenter Content: Content Server

A content repository for building secure business libraries with check in and check out, revision control, and automated publishing in web-ready formats. Current information is available to authorized users anytime, anywhere.

Oracle WebCenter: Content Server is a component of Oracle WebCenter Content.

Oracle WebCenter Portal's Discussions Server

Backend discussions server for the Discussions and Announcements services.

Oracle Enterprise Manager

A component that enables administrators to manage Oracle Fusion Middleware services through a single environment. The Fusion Middleware administrator uses Enterprise Manager to configure, manage, and monitor Framework applications.

Oracle HTTP Server (OHS)

Software that processes web transactions that use the Hypertext Transfer Protocol (HTTP). Oracle uses HTTP software developed by the Apache Group.

Oracle Internet Directory

Oracle's LDAP V3 compliant LDAP server. It is used as a repository for provisioning users and groups. By default, the **Oracle Single Sign-On (OSSO)** authenticates user credentials against Oracle Internet Directory information about dispersed users and network resources. Oracle Internet Directory combines LDAP version 3 with the high performance, scalability, robustness, and availability of the Oracle database.

Oracle JDeveloper

Oracle JDeveloper is an integrated development environment (**IDE**) for building applications and web services using the latest industry standards for Java, XML, and SQL. Developers can use Oracle JDeveloper to create Java portlets.

Oracle JSF Portlet Bridge

Based on and conforming to JSR 329, the Oracle JSF Portlet Bridge enables application developers to expose a JSF application or task flow as a JSR 286 portlet for consumption in another application.

Oracle Metadata Services

See **MDS**.

Oracle Portal

A component used for the development, deployment, administration, and configuration of enterprise class **portal**s. Oracle Portal incorporates a portal building framework with self-service publishing features to enable you to create and manage information accessed within your portal.

See also **Oracle WebLogic Portal**.

Oracle Secure Enterprise Search (SES)

Provides easy-to-use search for public and secure data, with unified ranking results. With Framework applications, Oracle SES is set as the default and preferred search platform.

With Spaces applications, WebCenter Portal's internal live search adapters are set as the default search platform; however, large-scale implementations should be configured to use Oracle SES for best performance.

Oracle Single Sign-On (OSSO)

A component that enables users to log in to all features of the Oracle Fusion Middleware product suite, and to other web applications, using a single user name and password.

Oracle WebCenter Content's Site Studio

A powerful, flexible web development application suite that offers a comprehensive approach to designing, building, and maintaining enterprise-scale web sites. Site Studio uses Oracle WebCenter Content: Content Server as the main repository for a web site.

In WebCenter, Content Presenter integrates with Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in either a Site Studio region template or a custom Content Presenter display template.

Oracle SOA Suite

A middleware component of Oracle Fusion Middleware. Oracle SOA Suite enables services to be created, managed, and orchestrated into SOA composite applications. Composites enable you to easily assemble multiple technology components into one SOA composite application. Oracle SOA Suite plugs into heterogeneous infrastructures and enables enterprises to incrementally adopt SOA.

Oracle Technology Network

See **OTN**.

Oracle WebCenter Content

Provides a flexible, secure, centralized, web-based repository that manages all phases of the content life cycle: from creation and approval to publishing, searching, expiration, and archival or disposition. It enables contributors to easily contribute content from native desktop applications, efficiently manage business content through rich library services, and securely access that content anywhere using a web browser. All content, regardless of content type, is stored in the web repository or database for management, reuse and access.

Oracle WebCenter Portal

A suite of services that enables you to build Oracle WebCenter Portal applications. Oracle WebCenter Portal reduces the front-end labor historically required to bring necessary business components to the user by capitalizing on the notion of Service Oriented Architecture (SOA). The suite includes a wide range of plug-and-play products, tools, and services that make it easy to build the applications your users need. Oracle WebCenter Portal includes:

- **Oracle WebCenter Portal services**
- **Oracle WebCenter Portal: Framework**
- **content integration services**
- **Oracle ADF**
- **Oracle Secure Enterprise Search (SES)**
- **Oracle WebCenter Portal's Discussions Server**
- Mobile Services
- Portlet Pack

Oracle WebCenter Portal: Framework

A set of features provided by **Oracle WebCenter Portal** that augments the Java Server Faces (JSF) environment by providing additional integration and runtime customization options. It integrates capabilities historically included in portal products, such as site navigation, page hierarchies, portlets, customization, personalization, and integration, directly into the fabric of the JSF environment. This eliminates artificial barriers for the user and provides the foundation for developing context-rich applications. You can selectively add only desired Oracle WebCenter Portal components or services to your framework application.

Oracle WebCenter Portal's Pagelet Producer

Provides a collection of useful tools and features that facilitate dynamic pagelet development.

Oracle WebCenter Portal services

A collection of Web 2.0 services that expose social networking and personal productivity features through various services.

- Activity Graph
- Announcements service
- Analytics service
- Discussions service
- Documents service
- Events service
- Instant Messaging and Presence service
- Links service
- Lists service
- Mail service
- Notes service
- Notifications service
- People Connections service
- Personalization for WebCenter Portal
- Polls service
- Recent Activities service
- RSS service
- Search service
- Tags service
- Worklist service

Oracle WebCenter Portal: Spaces

A WebCenter Portal application built using JSF, Oracle ADF, WebCenter Portal: Framework, WebCenter Portal: Services, and Composer. In the production documentation, it is commonly referred as **Spaces application (Spaces)**.

Oracle WebLogic Server Administration Console

A browser-based, graphical user interface to manage a WebLogic Server domain. Use to:

- Configure, start, and stop WebLogic Server instances
- Configure WebLogic Server clusters
- Configure WebLogic Server services, such as database connectivity (JDBC) and messaging (JMS)
- Configure security parameters, including creating and managing users, groups, and roles
- Configure and deploy your applications
- Monitor server and application performance
- View server and domain log files
- View application deployment descriptors
- Edit selected run-time application deployment descriptor elements

OTN

Oracle Technology Network. The online Oracle technical community that provides a variety of technical resources for building Oracle-based applications. You can access OTN at `http://www.oracle.com/technetwork`.

Oracle WebLogic Portal

WebLogic Portal enables you to provide a user interface to integrate your applications. WebLogic Portal lets you surface application data and functionality from heterogeneous environments into an integrated, dynamic, and customizable web-based portal user interface that can simultaneously support multiple devices. In addition to a powerful portal framework and its J2EE security foundation, WebLogic Portal provides many business services, such as content management, communities, personalization, search, and user management. WebLogic Portal provides a virtual content repository that lets you federate external content management systems into a single management interface. You can then build portals using content in those external resource. WebLogic Portal also provides a WLP content repository for creating and managing content.

Page Customizable component

A component provided in the Composer tag library that defines the editable area of a page at runtime. Within this area, users can edit properties for a component, add content to the page, arrange content, and so on.

page hierarchy

A model that associates pages in a parent-child relationship, where any page can have one or more sub pages. This parent-child model not only helps define the overall structure of the portal, but also allows child pages to inherit the security policies from their parent.

page parameter

A parameter associated with a page that can be used to store values that can then be passed to the components on the page. It also enables your page to take values through its URL. Page parameters are defined using the `<parameter>` tag at the top of your `PageDef.xml`. You can bind page parameters to your **page variable**s.

Page Properties

A dialog, accessed from Composer, that provides access to a page's display options, security settings, and parameters.

page scheme

Determines the background image used in the page. The Spaces application provides several default page schemes and an option for specifying a custom page scheme.

page style

Determines the initial page structure, for example one column or two column. Some default page styles also include the task flows, components, and page properties useful for a particular purpose. For example, a page created using the Text page style includes a Text component.

page template

Lets you specify view elements that you intend to be common to all of your pages. A page template file is a JSPX file that includes ADF components and other elements. Typically, page templates define a page layout, with headers, footers, and content areas. In addition, the page template usually specifies the positioning and style of the navigation UI for your pages.

page variable

A variable that binds your public portlet parameter to the page. Page variables are defined within the `<variableIterator>` of your `PageDef.xml`. One page variable can be bound to multiple public portlet parameters.

Panel Customizable component

A component provided in the Composer tag library that provides a container region for a group of Oracle ADF components and portlets that are customizable at runtime. Any Show Detail Frame components and portlets added as child components to a Panel Customizable component can be moved or maximized with the Panel Customizable component.

parameter

A variable that controls the default behavior of task flow content and facilitates the wiring of a task flow to page parameters and page definition variables.

parent component

A component that contains other components, such as a Box component that contains task flows. The Box is the parent component of the task flows. In contrast, the task flows are the Box's child components.

See also **Child Components**.

participant

A Spaces user who can manipulate the content of a space. A participant can upload and share documents, initiate and take part in chats with other members, create discussion topics, create new or view existing lists.

PDK-Java

Java Portlet Developer Kit. The development framework used to build and integrate web content and applications with **Oracle WebCenter Portal**. It includes toolkits, samples, and technical articles that help make portal development simple. You can take existing Java **servlet**s, **JSP**s, URL-accessible content and web services and turn them into **portlet**s. It is typically used by external developers and vendors to create portlets and services.

People Connections service

A WebCenter Portal service that provides social networking tools for creating, interacting with, and tracking the activities of one's enterprise connections.

See also **Activity Stream**, **Connections**, **Feedback**, **Message Board**, and **Profile**.

personalization

Dynamic changes to an application's behavior based on user context, facilitated by Personalization for WebCenter Portal.

See also **application customization** and **user customization**

Personalization for WebCenter Portal

A WebCenter Portal service that enables you to deliver content within your application to targeted application users based on selected criteria. Personalization for WebCenter Portal also provides a declarative means for specifying dynamic application flow.

personal page

A page created by a user in his or her Home space. Personal pages are viewable by other users only if specifically granted access by the user who created the page.

personal profile

A page that displays a user's personal information such as email address, phone number, office location, department, manager, direct reports, and so on.

See also **Profile**.

Polls service

A WebCenter Portal service that enables you to create, edit, and take online polls on your application pages. Polls let you survey your audience (such as their opinions and their experience level) and check whether they can recall important information, and gather feedback on the efficacy of presentations.

portal

A common interface (that is, a web page) that provides a personalized, single point of interaction with web-based applications and information relevant to individual users or class of users.

portal application template

See **application templates**.

Portal Developer Kit

See **PDK-Java**.

portlet

A reusable web component that can draw content from many different sources. Portlets can display excerpts of other web sites, generate summaries of key information, perform searches, and access assembled collections of information from a variety of data sources. Because different portlets can be placed on a common page, the user receives a single-source experience, even though the content may be derived from multiple sources. Portlet resources include the many prebuilt portlets available out of the box and programmatic portlets built through WebCenter's JSR 286, PDK-Java Portlet wizards, and other portlet building tools.

portlet event

A JSR 286 feature that allows portlets to react to actions or state changes not directly related to an interaction of the user with the portlet.

portlet filter

A JSR 286 feature that allows on-the-fly transformations of information in both the request to and the responses from a portlet. A portlet filter is a reusable piece of code that can transform the content of portlet requests and portlet responses.

portlet mode

The ways by which a **portlet** can be called to display information. These methods include:

- **Shared Screen mode** or **View mode**
- **Edit mode** or **Edit Defaults mode**
- **Customize mode**
- **Help mode**
- **About mode**
- **Full Screen mode (Portlets)** or **Show Details Page mode**

Portlet Producer Application template

An application template, provided by JDeveloper, for creating an application with the recommended projects and technology scopes required for developing portlets. The Portlet Producer Application template consists of a single project scoped for portlet creation (Portlets).

See also **Framework application template** and **producer**.

predefined page

A page created by the Spaces application to perform a specific function. Examples of predefined pages include, Welcome pages, Search pages, and Documents pages.

Predeployment Tool

A utility for **Framework applications** that assists you in configuring your target system with the new producer registrations you have added to your application in Oracle JDeveloper. You must run this utility before deploying your application. You can also use this utility after deployment to migrate metadata from stage to production, for example, to export and import your customizations. This tool also enables you to define the **MDS** repository location to allow run-time customizations to be migrated.

pretty URL

A shortened version of a page's URL that hides the complexity of the real web address.

private parameter

A portlet parameter that is known only to the portlet itself and has no connection to the page on which the portlet resides.

Contrast with **public parameter**.

producer

A communication link between portlet consumers (such as a **Framework application** or a **portal**). When a consumer application renders a portlet, it calls the producer of that portlet, which in turn executes the portlet and returns the results in the form of portlet content. A producer can contain one or more portlets. A portlet can be contained by only one producer.

Oracle WebCenter Portal supports two types of producers:

- Oracle **PDK-Java** producers: Deployed to a **Java EE** application server, which is often remote and communicates through Simple Object Access Protocol (SOAP) over HTTP.
- **Web Services for Remote Portlets** (WSRP): A web services standard that enables the plug-and-play of visual, user-facing web services with portals or other intermediary web applications. Being a standard, WSRP enables interoperability between a standards-enabled container based on a particular language (such as **JSR 286**, .NET, Perl) and any WSRP portal. A portlet (regardless of language) deployed to a WSRP-enabled container can be rendered in any application that supports this standard.

Profile

In the **People Connections service**, a feature for viewing and managing information about yourself, such as your contact information, manager, and direct reports, and for viewing this information about other application users.

programmatic portlets

Portlets constructed in a non-declarative manner using **API**s. Also referred to as *hand-* or *manually-coded* portlets.

public render parameters

A JSR 286 feature that enables portlets to share parameter values, allowing a form of interportlet communication.

public space

A space that is available to all users, even those who are not logged in to the Spaces application.

public page

A page within the Spaces application that is available to all users, even those who are not logged in to the application.

public parameter

A portlet parameter that is known to the page and bound to it by way of a page variable.

Contrast with **private parameter**.

public user

A user who can access, but is not logged into, a WebCenter Portal application. A public user can view any page that has been marked as public, but cannot personalize or edit any content, or view pages that have any form of access control.

Contrast with **authenticated user**.

Recent Activities service

A WebCenter Portal service that provides a means of tracking recent activities in a Framework application.

recipe

A weighted list of similarity calculations. The weighting of each calculation determines its significance in deciding the overall recommendation score. Recommendations are ordered by their total recommendation score.

resize handle

A user interface element in a task flow chrome increasing or decreasing the height of the task flow.

resource

Items users can manage through the Resource Manager, like page templates, skins, task flows, navigations, and so on. Spaces categorizes resources under the following categories: Structure, Look and Layout, and Mashups.

Resource Action Handling framework

Enables services that expose custom resources to be viewed, searched, and tagged.

Resource Catalog

A catalog that provides a federated view of one or more otherwise unrelated repositories in a unified search and browse user interface. Resources are created and published in their source repository and are then exposed to the developer in JDeveloper's Resource Palette and to the end user in the Resource Catalog Viewer. Resource catalogs can contain UI components, Oracle ADF components, portlets, service task flows, and documents.

Resource Index

The starting point for accessing WebCenter Portal REST APIs. Sending a GET request to the Resource Index URI returns a list of links to entry points for all available services.

Resource Manager

Enables users with the appropriate privileges to continue developing the portal after the application has been deployed. Using the Resource Manager users can also download runtime portal resources (from Framework applications and Spaces) and import them into Oracle JDeveloper for further development. These resources can then be exported from JDeveloper and uploaded back into the deployed application.

resource type

Defines the type of resource that a WebCenter Portal REST API link identifies. Use resource types to determine the response bodies for GET requests and allowable request bodies for POST and PUT. Also use `resourceType` attributes on entities to uniquely identify their type.

REST APIs

Oracle WebCenter Portal provides a set of web-based REST (REpresentational State Transfer) APIs for retrieving and modifying server data dynamically from the client. REST APIs are available for **Discussions service**, **People Connections service**, and **Spaces application (Spaces)**.

Reverse Proxy Server

A server process that hides the physical location of internal servers by exposing the servers as a single public site. Requests to the public site are routed to the appropriate internal server.

Round-trip development

Round-trip development refers to features and techniques that allow you to retrieve resources from a deployed, runtime portal back to JDeveloper for maintenance or enhancement. After modifying a resource in JDeveloper, you can use the Resource Manager to upload the resource back to the deployed portal. WebCenter Portal's round-trip development features provide a simple, convenient way to modify portal resources without redeploying the entire application.

RSS reader

An RSS reader provided with the Spaces application that incorporates public news feeds from external sources onto application pages. This RSS reader is available only in Spaces, and not in Framework applications.

RSS service

A WebCenter Portal service that provides a means of publishing content from other services as news feeds. The RSS service supports both RSS 2.0 and Atom 1.0 formats.

Search service

A WebCenter Portal service that enables the discovery of information and people in an application, returning only the results users are authorized to see

Secure Enterprise Search

See **Oracle Secure Enterprise Search (SES)**.

secured application page

A page created by a user that has not been made available to public users.

Self-Registration page

A predefined page where users can register with the Spaces application, thus creating themselves an identity store login account. Administrators can customize certain aspects of this page.

Self-Subscription page

A predefined page where users can register to become members of a space. Moderators can customize certain aspects of this page.

service ID

In Expression Language, the string that identifies a particular service. For example, the string `oracle.webcenter.collab.announcement` is the service ID for the Announcements service.

A PDK-Java producer's unique identifier. PDK-Java enables you to deploy multiple producers under a single adapter servlet. Different producers are identified by their unique service IDs. A service ID is required only when a service ID/producer name is not appended to the URL endpoint.

Service Oriented Architecture

See **SOA**.

servlet

A Java program that usually runs on a **Web server**, extending the web server's functionality. HTTP servlets take client HTTP requests, generate dynamic content (such as through querying a database), and provide an HTTP response.

session language

A display language specified by the user that remains in effect for the life of the session cookie (from log on to log off). If the user clears browser cookies, the display language reverts to the user-level default language, if specified, then to the application-level default language set by the Spaces administrator. Set the session language in the Change Language pop-up, accessible from the Welcome page.

Shared Screen mode

A **portlet mode** that renders the body of the portlet and enables you to display a portlet on a page that can contain other portlets. Every portlet must have at least a Shared Screen mode.

See also **View mode**.

Show Detail Frame component

A component provided in the Composer tag library that renders a border or chrome around the child component. It provides a header with an Actions menu and thereby providers user interface (UI) controls to customize the display of the child component. However, to customize the display of the child component, the Show Detail Frame component must be included inside a Panel Customizable component.

Show Details Page mode

A **portlet mode** that provides full-browser display of the portlet. For example, a portlet in **Show Page mode** could be limited to displaying only the ten most recently submitted expense reports, while the same portlet in Show Details Page mode could show all submissions.

Contrast with **Show Page mode**.

show modes

Types of **portlet mode**s encompassing **Show Page mode** and **Show Details Page mode**.

Show Page mode

A **portlet mode** that provides a smaller portlet display to allow space for additional portlets and other objects in the browser window. For example, a portlet in Show Page mode could be limited to displaying only the ten most recently submitted expense reports, while the same portlet in Show Details Page mode could show all submissions.

Contrast with **Show Details Page mode**.

similarity calculation

Used by the Activity Graph service to provide a similarity score (a number between zero and one) that designates how similar two objects are to each other given a specific criterion. The weighting of each calculation determines its significance in deciding the overall recommendation score. Recommendations are ordered by their total recommendation score.

skin

A style sheet based on the CSS 3.0 syntax specified in one place for an entire application. Instead of providing a style sheet for each component, or inserting a style sheet on each page, you can create one skin for the entire application.

SOA

Service Oriented Architecture. A design methodology aimed at maximizing the reuse of application services.

Source view (JDeveloper)

A view, in **Oracle JDeveloper**, that provides a way to directly edit the source code of a file.

Source view (Spaces)

A view, in Oracle WebCenter Portal's Composer, that provides a selectable structural representation of a page and its components.

See also Design view (Spaces).

space

A work area within Spaces that supports a group of people of any size that is organized around an area of interest or a common goal.

Spaces application (Spaces)

A web-based application that offers the very latest technology for social networking, communication, collaboration, and personal productivity. Spaces uses services and applications to bring everything together that users require to exchange ideas with others, keep track of personal and work-related tasks, interact with critical applications, and zero in on projects and interests; all within a single integrated environment.

space icon

An image displayed alongside space names on the Spaces page in My Spaces to help other users with identification and location.

space logo

An image displayed on the Home space page to provide a visual identity for the space. The Home space logos also display alongside the space name at the top of the page in Full Screen Mode.

space member

A user who is participating in a space. Members can be added or invited to a space, or they can subscribe to a space themselves if self-registration is enabled.

space owner

A user who initially created a space. The space owner is automatically also a moderator of the space.

space template

A starting point for creating a new space. Spaces includes several out-of-the-box templates to get you started, and you can create custom space templates using existing spaces as the basis.

space Unavailable page

A predefined page that displays when a space member tries to open a space that is temporarily offline. Moderators can customize this page.

Spaces application administrator

See administrator.

Spaces Switcher

A menu showing three areas: **Recent Spaces** lists up to ten recently accessed spaces, followed by spaces to which current user most recently gained access. **My Spaces** lists all spaces to which the current user has access, in alphabetical order. A list of links provides direct access from the menu to the Home space, the Spaces browser page, and the Create a Space dialog.

struts

A development framework for Java servlet applications based upon the **MVC** design paradigm.

style properties

Used to override the style information from the skin CSS to set specific instances of component display.

Tags service

A WebCenter Portal service that enables users to apply their own terms to application objects, making it possible to search for those objects using personally meaningful terms.

task flow

A set of ADF Controller activities, control flow rules, and managed beans that interact to allow a user to complete a task. Task flows provide a modular approach for defining control flow in an application. Instead of representing an application as a single JSF page flow, developers can break it up into a collection of reusable task flows.

task flow header

An area at the top of a task flow that displays the task flow name and various tools for interacting with the task flow.

template

See **space template**, **application templates**, and **custom display template**.

Text component

A component available through Composer. A rich text editor for providing static page text. For designers of Framework applications, this is the runtime equivalent of a Rich Text Editor component.

Unauthorized Access page

A predefined page that is shown when someone without access permission tries to open a page.

URL parameter

See **private parameter**.

user customization

Changes that affects only a user's own work space.

See also **application customization** and **personalization**

validation-based caching

A **caching** method that uses a validation check to determine if the cached item is still valid.

Contrast with **expiry-based caching**.

Virtual Content Repository

Virtual Content Repository (VCR) enables you to plug in multiple, heterogeneous content repositories.

viewer

Spaces users who can look at the information in a space but cannot contribute any of their own.

View mode

(**JSR 286** portlets only.) A **portlet mode** that enables you to display a JSR 286 portlet on a page that can contain other portlets. It is the only required mode for JSR 286 portlets.

See also **Shared Screen mode**.

WAR

Web application archive file. This file is used in deploying applications on a **Java EE** application server. WAR files encapsulate in a single module all of the components necessary to run an application. WAR files typically contain an application's **servlet**, **JSP**, and **JSF JSP** components.

See also **EAR**.

Web 2.0

Technologies, such as wiki, RSS, and blogs, that enable the construction of highly interactive web applications.

See also **Oracle WebCenter Portal services**.

Web Application Archive file

See **WAR**.

Web Clipping portlet

A browser-based declarative tool that enables you to integrate any web application with your **Framework application**. It is designed to give you quick integration by leveraging the web application's existing user interface. You can drag and drop Web Clipping portlets onto a *.jspx page.

Web Page component

A component available through Composer. A means of embedding another web site, wiki, or blog within the context of a page which is created in the Spaces application. For designers of Framework applications, this is the equivalent of an Inline Frame component.

Web server

A program that delivers web pages.

Web Services for Remote Portlets

See **WSRP**.

WebCenter Portal Application

A WebCenter portal application based on **Oracle WebCenter Portal: Framework** or **Oracle WebCenter Portal: Spaces**.

WebCenter Portal's Extension for Oracle JDeveloper

An extension available through the Oracle JDeveloper Update Wizard that installs the necessary libraries, templates, wizards, and dialogs needed to build and deploy **Framework applications** in **Oracle JDeveloper**.

WebCenter Portal: Framework

See **Oracle WebCenter Portal: Framework**.

WebCenter Portal systems administrator

See administrator.

WebLogic Server

See **WLS**.

Welcome page

There are two types of Welcome page:

- Public Welcome page: A predefined page that users encounter before logging in to the Spaces application.
- Personal Welcome page: A predefined page that introduces users to their Home space.

wiki page

A page that provides in-place editing using HTML or a simple mark-up language. Any user with sufficient privileges can add, revise, and remove wiki content.

WLS

WebLogic Server. A scalable, enterprise-ready Java Platform, Enterprise Edition (Java EE) application server. The WebLogic Server infrastructure supports the deployment of many types of distributed applications and is an ideal foundation for building applications based on Service Oriented Architectures (SOA).

See also **Integrated WLS**

WLST

WebLogic Scripting Tool. A command line tool for managing Oracle Fusion Middleware components, such as Oracle WebCenter Portal.

Worklist service

A WebCenter Portal service that provides access to notifications, alerts, and BPEL tasks assigned to the current user.

WSRP

Web Services for Remote Portlets (WSRP) is a web services standard that allows the plug-and-play of visual, user-facing web services with portals or other intermediary web applications. Being a standard, WSRP enables interoperability between a standards-enabled container based on a particular language (such as JSR 286, .NET, Perl) and any WSRP portal. A portlet (regardless of language) deployed to a WSRP-enabled container can be rendered on any portal that supports this standard.

XSL

Extensible Stylesheet Language (XSL) is the language used within style sheets to transform or render XML documents.

Index

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

R

S

T

U

X