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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle’s PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization’s custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See PeopleTools 8.53 Installation for your database platform, “Installing PeopleSoft Online Help.” If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
• Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the PeopleTools: PeopleSoft Applications User’s Guide introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user’s guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<table>
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<th>Description</th>
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</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Highlights PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.</td>
</tr>
<tr>
<td><strong>Italics</strong></td>
<td>Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. Italic also highlight references to words or letters, as in the following example: Enter the letter <strong>O</strong>.</td>
</tr>
<tr>
<td><strong>Key+Key</strong></td>
<td>Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.</td>
</tr>
<tr>
<td><strong>Monospace font</strong></td>
<td>Highlights a PeopleCode program or other code example.</td>
</tr>
<tr>
<td><strong>. . . (ellipses)</strong></td>
<td>Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.</td>
</tr>
<tr>
<td><strong>Typographical Convention</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>{ } (curly braces)</td>
<td>Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (</td>
</tr>
<tr>
<td>[ ] (square brackets)</td>
<td>Indicate optional items in PeopleCode syntax.</td>
</tr>
<tr>
<td>&amp; (ampersand)</td>
<td>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.</td>
</tr>
<tr>
<td>⇒</td>
<td>This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.</td>
</tr>
</tbody>
</table>

**ISO Country and Currency Codes**

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

**Region and Industry Identifiers**

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

**Region Identifiers**

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
• North America

Industry Identifiers
Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

• USF (U.S. Federal)
• E&G (Education and Government)

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.

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.

Using and Managing the PeopleSoft Online Help
Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

• What’s new in the PeopleSoft Online Help.
• PeopleSoft Online Help accessibility.
• Accessing, navigating, and searching the PeopleSoft Online Help.
• Managing a locally installed PeopleSoft Online Help website.

About PeopleSoft Interaction Hub
This section discusses:

• PeopleSoft Portal Solutions product family.
• PeopleSoft Interaction Hub and PeopleTools.

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

• PeopleSoft Interaction Hub.
• PeopleSoft Internal Controls Enforcer.

PeopleSoft Interaction Hub

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

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

Two key characteristics distinguish PeopleSoft Interaction Hub as a rich Web 2.0 platform:

• First, PeopleSoft Interaction Hub is a traditional portal framework that can be used for aggregating and managing content from multiple applications and sources. With unified navigation, it is now simple to configure PeopleSoft Interaction Hub to federate multiple PeopleSoft application systems.

• Second, its collaborative capabilities make PeopleSoft Interaction Hub a functional application that complements the features found in PeopleSoft applications.

PeopleSoft Internal Controls Enforcer

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

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

See the product documentation for *PeopleSoft 9.1: Internal Controls Enforcer*.

PeopleSoft Interaction Hub and PeopleTools Portal Technology

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

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

The main elements of the PeopleTools portal technology are a portal servlet and an application server. These two elements work together to provide common portal processing features such as page assembly, search, content management, navigation, and homepage personalization.
Product documentation for PeopleTools covers the PeopleSoft Pure Internet Architecture and PeopleTools portal technology in detail.

See PeopleTools: Portal Technology.

Related Documentation

This section discusses:

- PeopleSoft Interaction Hub documentation.
- PeopleTools documentation.

PeopleSoft Interaction Hub Documentation

PeopleSoft Interaction Hub documentation includes:

- PeopleSoft Interaction Hub: Branding
  This subject covers the branding feature, which enables you to apply various branding themes to the portal, portal sites, and collaborative workspaces to present multiple visual designs and deliver appropriate links for specific user audiences.

- PeopleSoft Interaction Hub: Collaborative Workspaces
  This subject covers setup, administration, and use of collaborative workspaces, which are virtual team rooms that facilitate collaboration on a variety collaborative projects and processes.

- PeopleSoft Interaction Hub: Content Management System
  This subject describes the content management system, which includes features to help you manage, create, and organize content. The resulting content is ready and available for placement in various portal pagelets and news publications; reuse in workspaces, calendars, and other portal features; or available just for browsing.

- PeopleSoft Interaction Hub: Portal and Site Administration
  This subject covers tasks for administering portals and sites including product configuration, system-wide setup and administration, integration with third-party systems, and so on.

- PeopleSoft Interaction Hub: Resource Finder
  This subject describes how to setup and use Resource Finder, a highly flexible repository that describes any organizational resource, along with links that relate these resources to each other.

- PeopleSoft Interaction Hub: Using Portal Features
  This subject covers setup and usage of items such as blogs, calendars, discussion forums, feeds, tagging, searching, related content services, and other features of PeopleSoft Interaction Hub.
PeopleTools Documentation

PeopleSoft Online Help for PeopleTools contains the complete set of subject areas covering PeopleTools 8.53. In particular, several of these subjects are useful to the setup, administration, and use of PeopleSoft Interaction Hub including:

- **PeopleTools: Feed Publishing Framework**
  The PeopleTools Feed Publishing Framework supports the publication of PeopleSoft Interaction Hub data as feeds. In addition, the framework can be used to develop custom feed types.

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

- **PeopleTools: Portal Technology**
  PeopleTools portal technology is the foundation of the PeopleSoft Interaction Hub product. This subject covers critical portal technologies such as portal implementation, PeopleSoft Pure Internet Architecture, Pagelet Wizard, the PeopleSoft Related Content Framework, and others.

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

- **PeopleTools: PeopleSoft Applications User's Guide**
  This subject provides general information about PeopleSoft applications useful to all users of PeopleSoft systems. Topics include an introduction to the PeopleSoft Pure Internet Architecture, explanation of how to navigate through the system, how to perform searches, elements of application pages, and so on.

**Note:** These subjects and others in the PeopleSoft Online Help are referenced as needed.

---

PeopleSoft Portal Solutions Related Links

- PeopleSoft Interaction Hub 9.1 Documentation Home Page [ID 887960.1]
- PeopleSoft Information Portal on Oracle.com
- My Oracle Support
- PeopleSoft Training from Oracle University
- PeopleSoft Video Feature Overviews on YouTube
Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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Follow PeopleSoft on Twitter@PeopleSoft_Info.
Part I

Part 1: Introduction
Chapter 1

Getting Started With PeopleSoft Interaction Hub

Getting Started With PeopleSoft Interaction Hub

These topics provide an overview of PeopleSoft Interaction Hub and discuss:

• PeopleSoft Interaction Hub integrations.
• PeopleSoft Interaction Hub implementation tasks.

PeopleSoft Interaction Hub Overview

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

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

• PeopleSoft Interaction Hub.
• PeopleTools portal technology.
• PeopleSoft Interaction Hub packs.

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

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

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

Image: PeopleSoft Interaction Hub homepage example

This example illustrates the PeopleSoft Interaction Hub homepage.

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

These features are available on the PeopleSoft Interaction Hub homepage header:

**Home**
Select to return to your PeopleSoft Interaction Hub homepage (My Page).

**Worklist**
Select to access your worklist.

See the product documentation for *PeopleTools: PeopleSoft Applications User's Guide,* “Using Workflow.”

**Resource Finder**
Select to access the Resource Finder - Advanced Search page, where you can perform detailed searches for resources in your enterprise and access relevant resource profiles.


**MultiChannel Console**
Select to launch the MultiChannel Console.

See the product documentation for *PeopleTools: PeopleSoft MultiChannel Framework,* “Understanding PeopleSoft MultiChannel Framework.”

**Search**
Submit a portal search request and access the Search page.


**Add to My Links**
Select to access the Add to My Links page, where you can add a My Link to the currently accessed component of your My Links collection.
Main Menu
Use the cascading drop-down menu navigation to view menu folders and navigate to a menu item.

My Page
Select to access your PeopleSoft Interaction Hub homepage tab.

Guest
Select to access a sample tab that is configured for guest users.

Investor
Select to access the Investor Portal homepage tab.

Administration
Select to access the PeopleSoft Interaction Hub Administration homepage tab.

PeopleSoft Interaction Hub Administration Homepage
The PeopleSoft Interaction Hub Administration homepage tab displays homepage pagelets for administrative tasks:

Image: PeopleSoft Interaction Hub Administration tab
The following example illustrates the PeopleSoft Interaction Hub Administration Homepage tab that displays pagelets for administrative tasks.

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

- Site Manager Center.
- Content Management Center.
See "Understanding Managed Content (PeopleSoft Interaction Hub 9.1: Content Management System)".

• Branding Center.
  See "Navigating in PeopleSoft Interaction Hub Branding (PeopleSoft Interaction Hub 9.1: Branding)".

• Context Manager Center.
  See "Context Manager Center Pagelet (PeopleSoft Interaction Hub 9.1: Using Portal Features)".

• Resource Finder Center.
  See "Understanding PeopleSoft Interaction Hub Resource Finder (PeopleSoft Interaction Hub 9.1: Resource Finder)".

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

**PeopleTools Portal Technology**

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

**PeopleSoft Interaction Hub Packs**

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

**Image: PeopleSoft Interaction Hub as an integrating layer**

This diagram shows PeopleSoft Interaction Hub as the integrating layer between the portal audience and the PeopleSoft applications and their associated portal packs:

The following image is an example of PeopleSoft Interaction Hub as an integrating layer.

See the product documentation for *PeopleTools: Portal Technology*.

---

**PeopleSoft Interaction Hub Integrations**

PeopleSoft Interaction Hub can integrate with all of the following:

- PeopleSoft applications.
- Non-PeopleSoft applications.
- Third-party internet services.
• Internet content.
• Extranet content.
• Intranet content.

**PeopleSoft Interaction Hub Implementation Tasks**

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

**Other Sources of Information**

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

See the product documentation for

*PeopleTools: PeopleSoft Setup Manager*
Chapter 2

Administering Portals and Sites

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

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

• Configuring and Managing PeopleSoft Interaction Hub
• Administering the Search Infrastructure
• Administer Integration with Third-Party Systems, Messaging, and Internet Content

Understanding Site Administration
Site Management facilitates the creation and management of multiple sites from within one installation of PeopleSoft Interaction Hub. Each site is managed separately.

The Site Administration portion of this PeopleBook discusses:

• Managing and administering sites.
• Defining site security.
• Defining Site Publication Defaults.
• Configuring the Site Homepage.
• Managing Site Branding.
• Publishing to a Site.
• Moving Sites Between Databases.

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

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

• Administering Action Items
See "Administering Action Item Lists (PeopleSoft Interaction Hub 9.1: Using Portal Features)".

- Administering a Blog
  See "Managing Blogs (PeopleSoft Interaction Hub 9.1: Using Portal Features)".

- Administering Community Calendars
  See "Administering Community Calendars (PeopleSoft Interaction Hub 9.1: Using Portal Features)".

- Administering a Discussion Forum
  See "Managing Discussion Forums (PeopleSoft Interaction Hub 9.1: Using Portal Features)".

- Administering Polls
  See "Administering Polls (PeopleSoft Interaction Hub 9.1: Using Portal Features)".

- Setting Up PeopleSoft Interaction Hub Branding
  See "Enabling PeopleSoft Interaction Hub Branding (PeopleSoft Interaction Hub 9.1: Branding)"

- Administering Collaborative Workspaces
  See "Understanding Workspace Administration (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces)".

- Administering the Content Management System
  See "Administering the Content Management System (PeopleSoft Interaction Hub 9.1: Content Management System)".

- Administering News Content
  See "Administering News Content (PeopleSoft Interaction Hub 9.1: Content Management System)".
Part II

Part 2: Portal Administration
Chapter 3

Configuring PeopleSoft Interaction Hub

Configuring PeopleSoft Interaction Hub

These topics discuss how to:

• Set the default style sheet.
• Define installation options.
• Enable or disable My Links.
• Enable the signon PeopleCode.
• Set up multichannel framework (MCF) for PeopleSoft Interaction Hub.
• View menu item details.
• Use PeopleSoft Interaction Hub content reference attributes.

See the product documentation for PeopleTools: Portal Technology.

Setting the Default Style Sheet

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

Page Used to Set Default Style Sheet

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleTools Options</td>
<td>PSOPTIONS</td>
<td>PeopleTools, Utilities, Administration, PeopleTools Options</td>
<td>Set the default style sheet.</td>
</tr>
</tbody>
</table>

PeopleTools Options Page

Use the PeopleTools Options page (PSOPTIONS) to set the default style sheet.
Navigation

PeopleTools, Utilities, Administration, PeopleTools Options

Image: PeopleTools Options page

This example illustrates the fields and controls on the PeopleTools Options page.

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

You can create your own style sheets and use one of them in place of the delivered style sheet by selecting it in the Style Sheet Name field on the PeopleTools Options page.
Note: You can also create your own alternate style sheet and have browser specific adjustments. Create an additional style sheet, including the adjusted styles, and define it with the exact same name with _ALT appended to it. For example, PeopleSoft Interaction Hub sets the style sheet name in PSOPTIONS to EPPSTYLEDEF; therefore, EPPSTYLEDEF_ALT is automatically applied to alternate browsers.

Defining Installation Options

This section discusses how to define PeopleSoft Interaction Hub installation options in the Installation Options component (EO_PE_OPTIONS).

Pages Used to Define Installation Options

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Installation Options</td>
<td>EO_PE_OPTIONS1</td>
<td>Portal Administration, System Data, Installation Options</td>
<td>Define PeopleSoft Interaction Hub installation options.</td>
</tr>
<tr>
<td>Portal and Security Defaults</td>
<td>EO_PE_OPTIONS2</td>
<td>Portal Administration, System Data, Installation Options, Portal and Security Defaults</td>
<td>Select the portal and security defaults used when creating portal registry structures.</td>
</tr>
<tr>
<td>Last ID Values</td>
<td>EO_PE_OPTIONS3</td>
<td>Portal Administration, System Data, Installation Options, Last ID Values</td>
<td>Displays the last ID created for a given feature. This data is used in generating the next available ID.</td>
</tr>
<tr>
<td>Features</td>
<td>EO_PE_OPTIONS4</td>
<td>Portal Administration, System Data, Installation Options, Features</td>
<td>Enable specific features delivered in Feature Packs.</td>
</tr>
</tbody>
</table>

Related Links

Summary of Delivered Security Data

Installation Options Page

Use the Installation Options page (EO_PE_OPTIONS1) to define PeopleSoft Interaction Hub installation options.
Navigation

Portal Administration, System Data, Installation Options

Image: Installation Options page (1 of 2)

This example illustrates the fields and controls on the Installation Options page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Installation Options</th>
<th>Portal and Security Defaults</th>
<th>Last ID Values</th>
<th>Features</th>
</tr>
</thead>
</table>

Select the Portal Solutions installation system options. The Image Attachment URL Path is used to dynamically look up where the content management image attachments are on the web server. This path is used to render the image. The maximum email notifications limit the number of notifications that can be sent.

### Search Results Weighting
- [ ] Include Content Rating Results

### Search Alert Notification
- [ ] Enable Saved Search Alerts

### Branding
- [ ] Enable Branding Themes
- [ ] Enable Adding Image Objects
- [ ] Enable Adding HTML Objects

### Resource Finder
- [ ] Enable Resource Finder
- [ ] Use Resource Finder for Profile Pages

### Content Management

- **Image Attachment URL Path**: `pslimages/portal/pai`
- **Default Poll**: `DEF_RATING`
- [ ] Enable Content in WorkCenter

### Discussion Forums

- **Discussions Viewing Default**: Threaded View
- [ ] Site Specific
This example illustrates the fields and controls on the Installation Options page. You can find definitions for the fields and controls later on this page.

Use the Installation Options page to configure your installation of PeopleSoft Interaction Hub.

**Search Results Weighting**

**Include Content Rating Results**

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

*Important!* The Include Content Rating Results option is not applicable if you are using PeopleSoft Interaction Hub 9.1 Revision 2. This option is ignored even if you select it.

**Search Alert Notification**

**Enable Saved Search Alerts**

Controls whether the Saved Searches page shows or hides the option to set alert notifications for the given saved search.

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

*Important!* The Enable Saved Search Alerts option is not applicable if you are using PeopleSoft Interaction Hub 9.1 Revision 2. This option is ignored even if you select it.
Branding

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

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

See Enabling or Disabling My Links.

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

See "Specifying Header and Footer Images (PeopleSoft Interaction Hub 9.1: Branding)".

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

See "Enabling HTML Area Elements in Headers and Footers (PeopleSoft Interaction Hub 9.1: Branding)".

Resource Finder

Enable Resource Finder
Select to use the Resource Finder feature.

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

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

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

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

- Resource Finder is set up and loaded with data.

This setup includes the generation of associated Resource Finder search collections.
• Resource Finder participants are loaded with their associated user IDs, where applicable, using the Load Participant User IDs Application Engine process (EPX_LOAD_OPR).

See "Loading Participant User IDs (PeopleSoft Interaction Hub 9.1: Resource Finder)".

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

See "Viewing Member Profiles (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces)".

See "Understanding PeopleSoft Interaction Hub Resource Finder (PeopleSoft Interaction Hub 9.1: Resource Finder)".

**Content Management**

**Image Attachment URL Path**

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

See "Setting Up an FTP Service for Image Attachments (PeopleSoft Interaction Hub 9.1: Content Management System)".

**Default Poll**

Select ID for the default ratings poll. This poll is used to rate pieces of content and is made available in the Related Content frame of the WorkCenter template.

See "Configuring Content Display in a WorkCenter (PeopleSoft Interaction Hub 9.1: Content Management System)".

**Enable Content in WorkCenter**

Select this option to enable viewing of content in the WorkCenter template.

See "Configuring Content Display in a WorkCenter (PeopleSoft Interaction Hub 9.1: Content Management System)".

**Discussion Forums**

**Discussions Viewing Default**

Select *Flat View* to display all discussion postings in chronological order with details.

Select *Threaded View* to display the hierarchy of the discussion without the details.
Site Specific

Select to make a discussion forum viewable only within the site in which it was created. For example, if Site Specific is selected and a user is in the Customer portal, then in the Discussions pagelet, that user will see discussion forums that were created in the Customer portal only.

Deselect this option to make all discussion forums appear regardless of the portal in which it was created. For example, if the user is in the Customer portal, then in the Discussions pagelet the user will see discussion forums created in the Customer portal, Employee portal, Supplier portal, and so on.

Collaborative Workspaces

Maximum Email Notifications

Enter the maximum number of email messages you want to be able to send in the member invitation notification process for a Collaborative Workspace.

If the number of email messages sent in the notification process exceeds this number, an error appears and the system sends no email.

Default Module Image

Enter the name of the image that you want to display by default in the Collaborative Workspace menu to the left of module names.

Default Presence Indicators in Members Module

Select to display instant messaging presence indicators in the Members module. If you decide to display presence indicators, keep in mind that one server trip is executed per indicator per member.

See Understanding Instant Messaging in PeopleSoft Interaction Hub.

Enable External Users

Select this option to enable workspace owners to invite external users to participate in the workspace.

Calendar Events / Action Items

Export Option

Select the option for the Export link on the Event View page and the Add to Personal Calendar link on the Action Item Details page. Valid options are

- **Not Used**, which will hide the link on the page.
- **Open Calendar Program**, which will open the file with the default local calendar application that is associated with the *.ics extension.
- **Send as Email Attachment**, which sends an email with the iCal attachment.
• **User Prompt**, which enables the user to either open the file or send an email.


### Alerts iCal Attachment

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

• **No attachment with Alerts**

• **Attach iCal file with Alerts**

### Work Week

Select days to define the default work week for all calendars in the system. These defaults can be overridden by the properties of each calendar.

See "Calendar Properties Page *(PeopleSoft Interaction Hub 9.1: Using Portal Features)*".

### iTracker

**Enable Content Tracking**

Select this option to enable automatic invisible usage tracking (iTracker) for content management system content, discussion forum posts, and blog posts.

See "Understanding Usage Tracking (iTracker) *(PeopleSoft Interaction Hub 9.1: Using Portal Features)*".

### Portal and Security Defaults Page

Use the Portal and Security Defaults page (EO_PE_OPTIONS2) to select the portal and security defaults used when creating portal registry structures.
Navigation

Portal Administration, System Data, Installation Options, Portal and Security Defaults

Image: Portal and Security Defaults page

This example illustrates the fields and controls on the Portal and Security Defaults page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Installation Options</th>
<th>Portal and Security Defaults</th>
<th>Last ID Values</th>
<th>Features</th>
</tr>
</thead>
</table>

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

**Portal Registry Structures**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registry Object Prefix</td>
<td>ADMIN</td>
</tr>
<tr>
<td>Menu Template Pagelet</td>
<td>PAPP_PT_NAVIGATION_SCR</td>
</tr>
<tr>
<td>Base Workspace Template Name</td>
<td>PAPP_BASE_WORKSPACE_TMPL</td>
</tr>
<tr>
<td>Base Wiki Workspace Template Name</td>
<td>PAPP_BASE_WIKI_TMPL</td>
</tr>
</tbody>
</table>

**Site Manager Security**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator Perm Template</td>
<td>PAPP9000</td>
</tr>
<tr>
<td>Publisher Perm Template</td>
<td>PAPP5080</td>
</tr>
<tr>
<td>Viewer Perm Template</td>
<td>PAPP5010</td>
</tr>
</tbody>
</table>

**Workspace Security**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator Permission List</td>
<td>PAPP5030</td>
</tr>
<tr>
<td>Manager Permission List</td>
<td>PAPP5050</td>
</tr>
<tr>
<td>User Permission List</td>
<td>PAPP5030</td>
</tr>
<tr>
<td>Administrator Role</td>
<td>PAPP_WORKSPACE_MANAGER</td>
</tr>
</tbody>
</table>

**User Base Role**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Logged-In User Base Role</td>
<td>PAPP_USER</td>
</tr>
</tbody>
</table>

**Related Discussion Forum**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moderator Role</td>
<td>PAPP_DISCUSSIONS_ADMIN</td>
</tr>
<tr>
<td>Contributor Role</td>
<td>PAPP_DISCUSSIONS_CONTRIBUTOR</td>
</tr>
</tbody>
</table>

**Content Migration**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approver Role</td>
<td>PAPP_CONTENT_ADMIN</td>
</tr>
</tbody>
</table>

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

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

**Portal Registry Structures**

Registry structures are the stored menu items, pagelets, templates, and such. Many features automatically create portal registry structures, including Pagelet Wizard pagelets, News Publication pagelets, Submitted Menu Items, Manage Navigation, and Shortcut Collections.
Registry Object Prefix  Enter a value to use as a prefix for all automatically created portal registry structures.

*Note:* This value allows easy identification of the objects that are in PeopleSoft Application Designer.

Menu Template Pagelet  Enter the menu template pagelet value that is to be used when rendering target pages by using Context Manager.

*Note:* PAPP_PT_NAVIGATION_SCR is the delivered default value. If you want to customize and use your own menu template pagelet, enter its value here.

Base Workspace Template Name  Select the portal registry template on which all Collaborative Workspace templates and their portal registries are based.

Base Wiki Space Template Name  Select the portal registry template on which all Wiki Space templates and their portal registries are based.

See "Installation Options Page (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces)".

**Site Manager Security**

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

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

**Publisher Permission Template**  Enter the publisher template permission lists that are cloned during the creation of a new site.

**Viewer Permission Template**  Enter the viewer template permission lists that are cloned during the creation of a new site.

**Workspace Security**

**Administrator Permission List**  Select the permission list for administrators of the workspace. The delivered permission list is PAPP5350.

**Manager Permission List**  Select the permission list for managers of the workspace. The delivered permission list is PAPP5360.

**User Permission List**  Select the permission list for users of the workspace. The delivered permission list is PAPP5300.

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

See "Understanding Workspace Privilege Sets (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces)".
User Base Role

Logged-In User Base Role
Select the role that enables access to the base objects in the PeopleSoft Interaction Hub features that use privilege sets. The delivered role is PAPP_USER. Every user in the system, other than Guest, must be assigned this role along with the PeopleSoft User role.

**Note:** If you select a role other than PAPP_USER, make sure to select Update Privilege Sets on Save to automatically update the privilege set assignments to the new role.

Update Privilege Sets on Save
Select this checkbox to update all privilege set assignments to the base user role when you select Save. This option enables you to change the role name in the privilege set assignment for all the features that have the concept of privilege sets.

This enables you to use your own 'base' role instead of the delivered role. So, if you change your base role, it's not a customization. This setting lets you update all the privilege set assignments to your role. We deliver some system data using this role, but some of these privilege set assignments (like for discussions) are not accessible online.

See [Roles with Special Uses](#).

Related Discussion Forum

Moderator Role
Select a role for the moderator.

Contributor Role
Select a role for contributors.

Content Migration

Approver Role
Select a role for approvers.

Last ID Values Page
Use the Last ID Values page (EO_PE_OPTIONS3) to display the last ID created for a given feature.

This data is used in generating the next available ID.
Navigation

Portal Administration, System Data, Installation Options, Last ID Values

Image: Last ID Values page

This example illustrates the fields and controls on the Last ID Values page.

<table>
<thead>
<tr>
<th>Installation Options</th>
<th>Portal and Security Defaults</th>
<th>Last ID Values</th>
<th>Features</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Last ID Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last CM Folder ID</td>
</tr>
<tr>
<td>Last CM Content ID</td>
</tr>
<tr>
<td>Last CM Migration ID</td>
</tr>
<tr>
<td>Last Related Content ID</td>
</tr>
<tr>
<td>Last Related Publication ID</td>
</tr>
<tr>
<td>Last Discussion Forum ID</td>
</tr>
<tr>
<td>Last Discussion Post ID</td>
</tr>
<tr>
<td>Last Action Items List ID</td>
</tr>
<tr>
<td>Last Action Item ID</td>
</tr>
<tr>
<td>Last Calendar ID</td>
</tr>
<tr>
<td>Last Event ID</td>
</tr>
<tr>
<td>Last Event Recurrence ID</td>
</tr>
<tr>
<td>Last Package ID</td>
</tr>
<tr>
<td>Last Wiki Identifier</td>
</tr>
<tr>
<td>Last Service ID</td>
</tr>
<tr>
<td>Last Instance ID</td>
</tr>
<tr>
<td>Last Profile Id</td>
</tr>
<tr>
<td>Last Profile Attribute ID</td>
</tr>
<tr>
<td>Last Content Attribute ID</td>
</tr>
</tbody>
</table>

The Last ID Values page displays the current greatest value for IDs that are used by other features in PeopleSoft Interaction Hub such as content management, related content, discussion forums, and so on.

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

Features Page

Use the Features page (EO_PE_OPTIONS4) to enable specific features delivered in Feature Packs.
Navigation

Portal Administration, System Data, Installation Options, Features

Image: Features page

This example illustrates the fields and controls on the Features page.

Use the Features page to enable specific features delivered in feature packs. Ensure that your system meets the minimum PeopleTools release listed in the Tools Release column. Then select the Enabled option to enable a specific feature.

The currently available features are:

<table>
<thead>
<tr>
<th>Feature Pack</th>
<th>Feature ID</th>
<th>Description</th>
<th>For More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>FP1</td>
<td>CM002</td>
<td>Secure content based on business attributes</td>
<td>See &quot;Administering Content Management Business Attribute Security (PeopleSoft Interaction Hub 9.1: Content Management System)&quot;.</td>
</tr>
<tr>
<td>FP2</td>
<td>SES001</td>
<td>Using Oracle Secure Enterprise Search to build search collections.</td>
<td>See Understanding Search in PeopleSoft Interaction Hub.</td>
</tr>
</tbody>
</table>

Not all features delivered in a feature pack are enabled through this page. Other features delivered in feature packs, while not specifically identified as such, can be enabled on the Installation Options page.

Related Links

Installation Options Page

Enabling or Disabling My Links

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

- Enable My Links.
- Disable My Links in the PeopleTools Favorites feature.

Understanding My Links

My Links functionality can be configured to be part of the portal header, to be integrated with the PeopleTools Favorites feature, to be in both locations, or to be in neither location.
Most aspects of the My Links feature are available from either location such as adding, editing, or navigating to any links defined as My Links. However, the View My Links page is directly accessible only through the My Links link in the portal header. Depending on how a user has configured his or her collection of My Links links, the View My Links page might or might not be available through the Favorites drop-down menu.

**Related Links**
"View My Links Page (PeopleSoft Interaction Hub 9.1: Using Portal Features)"

**Enabling My Links**
By default, the My Links feature has been enabled to display in the portal header and as part of the PeopleTools Favorites feature. Therefore, no explicit action is necessary to enable My Links. However, if My Links has been disabled in either or both locations, the following procedures document the steps necessary to re-enable My Links in either or both locations.

To enable the use of My Links in the portal header:

1. Access the Installation Options page (Portal Administration, System Data, Installation Options).
2. Select the following branding option: Enable Branding Themes.

   **Note:** Selecting this option enables the My Links functionality and the display of the Add to My Links link in the portal header.

3. Save your changes.

To integrate the use of My Links as part of the PeopleTools Favorites feature:

2. In the Navigation Options section, ensure that the Navigation Type is set to Drop-down.
3. Ensure that the Display My Favorites folder option is selected.
4. Save your changes.
5. Access the Structure and Content page (PeopleTools, Portal, Structure and Content).
6. Click the PeopleSoft Interaction Hub - Hidden link.
7. Click the Edit link for the PeopleSoft Interaction Hub Profile item.

   **Important!** When defining attributes on this page, the attribute values are case sensitive.

8. In the Content Reference Attributes section, ensure that the attribute value for the MYFAVORITES attribute is set to Y.
9. In the Content Reference Attributes section, ensure that the attribute value for the MYFAVORITES_CLASS attribute is set to EPPSC_MY_SHORTCUTS:Links.
10. For the MYFAVORITES_CLASS attribute, ensure that the Translate option is unselected.
11. Save your changes.

See the product documentation for PeopleTools: Portal Technology, "Administering Portals," Administering Content References, Defining Content References.

**Related Links**

**Defining Installation Options**
"Configuring Headers and Footers (PeopleSoft Interaction Hub 9.1: Branding)"

**Disabling My Links in the PeopleTools Favorites Feature**

In PeopleSoft Interaction Hub, by default, the My Links feature has been enabled to display as part of the PeopleTools Favorites feature. The following steps document the procedure to disable My Links as part of the PeopleTools Favorites feature, thereby restoring the default PeopleTools behavior.

To disable the use of My Links as part of the PeopleTools Favorites feature:

1. Access the Structure and Content page (PeopleTools, Portal, Structure and Content).
2. Click the PeopleSoft Interaction Hub - Hidden link.
3. Click the Edit link for the PeopleSoft Interaction Hub Profile item.

**Note:** Important. When defining attributes on this page, the attribute values are case sensitive.

4. In the Content Reference Attributes section, ensure that the attribute value for the MYFAVORITES attribute remains set to Y.

5. In the Content Reference Attributes section, change the name of the MYFAVORITES_CLASS attribute to _MYFAVORITES_CLASS.

6. Save your changes.

**Note:** No changes are necessary on the General Settings page.

**Enabling the Signon PeopleCode**

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

**Page Used to Enable Signon PeopleCode**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signon PeopleCode</td>
<td>SIGNONPPC_PAGE</td>
<td>PeopleTools, Security, Security Objects, Signon PeopleCode</td>
<td>Enable the StoreUserLogonInfo function to update the portal statistics table and enable the tracking and storage of data needed to feed the User Logon Statistics pagelet.</td>
</tr>
</tbody>
</table>
Understanding Enabling the Signon PeopleCode

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

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

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

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

Related Links

"Working With the User Logon Statistics Pagelet (PeopleSoft Interaction Hub 9.1: Using Portal Features)"

Signon PeopleCode Page

Use the Signon PeopleCode page (SIGNONPPC_PAGE) to enable the StoreUserLogonInfo function to update the portal statistics table and enable the tracking and storage of data needed to feed the User Logon Statistics pagelet.

Navigation

PeopleTools, Security, Security Objects, Signon PeopleCode

Image: Signon PeopleCode page

This example illustrates the fields and controls on the Signon PeopleCode page.
Enable the row that contains the Function Name field value of `StoreUserLogonInfo`. When a user logs on to the portal, a row is inserted into a portal statistics table. The table stores the user ID, date, and time of logon.

See the product documentation for *PeopleTools: Security Administration*, "Employing Signon PeopleCode and User Exits."

**Setting Up MCF For PeopleSoft Interaction Hub**

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

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

To modify MCF-related content references:

1. Go to PeopleTools, Portal, Structure and Content.
2. Navigate to the content references.
   - The content references follow this list.
3. Change the Node Name value from *Always use local* to the appropriate content provider.
4. Click *Save*.

The content references that need to be modified are:

- Root, Tools - Hidden, MCF Console.
- Root, Tools - Hidden, CTI Console.
- Root, PeopleTools, MultiChannel Framework, Universal Queue - All CREFs in this folder.
- Root, PeopleTools, MultiChannel Framework, CTI Configuration - All CREFs in this folder.

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

See the product documentation for *PeopleTools: PeopleSoft MultiChannel Framework*.

**Viewing Menu Item Details**

This section discusses the pages used to view menu item details.
Pages Used to View Menu Item Details

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu Item Detail</td>
<td>PT_IQREGITEM</td>
<td>PeopleTools, Portal, View</td>
<td>Review the portal registry (menu navigation) information for a menu item.</td>
</tr>
<tr>
<td>Menu Folder Structure</td>
<td>PT_IQREGFOLDERS</td>
<td>PeopleTools, Portal, View</td>
<td>Provides a list of content references for a selected portal registry folder.</td>
</tr>
<tr>
<td>Menu Security</td>
<td>PT_IQREGSECURTY</td>
<td>Portal Administration, Navigation, View Menu Security.</td>
<td>Provides a list of folders or content references that a user ID, role, or permission list has access to.</td>
</tr>
</tbody>
</table>

Using PeopleSoft Interaction Hub Content Reference Attributes

This section discusses the content reference attributes recognized by the following PeopleSoft Interaction Hub features:

- Context Manager
- Content Management
- Navigation
- Collaborative Workspaces
- Site Manager

See the product documentation for *PeopleTools: Portal Technology*.

**Navigation Content Reference Attributes**

This section discusses content reference attributes used for navigation.

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

**Context Manager Content Reference Attributes**

This section discusses the content reference attributes used by Context Manager.
### Content Reference Attribute

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

### Collaborative Workspace Content Reference Attributes

This section discusses content reference attributes used by Collaborative Workspaces.

<table>
<thead>
<tr>
<th><strong>Content Reference Attribute</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>EPPCW_MOD_NAME</td>
<td>Specifies that a CREF is a Collaborative Workspace module. This is the key attribute in identifying that a content reference is a Collaborative Workspace module. Enter the value in the Attribute Value field.</td>
</tr>
<tr>
<td>EPPCW_MOD_LABEL</td>
<td>Specifies the name of the Collaborative Workspace module displayed in the modules list and in the Collaborative Workspace menu.</td>
</tr>
<tr>
<td>EPPCW_MOD_DESCR</td>
<td>Provides the description of the Collaborative Workspace module.</td>
</tr>
<tr>
<td>EPPCW_MOD_IMG</td>
<td>Specifies the name of the image used in the Collaborative Workspace menu to the left of the Collaborative Workspace module name.</td>
</tr>
<tr>
<td>EPPCW_MOD_REQ</td>
<td>Specifies whether or not the Collaborative Workspace module is required. A value of ( Y ) implies that it cannot be removed from the Collaborative Workspace by way of the creation wizard. A value of ( N ) implies that it can be removed from the Collaborative Workspace by way of the creation wizard. Enter the desired value in the Attribute Value field.</td>
</tr>
<tr>
<td>EPPCW_MOD_APPCLASS</td>
<td>Specifies the application class for a Collaborative Workspace module used for adding, deleting, and archiving module data. Enter the value in path format delimited by : in the Attribute Value field.</td>
</tr>
<tr>
<td>EPPCW_MOD_ADM</td>
<td>Specifies whether or not this is an Collaborative Workspace administration module. This setting affects the security placed on the content reference. Enter a value of ( Y ) or ( N ) in the Attribute Value field.</td>
</tr>
<tr>
<td>EPPCW_PAGELET</td>
<td>Identifies a pagelet as a Collaborative Workspace related pagelet.</td>
</tr>
</tbody>
</table>
### Content Reference Attribute

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPPCW_REL_MODE</td>
<td>Specifies the contextual mode in which a pagelet is related to a Collaborative Workspace. Entering a value of KEYS passes the Collaborative Workspace keys and their values to the pagelet. Entering a value of WORKSPACE passes the Collaborative Workspace name to the pagelet. Enter this value in the Attribute Value field.</td>
</tr>
<tr>
<td>EPPCW_KEY_MAPPING</td>
<td>This content reference attribute applies to related pagelets on templates only. It enables the mapping of Collaborative Workspace key names to names within the related pagelet. Enter valid value formats of KEY1ORIGINAME=KEY1NEWNAME; KEY2ORIGINAME=KEY2NEWNAME; KEYNORIGINAME=KEYNNEWNAME; and so forth in the Attribute Value field.</td>
</tr>
<tr>
<td>EPPCW_IGNOREKEYNAME</td>
<td>Enables the skipping of specified keys as parameters passed to links within Collaborative Workspaces. Key names listed in the Attribute Value field will not be passed to the link as query string parameters. Enter valid value formats of KEY1NAME; KEY2NAME; KEYNNAME; and so forth in the Attribute Value field.</td>
</tr>
</tbody>
</table>

### Site Manager Folder Reference Attributes

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_SITE</td>
<td>This folder reference attribute applies to the root folder of a portal registry. Specifies that the portal registry is a Site Manager-created site.</td>
</tr>
<tr>
<td>PAPP_SITE_PUB_TMPL</td>
<td>This folder reference attribute applies to the root folder of a portal registry site created by Site Manager. Specifies the publishing template behavior within the Manage Navigation component of a site. Enter valid values of OWN (publishers can select their own template) or DFT (publishers must use the site default template).</td>
</tr>
<tr>
<td>PAPP_SITE_PUB_DATE</td>
<td>Specifies the default publication (effective) date for content created through the Manage Navigation component of a site.</td>
</tr>
<tr>
<td>PAPP_SITE_EXP_DATE</td>
<td>Specifies the default expiration date for content created through the Manage Navigation component of a site.</td>
</tr>
</tbody>
</table>

### Defining Privilege Sets

This section provides an overview of privilege sets and discusses the pages used to define privilege sets.
Pages Used to Define Privilege Sets

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Privilege Set</td>
<td>EO_PE_PRIVSET_DEFN</td>
<td>Portal Administration, Define Privilege Set</td>
<td>Select a feature and define a privilege set.</td>
</tr>
<tr>
<td>Privileges</td>
<td>EO_PE_PRIVSET_PRIV</td>
<td>Portal Administration, Define Privilege Sets Access the Privileges tab.</td>
<td>Select privileges for the privilege set.</td>
</tr>
</tbody>
</table>

Understanding Privilege Sets

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

Privilege sets are used with these features:

- Action Items
- Blogs
- Community Calendars
- Collaborative Workspaces
- Discussion Groups
- Polls
- Wiki Pages

The following table lists the privilege sets according to feature.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Privilege Set Name</th>
<th>Privilege Set ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Items</td>
<td>Administrator</td>
<td>EPPAI_ADMINISTRATOR</td>
</tr>
<tr>
<td>Action Items</td>
<td>Contributor</td>
<td>EPPAI_CONTRIBUTOR</td>
</tr>
<tr>
<td>Action Items</td>
<td>Viewer</td>
<td>EPPAI_VIEWER</td>
</tr>
<tr>
<td>Blogs</td>
<td>Administrator</td>
<td>EPPBL_ADMINISTRATOR</td>
</tr>
<tr>
<td>Blogs</td>
<td>Author</td>
<td>EPPBL_AUTHOR</td>
</tr>
<tr>
<td>Blogs</td>
<td>Reader</td>
<td>EPPBL_READER</td>
</tr>
<tr>
<td>Collaborative Workspaces</td>
<td>Administrator</td>
<td>EPPCW_ADMIN</td>
</tr>
<tr>
<td>Collaborative Workspaces</td>
<td>Approver</td>
<td>EPPCW_APPROVER</td>
</tr>
<tr>
<td>Collaborative Workspaces</td>
<td>Contributor</td>
<td>EPPCW_CONTRIBUTOR</td>
</tr>
<tr>
<td>Collaborative Workspaces</td>
<td>Moderator</td>
<td>EPPCW_MODERATOR</td>
</tr>
<tr>
<td>Collaborative Workspaces</td>
<td>Owner</td>
<td>EPPCW_OWNER</td>
</tr>
<tr>
<td>Feature</td>
<td>Privilege Set Name</td>
<td>Privilege Set ID</td>
</tr>
<tr>
<td>----------------------</td>
<td>--------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Collaborative Workspaces</td>
<td>Viewer</td>
<td>EPPCW_VIEWER</td>
</tr>
<tr>
<td>Community Calendars</td>
<td>Administrator</td>
<td>EPPCA_ADMINISTRATOR</td>
</tr>
<tr>
<td>Community Calendars</td>
<td>Contributor</td>
<td>EPPCA_CONTRIBUTOR</td>
</tr>
<tr>
<td>Community Calendars</td>
<td>Viewer</td>
<td>EPPCA_VIEWER</td>
</tr>
<tr>
<td>Discussion Forums</td>
<td>Contributor</td>
<td>EPPDF_CONTRIBUTOR</td>
</tr>
<tr>
<td>Discussion Forums</td>
<td>Moderator</td>
<td>EPPDF_MODERATOR</td>
</tr>
<tr>
<td>Discussion Forums</td>
<td>Viewer</td>
<td>EPPDF_VIEWER</td>
</tr>
<tr>
<td>Question Polls</td>
<td>Administrator</td>
<td>EPPSP_ADMIN</td>
</tr>
<tr>
<td>Question Polls</td>
<td>Author</td>
<td>EPPSP_AUTHOR</td>
</tr>
<tr>
<td>Question Polls</td>
<td>Moderator</td>
<td>EPPSP_MODERATOR</td>
</tr>
<tr>
<td>Question Polls</td>
<td>Publisher</td>
<td>EPPSP_PUBLISHER</td>
</tr>
<tr>
<td>Question Polls</td>
<td>Viewer</td>
<td>EPPSP_VIEWER</td>
</tr>
<tr>
<td>Wiki</td>
<td>Administrator</td>
<td>EPPWI_ADMINISTRATOR</td>
</tr>
<tr>
<td>Wiki</td>
<td>Contributor</td>
<td>EPPWI_CONTRIBUTOR</td>
</tr>
<tr>
<td>Wiki</td>
<td>Viewer</td>
<td>EPPWI_VIEWER</td>
</tr>
</tbody>
</table>

**Privilege Set Page**

Use the Privilege Set page (EO_PE_PRIVSET_DEFN) to select a feature and define a privilege set.
Navigation

Portal Administration, Define Privilege Set

Image: Privilege Set page

This example illustrates the fields and controls on the Privilege Set page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Privilege Set</th>
<th>Privileges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Privilege Set ID: EPPAI_ADMINISTRATOR</td>
<td></td>
</tr>
<tr>
<td>Description: Administrator</td>
<td></td>
</tr>
<tr>
<td>Summary: An administrator has all privileges for the action item list.</td>
<td></td>
</tr>
<tr>
<td>Feature Code: Action Items</td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>System Item</td>
<td></td>
</tr>
<tr>
<td>Assigned</td>
<td></td>
</tr>
</tbody>
</table>

Feature Code: Select the feature for which you want to define privileges.

Active: Displays the list of definitions that you can view.

System Item: Select to make this privilege set available for use.

Privileges Page

Use the Privileges page (EO_PE_PRIVSET_PRIV) to select privileges for the privilege set.
Navigation

Portal Administration, Define Privilege Sets Access the Privileges tab.

Image: Privileges page

This example illustrates the fields and controls on the Privileges page.

<table>
<thead>
<tr>
<th>Privilege Set ID: EPFAI_ADMINISTRATOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>✅ Add / Edit Any Action Item</td>
</tr>
<tr>
<td>✅ Delete Any Action Item</td>
</tr>
<tr>
<td>✅ Delete List</td>
</tr>
<tr>
<td>✅ Delete Own Action Items</td>
</tr>
<tr>
<td>✅ Edit List</td>
</tr>
<tr>
<td>✅ View Action Items</td>
</tr>
</tbody>
</table>

Select the appropriate privileges for the Privilege Set. Click the information icon for a description of the listed privilege.

Select the privileges for this privilege set. The list of available features varies depending on the feature selected.
Chapter 4

Managing Guest User Accounts

Managing Guest User Accounts

These topics provide an overview of guest user accounts and discuss how the portal administrator can:

- Set up security for guest user accounts.
- Create a guest user ID.
- Configure the guest homepage.
- Personalize pagelets for guests using the User Personalization component.
- Personalize guest pagelets unavailable by way of the User Personalization component.
- Extend the Language Selection pagelet.

Understanding Guest User Accounts

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

PeopleSoft Interaction Hub includes a guest user ID, which allows access to the base portal features as well as selected portal applications. The PeopleSoft system delivers a Guest homepage that contains the pagelets that are suitable for guest users.
Note: The Guest homepage does not include personalization options. Therefore, the navigation header does not display the Personalize Content and Personalize Layout links, nor the Add to My Links link.

Image: Guest page example

This is an example of the Guest homepage.

### Setting Up Security for Guest User Accounts

This section discusses how to:

- Access the Guest homepage.
- Set up the guest default login.

#### Accessing the Guest Homepage

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

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

<table>
<thead>
<tr>
<th><strong>Guest Roles</strong></th>
<th><strong>Permission Lists</strong></th>
<th><strong>Comments</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_GUEST</td>
<td>PAPP0000 - Base PeopleSoft Interaction Hub Objects.</td>
<td>Provides access to the PeopleSoft Interaction Hub base applications.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: Should not be removed from the PAPP_GUEST role.</td>
</tr>
<tr>
<td></td>
<td>PAPP0001 - Base Guest Objects.</td>
<td>Provides access to the Guest homepage.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: Should not be removed from the PAPP_GUEST role.</td>
</tr>
</tbody>
</table>
### Guest Roles

<table>
<thead>
<tr>
<th>Guest Roles</th>
<th>Permission Lists</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPX0000 - Base Repository Objects.</td>
<td>Provides access to the resource repository.</td>
<td><strong>Note:</strong> Should not be removed from the PAPP_GUEST role.</td>
</tr>
<tr>
<td>PAPP1100 - Company News pagelet.</td>
<td>Provides access to view company news content from the Guest homepage.</td>
<td></td>
</tr>
<tr>
<td>PAPP1110 - Promotions pagelet</td>
<td>Provides access to view promotions content from the Guest homepage.</td>
<td></td>
</tr>
<tr>
<td>PAPP1120 - Web Magazine pagelet</td>
<td>Provides access to view web magazine content from the Guest homepage.</td>
<td></td>
</tr>
<tr>
<td>PAPP1500 - Internet Information pagelets.</td>
<td>Provides access to view internet information content from the Guest homepage.</td>
<td></td>
</tr>
<tr>
<td>PeopleSoft Guest</td>
<td>PTPT1400 - Base Access</td>
<td>Provides the base access to the homepage and navigation menu.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> Should not be removed from the PeopleSoft Guest role.</td>
</tr>
</tbody>
</table>

To add new pagelets to the delivered Guest homepage:

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

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

See the product documentation for *PeopleTools: Security Administration*.

### Related Links

**Configuring the Guest Homepage**

**Setting Up the Guest Default Login**

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

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

where:

- **server** is the PortalServlet web server host name.
• *port* is the PortalServlet web server port number

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

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

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

An example of the URL is:

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

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

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

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

2. Access the Public Users group box and ensure that options are set as follows:
   
   • The Allow Public Access option is selected.
   
   • The User ID field is set to `GUEST`.

   • The Password field is set to `GUEST`.

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

See the product documentation for *PeopleTools: Portal Technology*.

**Related Links**

"Working With the Signon Pagelet (*PeopleSoft Interaction Hub 9.1: Using Portal Features*)"

**Creating a Guest User ID**

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

**Note:** The following procedure is for informational purposes only.

To create a guest user ID:


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

   The User Profiles - General tab appears.

3. Access the Logon Information group box.
• Select a symbolic ID for the database.
• Enter the password GUEST.
• Confirm the password GUEST.

4. Click the ID tab and select an ID Type field value of None.
5. Click the Roles tab and insert the following role names:
   • PAPP_GUEST
   • PeopleSoft Guest

6. Click Save.

Configuring the Guest Homepage

This section discusses how to:
• Prevent guest users from changing personalizations.
• Set the Guest homepage security.
• Prohibit guest user access to My Page homepage.
• Select pagelets for the Guest homepage.

Pages Used to Configure the Guest Homepage

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content Ref Administration -</td>
<td>PORTAL_CREF_ADM</td>
<td>PeopleTools, Portal, Structure and Content,</td>
<td>Hide pagelet action buttons to prevent guest users from accessing</td>
</tr>
<tr>
<td>General</td>
<td></td>
<td>Portal Objects, Homepage, Tabs</td>
<td>personalization options for displayed pagelets.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>In the Content References scroll area, click</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>the Edit link for the Guest value.</td>
<td></td>
</tr>
<tr>
<td>Content Reference Security</td>
<td>PORTAL_CREF_SEC</td>
<td>PeopleTools, Portal, Structure and Content,</td>
<td>Limit access to the guest homepage to only guest users.</td>
</tr>
<tr>
<td>(for the Guest homepage)</td>
<td></td>
<td>Portal Objects, Homepage, Tabs</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>In the Content References scroll area, click</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>the Edit link for the Guest value.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Security tab.</td>
<td></td>
</tr>
</tbody>
</table>
### Preventing Guest Users from Changing Personalizations

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

**Image: Pagelet action options**

Examples of action options on a pagelet.

To prevent guest users from changing pagelet personalizations:

1. Access the Content Ref Administration - General page.
2. Select the Hide pagelet action bar option in the Homepage tab attributes group box.
Setting Homepage Security for Guests
To set security for the Guest homepage:

1. Access the Content Reference Security page for the Guest homepage.
2. Insert a row in the Security Authorizations scroll area.
3. Set the Type field value to Permission List.
4. Set the Name field value to PTPT1400 or PAPP0001.

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

To prohibit guest users from accessing the My Page homepage:

2. Insert a row in the Security Authorizations scroll area.
3. Set the Type field value to Permission List.
4. Set the Name field value to either PTPT1000 or PAPP0002.

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

Selecting Pagelets for the Guest Homepage
To select pagelets for the Guest homepage:

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

1. Access the Tab Content page for the Guest homepage.
2. Select the pagelets that you want guest users to be able to access on the Guest homepage.

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

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

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

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

See the product documentation for PeopleTools: Portal Technology, “Administering Portal Homepages and Pagelets.”
*Req-Fix* (required-fixed). The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet cannot be changed and the pagelet cannot be removed from the homepage.

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

4. Click Save.

See the product documentation for *PeopleTools: Portal Technology*.

### Personalizing Pagelets for Guests Using the User Personalization Component

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

#### Pages Used to Personalize Pagelets for Guest Users

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalize &lt;Pagelet Wizard pagelet name&gt;</td>
<td>PTPPB_USER_PREF</td>
<td>Portal Administration, Pagelets, User Personalization, Pagelet Wizard</td>
<td>Configure available personalization options for guest users of pagelets generated by Pagelet Wizard.</td>
</tr>
<tr>
<td>Personalize Company Promotions</td>
<td>EO_PE_PR_PERS</td>
<td>Portal Administration, Pagelets, User Personalization, Promotions</td>
<td>Filter the content available on the Company Promotions pagelet displayed for guest users. If all promotion categories are required, the system displays a message indicating that personalization is not available.</td>
</tr>
<tr>
<td>Feed Reader</td>
<td>EO_PE_RSS_NEWS</td>
<td>Portal Administration, Pagelets, User Personalization, Feed Reader</td>
<td>Specify URLs to RSS news content you want to display on the Feed Reader pagelet that displays for guest users. Define display pagelet options.</td>
</tr>
</tbody>
</table>

### Understanding Personalizing Pagelets for Guest Using the User Personalization Component

Based on the roles and permission lists that are assigned to the guest user ID, as well as settings on the Guest homepage, the guest user cannot personalize the layout, content, or even the individual pagelets on the homepage.
Because guest users cannot perform their own pagelet personalizations, we provide the PAPP_GUEST_ADMIN role that you can attach to a user who you want to perform the role of Guest User Administrator.


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

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

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

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

- Make the pagelet available for personalization on the Guest homepage.
- Edit the pagelet personalization on the Guest homepage.

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

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Query Viewer</td>
<td>QUERY_VIEWER_SRCH</td>
<td>Reporting Tools, Query, Query Viewer</td>
<td>Run a query that lists the pagelets that already have edit URL information defined. Select the PAPP_PAGELET_PERSONALIZATION value.</td>
</tr>
<tr>
<td>Tab Content</td>
<td>PORTAL_TAB_CON_ADM</td>
<td>PeopleTools, Portal, Structure and Content, Portal Objects, Homepage, Tabs Click the Edit link for the Guest value. Click the Tab Content tab.</td>
<td>Make the pagelet available for personalization on the Guest homepage.</td>
</tr>
<tr>
<td>Tab Layout</td>
<td>PORTAL_TAB_LAY_ADM</td>
<td>PeopleTools, Portal, Structure and Content, Portal Objects, Homepage, Tabs Click the Edit link for the Guest value. Click the Tab Layout tab.</td>
<td>Set the layout position of the pagelet you just made available for personalization on the Guest homepage.</td>
</tr>
</tbody>
</table>
### Understanding Personalizing Guest Pagelets Unavailable by Way of the User Personalization Component

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

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

### Making the Pagelet Available for Personalization on the Guest Homepage

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

1. Access the Tab Content page for the Guest homepage.
2. Select the pagelet you want to display on the Guest homepage and select the Required option.
3. Access the Tab Layout page for the Guest homepage.
4. Select the layout position you want for the pagelet.
5. Access the Content Ref Administration page and clear the Hide pagelet action bar option.

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

6. Click Save.

### Editing the Pagelet Personalization on the Guest Homepage

To edit the pagelet personalization on the Guest homepage:

1. Click the Sign out link and log back in to the PeopleSoft Interaction Hub as a guest user.
2. Click the Customize button on the pagelet title bar of the pagelet you just added.
   - Clicking this button accesses the personalization page you defined for the pagelet.
3. Set the pagelet personalizations.
4. Repeat for each new pagelet.
5. Save your changes and sign out.

**Important!** As soon as the personalizations are complete, log back in to the PeopleSoft Interaction Hub as a portal administrator. Access the Content Ref Administration page for applicable guest homepage pagelets and reselect the Hide pagelet action bar option. Selecting this option hides the action buttons on the pagelet title bars.
You can create more than one homepage tab for a guest user. Personalizations cannot be enabled or disabled at the role level, so Oracle recommends enabling or disabling them at the tab label.

**Extending the Language Selection Pagelet**

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

**Understanding the Language Selection Pagelet**

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

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

**Extending the Language Selection Pagelet**

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

To create and display an image:

1. Create a *.GIF or *.JPG image.
2. Import the new image into the database through PeopleSoft Application Designer by navigating to File, New, Image.
3. Save the image object with a unique object name. For example, MY_XXX_IMAGE.
4. In PeopleSoft Application Designer, open the EPPLS_DSPL_WRK.EPPLS_LNGCD_IMG.RowInit record PeopleCode object.
5. Adjust the PeopleCode by adding the code shown below in bold, where XXX represents the translate value of your language in the LANGUAGE_CD field, and MY_XXX_IMAGE represents the image object's name.

```plaintext
...  
When = "ZHT"
  EPPLS_DSPL_WRK.EPPLS_LNGCD_IMG.LabelImage = Image.EPPLS_ZHT;
When = "XXX"
  EPPLS_DSPL_WRK.EPPLS_LNGCD_IMG.LabelImage = Image.MY_XXX_IMAGE;
When-Other  
  EPPLS_DSPL_WRK.EPPLS_LNGCD_IMG.LabelImage = Image.EPPLS_NOT_FOUND;
End-Evaluate;
```
Chapter 5

Administering Portal Homepages

Administering Portal Homepages

These topics discuss:

- Managing homepages through the portal registry.
- Managing homepages in the Custom Tabs navigation collection.

Managing Homepage Tabs through the Portal Registry

The portal registry provides a standard mechanism for creating and maintaining homepage tabs as content references. Managing homepage tabs in this manner allows you to create the tab, manage permissions for the tab, specify the pagelets and layout of the tab, and determine the order of the tabs.

The product documentation for PeopleTools provides more information on managing homepage tabs.


Managing Homepage Tabs in the Custom Tabs Navigation Collection

This topic provides an overview of the Custom Tabs navigation collection and discusses:

- Maintaining the Custom Tabs navigation collection.
- Maintaining content references in the Custom Tabs navigation collection.

Understanding the Custom Tabs Navigation Collection

PeopleSoft Interaction Hub enables you to create homepage tabs from various links defined in the Custom Tabs (PAPP_CUSTOM_TAB) navigation collection. This navigation collection allows you to create links to local or remote content references that are then rendered as homepage tabs. This special navigation collection provides you with the following benefits with respect to remote content:

- Security is checked in real time against definitions in the content provider system.
- You do not need to manually import content references or security from the content provider system
- If the remote system is down or has not been configured, the homepage tab is not displayed.

Note: Remote items require additional processing whenever a user signs in or the cache expires to check security on the remote content provider system. In addition, the Navigation Collections component only supports adding remote component-based content references. To add other remote items to a navigation collection, you must manually create the content reference through the Structure and Content component.

This Custom Tabs navigation collection is delivered with 12 pre-defined links as sample data. Because the content reference definitions for 10 of these links have been hidden from portal navigation, these
sample links will not appear as custom homepage tabs in your system. Two links, Manager Dashboard and Company Directory, are not hidden from portal navigation. However, they also will not automatically appear as custom homepage tabs until the remote content provider systems hosting those links are configured under unified navigation in the PeopleSoft Interaction Hub system.

**Note:** To avoid forcing users to scroll horizontally on the homepage, Oracle recommends that you configure and display no more than seven standard or custom homepage tabs.

**Image: Homepage tabs from the Custom tabs navigation collection**

This example illustrates four homepage tabs from the Custom Tabs navigation collection. The currently selected tab, Company Directory, is a remote content reference from a PeopleSoft HCM system.

**Pages Used to Maintain the Custom Tabs Navigation Collection**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
<td>PTPP_SCMAINTCOLL</td>
<td>1. Portal Administration,</td>
<td>Maintain local and remote links in the Custom Tabs navigation collection that can be used as homepage tabs.</td>
</tr>
<tr>
<td>Collections</td>
<td></td>
<td>Navigation, Navigation</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Collections</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Click the Search button.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Click the Edit link for the</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Custom Tabs navigation collection.</td>
<td></td>
</tr>
</tbody>
</table>

**Maintaining the Custom Tabs Navigation Collection**

Use the Navigation Collections page (PTPP_SCMAINTCOLL) to maintain links in the Custom Tabs navigation collection.
Navigation

1. Portal Administration, Navigation, Navigation Collections

2. Click the Search button.

3. Click the Edit link for the Custom Tabs navigation collection.

Image: Navigation Collections page for the Custom Tabs navigation collection

This example illustrates the fields and controls on the Navigation Collections page for the Custom Tabs navigation collection. You can find definitions for the fields and controls later on this page.

To maintain the Custom Tab navigation collection:

- Click the Add Link button to define a new local or remote link.
- Select an existing link and click the Edit Link button to edit an existing link.
- Select an existing link and click the Delete Link button to delete an existing link.
**Important!** Do not edit the properties for the Custom Tabs navigation collection.

<table>
<thead>
<tr>
<th><strong>Name</strong></th>
<th>Custom Tabs is the name of the navigation collection.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>The description of this navigation collection.</td>
</tr>
<tr>
<td><strong>Valid from date</strong></td>
<td>Select the date on which you want this navigation collection to become active.</td>
</tr>
<tr>
<td><strong>Valid to date</strong></td>
<td>Select the date on which you want this navigation collection to become inactive.</td>
</tr>
<tr>
<td><strong>Owner ID</strong></td>
<td>Set the default owner ID for new definitions you create. Alternatively, leave the option blank, which is the default, to allow users to select the owner ID they want. The Owner ID helps identify which applications team last made a change to a definition.</td>
</tr>
<tr>
<td><strong>Add Link</strong></td>
<td>Click to access the Add Link page to define a link for a new custom tab. On the Add Link page, you can create a link to a local menu item or to a remote component based content reference. See the product documentation for <em>PeopleTools: Portal Technology</em> &quot;Working with Navigation Pages,&quot; Creating and Maintaining Navigation Collections for more information on creating local and remote links in navigation collections. If you need to create a remote link to a non-component based content reference, then you will need to edit the Custom Tabs navigation collection through Structure and Content. See <em>Maintaining Content References in the Custom Tabs Navigation Collection</em> for more information.</td>
</tr>
<tr>
<td><strong>Add Folder</strong></td>
<td>Click to add a subfolder to the navigation collection. <strong>Important!</strong> Links in subfolders are not supported in the Custom Tabs navigation collection. Do not create a subfolder and links within the subfolder.</td>
</tr>
<tr>
<td><strong>Edit Link</strong></td>
<td>Click to access the Edit Link page for a link.</td>
</tr>
<tr>
<td><strong>Delete Link</strong></td>
<td>Click to access the Confirmation page to delete or cancel the deletion.</td>
</tr>
</tbody>
</table>

- Save your changes.

**Maintaining Content References in the Custom Tabs Navigation Collection**

You can use the Structure and Content component to maintain content references in the Custom Tabs navigation collection. This will allow you to:

- Disable a homepage tab by selecting the hide from portal navigation attribute.
- Enable the display of a homepage tab (for example, one of the tabs delivered as sample data) by
deselecting the hide from portal navigation attribute.

- Manually create a content reference to a remote non-component-based item.

To access the Custom Tabs navigation collection in the Structure and Content component:

2. Click the Portal Objects link.
3. Click the Navigation Collections link.
4. Click the Custom Tabs link.

**Image: Structure and Content page for the Custom Tabs navigation collection**

This example illustrates the fields and controls on the Structure and Content page for the Custom Tabs navigation collection.

To disable a custom homepage tab, click the Edit link for that content reference. Then, select the Hide from portal navigation option and save the definition.

To enable a custom homepage tab, click the Edit link for that content reference. Then, deselect the Hide from portal navigation option and save the definition.
Creating a Content Reference to a Remote, Non-Component-Based Item

**Note:** Remote, non-component based content (such as a remote dashboard) must be accessible through unified navigation from the PeopleSoft Interaction Hub system before it can be designated as a homepage tab.

To manually create a content reference to a remote, non-component-based item such as a remote dashboard to be used as a custom homepage tab:

1. On the Structure and Content page click the link labeled Add Content Reference.

   **Image: Content Ref Administration page**

   This example illustrates the fields and controls on the Content Ref Administration page. You can find definitions for the fields and controls later on this page.

2. Specify the node name of the portal host node, such as HRMS, ERP, or LOCAL_NODE.

   **Note:** For a remote dashboard, the Node Name field can specify LOCAL_NODE or can be left blank.

3. In the URL Type field, select one of the following:
• PeopleSoft Generic URL – For remote content from a PeopleSoft application.

• Non-PeopleSoft URL – For remote content from a non-PeopleSoft system, such as an external web site.

4. In the Portal URL field, enter a partial or full URL depending on the URL type:

   • For a PeopleSoft Generic URL, navigate to the remote item through unified navigation from the PeopleSoft Interaction Hub system. Copy the full URL. Then, remove the server, port, servlet, site, portal, and node from the URL, leaving you with a URL string similar to the following:

     http://server.example.com/content

   • For a Non-PeopleSoft URL, copy the full URL from the browser and paste it into the Portal URL field. For example:

     http://server.example.com/content

5. Define the following four content reference attributes:

<table>
<thead>
<tr>
<th>Name</th>
<th>Attribute Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CREFID</td>
<td>The name of the remote CREF as defined in the content provider system.</td>
</tr>
<tr>
<td>LOCATION</td>
<td>REMOTE</td>
</tr>
<tr>
<td>NODE</td>
<td>The portal host node name of the remote node.</td>
</tr>
<tr>
<td>PORTAL</td>
<td>The name of remote portal. This must be the same name as the current portal in the local system—for example, EMPLOYEE.</td>
</tr>
</tbody>
</table>

6. Save the content reference definition.

Note: The Custom Tabs navigation collection includes definitions for several remote, non-component based items that can be used as examples, including the Recruiting Dashboard and the Manager Dashboard, among others.
Chapter 6

Enabling the Account Sign On Utility

Enabling the Account Sign On Utility

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

Understanding the Account Sign On Utility

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

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

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

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

Creating and Maintaining Signon Data

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

- Extract URL sign-on information.
- Create seamless links to external websites.
- Manage user account sign-on entries.
Pages Used to Create and Maintain Signon Data

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

Extracting URL Sign On Information

To extract the URL sign on information:

1. Determine the field names and values the external site uses for authentication.
   
   a. Examine the signon page for the site by viewing the HTML source from a browser.
   
   b. Determine whether the site uses a simple POST authorization form for signon.

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

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

      If the site uses additional parameters, beyond user ID and password fields, make a note of those parameters and values.
2. Enter the data from step 1c into the Account Sign On Utility page.

**Account Sign On Utility Page**

Use the Account Sign On Utility page (EO_PE_EXT_URL_ADMN) to create seamless links to external websites that require user IDs and passwords, and to register external URLs within the portal registry.

**Navigation**

Portal Administration, Account Sign On, Account Sign On Utility

**Image: Account Sign On Utility page**

This example illustrates the fields and controls on the Account Sign On Utility page. You can find definitions for the fields and controls later on this page.

| URL | Enter the URL to the external site's sign on page. |
| Menu Item Name | PAPP_NYTGRAPHIC |
| *URL | http://www.nytimes.com |
| *Menu Label | New York Times |
| *User Field Name | USER_ID |
| *Pwd Field Name | PASSWORD |

**Additional Form Fields and Values**

<table>
<thead>
<tr>
<th>Order</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Register and Save URL**

<table>
<thead>
<tr>
<th>Menu Folder</th>
<th></th>
</tr>
</thead>
</table>

**URL**

Enter the URL to the external site's sign on page.

**Menu Label**

Displays as the link text used to access the site.

**User Field Name**

Enter the user ID field name as displayed in the external website's code.

**Pwd Field Name (password field name)**

Enter the password field name as displayed in the external website's code.

**Additional Form Fields and Values**

**Order**

Displays the order in which any necessary field names and values are passed to the external website.
Enable the Account Sign On Utility

**Field Name**

Enter each field name for which a field value is required by the external site.

**Field Value**

Enter each field value that is required by the external site.

**Register and Save URL**

**Menu Folder**

Enter the name of the menu folder in which you want the link to the external site to appear.

**Creation Date, Updated by, and Updated on**

These fields display information once the URL is registered.

**Registered**

Displays as selected once the URL is registered.

**Register URL**

Click to register the URL in the portal registry.

**Edit Account Sign On Page**

Use the Edit Account Sign On page (EO_PE_EXT_USRIDPWD) to when a portal administrator accesses this page from the Edit Account Sign On menu link, this page is ideal resetting user passwords to external sites registered using the account signon utility.

When accessed from the My Account Sign On link, this page can be used to update your own account signon data for external sites you have registered using the account signon utility.

**Navigation**

- Portal Administration, Account Sign On, Edit Account Sign On
- My Account Sign On

**Image: Edit Account Sign On page**

This example illustrates the fields and controls on the Edit Account Sign On page.

### Edit Account Sign On

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

<table>
<thead>
<tr>
<th><strong>URL:</strong></th>
<th>PAPP_NYTIMES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Menu Label:</strong></td>
<td>NYTIMES</td>
</tr>
<tr>
<td><strong>User ID:</strong></td>
<td>psmith</td>
</tr>
<tr>
<td><strong>Password:</strong></td>
<td>*******************</td>
</tr>
</tbody>
</table>

Enter user ID and password information to be used to access the external sites registered using the account signon utility.
Chapter 7

Administering the Alerts Framework

Administering the Alerts Framework

These topics provide an overview of the Alerts framework and discuss how to:

- Set up alerts.
- Manage alert subscriptions.
- Send email alerts.

Understanding Email Alerts

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

Related Links
"Maintaining Alert Subscriptions (PeopleSoft Interaction Hub 9.1: Using Portal Features)"

Setting Up Alerts

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

- Define alert options by feature.
- Define email alert options.

Pages Used to Set Up Alerts

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alerts Setup</td>
<td>EPPAN_ALERTS_SETUP</td>
<td>Portal Administration, Alerts, Alerts Setup</td>
<td>Define alert options by feature.</td>
</tr>
<tr>
<td>Define Alerts Email</td>
<td>EPPAN_EMAIL_OPTNS</td>
<td>Portal Administration, Alerts, Email Options</td>
<td>Define email alert options.</td>
</tr>
<tr>
<td>Preview Alerts Email - Header Text</td>
<td>EPPAN_EMLPREV_SEC2</td>
<td>Click the Preview button for the Header Text item on the Define Alerts Email page.</td>
<td>Preview the email alert header text entered on the Define Alerts Email - Header Text page.</td>
</tr>
</tbody>
</table>
### Page Name | Definition Name | Navigation | Usage |
--- | --- | --- | --- |
Define Alerts Email - Header Text | EPPAN_EMLTXT_SEC | Click the Edit button for the *Header Text* item on the Define Alerts Email page. | Enter default header text that you want to send out in text-based email alerts. |
Preview Alerts Email - Footer Text | EPPAN_EMLPREV_SEC2 | Click the Preview button for the *Footer Text* item on the Define Alerts Email page. | Preview the email alert footer text entered on the Define Alerts Email - Footer Text page. |
Define Alerts Email - Footer Text | EPPAN_EMLTXT_SEC | Click the Edit button for the *Footer Text* item on the Define Alerts Email page. | Enter default footer text that you want to send out in text-based email alerts. |
Preview Alerts Email - Header HTML | EPPAN_EMLPREV_SEC | Click the Preview button for the *Header HTML* item on the Define Alerts Email page. | Preview the email alert header HTML entered on the Define Alerts Email - Header HTML page. |
Define Alerts Email - Header HTML | EPPAN_EMLHTML_SEC | Click the Edit button for the *Header HTML* item on the Define Alerts Email page. | Enter default header HTML that you want to send out in HTML-based email alerts. |
Preview Alerts Email - Footer HTML | EPPAN_EMLPREV_SEC | Click the Preview button for the *Footer HTML* item on the Define Alerts Email page. | Preview the email alert footer HTML entered on the Define Alerts Email - Footer HTML page. |
Define Alerts Email - Footer HTML | EPPAN_EMLHTML_SEC | Click the Edit button for the *Footer HTML* item on the Define Alerts Email page. | Enter default footer HTML that you want to send out in HTML-based email alerts. |
Send Test Email | EPPAN_EMAIL_TEST | Click the Send Text Test Email button on the Define Alerts Email page. Click the Send HTML Test Email button on the Define Alerts Email page. | When you click the Send Text Test Email button, you can send a test email to a desired email address using the default text header and footer definitions. When you click the Send HTML Test Email button, you can send a test email to a desired email address using the default HTML header and footer definitions. |

### Alerts Setup Page
Use the Alerts Setup page (EPPAN_ALERTS_SETUP) to define alert options by feature.
Navigation

Portal Administration, Alerts, Alerts Setup

Image: Alerts Setup page

This example illustrates the fields and controls on the Alerts Setup page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Displays the name of the feature for which you are setting up alerts options.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>Select to enable alerts for the feature.</td>
</tr>
</tbody>
</table>

Feature Details

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

Define Alerts Email Page

Use the Define Alerts Email page (EPPAN_EMAIL_OPTNS) to define email alert options.
Navigation

Portal Administration, Alerts, Email Options

**Image: Define Alerts Email page**

This example illustrates the fields and controls on the Define Alerts Email page. You can find definitions for the fields and controls later on this page.

![Define Alerts Email page](image)

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

**Allow HTML Email**

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

**Header and Footer Setup**

**Items**

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

- **Footer Text**
  - Click the Preview button to access the Preview Alerts Email - Footer Text page, where you can preview the email alert footer text entered on the Define Alerts Email - Footer Text page.
  - Click the Edit button to access the Define Alerts Email - Footer Text page, where you can enter email alert footer text.
Chapter 7 Administering the Alerts Framework

*Header HTML.* Click the Preview button to access the Preview Alerts Email - Header HTML page, where you can preview the email alert header HTML entered on the Define Alerts Email - Header HTML page.

Click the Edit button to access the Define Alerts Email - Header HTML page, where you can enter email alert header HTML.

*Footer HTML.* Click the Preview button to access the Preview Alerts Email - Footer HTML page, where you can preview the email alert footer HTML entered on the Define Alerts Email - Footer HTML page.

Click the Edit button to access the Define Alerts Email - Footer HTML page, where you can enter email alert footer HTML.

**Email**

**Subject**
Enter the default subject text that you want to send out with email alerts.

**Reply To**
Enter the default reply email address that you want to provide in email alerts.

**Send Text Test Email**
Click to access the Send Test Email page, where you can send a test email using the header and footer text you have defined in the Header and Footer Setup group box.

**Send HTML Test Email**
Click to access the Send Test Email page, where you can send a test email using the header and footer HTML you have defined in the Header and Footer Setup group box.

**Managing Alert Subscriptions**

This section discusses how to:

- Administer user alert subscriptions.
- Maintain your alert subscriptions.

**Pages Used to Manage Alert Subscriptions**

<table>
<thead>
<tr>
<th><strong>Page Name</strong></th>
<th><strong>Definition Name</strong></th>
<th><strong>Navigation</strong></th>
<th><strong>Usage</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>User Alerts</td>
<td>EPPAN_MY_ALERTS</td>
<td>Portal Administration, Alerts, User Subscriptions</td>
<td>Manage user alert subscriptions.</td>
</tr>
<tr>
<td>Update Alerts Subscription</td>
<td>EPPAN_ALERTS</td>
<td>Click the Edit button on the User Alerts page.</td>
<td>Portal administrators can update alert subscription preferences for users.</td>
</tr>
</tbody>
</table>

**User Alerts Page**

Use the User Alerts page (EPPAN_MY_ALERTS) to manage user alert subscriptions.
Navigation

Portal Administration, Alerts, User Subscriptions

Image: User Alerts page

This example illustrates the fields and controls on the User Alerts page. You can find definitions for the fields and controls later on this page.

**User Alerts**

Vice President of Finance

Below is a list of the current alert subscriptions and delivery preferences. Click Edit to make any changes to an existing alert.

<table>
<thead>
<tr>
<th>Display Subscriptions for:</th>
<th>All</th>
</tr>
</thead>
</table>

### Alerts Subscriptions

<table>
<thead>
<tr>
<th>Title</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Calendar</td>
<td>Immediate</td>
</tr>
<tr>
<td>HR Calendar</td>
<td>Immediate</td>
</tr>
<tr>
<td>Employee Kiosk</td>
<td>Daily</td>
</tr>
<tr>
<td>Guest Column</td>
<td>Daily</td>
</tr>
</tbody>
</table>

**Delete All Subscriptions**

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

### Alerts Subscriptions

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

**Title**

Displays the title of the item to which the user has subscribed to email alerts.

When used with the Collaborative Workspaces Discussions module and calendars, these are the titles of the forums and topics to which a user has subscribed to email alerts.

**Delivery**

Displays the frequency at which the user selected to receive email alerts.

**Edit**

Click to access the Update Alerts Subscription page, where you can update alert subscription preferences.

**Delete**

Click to delete the alert subscription. You will be prompted to confirm the deletion.

**Delete All Subscriptions**

Click to delete all alert subscriptions displayed in the Alert Subscriptions group box. You will be prompted to confirm your
deletion. If you do not want to complete the deletion, do not click Save.

**Delivery Preferences**

**Email Address**
Displays the email address to which the email alerts are being sent. This email address is defined on the General Profile Information page.


**Email Format**
Select the format in which email alerts should be sent to the user.

*Text Only.* Select to indicate that text-based email alerts should be sent to the user. The contents of the email will use any text header and footer definitions you have entered on the Define Alerts Email page.

*HTML.* Select to indicate that HTML-based email alerts should be sent to the user. To use this option, the Allow HTML Email option must be selected on the Define Alerts Email page. The contents of the email will use any HTML header and footer definitions you have entered on the Define Alerts Email page.

**Content**
*Links Only.* Select to indicate that the email alert should contain only links to the items about which the user is being notified.

*Links with Summaries.* Select to indicate that the email alert should contain links to and summaries about the items about which the user is being notified.

**Include Overview/Outline**
Select to have email alerts sent with an overview at the beginning of the email. The overview contains an outline of email contents.

**Scheduling Alert Notifications**

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

**Page Used to Schedule Alert Notifications**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Alerts Notifications</td>
<td>EPPAN_ALERT_RUN</td>
<td>Portal Administration, Alerts, Send Notifications, Send Alerts Notifications</td>
<td>Configure and run the Send Alerts Notifications process.</td>
</tr>
</tbody>
</table>
Understanding the Send Alerts Notification Process
The primary process used to send email alerts to subscribed users is the Send Alerts Notification Application Engine process (EPPAN_ALERTS). This process should be run at least once a day to process any requested daily alert notifications.

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

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

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

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

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

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

See the product documentation for PeopleTools: System and Server Administration, “Setting Application Server Domain Parameters,” SMTP Settings.

Send Alerts Notifications Page
Image: Send Alerts Notifications page

This example illustrates the fields and controls on the Send Alerts Notification page. You can find definitions for the fields and controls later on this page.

---

**Run Control ID:**
ALERT_NOTIFICATION, Report Manager, Process Monitor

**Run Control ID**

**Last Run Date:**
Displays the date on which this process was last run.

**Number of Parallel Processes:**
Select the number of child processes to spawn and run in parallel.
Create Log File

See Understanding the Send Alerts Notification Process.

Select to indicate that you want additional process information, beyond the information in the message log, to be generated into a log file. The log file is generated and placed in the Process Scheduler directory; <tools>/appserv/prcs/<database name>/ files, for example.
Chapter 8

Administering the Tagging Framework

Administering the Tagging Framework

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

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

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

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

These topics present an overview of the tagging framework and discuss:

- Enabling web services.
- Managing the tagging framework.
- Implementing tagging web services.

Understanding the Tagging Framework

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

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

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

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

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

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

Related Links
"Understanding Tagging in PeopleSoft Interaction Hub (PeopleSoft Interaction Hub 9.1: Using Portal Features)"

Enabling Web Services

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

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

- Add tags
- Remove tags
- Clear tags
- Modify tags
- Get tags
- Search
- Tag Cloud

See the product documentation for PeopleTools: Security Administration, PeopleTools: PeopleSoft Integration Broker Administration.

Related Links
Understanding Public Web Services

Managing the Tagging Framework

This section describes how to:

- Define tagging domains.
- Define tag namespaces.
• Map namespaces to search index groups.

### Pages Used to Managing the Tagging Framework

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tagging Application Domain</td>
<td>EPPTG_APPDOMAIN</td>
<td>Portal Administration, Tagging, Tagging Domain</td>
<td>Define application tag domains.</td>
</tr>
<tr>
<td>Tagging Namespace</td>
<td>EPPTG_NAMESPACE</td>
<td>Portal Administration, Tagging, Tagging Namespace</td>
<td>Define application tagging namespaces.</td>
</tr>
<tr>
<td>Search Index</td>
<td>EPPTG_NSSRCHIDX</td>
<td>Portal Administration, Tagging, Tagging Namespace, Search Index</td>
<td>Associate index groups with tagging namespaces.</td>
</tr>
</tbody>
</table>

#### Tagging Application Domain Page

Use the Tagging Application Domain page (EPPTG_APPDOMAIN) to define application tag domains.

**Navigation**

Portal Administration, Tagging, Tagging Domain

**Image: Tagging Application Domain page**

This example illustrates the fields and controls on the Tagging Application Domain page. You can find definitions for the fields and controls later on this page.

---

**Tagging Application Domain**

The domain defines the largest scope to which the tag will belong to. Typically a tag domain is associated with an application (e.g. HRMS, FMS, Portal would all be in their own domain).

**Application Tag Domain** LOCAL_TAG_DOMAIN

**Description** Local Tag Domain

**Tag Browser URL**

---

**Description**

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

**Tag Browser URL**

Specify the URL for the tag browser page for this domain. This URL will be prepended to the tags.
If this is specified, it is assumed that the domain has its own tag browser page to display search results of the tags. If this field is left blank the domain will use the default PeopleSoft Interaction Hub tag browser.

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

---

**Message Node Name**

Identifies the node in the PeopleSoft Interaction Hub environment with which the tag domain is associated.

---

**Tagging Namespace Page**

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

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

---

**Local Interface**

**Image: Tagging Namespace page for local interface**

This example illustrates the fields and controls on the Tagging Namespace page.

![Tagging Namespace](image)

Use a local interface to implement tagging within the PeopleSoft Interaction Hub application. Use the Package Name, Path, and Application ID fields to identify the application class that will be used with the namespace. The application class specified here must implement the EPPTG_TAGS:TaggedContent application class.
Remote Interface
The following page shows the Tagging Namespace page with the Remote Interface option selected.

Image: Tagging Namespace page for remote interface
This example illustrates the fields and controls on the Tagging Namespace page.

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

Adding a Tag
The following parameters are required to add a tag:

Node
Node corresponds to the tag domain. Nodes can be associated with a domain using the Tagging Application Domain page in PeopleSoft Interaction Hub (Portal Administration, Tagging, Tagging Domain). Nodes used in tagging web service must be of the type External. When a search is performed, this differentiates between the tags added through the web service and those added through the related content framework.

Portal
This corresponds to the portal name of the application.

The Portal value can be any string.

Namespace
Namespace is like a Java package. It helps in logical grouping of tags. If the namespace is not preconfigured in PeopleSoft Interaction Hub then a namespace is automatically created in the name of the domain.

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

See the product documentation for PeopleTools: PeopleCode Language Reference, PeopleCode Built-in Functions, GenerateComponentRelativeURL, PeopleTools: PeopleCode Language Reference, PeopleCode Built-in Functions, GenerateComponentContentRelURL.

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

Tagging an External Application

Tags can also be used by external (non-PeopleSoft) applications using the tagging web service. However, in this case the complete URL has to be sent in the input message instead of the relative URL. The important point to note here is that the URL string must start with HTTP://. This differentiates external application tags from PeopleSoft system tags. The differentiation is needed to prevent the suffixing of a portal URI to form an absolute URL, which occurs in the case of PeopleSoft system tags. In this case the portal name is just a string.

Configuring Tagging Web Services

Follow these steps to configure tagging web services:

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

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

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

3. Create unique URLs.

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

   With a PeopleSoft system you must use the GenerateComponentRelativeURL function to provide a relative URL. This will be concatenated with the portal URI of the node assigned to the system. Use a relative URL instead of an absolute URL to address the issue of possible change of the server.
With external system tags you must provide the absolute URL. The URL provided for external system content must start with http://. A URL is identified as belonging to an external system only by the presence of the string http:// at the beginning.

**Web Services Command Format**

Tagging web services use the following command format:

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

**Command Format Parameters**

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

Possible values are:

- ADD_TAGS
- MODIFY_TAGS
- CLEAR_TAGS
- REMOVE_TAGS
- GET_TAGS
- SEARCH_TAGS
- TAG_CLOUD

**Basic Tag Commands**

This section describes the implementation of the basic tag commands:

- ADD_TAGS
- MODIFY_TAGS
• CLEAR_TAGS
• REMOVE_TAGS
• GET_TAGS

Basic Input

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

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

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

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

Basic Input Parameters

id     This is a required parameter for the following commands:

• ADD_TAGS
• MODIFY_TAGS
• CLEAR_TAGS
• REMOVE_TAGS
• GET_TAGS

node     The name of the node that sent the command
**portal**
The portal name. If the tagging system is non-PeopleSoft, define a standard value that is used by all your tag commands.

**ns**
The tagging namespace.

**url**
The URL the tags are associated with.

**tags**
The comma separated list of tags that are being manipulated.

This is a required parameter for the following commands:

- ADD_TAGS
- MODIFY_TAGS
- REMOVE_TAGS

**type**
Valid values are:

- *public* – these tags are viewable by all users for the content.
- *private* – these tags are viewable only by the user who created the tags.

This is a required parameter for the following commands:

- ADD_TAGS
- MODIFY_TAGS
- CLEAR_TAGS
- REMOVE_TAGS
- GET_TAGS

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

This is a required parameter for ADD_TAGS.

It is an optional parameter for MODIFY_TAGS.

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

This is a required parameter for the following commands:

- ADD_TAGS
- MODIFY_TAGS

## Basic Output

The following xml is an example of output for these commands:
• ADD_TAGS
• MODIFY_TAGS
• CLEAR_TAGS
• REMOVE_TAGS

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

Basic Output Parameters

Status
The status of the command.

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

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

Get Output

This is an example of output for the GET_TAGS command:

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

Get Output Parameters

Status
The status of the command.

• 0 – Success

• Non 0 – Error. (All errors default to 1.)

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

Tag
One tag node is returned for each tag.

type
Valid values are:
public – these tags are viewable by all users for the content.

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

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

**Add Operation**

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

**Modify Operation**

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

**Clear Operation**

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

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

**Clear Input**

This is an example of input for Clear:

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

**Remove Operation**

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

**Remove Input**

The following is an example of input for Remove:

```xml
<?xml version="1.0"?>
<tagging>
  <tagop lang="ENG" userid="VP1">
```


Get Operation

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

Search Operation

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

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

Search Input

This is an example of input for Search:

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

Search Input Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>lang</td>
<td>This corresponds to the language the user has entered their tags in. Use PeopleSoft language codes. The default is the system default (%language_base).</td>
</tr>
<tr>
<td>userid</td>
<td>The user ID that entered the tag. The user ID must be a valid PeopleSoft user.</td>
</tr>
<tr>
<td>cmd</td>
<td>The command value – SEARCH_TAGS.</td>
</tr>
<tr>
<td>domain</td>
<td>The tagging domain that is being searched. This is a required parameter.</td>
</tr>
<tr>
<td>ns</td>
<td>The namespace that is being searched. This is an optional parameter.</td>
</tr>
</tbody>
</table>
The default is to search all namespaces within the domain.

**num_results**  
The maximum number of results to return.

This is a required parameter.

**search**  
The tag that is being searched.

**Search Output**

This is an example of output for Search:

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

**Search Output Parameters**

**Status**  
The status of the command.

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

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

**Result**  
Each row of data is returned as a Result.

- **Label** – The short description of a search result.
- **Description** – The long description of a search result.
- **RelatedTags** – Any tags associated with the search result are listed here, comma separated.
- **Url** – link to the search result.
Tag Cloud Operation

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

Tag Cloud Input

This is an example of input for Tag Cloud:

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

Tag Cloud Input Parameters

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

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

- **cmd**
  
  The command value – TAG_CLOUD

- **scope**
  
  This defines where tags are retrieved to generate the cloud. Specify values in KEY=VALUE pairs separated by a comma. Valid Keys are:
  
  - **DOMAIN** – The tagging application domain. This key is required.
  
  - **TAG_NS** – A namespace associated in the domain.

  This key is optional.

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

- **num_results**
  
  The maximum number of results to show in the tag cloud.

  This is a required parameter.

- **search**
  
  The tag that is being searched.

- **sort**
  
  The sort order of the tag cloud.

  Possible values are:

  - **ALPHA-A** – Alphabetical ascending A-Z.
  
  - **ALPHA-D** – Alphabetical descending Z-A.
- \textit{COUNT-A} – Count ascending 0-X.
- \textit{COUNT-D} – Count descending X-0.
- \textit{ATIME-A} – List tags oldest added time first.
- \textit{ATIME-D} – List tags newest added time first.

This is an optional parameter.

The default is \textit{ATIME-D}.

### Tag Cloud Output

This is an example of output for Tag Cloud:

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

### Tag Cloud Output Parameters

- **Status**: The status of the command.
  - \textit{0} - Success.
  - \textit{Non 0} - Error. (All errors default to 1.)

- **ErrorMsg**: If Status is a value other than \textit{0}, then the xml node is returned with a message detailing the error.

- **TagBrowserUrl**: The URL to the tag browser.

- **TagCloud**: Contains all the tags in the tag cloud.

- **Tag**: The tag with these attributes:
  - \textit{Count} – How often the tag is used to link a piece of content.
  - \textit{Size} – The default suggested sizing of the tag.
  - \textit{Weight} – Suggested weighting of the tag.

Possible values are:
- \textit{lighter}
- \textit{normal}
Tag Browser
The search result links that correspond to tags added using web service must open in a new window.

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

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

Each domain in the application domain page will have a scope corresponding to it in the tag browser page.
Chapter 9

Managing Menu Item Requests

Managing Menu Item Requests

These topics provide an overview of Menu Item Requests feature and a list of common elements used in this topic. These topics also discuss how to:

• Set up menu item request email notifications.
• Submit and edit menu item requests.
• Manage menu item requests.
• Register approved menu item requests.

Understanding the Menu Item Requests Feature

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

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

• PAPP4100.
  Submit menu item requests.
• PAPP4020.
  Approve and manage menu item requests.
• PAPP4025
  Register menu item requests.

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Role Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_AUTHOR</td>
<td>Content Author</td>
</tr>
<tr>
<td>PAPP_NAVIGATION_MANAGER</td>
<td>Navigation Manager</td>
</tr>
<tr>
<td>PAPP_NAVIGATION_ADMIN</td>
<td>Navigation Administrator</td>
</tr>
</tbody>
</table>
The Menu Item Requests feature can be set up to send email notifications of status changes to menu item requests. Manager notifications are sent for newly submitted requests pending review and approval. Administrator notifications are sent for approved requests pending portal registration.

See the product documentation for *PeopleTools: Security Administration*.

**Related Links**

Summary of Delivered Security Data

**Common Elements Used in Menu Item Requests**

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Displays the current status of the associated request.</td>
</tr>
<tr>
<td>Content Type</td>
<td>Displays the content type of the associated request.</td>
</tr>
<tr>
<td>Creation Date</td>
<td>Displays the creation date of the request.</td>
</tr>
<tr>
<td>Created By</td>
<td>Displays the user ID of the person who created the request.</td>
</tr>
</tbody>
</table>

**Setting Up Menu Item Request Email Notifications**

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

**Page Used to Set Up Menu Item Request Email Notifications**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu Item Request Notification</td>
<td>EPPMI_NOTIFY</td>
<td>Portal Administration, Menu Item Requests, Request Notification</td>
<td>Set up menu item request email notifications.</td>
</tr>
</tbody>
</table>

**Menu Item Request Notification Page**

Use the Menu Item Request Notification page (EPPMI_NOTIFY) to set up menu item request email notifications.
Navigation

Portal Administration, Menu Item Requests, Request Notification

Image: Menu Item Request Notification page

This example illustrates the fields and controls on the Menu Item Request Notification page. You can find definitions for the fields and controls later on this page.

Menu Item Request Notification

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

<table>
<thead>
<tr>
<th>Notified Users</th>
<th>Find</th>
<th>1-3 of 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>Manager</td>
<td>Administrator</td>
</tr>
<tr>
<td>PAPP_AUTHOR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAPP_NAVIGATIONADM</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>PAPP_NAVIGATIONMGR</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

User ID
Select the ID of the user to which you want to send email notifications of menu item request status changes.

Manager
Select if the user is a navigation manager and requires notifications for newly submitted requests pending review and approval.

Administrator
Select if the user is a navigation administrator and requires notifications for approved requests pending portal registration.

Email Address
If available, the email address will default from the user profile, but can be overridden. Menu item request notifications will be sent to this address.

Managing Menu Item Requests

This section discusses how to:

• Approve menu item requests.
• Update menu item requests.
• Delete rejected menu item requests.
## Pages Used to Manage Menu Item Requests

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

### Manage Menu Item Requests Page

Use the Manage Menu Item Requests page (EPPMI_MANAGE_LST) to approve or reject submitted menu item requests.

**Navigation**

Portal Administration, Menu Item Requests, Manage Requests

**Image: Manage Menu Item Requests page**

This example illustrates the fields and controls on the Manage Menu Item Requests page. You can find definitions for the fields and controls later on this page.
Menu Item Requests

Menu Item Request
Click the Menu Item Request link to access the Edit Menu Item Request page, where you can access and edit information about the selected menu item request.

See Edit Menu Item Request Page.

Publish Date
Displays the date on which the submitter wants to publish the requested menu item.

Save Menu Items
Click to save changes made on the Edit Menu Item Request page.

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

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

Note: Requests with a status of Rework can be resubmitted, deleted, or saved as draft. Requests with a status of Rejected can be viewed or deleted. Requests with a status of Approved can be viewed.

Approved menu item requests will also trigger an email notification to the navigation administrator with a link to the Administer Menu Item Requests page.

Edit Menu Item Request Page
Use the Edit Menu Item Request page (EPPMI_ITM_EDIT_SEC) to edit a menu item request.
Navigation

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

**Image: Edit Menu Item Request page**

This example illustrates the fields and controls on the Edit Menu Item Request page. You can find definitions for the fields and controls later on this page.

---

**Manage Menu Item Requests**

**Edit Menu Item Request**

| Creation Date: 08/08/2002 | Created By: VP1 |

**Menu Item Request**

*Request Status: Submitted

Email Address: test@peoplesoft.com

Comments:

**Menu Item Identifier**

*Menu Item Label: Configuration Red Paper

*Menu Item ID: DEMO_CONFIGURATION_RED_PAPER

Long Description:

Publish Date: 03/30/2001

Expiration Date:

**Menu Item Content**

Menu Item Author: Vice President of Finance

Menu Item Type: Managed Content

Content Title: Portal Configuration Tips

Content ID: 1047

Content Type: File Attachment

Search Key Words

OK [Return to Menu Item List] [Go to Administer Requests]

**Menu Item Request**

**Request Status**

Update the status of the request based on your review and updates. Available values include:
Approved.
Rejected.
Rework.
Submitted.

**Email Address**
Displays the email address of the person who submitted this request.

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

**Menu Item Identifier**
Changes can be made to all fields in this section.

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

**Search Key Words**
Changes can be made to all fields in this section.

**OK**
Click to update your changes to the menu item request and return to the Manage Menu Item Requests page.

*Warning!* You must click the Save Menu Items button on the Manage Menu Item Requests page to save any changes you made on this page.

**Return to Menu Item List**
Click to return to the Manage Menu Item Requests page.

*Warning!* Any changes you made on this page will not be saved.

**Go to Administer Requests**
After saving your changes by clicking the Save Menu Items button on the Manage Menu Item Requests page, you can return to this page and click this link to access the Administer Menu Item Requests page, where you can register the menu item, once it has been approved.

*Note:* This link displays only if you have been granted permission to register menu item requests.

See Approving and Registering the Menu Item Requests.
Delete Menu Item Requests Page
Use the Delete Menu Item Requests page (EPPMI_DEL_LST) to delete rejected menu item requests.

Navigation
Portal Administration, Menu Item Requests, Delete Requests

Image: Delete Menu Item Requests page
This example illustrates the fields and controls on the Delete Menu Item Requests page.

Delete Menu Item Requests
Only those Menu Items with a request status of 'Rejected' can be deleted from the Menu Item requests table.

<table>
<thead>
<tr>
<th>Rejected Menu Item Requests</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu Item Request</td>
<td>Status</td>
<td>Menu Item Type</td>
<td>Created By</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All My Children Soup Updates</td>
<td>Rejected</td>
<td>Web Site URL</td>
<td>VM1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

You will be prompted to confirm your deletion.

Approving and Registering the Menu Item Requests
This section discusses how to:

• Register approved menu item requests.
• Define the menu item registry entry.
• Select a menu item folder.
• View menu item registry details.

Pages Used to Register Approved Menu Item Requests

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administer Menu Item Requests</td>
<td>EPPMI_REG_LST</td>
<td>Portal Administration, Menu Item Requests, Register Requests</td>
<td>Register approved menu item requests.</td>
</tr>
<tr>
<td>Define Menu Item Registry</td>
<td>EPPMI_REG_DFO</td>
<td>My Content, Submit Menu Items, Register Requests</td>
<td>Register approved menu item requests.</td>
</tr>
<tr>
<td><strong>Page Name</strong></td>
<td><strong>Definition Name</strong></td>
<td><strong>Navigation</strong></td>
<td><strong>Usage</strong></td>
</tr>
<tr>
<td>-------------------------</td>
<td>--------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Edit Menu Item Request</td>
<td>EPPMI_ITM_EDIT_SEC</td>
<td>Click the link for a menu item request in <strong>Rejected, Submitted, Rework, or Approved</strong> status on the Administer Menu Item Requests page.</td>
<td>Access and edit details of a menu item request.</td>
</tr>
<tr>
<td>View Menu Item Request</td>
<td>EPPMI_ITM_VIEW_SEC</td>
<td>Click the Menu Item Request link for a menu item request in <strong>Registered</strong> status on the Administer Menu Item Requests page.</td>
<td>View menu item request details.</td>
</tr>
<tr>
<td>Define Registry</td>
<td>EPPMI_REG_DFN</td>
<td>Click the Register Item button on the Administer Menu Item Requests page.</td>
<td>Determine how the menu item will be rendered online, such as the site and menu folder to which it will be published.</td>
</tr>
<tr>
<td>Select Menu Folder</td>
<td>EPPMI_REG_FLD</td>
<td>Click the Select Menu Folder button on the Define Registry page.</td>
<td>Choose the parent folder in which you want to register the menu item.</td>
</tr>
<tr>
<td>Confirm Registry</td>
<td>EPPMI_REG_CNF</td>
<td>My Content, Submit Menu Items, Register Requests</td>
<td>Confirm menu item registration.</td>
</tr>
<tr>
<td>Registry Details</td>
<td>EPPMI_REG_VIEW</td>
<td>• Click the Yes - Register button on the Confirm Registry page.</td>
<td>Review registry information for the menu item, or remove the menu item from registry.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Registry Details button on the Administer Menu Item Requests page.</td>
<td></td>
</tr>
</tbody>
</table>

**Administer Menu Item Requests Page**  
Use the Administer Menu Item Requests page (EPPMI_REG_LST) to register approved menu item requests.
Navigation

Portal Administration, Menu Item Requests, Register Requests

Image: Administer Menu Item Requests page

This example illustrates the fields and controls on the Administer Menu Item Requests page. You can find definitions for the fields and controls later on this page.

**Administer Menu Item Requests**

Use the search criteria to filter the Menu Item requests, then click 'Search'. Click the Menu Item Request link to update the request status. Click Register Item to register an approved Menu Item request.

<table>
<thead>
<tr>
<th>Menu Item Request</th>
<th>Status</th>
<th>Type</th>
<th>Publish Date</th>
<th>Register Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>assistant</td>
<td>Approved</td>
<td>Web Site URL</td>
<td>02/13/2013</td>
<td>Register Item</td>
</tr>
<tr>
<td>Vice president</td>
<td>Approved</td>
<td>Web Site URL</td>
<td>02/27/2013</td>
<td>Register Item</td>
</tr>
<tr>
<td>Vice President of Oracle</td>
<td>Approved</td>
<td>Web Site URL</td>
<td>02/12/2013</td>
<td>Register Item</td>
</tr>
<tr>
<td>Full Table Publish Rules</td>
<td>Approved</td>
<td>PeopleSoft URL</td>
<td>11/02/2000</td>
<td>Register Item</td>
</tr>
<tr>
<td>Documentation Tips</td>
<td>Approved</td>
<td>Managed Content</td>
<td>08/03/2002</td>
<td>Register Item</td>
</tr>
</tbody>
</table>

**Menu Item Request**

Click for a menu item request in Rejected, Submitted, Rework, or Approved status to access the Edit Menu Item Request page.

Click for a menu item request in Registered status to access the View Menu Item Request page.

**Register Item**

Click to access the Define Registry page, where you can register the menu item.

This button displays for menu item requests in Approved status.

**Registry Details**

Click to access the Registry Details page, where you can view registry details for a menu item, or remove the menu item from the registry.

This button displays for menu item requests in Registered status.

**Save Menu Items**

Click to save the changes made on the Edit Menu Item Request page.

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

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

Access the Define Menu Item Registry page (EPPMI_REG_DFO) (click the Approve & Register button on the Edit Menu Item Request page).

**Navigation**

My Content, Submit Menu Items, Register Requests

**Image: Define Menu Item Registry page**

This example illustrates the fields and controls on the Define Menu Item Registry page. You can find definitions for the fields and controls later on this page.

---

**Note:** Only requests with a status of *Registered* have the Registry Details option available.
<table>
<thead>
<tr>
<th><strong>Site Name</strong></th>
<th>Select the portal or site in which you want to register the menu item. This value defaults to the current portal or site.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Node Name</strong></td>
<td>This field displays when the Content Type field is set to PeopleSoft URL. Select the database node that contains the PeopleSoft page that you want to register as a menu item. The node is used to derive the web server URL used to access the content provider database. Select <em>Always use local</em> to indicate that you want to use the current portal database.</td>
</tr>
<tr>
<td><strong>Template Name</strong></td>
<td>This field displays when the Content Type field is set to PeopleSoft URL or Web Site URL. Select a template to determine how the URL content will be displayed on the page. PeopleSoft delivers a number of standard templates, or you can design your own. PeopleSoft recommends leaving this field clear unless there is a special circumstance. Leaving this field clear, allows the system to use the default template.</td>
</tr>
<tr>
<td><strong>Product</strong></td>
<td>Optionally, enter text to tag menu items for SQL queries against the registry tables.</td>
</tr>
</tbody>
</table>
| **Access Type** | Select the type of security access you want to grant for the menu item. Available values include:

- *Permission*. Select to indicate that you want to specify permission lists that define access rights to the menu item.
- *Public*. Select to indicate that you want the menu item to be accessible by all users. |
| **Author Access** | This option displays when the Access Type field is set to Permission. Select to indicate that you want the user who submitted the menu item request to have access to the menu item regardless of any other permissions that are defined for the menu item. However, if the user does not have access to the menu component, the system will issue an authorization error. |
| **Permissions** | This option displays when the Access Type field is set to Permission. Select the permission lists that you want to have access to the menu item. |

Click the folder icons to navigate through the portal registry hierarchy. Click a folder link to select the desired folder and access the Confirm Registry page, where you can confirm the registration of the menu item.
Define Registry Page
Use the Define Registry page (EPPMI_REG_DFN) to determine how the menu item will be rendered online, such as the site and menu folder to which it will be published.

Navigation
Click the Register Item button on the Administer Menu Item Requests page.

Image: Define Registry page
This example illustrates the fields and controls on the Define Registry page. You can find definitions for the fields and controls later on this page.

**Site Name**
Select the portal or site in which you want to register the menu item. This value defaults to the current portal or site.

**Node Name**
This field displays when the Content Type field is set to PeopleSoft URL.

Select the database node that contains the PeopleSoft page that you want to register as a menu item. The node is used to derive the web server URL used to access the content provider database.

Select *Always use local* to indicate that you want to use the current portal database.

**Template Name**
This field displays when the Content Type field is set to PeopleSoft URL or Web Site URL.

Select a template to determine how the URL content will be displayed on the page. PeopleSoft delivers a number of standard templates, or you can design your own. PeopleSoft recommends leaving this field clear unless there is a special circumstance. Leaving this field clear, invokes the system to use the default template.
<table>
<thead>
<tr>
<th><strong>Product</strong></th>
<th>Optionally, enter text to tag menu items for SQL queries against the registry tables.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Access Type</strong></td>
<td>Select the type of security access you want to grant for the menu item. Available values include:</td>
</tr>
<tr>
<td></td>
<td><em>Permission.</em> Select to indicate that you want to specify permission lists that define access rights to the menu item.</td>
</tr>
<tr>
<td></td>
<td><em>Public.</em> Select to indicate that you want the menu item to be accessible by all users.</td>
</tr>
<tr>
<td><strong>Author Access</strong></td>
<td>This option displays when the Access Type field is set to <em>Permission.</em></td>
</tr>
<tr>
<td></td>
<td>Select to indicate that you want the user who submitted the menu item request to have access to the menu item regardless of any other permissions that are defined for the menu item. However, if the user does not have access to the menu component, the system will issue an authorization error.</td>
</tr>
<tr>
<td><strong>Permissions</strong></td>
<td>This option displays when the Access Type field is set to <em>Permission.</em></td>
</tr>
<tr>
<td></td>
<td>Select the permission lists that you want to have access to the menu item.</td>
</tr>
<tr>
<td><strong>Select Menu Folder</strong></td>
<td>Click to access the Select Menu Folder page, where you can choose the parent folder for the menu item.</td>
</tr>
</tbody>
</table>

**Select Menu Folder Page**
Use the Select Menu Folder page (EPPMI_REG_FLD) to choose the parent folder in which you want to register the menu item.
Navigation

Click the Select Menu Folder button on the Define Registry page.

Image: Select Menu Folder page

This example illustrates the fields and controls on the Select Menu Folder page.

<table>
<thead>
<tr>
<th>Administer Menu Item Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Menu Folder</td>
</tr>
</tbody>
</table>

Assistant

Click the folder icons to navigate through the Portal Registry hierarchy. Click the folder link to select the desired folder for the Menu Item.

Left | Right

- Root
- My Favorites
- Portal Objects
- Common Portal - Hidden
- Enterprise Components
- PeopleSoft
- My Content
- Content Management
- Investor Portal
- Internal Controls Enforcer
- Portal Administration
- Interaction Hub - Hidden
- Intern Ctrl Enforcer - Hidden
- Investor Portal - Hidden
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools
- Tools - Hidden
- Packaging
- [DemoSite Home]
- [Take a Survey]
- [Browse Workspaces]
- [My Account Sign On]
- [My Instant Messaging]
- [Usage Monitoring]
- [Change My Password]
- [My Personalizations]

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

Confirm Registry Page

Access the Confirm Registry page (EPPMI_REG_CNF) (Click a folder link to select the desired folder).
Navigation

My Content, Submit Menu Items, Register Requests

Image: Confirm Registry page

This example illustrates the fields and controls on the Confirm Registry page. You can find definitions for the fields and controls later on this page.

Administer Menu Item Requests

Confirm Registry

Vice President of Oracle

Portal Name: EMPLOYEE
Template Name:
Product:
Access Type: Public
Menu Item Name: ADMIN_VICE_PRESIDENT_OF_OR
Menu Folder Name: PAPP_CONTENT
Portal Menu Path: > My Content

? Are you sure you wish to register this Menu Item?

Yes - Register  No - Do Not Register

Yes - Register

Click Yes - Register button to register the menu item

No-Do Not Register

Click No — Do Not Register to cancel the registration and return to Select Menu Item Folder page.

Registry Details Page

Use the Registry Details page (EPPMI_REG_VIEW) to review registry information for the menu item, or remove the menu item from registry.
Navigation

- Click the Yes - Register button on the Confirm Registry page.
- Click the Registry Details button on the Administer Menu Item Requests page.

Image: Registry Details page

This example illustrates the fields and controls on the Registry Details page. You can find definitions for the fields and controls later on this page.

### Administer Menu Item Requests

#### Registry Details

<table>
<thead>
<tr>
<th>Site Name</th>
<th>EMPLOYEE</th>
<th>Employee-facing registry content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Node Name</td>
<td>(Not Specified)</td>
<td></td>
</tr>
<tr>
<td>Template Name</td>
<td>(Not Specified)</td>
<td></td>
</tr>
<tr>
<td>Menu Item</td>
<td>ADMIN_VICE_PRESIDENT_OF_OR</td>
<td>Vice President of Oracle</td>
</tr>
<tr>
<td>Menu Folder</td>
<td>PAPP_CONTENT</td>
<td>My Content</td>
</tr>
<tr>
<td>Menu Path</td>
<td>Home &gt; My Content &gt;</td>
<td></td>
</tr>
<tr>
<td>Access Type</td>
<td>Public</td>
<td></td>
</tr>
</tbody>
</table>

Remove from Registry  

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

- Click to remove the menu item from the registry.
- A new page displays confirming the removal.

Go To Registry Structure & Content

- Click to access the Content Ref Administration page for the menu item.
- This link displays if the current user has security access to the Structure and Content component.
see the product documentation for *PeopleTools: Portal Technology*, "Administering Portals," Administering Content References.
Chapter 10

Using the Portal Registry Load Process

Using the Portal Registry Load Process

These topics provide overview of the Registry Load Application Engine process (EO_PE_R_LOAD) and portal registry load files. These topics also discuss how to:

- Create a portal registry load file.
- Start the portal registry load message.
- Run the Registry Load process.

**Note:** The information in this topic is for system administrators who implement and maintain the PeopleSoft Interaction Hub.

Understanding the Portal Registry Load Process

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

The registry load process is one methodology for providing access to content from a content provider system in a PeopleSoft Interaction Hub system. However, the content references available through this methodology are only as current as the last registry load. Content references are not dynamically updated as they are created or deleted. An alternative methodology, *unified navigation*, federates PeopleSoft applications under a single portal system and dynamically provides access to content references on those content provider systems.

See Understanding Unified Navigation.

Loading data into the portal registry involves two staging tables:

- EO_PE_LOAD_DTL
- EO_PE_LOAD_FLDR

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

- Use your own application programming interfaces (APIs) to match the PORTAL_REG_LOAD message format.
- Export the data to a spreadsheet, save it as a CSV file, and follow the steps we provide for the inbound flat-file utility.

See Running the Portal Registry Load.

For the inbound flat-file definition, use the layout and message combination: PORTAL_REG_LOAD.
The result of the flat-file utility is a published PORTAL_REG_LOAD message. When the portal subscribes to the message, you see the data in the tables EO_PE_LOAD_DTL and EO_PE_LOAD_FLDR.

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

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

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

### Understanding the Portal Registry Load Files

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

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Column Heading</th>
<th>Format</th>
<th>Use</th>
<th>Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal Name</td>
<td>30 characters, uppercase, no spaces.</td>
<td>This value must match the portal definition object name. The valid values are EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER</td>
<td>Required</td>
</tr>
<tr>
<td>Content Provider</td>
<td>30 characters, mixed case, no spaces.</td>
<td>This value must match the exact spelling and case of an existing content provider node name. This is the content provider node for the content reference. Delivered content provider nodes include BP, CRM, EPM, ELM, ERP, GFHA, HRMS, LOCAL_NODE, SA, and SAHA.</td>
<td>Required for components and iScripts</td>
</tr>
<tr>
<td>Portal Template</td>
<td>30 characters, uppercase, no spaces.</td>
<td>This value must match a registered template object name. This template is used by the content reference. You must specify the template object name, not the template label.</td>
<td>Optional</td>
</tr>
<tr>
<td>Product</td>
<td>4 characters, mixed case, truncated after 4 characters.</td>
<td>Optional value that is stored with the content reference registry entry. Select this value in the registry load process to limit the rows in this file that are to be registered as content references.</td>
<td>Optional</td>
</tr>
<tr>
<td>Column Heading</td>
<td>Format</td>
<td>Use</td>
<td>Required?</td>
</tr>
<tr>
<td>----------------</td>
<td>--------</td>
<td>-----</td>
<td>-----------</td>
</tr>
<tr>
<td>Category</td>
<td>30 characters, uppercase, no spaces.</td>
<td>Used for user organization of the load file. Select this value in the Registry Load process to limit the rows in this file that are to be registered as content references.</td>
<td>Optional</td>
</tr>
<tr>
<td>URL Type</td>
<td>1 character, uppercase</td>
<td>Used to define the type of content reference target page. Values are: E: iScript</td>
<td>Required</td>
</tr>
<tr>
<td>Usage Type</td>
<td>1 character, uppercase</td>
<td>Used to define the use of the content reference target page. Values are: P: Pagelet</td>
<td>Required</td>
</tr>
<tr>
<td>Hidden</td>
<td>1 character, uppercase</td>
<td>Specifies whether the content reference is hidden in the menu navigation. Values are: N: Not hidden</td>
<td>Required</td>
</tr>
<tr>
<td>Fldr 1 Seq (Folder 1 sequence)</td>
<td>4 digits, numeric</td>
<td>Specifies the display order of the level 1 folder.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 1 Name</td>
<td>30 characters, free-form</td>
<td>Level 1 folder label.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 1 Desr (folder 1 description)</td>
<td>254 characters, free-form</td>
<td>Level 1 folder description.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 2 Seq</td>
<td>4 digits, numeric</td>
<td>Specifies the display order of the level 2 folder.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 2 Name</td>
<td>30 characters, free-form</td>
<td>Level 2 folder label.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 2 Desr</td>
<td>254 characters, free-form</td>
<td>Level 2 folder description.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 3 Seq</td>
<td>4 digits, numeric</td>
<td>Specifies the display order of the level 3 folder.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 3 Name</td>
<td>30 characters, free-form</td>
<td>Level 3 folder label.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 3 Desr</td>
<td>254 characters, free-form</td>
<td>Level 3 folder description.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 4 Seq</td>
<td>4 digits, numeric</td>
<td>Specifies the display order of the level 4 folder.</td>
<td>Optional</td>
</tr>
<tr>
<td>Column Heading</td>
<td>Format</td>
<td>Use</td>
<td>Required?</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>----------------------------</td>
<td>-----------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Fldr 4 Name</td>
<td>30 characters, free-form</td>
<td>Level 4 folder label.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 4 Desr</td>
<td>254 characters, free-form</td>
<td>Level 4 folder description.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 5 Seq</td>
<td>4 digits, numeric</td>
<td>Specifies the display order of the level 5 folder.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 5 Name</td>
<td>30 characters, free-form</td>
<td>Level 5 folder label.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 5 Desr</td>
<td>254 characters, free-form</td>
<td>Level 5 folder description.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 6 Seq</td>
<td>4 digits, numeric</td>
<td>Specifies the display order of the level 6 folder.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 6 Name</td>
<td>30 characters, free-form</td>
<td>Level 6 folder label.</td>
<td>Optional</td>
</tr>
<tr>
<td>Fldr 6 Desr</td>
<td>254 characters, free-form</td>
<td>Level 6 folder description.</td>
<td>Optional</td>
</tr>
<tr>
<td>Cref Seq (content reference sequence)</td>
<td>4 digits, numeric</td>
<td>Specifies the display order of the content reference in the lowest level folder.</td>
<td>Optional</td>
</tr>
<tr>
<td>Cref Name</td>
<td>30 characters, free-form</td>
<td>Content reference label.</td>
<td>Required</td>
</tr>
<tr>
<td>Cref Desr</td>
<td>254 characters, free-form</td>
<td>Content reference description.</td>
<td>Optional</td>
</tr>
<tr>
<td>Menu Name</td>
<td>30 characters, uppercase, no spaces</td>
<td>Menu name that stores the component. Used only by components.</td>
<td>Required for components.</td>
</tr>
<tr>
<td>Market</td>
<td>3 characters, uppercase, no spaces</td>
<td>Market associated with the component (usually GBL). Used only by components.</td>
<td>Required for components.</td>
</tr>
<tr>
<td>Panel group</td>
<td>18 characters, uppercase, no spaces</td>
<td>Component name that stores the pages. Used only by components.</td>
<td>Required for components.</td>
</tr>
<tr>
<td>Record Name</td>
<td>15 characters, uppercase, no spaces</td>
<td>Record name that stores the iScript. The record must begin with WEBLIB_. Used only by iScripts.</td>
<td>Required for iScripts.</td>
</tr>
<tr>
<td>Field Name</td>
<td>18 characters, uppercase, no spaces</td>
<td>Field name that stores the iScript. Used only by iScripts.</td>
<td>Required for iScripts.</td>
</tr>
<tr>
<td>Pcode Event Type (PeopleCode event type)</td>
<td>14 characters, mixed case, no spaces</td>
<td>PeopleCode function event that stores the iScript (usually FieldFormula). Used only by iScripts.</td>
<td>Required for iScripts.</td>
</tr>
<tr>
<td>Column Heading</td>
<td>Format</td>
<td>Use</td>
<td>Required?</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>Pcode Function Name</td>
<td>30 characters, mixed case, no spaces</td>
<td>PeopleCode function name that is used to invoke the iScript. This value might contain appended query string parameters if length permits. The function must begin with iScript. Used only by iScripts.</td>
<td>Required for iScripts.</td>
</tr>
<tr>
<td>Portal Object Name</td>
<td>30 characters, uppercase, no spaces</td>
<td>Object name for the content reference. If this column is blank, the value in the content reference label column (Cref Name) is in uppercase and used.</td>
<td>Optional</td>
</tr>
</tbody>
</table>
| Default Column              | 1 digit, numeric              | Defines the default column for the pagelet in the homepage layout. If this column is blank, the default value is 1. Used only by pagelets. Values are:  
  1: First column.  
  2: Second column | Optional                  |
<p>| Edit URL Content Provider   | 30 characters, mixed case, no spaces | Content provider for the edit URL that is used to access the Pagelet Personalization page. The edit URL is listed in the External URL/Edit URL/Related Link column. If no edit URL is specified, leave this column blank. Used only by pagelets. | Optional                  |</p>
<table>
<thead>
<tr>
<th>Column Heading</th>
<th>Format</th>
<th>Use</th>
<th>Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>External URL/Edit URL/</td>
<td>Unlimited long character,</td>
<td>Use of this column depends on the URL type and the usage type of the</td>
<td>Required for External URLs</td>
</tr>
<tr>
<td>Related Link</td>
<td>free-form</td>
<td>content reference:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Component or iScript</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pagelets: (Optional). The URL that is used to access the pagelet</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>personalization page.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Edit URL value for a PeopleSoft personalization page must be</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>of the following form (replacing MENU, MKT, and COMPONENT name</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>with the PeopleSoft values):</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For an 8.44 content provider:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>c:/MENU. COMPONENT. MKT</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For an 8.1x content provider:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>ICType=Panel&amp; Menu=MENU&amp; Market=MKT_NAME&amp;Panel GroupName=COMPONENT</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Component or iScript</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Targets: (Optional). The URL that is used to access the pagelet</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>personalization iScript. The Edit URL</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>value for a PeopleSoft personalization page must be of the following</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>form (replacing RECORD, FIELD, EVENT, FUNCTION name with the</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>PeopleSoft values).</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For an 8.4x content provider:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>s/RECORD. FIELD.EVENT. FUNCTION</td>
<td></td>
</tr>
</tbody>
</table>
### Column Heading | Format | Use | Required?
--- | --- | --- | ---
• For an 8.1x content provider:
  ICType=Script&
  ICScript
  ProgramName=
  RECORD.
  FIELD EVENT.
  FUNCTION
• External Targets: (required). URL that is used to access the external content reference. If no content provider is listed for this content reference, state the complete URL `http://`. If a content provider is used, state only the remaining portion of the URL.

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

See [Registry Load Data Page](#).

### Creating a Portal Registry Load File

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

To create a portal registry load file:

1. Save PORTAL_REG_LOAD_SAMPLE.xls with a different name.
2. Replace the existing rows with your data. The number of rows of data is not limited.

**Note:** Do not put commas or tabs in any of the Microsoft Excel file cells, including the description fields. Commas and tabs disrupt the data stored as a CSV file.
3. Save the file with your data.
4. Delete the row that contains the column headings.
5. Save the file again, with the file type CSV (*.csv).
6. Place the file in a directory that is accessible to the application server for the portal database.

### Running the Portal Registry Load

This section discusses how to:

- Set up the portal registry load message.
- Define inbound file processing.
- Run a process request.
- Monitor application messages.

### Pages Used to Start the Portal Registry Load Message

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Node Definition - Transactions</td>
<td>IB_NODETRXLIST</td>
<td>PeopleTools, Portal, Node Definitions, Transactions</td>
<td>Attach Application Message transactions to a message node definition.</td>
</tr>
<tr>
<td>File Inbound</td>
<td>EO_FILE_INBOUND</td>
<td>Enterprise Components, Integration Definitions, Inbound File Rule</td>
<td>Define inbound file processing.</td>
</tr>
<tr>
<td>Inbound File Publish</td>
<td>EO_FILETOMSG</td>
<td>Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish</td>
<td>Initiate file-to-message processing. The file-to-message processing function reads the file rowset and publishes it as a message.</td>
</tr>
<tr>
<td>Registry Load Data</td>
<td>EO_PE_REG_LOAD</td>
<td>Portal Administration, Navigation, View Registry Load Data</td>
<td>Check the data in the PS_EO_PE_LOAD_DTL and PS_EO_PE_LOAD_FLDR staging tables.</td>
</tr>
</tbody>
</table>

### Setting Up the Portal Registry Load Message

To set up the portal registry load message:

1. In PeopleSoft Application Designer, access the PORTAL_REGISTRY message channel.
2. Navigate to File, Definition Properties to display the Message Channel Properties panel.
3. Click the Use tab.
4. Click Run in the Message Channel Status group box.
5. Click OK to save the channel.
6. In PeopleSoft Application Designer, access the PORTAL_REG_LOAD message.
7. Navigate to File, Definition Properties and click the Use tab.

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

9. Click OK to save the message.

10. Use your browser to log in to your PeopleSoft Interaction Hub database. Access the Node Definitions page.

   Select the local default message node, delivered as PSFT_PA.

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

12. Click Save to save the attached message transactions.

**Defining Inbound File Processing**

To define inbound file processing:

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

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

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

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

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

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

**Running the Inbound File Publish Process**

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


2. Enter a request ID and description.

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

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

5. Click Save.

6. Click Run. Record the process instance number.

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

**Monitoring Application Messages**

To monitor application messages:

1. Access the Application Message Monitor page.
2. Select the Pub Contracts tab.
3. Select a publish node.
4. Select a channel name.
5. Select the message name.
6. Click Refresh.
7. Check the Status field to see if *Done* is displayed for the published message.
8. Select the Sub Contracts tab.
9. Click Refresh.
10. Check the Status field to see if *Done* is displayed for the message subscription contract.
11. Access the Registry Load Data page to check the data in the EO_PE_LOAD_DTL and EO_PE_LOAD_FLDR staging tables.
12. Enter in the inquiry fields specific to your loaded data. Leave the Load Status field blank.
13. Run the Registry Load process.

See the product documentation for *PeopleTools: PeopleSoft Integration Broker*.

**Running the Registry Load Process**

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

- Run the Registry Load process.
- Review and correct errors.

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

**Pages Used to Run the Registry Load Process**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Registry Load</td>
<td>EO_PE_RUN_LOAD</td>
<td>Portal Administration, Navigation, Run Registry Load Click Add a New Value.</td>
<td>Run the Registry Load process.</td>
</tr>
<tr>
<td>Registry Load Data</td>
<td>EO_PE_REG_LOAD</td>
<td>Portal Administration, Navigation, View Registry Load Data</td>
<td>Review and correct loaded data or errors.</td>
</tr>
<tr>
<td>Registry Load Folders</td>
<td>EO_PE_FLDR_SEC</td>
<td>Click the View Folders link on the Registry Load Data page.</td>
<td>View the folder hierarchy for the folders that were created by the Registry Load process.</td>
</tr>
</tbody>
</table>
Understanding Registry Load Process Prerequisites
Before you can run the Registry Load process, perform these tasks:

- Configure and start PeopleSoft Process Scheduler for the application server.
- Set up a run control ID.

Run Registry Load Page
Use the Run Registry Load page (EO_PE_RUN_LOAD) to run the Registry Load process.

Navigation
Portal Administration, Navigation, Run Registry Load

Click Add a New Value.

Image: Registry Load page

This example illustrates the fields and controls on the Registry Load page.

To run the Registry Load process:

1. Select the Register Content option.

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

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

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

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

   The default portal definition is EMPLOYEE.

5. Enter an effective date.
6. Enter an expiration date.

7. Click Run.

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

See the product documentation for *PeopleTools: Portal Technology*.

**Registry Load Data Page**

Use the Registry Load Data page (EO_PE_REG_LOAD) to review and correct loaded data or errors.

**Navigation**

Portal Administration, Navigation, View Registry Load Data

**Image: Registry Load Data page**

This example illustrates the fields and controls on the Registry Load Data page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Portal Name</th>
<th>Load Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the portal name that was specified when you ran the process.</td>
<td>Select the load status of the rows that you want to view. Values are:</td>
</tr>
<tr>
<td><strong>Error in Load Data</strong>: Content references were marked in error during the load process and were not registered.</td>
<td><strong>Not Registered</strong>: The load process did not pick up the content references. For rows that were processed but have a Not Registered status, check to see if the content references object name already exists in the portal registry.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Node Name</th>
<th>URL Type</th>
<th>Product</th>
<th>Instance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Successfully Registered: Load data was successfully entered into the portal registry.

Leave this field clear to view all rows of the staging tables, including those rows that have not been processed.

Search
Click to retrieve applicable registry load data to the page.

View Folders
Click to access the Registry Load Folders page, where you can view the folder hierarchy. The page displays the folder created as well as the folder reference.

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

• Invalid portal name. Use the prompt button to see valid values.
• Blank content reference name (label).
• Blank URL type (component, iScript, or external).
• Incomplete data required for each URL type (for example, a menu name for a component URL type).
• Invalid content provider.
• Invalid template name.
Part III

Part 3: Administering the Search Infrastructure
Chapter 11

Understanding Search in PeopleSoft Interaction Hub

Understanding Search in PeopleSoft Interaction Hub

These topics provide overviews of:

- PeopleSoft Search Framework.
- The search infrastructure.
- Global Search in PeopleSoft Interaction Hub.
- In-feature Search in PeopleSoft Interaction Hub.
- Search definitions and categories.
- Search indexes.
- Search contexts.

Understanding PeopleSoft Search Framework

PeopleSoft Interaction Hub delivers enhanced search functionality that is built on the PeopleSoft Search Framework delivered in PeopleTools. This search framework consists of PeopleSoft components (pages and records provided by PeopleTools), which provide a centralized interface for configuring PeopleSoft integration with a back-end search engine, creating search artifacts like search definitions, search categories, and building and maintaining search indexes. Oracle Secure Enterprise Search (SES) is the back-end search engine on which the PeopleSoft Search Framework relies.

The PeopleSoft Search Framework enables application developers and implementation teams, to create search artifacts in a consistent, declarative manner and to deploy and maintain search indexes using one standard interface, regardless of PeopleSoft application.

See the product documentation for PeopleTools: PeopleSoft Search Technology, “PeopleSoft Search Technology Overview.”

The SES search enables users to incorporate additional sources of content into search groups and adds additional features for users:

- Users can perform a search from anywhere in the portal and retrieve links to documents, managed content, websites, and transactions, all in one place.
- Searches can be performed across the entire portal, or content from other content provider systems.
- Search results are filtered for security to ensure that users see only content to which they have access.
- Searches can be limited to a search group.
Understanding the Search Infrastructure

The following process occurs when a user submits a search request:

1. A user enters a search request in the Search field located in the portal header.
   Depending on access security and portal configuration, a user can search the entire portal or within a search group.

2. The query text is submitted to the PeopleSoft Search Framework.

3. The query string is passed to the SES server.

4. The SES server performs the search and applies security.
   The SES server makes a call back to the PeopleSoft Search Framework where the security is configured for each search definition.

5. The SES server filters the search results for security and returns the search results on the search page.

The search administrator is responsible for defining, deploying search definitions and categories, building and maintaining the search indexes, and defining security that are integral to the SES-based search functionality.

See the product documentation for PeopleTools: PeopleSoft Search Technology.

Understanding Search in PeopleSoft Interaction Hub

You can perform searches in PeopleSoft Interaction Hub by specifying a search string and search group in Global Search, which is available in the portal header. After the results are displayed, you can refine your original search or specify entirely different search criteria and search group. In addition, PeopleSoft Interaction Hub enables users to search content using feature-based search. Both these search options are based on SES.

Note: Both the search options require that you deploy the necessary search definitions and categories.

Deploying Search Definitions and Categories

Global Search

Global Search, formerly called Application Search, provides a way for a user to search across all or a specific group of search indexes. Global Search is available in the portal header throughout the user's session irrespective of the content the user is accessing in the target frame. It allows the user to search and drill down to a specific row and transaction from the search results without navigating to the classic component search page. Global Search can be configured to search across indexes from multiple content provider systems.
In the following example, Global Search has been configured for a PeopleSoft Interaction Hub system.

**Image: Global Search in the portal header**

This example illustrates Global Search in the portal header.

---

**Feature-Based Search**

Many features in PeopleSoft Interaction Hub provide a Search link that allows you to search for content within the scope of that feature. You can search within each of the following:

- Action item lists
- Blogs
- Calendars
- Content management folders
- Discussion forums
- Resource Finder
- Workspaces

**Related Links**

"Understanding Searching in the Portal (PeopleSoft Interaction Hub 9.1: Using Portal Features)"

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**Understanding Search Definitions and Categories**

A search definition maps the PeopleSoft Query fields, web source, or file source, to searchable attributes in the SES search engine.

The search definition also enables you to attach security attributes to restrict access to the search results. The search definition provides the information required by the framework to enable the system to create search results (search documents).

Search categories enable you to group search definitions logically. Since end users run searches against search categories, not individual search definitions, a search definition must belong to at least one search category. It is a requirement that at least one search category exists with exactly the same name as the search definition.
Oracle delivers the required search definitions and search categories for the features of PeopleSoft Interaction Hub.

**Important!** The delivered search definitions and categories must not be modified or deleted.

Delivered Search Definitions and Categories

See the product documentation for *PeopleTools: PeopleSoft Search Technology*

### Delivered Search Definitions and Categories

PeopleSoft Interaction Hub delivers the following search definitions and categories.

**Important!** Oracle recommends that you do not modify or delete the delivered search definitions and categories. The exception is the PAPP_SAMPLE_WEBSOURCE search definition and category, which is delivered as sample source for the PAPP_CONTENT_CRAWLED search category.

For more information on the PAPP_CONTENT_CRAWLED search category, see "Understanding the Content Categorization Process (PeopleSoft Interaction Hub 9.1: Content Management System)".

### Delivered Search Definitions

PeopleSoft Interaction Hub delivers the following search definitions.

<table>
<thead>
<tr>
<th>Search Definition</th>
<th>Description</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_ACTION_ITEMS</td>
<td>Action Items</td>
<td>This search definition contains:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Content from action items.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Document-type content with attachments from action items.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Remarks from action items.</td>
</tr>
<tr>
<td>PAPP_BLOGS</td>
<td>Blogs</td>
<td>This search definition contains content from blogs.</td>
</tr>
<tr>
<td>PAPP_BLOG_POSTS</td>
<td>Blog Posts</td>
<td>This search definition contains content from blog posts.</td>
</tr>
<tr>
<td>PAPPCALENDAR_EVENTS</td>
<td>Calendars</td>
<td>This search definition contains content from calendar events and attachments.</td>
</tr>
<tr>
<td>PAPPCONTENT</td>
<td>Content Author Index</td>
<td>This search definition is an administrator's index accessible from the feature search page displays active content, regardless of published status.</td>
</tr>
<tr>
<td>PAPPCONTENT_PUB</td>
<td>Content</td>
<td>This search definition is accessible from Global Search and includes published content only.</td>
</tr>
<tr>
<td><strong>Search Definition</strong></td>
<td><strong>Description</strong></td>
<td><strong>Usage</strong></td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------</td>
<td>----------</td>
</tr>
<tr>
<td>PAPP CONTENT PUB ARC</td>
<td>Content Archived</td>
<td>This search definition is a published archived content index accessible from Global Search. This index is optional and is provided for users who might want to query archived content.</td>
</tr>
<tr>
<td>PAPP DISCUSSION FORUMS</td>
<td>Discussion Forums</td>
<td>This search definition contains content from active forums of the general discussion category.</td>
</tr>
</tbody>
</table>
| PAPP DISCUSSION POSTS | Discussion Posts | This search definition contains:  
  - Content from posts to general discussion forums.  
  - Content from posts to action items discussions.  
  - Content from posts to content management discussions. |
| PAPP RESOURCE FINDER EXT COMPONENT | Resource Finder External Component | This search definition contains external information of participants. |
| PAPP RESOURCE FINDER PARTICIPANT | Resource Finder Participants | This search definition contains participant content. |
| PAPP SAMPLE WEBSOURCE | Sample source | **Warning!** Do not deploy. Remove from PAPP CONTENT CRAWLED search category before you deploy the search category.  
This search definition is provided as an example of how to define a web source. You must create a custom search definition of type web source only.  
See the product documentation for PeopleTools: PeopleSoft Search Technology, “Creating Web Source Search Definitions.” |
| PAPP WORKSPACES | Workspace Portals | This search definition contains workspace content. |
| PTPORTALREGISTRY | Menu | This search definition contains content references from the portal registry. |
### Search Definition

<table>
<thead>
<tr>
<th>Search Definition</th>
<th>Description</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_CW_ACTION_ITEMS</td>
<td>Workspace Action Items</td>
<td>This search definition contains:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Content from collaborative workspace action items.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Document-type content with attachments from collaborative workspace action items.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Remarks from collaborative workspace action items.</td>
</tr>
<tr>
<td>PAPP_CW_BLOGS</td>
<td>Workspace Blogs</td>
<td>This search definition contains content from collaborative workspace blogs.</td>
</tr>
<tr>
<td>PAPP_CW_BLOG_POSTS</td>
<td>Workspace Blog Posts</td>
<td>This search definition contains content from collaborative workspace blog posts.</td>
</tr>
<tr>
<td>PAPP_CW CALENDARS</td>
<td>Workspace Calendars</td>
<td>This search definition contains content from collaborative workspace calendars.</td>
</tr>
<tr>
<td>PAPP_CW_DISCUSSION_FORUMS</td>
<td>Workspace Discussion Forums</td>
<td>This search definition contains content from collaborative workspace discussion forums.</td>
</tr>
<tr>
<td>PAPP_CW_DISCUSSION_POSTS</td>
<td>Workspace Discussion Posts</td>
<td>This search definition contains content from collaborative workspace discussion posts.</td>
</tr>
<tr>
<td>PAPP_CW_DOCUMENTS</td>
<td>Workspace Documents</td>
<td>This search definition contains content from the Documents module of collaborative workspaces.</td>
</tr>
<tr>
<td>PAPP_CW_LINKS</td>
<td>Workspace Links</td>
<td>This search definition contains collection of links to CREFs, external URLs, etc. from collaborative workspaces.</td>
</tr>
<tr>
<td>PAPP_CW_MEMBERS</td>
<td>Workspace Members</td>
<td>This search definition contains collaborative workspace member data.</td>
</tr>
<tr>
<td>PAPP_CW_WIKI</td>
<td>Workspace Wiki</td>
<td>This search definition contains wiki content from collaborative workspaces.</td>
</tr>
</tbody>
</table>

### Delivered Search Categories

PeopleSoft Interaction Hub delivers the following search categories:

<table>
<thead>
<tr>
<th>Search Category</th>
<th>Description</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_ACTION_ITEMS</td>
<td>Action Items</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>Search Category</td>
<td>Description</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PAPP_BLOG</td>
<td>Blogs</td>
<td><strong>Note:</strong> This search category must be deployed manually. This search category is a composite of the following search definitions:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_BLOGS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_BLOG_POSTS</td>
</tr>
<tr>
<td>PAPP_BLOGS</td>
<td>Blog</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_BLOG_POSTS</td>
<td>Blog Posts</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPPCALENDAR_EVENTS</td>
<td>Calendars</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_CONTENT</td>
<td>Content Author Index</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
</tbody>
</table>
| PAPPCONTENT_CRAWLED   | Content Crawled   | This is an empty search category. It must be deployed manually. System audits require that a search category include at least one search definition. This category includes one example category (PAPP_SAMPLE_WEBSOURCE) to demonstrate how you might configure a web source search definition and to ensure that system audits pass. **Important!** Before deploying the PAPPCONTENT_CRAWLED search category, ensure that you remove the example search category and replace it with at least one valid search category.
<p>|                       |                   | For more information on the PAPPCONTENT_CRAWLED search category, see &quot;Understanding the Content Categorization Process (PeopleSoft Interaction Hub 9.1: Content Management System)&quot;. |
| PAPP_SAMPLE_WEBSOURCE | Sample source     | <strong>Warning!</strong> Do not deploy. Remove from the PAPPCONTENT_CRAWLED search category before you deploy the search category.             |</p>
<table>
<thead>
<tr>
<th>Search Category</th>
<th>Description</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_CONTENT_PUB</td>
<td>Content</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_CONTENT_PUB_ARC</td>
<td>Content Archived</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_DISCUSSIONS</td>
<td>Discussions</td>
<td><strong>Note:</strong> This search category must be deployed manually.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This search category is a composite of the following search definitions:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_DISCUSSION_FORUMS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_DISCUSSION_POSTS</td>
</tr>
<tr>
<td>PAPP_DISCUSSION_FORUMS</td>
<td>Discussion Forums</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_DISCUSSION_POSTS</td>
<td>Discussion Posts</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_RESOURCE_FINDER_EXT_</td>
<td>Resource Finder External Component</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>COMPONENT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAPP_RESOURCE_FINDER_PARTICIPANT</td>
<td>Resource Finder Participant</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_WORKSPACES</td>
<td>Workspace Portals</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>Search Category</td>
<td>Description</td>
<td>Usage</td>
</tr>
<tr>
<td>--------------------------</td>
<td>----------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>PTPORTALREGISTRY</td>
<td>Menu</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed. Additionally, this menu search category can be expanded to include menu search indexes from multiple content providers, so that, when you search using the Menu search group in the PeopleSoft Interaction Hub system, you will see search results from multiple content providers, such as PeopleSoft HRMS, PeopleSoft FSCM and so on. Also, the search results indicate the content provider that provides the content in each transaction. See Setting Up Unified Navigation Menu Search.</td>
</tr>
<tr>
<td>PAPP_CW_ACTION_ITEMS</td>
<td>Workspace Action Items</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_CW_BLOGS</td>
<td>Workspace Blog</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
</tbody>
</table>
| PAPP_CW_BLOG_CATG        | Workspace Blogs      | Note: This search category must be deployed manually. This search category is a composite of the following search definitions:  
  • PAPP_CW_BLOGS  
  • PAPP_CW_BLOG_POSTS |
<p>| PAPP_CW_BLOG_POSTS       | Workspace Blog Posts  | This search category is deployed automatically when the corresponding search definition is deployed. |
| PAPP_CWCALENDARS         | Workspace Calendars  | This search category is deployed automatically when the corresponding search definition is deployed. |
| PAPP_CW_DISCUSSION_FORUMS | Workspace Discussion Forums | This search category is deployed automatically when the corresponding search definition is deployed. |
| PAPP_CW_DISCUSSION_POSTS | Workspace Discussion Posts | This search category is deployed automatically when the corresponding search definition is deployed. |</p>
<table>
<thead>
<tr>
<th>Search Category</th>
<th>Description</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_CW_DOCUMENTS</td>
<td>Workspace Documents</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_CW_LINKS</td>
<td>Workspace Links</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_CW_MEMBERS</td>
<td>Workspace Members</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_CW_WIKI</td>
<td>Workspace Wiki</td>
<td>This search category is deployed automatically when the corresponding search definition is deployed.</td>
</tr>
<tr>
<td>PAPP_CW_WORKSPACES</td>
<td>Workspaces</td>
<td>Note: This search category must be deployed manually. This search category is a composite of the following search definitions:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_CW_ACTION_ITEMS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_CW_BLOG_POSTS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_CWCALENDARS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_CW_DISCUSSION_POSTS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_CW_DOCUMENTS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_CW_LINKS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_CW_WIKI</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• PAPP_WORKSPACES</td>
</tr>
</tbody>
</table>

**Understanding Search Indexes**

PeopleSoft Interaction Hub uses the PeopleSoft Search Framework, which is based on the SES search engine, to define search definitions and build search indexes for use with portal searches. Before end users can submit search requests against the deployed search objects, the search indexes must first be built on the search engine. Prior to the index being built, a deployed search category is an empty shell, containing no searchable data. A search index needs to be built for each individual search category.

PeopleSoft Interaction Hub delivers search definitions and search categories for use with portal searches. You can build search indexes using the delivered search definitions and categories.

**Important!** PeopleSoft Interaction Hub content is not dynamically indexed. The search results are only as current as the last time the search indexing process (or processes) ran. It is the responsibility of the portal administrator to ensure that search indexing is performed on a regular schedule.
The PeopleSoft Search Framework enables you to generate SES-based search indexes using these source types:

- **PeopleSoft Query and Connected Query**
  
  This option provides a familiar and intuitive way to declare the fields relevant for end user searches. With PeopleSoft Query you define your search meta data attributes. You use the Search Framework Designer to map query fields to meta data attributes, save the search definition to the database, and create search categories.

- **Web source**
  
  This option enables you to index content deployed on a website that you want to make available for end user searches.

- **File source**
  
  This option enables you to index files, such as reports, residing in your file system.


**Related Links**

Building Search Indexes

**Understanding Search Contexts**

Search contexts define which search groups appear in the Global Search Bar, depending on the context of the user. That is, depending on where users are in the interface, which determines their context, you can control what appears in the drop-down. Note that a search group is just another name for a search category that you enable for the purpose of setting up search contexts.

Search groups can be added to each of these three search contexts:

- **Home Page**: These are set of search groups available to select when the user is viewing the home page.

- **Portal Node**: These are the search groups available if the user is accessing content from a particular node. There can be more than one search group for the same node.

- **Work Center**: These are the search groups available when the user is accessing content that is part of a WorkCenter template. When in a WorkCenter template, search groups associated with the underlying node will not be part of the search group drop down.

At each of these levels, a default search group can be selected. It is not required to have a default search group for any level.

Use the Search Administration WorkCenter to define and view search contexts. See *Maintaining Search Contexts*.

Chapter 12

Administering Search Indexes

Administering Search Indexes

These topics provide an overview of search indexes and discuss:

- Prerequisites.
- Oracle SES instance.
- Delivered search definitions and categories.
- Deploying search definitions and categories.
- Building search indexes.
- Adding users to search groups.
- Importing remote search groups.
- Maintaining search contexts.
- Creating custom search definitions and categories.
- Setting up unified navigation menu search.

Understanding Search Index Administration

PeopleSoft Interaction Hub uses the PeopleSoft Search Framework, which is based on the Oracle Secure Enterprise Search (SES) search engine, to define search definitions and build search indexes for use with portal searches. Before end users can submit search requests against deployed search objects, the search indexes must first be built on the search engine. Prior to the index being built, a deployed search category is an empty shell, containing no searchable data. A search index needs to be built for each individual search category.

To administer search indexes on a PeopleSoft Interaction Hub system, you must:

1. Complete prerequisite software installation and configuration.
   
   See Prerequisites.

2. Deploy search definitions and categories.
   
   See Deploying Search Definitions and Categories.

3. Build search indexes.
   
   See Building Search Indexes.

4. Add users to search groups.
Adding Users to Search Groups.

5. Maintain search contexts.

See Maintaining Search Contexts

See the product documentation for *PeopleTools: PeopleSoft Search Technology*, “Working with Search Indexes.”

PeopleSoft Interaction Hub provides the Search Administration WorkCenter that enables access to all the transaction pages needed to deploy search definitions and categories, administer search indexes, and perform tasks related to the search functionality. The Build Search Index pagelet (an activity guide pagelet) lists the tasks that you need to complete to deploy search definitions and categories and build search indexes. The PTSF Administration pagelet presents administrative tasks, some of which are necessary to complete setup of search on the PeopleSoft Interaction Hub system.

**Image: Search Administration WorkCenter**

This example illustrates the pagelets in the Search Administration WorkCenter and the target content area.

**Prerequisites**

To configure your PeopleSoft Interaction Hub system for SES, complete the following prerequisite steps:

1. Configure Oracle SES for the PeopleSoft Search Framework. In addition, configure Integration Broker and the integration gateway on your PeopleSoft Interaction Hub system.

   See the product documentation for *PeopleTools 8.53 Installation* for your database platform, “Configuring Integration Between PeopleTools and Oracle SES.”


2. Connect your PeopleSoft Interaction Hub system to the Oracle SES instance.

   See Setting Up Your Oracle SES Instance.
3. Configure single signon (SSO) between your PeopleSoft Interaction Hub system and any content provider systems that host search indexes that you want to include in Global Search.


4. Define the URI text for the default local node (PSFT_PA) and all active local portal host nodes, such as, EMPL, CUST, PART, SUPP, and ENTP (PeopleTools, Portal, Node Definitions) and click the Portal tab.

If the URI text is not set for PSFT_PA, you will see errors when you attempt to access search results for PeopleSoft Interaction Hub features such as action items, blogs, content, discussion forums and so on.

If the URI text is not set for a particular portal host node, then you will see errors when you attempt to access search results for the portal registry assigned to that node (EMPLOYEE for the EMPL node, and so on).

After completing these tasks, you have to deploy search definitions and categories and build search indexes.

See *Deploying Search Definitions and Categories, Building Search Indexes*.

### Setting Up Your Oracle SES Instance

When you create a search instance, you define the connectivity from your PeopleSoft Interaction Hub system to the back-end Oracle SES search engine. This search instance is the basis for the PeopleSoft Search Framework on your PeopleSoft Interaction Hub system.

A single Oracle SES instance can be shared among multiple PeopleSoft applications or even other applications in the enterprise.


### Page Used to Connect to the Oracle SES Instance

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Instance Properties</td>
<td>PTSF_SES_SETTING</td>
<td>PeopleTools, Search Framework, Administration, Search Instance</td>
<td>To connect your PeopleSoft Interaction Hub system to the Oracle SES instance.</td>
</tr>
</tbody>
</table>

**Search Instance Properties Page**

Use the Search Instance Properties page (PTSF_SES_SETTING) to connect your PeopleSoft Interaction Hub system to the Oracle SES instance.
Navigation
PeopleTools, Search Framework, Administration, Search Instance

Image: Search Instance Properties page

This example illustrates the Search Instance Properties page.

1. Add a new value if no search instance has been defined.
2. Enter the values to define a search connection to your search engine instance.
3. Click Save to save your settings.
4. Click the Ping button to test connectivity to the search engine instance.
   The results should show success.
5. Click the Test Login button to test the login credentials at the search engine instance.
   These results should also show success.

Deploying Search Definitions and Categories

PeopleSoft Interaction Hub delivers search definitions and search categories that need to be deployed to the SES search instance so that SES can create the structure of the search index based on the search definition, crawl the defined search criteria, and populate the index with the results of the search definition query. Search categories enable you to group search definitions within logical, manageable groups.

A one–to–one correspondence must exist between a search definition and a search category. For example, the PAPP_ACTION_ITEMS search definition must have a search category of the same name. When you deploy a search definition, the corresponding search category is also deployed automatically.

When a search category is a composite of multiple search definitions, the search category must be deployed manually after deploying each of the search definitions that it contains. For example, the PAPP_BLOG search category must be manually deployed after deploying the PAPP_BLOGS and the PAPP_BLOG_POSTS search definitions.


Pages Used to Deploy Search Definitions and Categories

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deploy Search Definition</td>
<td>PTSF_DEPLOY_SBO</td>
<td>Portal Administration, Search Administration</td>
<td>To deploy search definitions.</td>
</tr>
<tr>
<td>Deploy Search Category</td>
<td>PTSF_DEPLOY_CAT</td>
<td>Portal Administration, Search Administration, Deploy Search Category tab</td>
<td>To deploy search categories.</td>
</tr>
</tbody>
</table>

Deploy Search Definition Page

Use the Deploy Search Definition page (PTSF_DEPLOY_SBO) to deploy search definitions to the Oracle SES instance.
Navigation

Portal Administration, Search Administration, Search Administration WorkCenter

Image: Deploy Search Definition page (page 1 of 2)

This example illustrates the Deploy Search Definition page.
This example illustrates the Deploy Search Definition page (page 2 of 2).

To deploy the delivered PeopleSoft Interaction Hub search definitions to the Oracle SES instance:

1. Select Portal Administration, Search Administration, Search Administration WorkCenter.

2. On the Deploy Search Definition page, select the delivered search definitions.

   **Warning!** Do not deploy the PAPP_SAMPLE_WEBSOURCE search definition. This search definition is delivered as sample source for the PAPP_CONTENT_CRAWLED search category.

3. Optionally, select the portal registry menu definition (PTPORTALREGISTRY).

4. Click the Deploy button to deploy the selected definitions.

   When the deployment completes for each search definition, the Deploy Status for the search definition will change to Deployed.


**Deploy Search Category Page**

Use the Deploy Search Category page (PTSF_DEPLOY_CAT) to manually deploy the composite search categories.
Navigation
1. Portal Administration, Search Administration, Search Administration WorkCenter
2. On the Deploy Search Definition page, click the Deploy Search Category tab.

Image: Deploy Search Category page (page 1 of 2)

This example illustrates the Deploy Search Category page (page 1 of 2).
This example illustrates the Deploy Search Category page (page 2 of 2).

<table>
<thead>
<tr>
<th>Position</th>
<th>Category Name</th>
<th>Description</th>
<th>Definition Type</th>
<th>Deploy Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>PAPP_CWCALENDARS</td>
<td>Workspace Calendars</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>15</td>
<td>PAPP_CW_DISCUSSION FORUMS</td>
<td>Workspace Discussion Forums</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>16</td>
<td>PAPP_CW_DISCUSSION POSTS</td>
<td>Workspace Discussion Posts</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>17</td>
<td>PAPP_CWDOCUMENTS</td>
<td>Workspace Documents</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>18</td>
<td>PAPP_CWLINKS</td>
<td>Workspace Links</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>19</td>
<td>PAPP_CW_MEMBERS</td>
<td>Workspace Members</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>20</td>
<td>PAPP_CW_WIKI</td>
<td>Workspace Wiki</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>21</td>
<td>PAPP_CW_WORKSPACES</td>
<td>Workspaces</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>22</td>
<td>PAPP_DISCUSSIONS</td>
<td>Discussions</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>23</td>
<td>PAPP_DISCUSSION FORUMS</td>
<td>Discussion Forums</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>24</td>
<td>PAPP_DISCUSSION POSTS</td>
<td>Discussion Posts</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>25</td>
<td>PAPP_ResourceFinder_EXT_COMPONENT</td>
<td>Resource Finder External Component</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>26</td>
<td>PAPP_ResourceFinder_PARTICIPANT</td>
<td>Resource Finder Participant</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>27</td>
<td>PAPP_SAMPLE_WEBSOURCE</td>
<td>Sample source. Do not deploy. Remove from Crawled Content Search Category before deploying</td>
<td>PTSF_DEFAULT</td>
<td>Undeployed</td>
</tr>
<tr>
<td>28</td>
<td>PAPP_WORKSPACES</td>
<td>Workspace Portals</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
<tr>
<td>29</td>
<td>PTPORTALREGISTRY</td>
<td>Menu</td>
<td>PTSF_DEFAULT</td>
<td>Deployed</td>
</tr>
</tbody>
</table>

To deploy the PeopleSoft Interaction Hub search categories to the Oracle SES instance:

1. Select Portal Administration, Search Administration, Search Administration WorkCenter.
2. On the Deploy Search Definition page, click the Deploy Search Category tab.
3. On the Deploy Search Category page, select the delivered PeopleSoft Interaction Hub search categories.
4. Click the Deploy button to deploy the selected search categories.

When the deployment completes for each search category, the Deploy Status for the search category will change to Deployed.


### Building Search Indexes

After deploying the delivered search definitions and categories, you must build search index for each search definition. If you deploy any custom search definitions and categories, you must also build search indexes for these custom search definitions. These search indexes provide search functionality through the Global Search and the feature-based search pages.
Page Used To Build Search Index

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build Search Index</td>
<td>PTSF_SCHEDULE_SI</td>
<td>Portal Administration, Search Administration</td>
<td>Set up and run the Build Search Index process.</td>
</tr>
</tbody>
</table>

**Build Search Index Page**

Use the Build Search Index page (PTSF_SCHEDULE_SI) to build search indexes for the deployed search definitions.

**Navigation**

1. Portal Administration, Search Administration, Search Administration WorkCenter
2. On the Build Search Index pagelet, for example, click the Blogs link.

**Image: Build Search Index page**

This example illustrates the Build Search Index page.

To build a PeopleSoft Interaction Hub search index:

1. Select Portal Administration, Search Administration, Search Administration WorkCenter.
2. On the Build Search Index pagelet, click a search category for which you want to build an index. As an example, click the Blogs link.
The Build Search Index page appears in the target content area. The Run Control ID and the Search Definition fields are populated with values associated with the selected search category.

**Note:** The delivered run controls must not be modified, so you cannot change the Indexing Type and the Language Option. To modify these options, you have to create new run controls.

3. Click Run.

4. Use Process Monitor to verify program completion and success.

5. Repeat steps 1 through 4 to build search indexes for search categories as needed.

### Adding Users to Search Groups

PeopleSoft Interaction Hub delivers default assignments of search groups to permission lists. Therefore, for your users to access any of the Global Search search groups defined in the portal header, you must add these users to one or more relevant roles that contain the appropriate permission list.

**Note:** The assignment of users to roles that contain the permission lists provides the users with access to the search groups on Global Search only. They can access the search results on the feature-based search pages irrespective of whether they were assigned to the permission list through a role.

<table>
<thead>
<tr>
<th>Search Group</th>
<th>Permission List</th>
<th>Permission List Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Items</td>
<td>PAPP5600</td>
<td>Access Action Items</td>
</tr>
<tr>
<td>Blogs</td>
<td>PAPP5710</td>
<td>Access Blogs</td>
</tr>
<tr>
<td>Calendars</td>
<td>PAPP5500</td>
<td>Access Community Calendars</td>
</tr>
<tr>
<td>Content Crawled</td>
<td>PAPP2010</td>
<td>Access Content Management</td>
</tr>
<tr>
<td>Content Management</td>
<td>PAPP2010</td>
<td>Access Content Management</td>
</tr>
<tr>
<td>Discussion Forums</td>
<td>PAPP4810</td>
<td>Access Discussion Forums</td>
</tr>
<tr>
<td>Published Content</td>
<td>PAPP2000</td>
<td>Access Published Content</td>
</tr>
<tr>
<td>Workspaces</td>
<td>PAPP5300</td>
<td>Access Workspaces</td>
</tr>
</tbody>
</table>

To add a user to a role that contains the delivered permission list:

1. Access the User Profiles page. (PeopleTools, Security, User Profiles, User Profiles)

2. Select the user to whom you want to assign a role.

3. Go to the Roles page.
4. Add the role or roles that contains the delivered permission lists to this user.

**Image: Roles page**

This example illustrates the fields and controls on the Roles page.

<table>
<thead>
<tr>
<th>User Roles</th>
<th>Description</th>
<th>Dynamic</th>
<th>View Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>EOTF_ADMIN</td>
<td>Transform Framework Admin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integration Administrator</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAPI_EXTERNAL_ADMIN</td>
<td>External Investor Portal Admin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAPI_GUEST</td>
<td>Investor Portal Guest</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAPI_IP_ADMIN</td>
<td>Communications Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAPI_IP_COMMGR</td>
<td>Executive Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAPI_IP_EXECSMR</td>
<td>Categorized Content Admin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAPICONTENT_ADMIN</td>
<td>Content Administrator</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

5. Save your changes.

6. Repeat steps 1 through 5 for additional users as needed.

**Importing Remote Search Groups from Content Providers**

When you import remote search groups, you add remote search group definitions from content provider systems to your PeopleSoft Interaction Hub system.

**Remote Search Groups Page**

Use the Remote Search Groups page (PTSF_IMPORTED_SG) to import remote search groups from content provider systems.
Navigation

1. Portal Administration, Search Administration, Search Administration WorkCenter
2. On the PTSF Administration pagelet, under Administration folder, click Remote Search Groups.

Image: Remote Search Groups page

This example illustrates the fields and controls on the Remote Search Groups page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Content Provider</th>
<th>Select the remote node defined in your system from which you want to import search groups.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Content providers must be defined as nodes known to your system using Integration Broker.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Import</th>
<th>Click to invoke the import process. This will import all search groups from the selected node.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Note:</strong> Importing remote search groups retrieves all the search groups defined in that content provider system along with all related search categories, associated search definitions, and the list of faceted attributes.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delete</th>
<th>Click to remove any unnecessary or obsolete search groups from your system.</th>
</tr>
</thead>
</table>


Maintaining Search Contexts

When you add search categories to a search context, you define which search groups you want to appear in which context in your system. You can configure search contexts for the portal homepage, for each portal node defined in the system, and for WorkCenter templates. In this task, you will define the search categories that appear on the portal homepage.

Define Search Context Page

Use the Define Search Context page (PTUS_CTX_DEF) to define the search categories that appear on the portal homepage.
Navigation

1. Portal Administration, Search Administration, Search Administration WorkCenter

2. On the PTSF Administration pagelet, under the Administration folder, click Define Search Context.

**Image: Define Search Context page**

This example illustrates the fields and controls on the Define Search Context page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Default</th>
<th>Select for the category that should be the default if the end user does not select a particular category.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Only one default search category can be selected for a search context.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If none of the categories is selected as the default category, then &quot;All&quot; will be the default, which means users can search across all search groups to which they have access.</td>
</tr>
<tr>
<td>Sequence</td>
<td>Specify a numerical sequence to define the order in which the search categories will appear in Global Search.</td>
</tr>
<tr>
<td>Search Category Name</td>
<td>Select the search category to include for this search context.</td>
</tr>
</tbody>
</table>


**Creating Custom Search Definitions and Categories**

A search definition maps the PeopleSoft Query fields, web source, or file source, to searchable attributes in the SES search engine. The search definition also enables you to attach security attributes to restrict access to the search results. The search definition provides the information required by the framework to enable the system to create search results (search documents).

Search categories enable you to group search definitions logically. A search definition must belong to at least one search category. End users run searches against search categories, not individual search
definitions. It is a requirement that at least one search category exists with exactly the same name as the search definition.

The PeopleSoft Interaction Hub system delivers search definitions and search categories. You can also create your own custom search definitions and search categories.


For creating custom search categories, see the product documentation for *PeopleTools: PeopleSoft Search Technology*, “Creating Search Categories.”

**Setting Up Unified Navigation Menu Search**

The PTPORTALREGISTRY search category can be expanded to include menu search indexes from multiple content providers.

Before you configure Unified menu search group, ensure that you complete the following prerequisites for SES implementation in PeopleSoft Interaction Hub:

1. Configure the PeopleSoft Search Framework and deploy Menu SES search index in your PeopleSoft Interaction Hub system and any content provider systems. A common Oracle SES server must be used by all systems.

2. Configure unified navigation between your PeopleSoft Interaction Hub system and any content provider systems.

For the steps to complete the configuration of Unified menu search group, see the product documentation for *PeopleSoft Portal Solutions 9.1 Revision 2 Installation*, “Configuring Global Search Using Oracle Secure Enterprise Search,” Task 2-21-5: Configuring Unified Menu Search Group through SES Console.
The following example shows unified search menu and search results that display the source of the content in the summary:

**Image: Unified search menu**

This example illustrates the Unified search menu.
Part IV

Part 4: Site Management
Chapter 13

Site Management Overview

This topic provides an overview of PeopleSoft Interaction Hub Site Management.

Understanding Site Management

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

Image: Site Management flow

The following graphic illustrates the Site Management process flow.

The functions of Site Management can be performed by users or roles appointed by the portal administrator.
1. A branding administrator creates branding theme elements that can be used on sites.

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

3. A site administrator can override branding themes (if authorized), appoint site publishers and viewers, set default security and templates, and configure the site's front page.

4. A site publisher can manage site navigation and content.

5. A site viewer can view the site.

Using Portal Features on Sites

This section describes which features of PeopleSoft Interaction Hub are available for use on sites. We also indicate whether the features available on sites can be configured uniquely for that site, or must be shared across the entire PeopleSoft Interaction Hub.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Site Specific Configuration?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Branding</td>
<td>Yes</td>
</tr>
<tr>
<td>Context Manager: Content Ratings</td>
<td>Yes</td>
</tr>
<tr>
<td>Context Manager: Related Contacts</td>
<td>Yes</td>
</tr>
<tr>
<td>Context Manager: Related Discussions</td>
<td>Yes</td>
</tr>
<tr>
<td>Context Manager: Related Information</td>
<td>Yes</td>
</tr>
<tr>
<td>Context Manager: Related Links</td>
<td>Yes</td>
</tr>
<tr>
<td>Context Manager: Related Resources</td>
<td>Yes</td>
</tr>
<tr>
<td>Discussion Forums</td>
<td>Yes</td>
</tr>
<tr>
<td>Email pagelet and Calendar Events pagelet</td>
<td>No</td>
</tr>
<tr>
<td>External News pagelets</td>
<td>No</td>
</tr>
<tr>
<td>Inquire Menu Item</td>
<td>Yes</td>
</tr>
<tr>
<td>Tasks pagelet</td>
<td>No</td>
</tr>
<tr>
<td>Internet pagelets (weather, stock, and so forth)</td>
<td>No</td>
</tr>
<tr>
<td>Language Selection pagelet</td>
<td>No</td>
</tr>
<tr>
<td>User Logon Statistics pagelet</td>
<td>No</td>
</tr>
<tr>
<td>Manage Navigation</td>
<td>Yes</td>
</tr>
<tr>
<td>Managed Content</td>
<td>Yes</td>
</tr>
<tr>
<td>Feature</td>
<td>Site Specific Configuration?</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>My Links</td>
<td>Yes</td>
</tr>
<tr>
<td>News Publications (and News Publication pagelets)</td>
<td>Yes, with appropriate security.</td>
</tr>
<tr>
<td>Pagelet Wizard</td>
<td>Yes—Pagelet definitions are not site specific, but pagelets can be registered to specific sites.</td>
</tr>
<tr>
<td>Portal Registry (Favorites, tabs, pagelets, content references, and so forth.)</td>
<td>Yes</td>
</tr>
<tr>
<td>Portal Options</td>
<td>No—Not delivered to sites by default.</td>
</tr>
<tr>
<td>Resource Finder</td>
<td>No</td>
</tr>
<tr>
<td>Saved Searches</td>
<td>No</td>
</tr>
<tr>
<td>Search Results</td>
<td>Yes—Results can either be local or include all sites in the portal.</td>
</tr>
<tr>
<td>Navigation Collections</td>
<td>Yes</td>
</tr>
<tr>
<td>Site Manager Center</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Navigating in PeopleSoft Interaction Hub Site Management

This topic discusses how to navigate in PeopleSoft Interaction Hub Site Management.

Navigating in PeopleSoft Interaction Hub Site Management

PeopleSoft Interaction Hub Site Management provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note: In addition to the PeopleSoft Interaction Hub Site Management custom navigation pages, the PeopleSoft system provides menu navigation and standard navigation pages.

See the product documentation for PeopleTools: PeopleSoft Applications User's Guide.

Using the Site Manager Center Navigation

Access a site. Click the Site Manager Center link at the root level of the menu.

These options are also available from the Administration tab on the site's homepage.

Image: Site Manager Center page

This example illustrates the Site Manager Center page.

Use the Site Manager Center accessed from within a site to manage the site's security, layout, and publishing, and branding.

The following tables list the custom navigation pages and how to use them to navigate in PeopleSoft Interaction Hub Site Management.

Site Administration

This table lists the features that you can access from Site Administration:
### Define Site Security
Specify who is authorized to publish or view site content.

### Define Publishing Defaults
Specify the publishing defaults that apply to each new element added to the site unless specifically overridden on that element.

### Configure Homepage
Configure the layout and select the pagelets to be displayed on the site's default homepage.

### Specify Site Features
Select the features that are accessible within the site.

---

**Site Publishing**

Maintain the navigation and Managed Content pagelets for the current site. This table lists the features that you can access from Site Publishing:

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Navigation</td>
<td>This utility is used to administer the menu folders and links for this site.</td>
</tr>
<tr>
<td>Update Content Pagelets</td>
<td>Edit the content ID associated with existing Managed Content pagelets.</td>
</tr>
</tbody>
</table>

---

**Site Branding**

Review branding data and override allowed branding elements to manage the look and feel of the current site. This table lists the features that you can access from Site Branding:

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Override Homepage Header</td>
<td>Override branding values for site's homepage header.</td>
</tr>
<tr>
<td>Override Target Page Header</td>
<td>Override branding values for site's target page header.</td>
</tr>
<tr>
<td>Override Homepage Footer</td>
<td>Override branding values for site's homepage footer.</td>
</tr>
<tr>
<td>Branding Queries</td>
<td>Access queries that list the details for sites and role assignments, themes, and header and footer definitions.</td>
</tr>
</tbody>
</table>
Using the Site Publisher Center

Navigation

Access a site. Click the Site Publisher Center link at the root level of the menu.

These options are also available from the Administration tab on the site's homepage.

Image: Site Publisher Center page

This example illustrates the fields and controls on the Site Publisher Center page.
Chapter 15

Managing Sites

Managing Sites

This topic provides an overview of PeopleSoft Interaction Hub Site Management and discusses how to create new sites using the Site Wizard.

Understanding Site Creation and Management

The Site Manager Center page consolidates access to the activities required to create and manage sites. Enterprises that require multiple sites within their main portal can use the Site Management tools to quickly create and configure subsites to their portal. These sites inherit characteristics from the main portal, but maintain their own navigation. Sites can also carry branding specifically designed to meet the site's requirements.

Site Management enables a portal administrator to create new sites that inherit infrastructure properties of the sponsor portal. The portal administrator initially authorizes site branding, page templates, and pagelets, and assigns site administrators. Subsequent site management can be delegated to site administrators who specify site specific branding values, set publishing defaults, and lay out the sites' homepage. The site administrator also manages security for site content publishers and site viewers.

See the product documentation for PeopleSoft Portal Solutions 9.1 Revision 2 Installation, “Creating Content Provider Navigation Collections.”

Create and maintain a site by:

1. Creating a new site definition.

   A portal administrator normally defines portal sites.

   or:

2. Updating an existing site definition.

   A portal administrator normally manages portal sites.

3. Reviewing available branding themes.

   Note: Depending on the user's security, a user can have either add/update or read-only access to the branding feature.

   A branding administrator normally defines branding themes.

Administer a site by:

1. Setting site security.

2. Setting publishing defaults.
3. Configuring the site homepage.

4. Configuring site specific branding values (Manage Site Branding).

A site administrator normally administers site navigation.

Publish content to a site by:

1. Managing site navigation.

2. Updating homepage content.

If you choose a site administration or management task within the main portal, it takes effect for the portal. To perform administration or to manage navigation for a site, you must first access the site. To do this, select Go to Site on the Manage Sites page and then navigate to the task you want to perform. Within a site, only site administration, site navigation management, and branding management tasks will be available.

A site administrator normally administers site branding.

Control site branding by:

- Overriding homepage headers and footers.

- Override target page headers and footers.

- Run branding queries.

**Common Elements Used in Site Management**

**Branding theme**

A branding theme consists of predefined headers and a style sheet, and an optional footer and restyled menu. Each site can optionally use the default portal theme or a site-specific theme.


**Portal**

As used in the context of site management, the portal is the default portal, as specified on the Portal Definitions page (PeopleTools, Portal, Portal Definitions). The portal is sometimes called the sponsor portal, because other sites can inherit elements of the sponsor portal.

Create new sites using the Site Wizard only from the portal. The delivered default portal is the EMPLOYEE portal.

**PS_SITETEMPLATE**

PS_SITETEMPLATE is a defined collection of templates, pagelets, and menu items on which all new sites are based. These values are stored in a portal registry of the same name, and can be accessed in the Structure and Content component using the corresponding portal URL address.

**Site**

A site is created using the Site Wizard. Each site is defined in relation to the defaults and themes of its sponsor portal.
Each site could be considered a separate portal, but instead PeopleSoft distinguishes between a portal and its sites.

**Site administrator**
A site administrator is the person authorized by a portal administrator to manage security, publishing defaults, branding overrides, and homepage layout for a site.

The site administrator can be assigned by role or by user ID.

**Site management**
Site management is the set of tasks grouped together in PeopleSoft Interaction Hub to create and manage sites.

**Site publisher**
A site publisher is a person authorized by a site administrator to manage site navigation and update homepage content. A site publisher can be assigned by role or by user ID.

A site publisher is not a site viewer unless specifically authorized as a viewer.

**Site viewer**
A site viewer is a person authorized by a site administrator to view site content.

A site viewer can be assigned by role or by user ID.

**Creating Sites**
This section discusses how to:

- Define a site.
- Authorize site branding.
- Use overrides with default portal assignments.
- Use site-specific themes.
- Appoint a site administrator.
- Specify site templates.
- Specify site pagelets.
## Pages Used to Create Sites

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Wizard - Site Definition</td>
<td>EPPSM_SITE_DEFN</td>
<td>• Portal Administration, Site Management, Create New Sites</td>
<td>Define portal sites.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the icon for step 1 while you are on any page in the Site Wizard.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Portal Administration, Site Management, Maintain Existing Sites.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Add New Site button.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Portal Administration, Site Management, Maintain Existing Sites.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Edit button.</td>
<td></td>
</tr>
<tr>
<td>Site Wizard - Authorize Site Branding</td>
<td>EPPSM_SITE_BRNDING</td>
<td>• Click Next on the Site Wizard - Site Definition page.</td>
<td>Set branding options.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the icon for step 2 while you are on any page in the Site Wizard.</td>
<td>Overridable elements and branding themes must be defined in the portal before being used on a site.</td>
</tr>
<tr>
<td>Select Branding Overrides</td>
<td>EPPSM_ELT.Assign</td>
<td>Click the Select Overridable Elements button on the Site Wizard - Authorize Site Branding page.</td>
<td>Choose to allow overrides of selected elements of the theme assigned by the main portal. This can vary by user if role-based theme assignments have been specified.</td>
</tr>
<tr>
<td>Select Branding Theme and Overrides</td>
<td>EPPSM_THM.Assign</td>
<td>Click the Select Theme and Overrides button on the Site Wizard - Authorize Site Branding page.</td>
<td>Authorize overrides of selected branding elements of the specified theme.</td>
</tr>
<tr>
<td>Site Wizard - Appoint Site Administrator</td>
<td>EPPSM_SITE_ADMIN</td>
<td>• Click the Next button on the Site Wizard - Authorize Site Branding page.</td>
<td>Specify the users or roles authorized to administer this site.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the icon for step 3 while you are on any page in the Site Wizard.</td>
<td></td>
</tr>
<tr>
<td>Site Wizard - Select Site Features</td>
<td>EPPSM_SITE_FEATURE</td>
<td>• Click the Next button on the Site Wizard - Appoint Site Administrator page.</td>
<td>Specify the features you want to enable on the site.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the icon for step 4 while you are on any page in the Site Wizard.</td>
<td></td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-----------------</td>
<td>----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Site Wizard - Specify Site Templates</td>
<td>EPPSM_SITE_TEMPLTS</td>
<td>• Click the Next button on the Site Wizard - Appoint Site Administrator page.</td>
<td>Specify the templates available to site publishers when adding links to the site menu navigation.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the icon for step 5 while you are on any page in the Site Wizard.</td>
<td></td>
</tr>
<tr>
<td>Site Wizard - Specify Site Pagelets</td>
<td>EPPSM_SITE_PAGELTS</td>
<td>• Click the Next button on the Site Wizard - Specify Site Templates page.</td>
<td>Specify which pagelets will be available to site administrators when configuring the site homepage.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the icon for step 6 while you are on any page in the Site Wizard.</td>
<td></td>
</tr>
</tbody>
</table>

**Site Wizard - Site Definition Page**

Use the Site Wizard - Site Definition page (EPPSM_SITE_DEFN) to define portal sites.
Navigation

- Portal Administration, Site Management, Create New Sites
- Click the icon for step 1 while you are on any page in the Site Wizard.
- Portal Administration, Site Management, Maintain Existing Sites. Click the Add New Site button.

   Portal Administration, Site Management, Maintain Existing Sites. Click the Edit button.

**Image: Site Wizard - Site Definition page**

This example illustrates the fields and controls on the Site Wizard - Site Definition page. You can find definitions for the fields and controls later on this page.

**Site ID**

Specify a site ID to identify this site. The site ID cannot contain spaces.

The site ID is used as the identifier for the portal registry created to support this site.

The Site ID field value appears in the list of sites you can select from on the Manage Sites page.

**Site Label**

Enter the label you want to use for the site. This site label appears in email alerts for the site.

**Long Description**

Enter a description of the site.
The long description appears as the link hover text for this site in the sponsor portal's menu navigation.

The Long Description field value appears in the list of sites you can select on the Manage Sites page.

**Default Template**
Select a default template for site content from the drop-down list box.

The default template is used for all content pages within the site unless overrides are authorized by the site administrator in the Define Publishing Defaults component. The templates available in the drop-down list box are those defined in PS_SITETEMPLATE.

**Label**
Specify a label that will appear in the sponsor portal's navigation.

**Navigation Folder**
Select the navigation folder in which you want a link to this site to appear on users' menus.

This link definition is optional. The link can be created later using the Managing Navigation component within the portal to add a link with the type *Portal Site*.

See [Managing Site Navigation](#).

Folders available in the drop-down list box are those available in the sponsor portal.

**Note:** If you choose to select a navigation folder for this site, the link may not appear in the portal menu until the menu is refreshed.

**Create Site**
After defining the new site, click to initiate the system processing for site creation. This process can take several minutes; do not interrupt it.

A message appears to indicate successful creation of the new site and to prompt you to continue to the next step.

**Related Links**

- Permission Lists and Roles Cloned When Creating Sites
- **Site Wizard - Authorize Site Branding Page**
Use the Site Wizard - Authorize Site Branding page (EPPSM_SITE_BRNDING) to set branding options.
Navigation

- Click Next on the Site Wizard - Site Definition page.
- Click the icon for step 2 while you are on any page in the Site Wizard.

Image: Site Wizard - Authorize Site Branding page

This example illustrates the fields and controls on the Site Wizard - Authorize Site Branding page. You can find definitions for the fields and controls later on this page.

Note: Overridable elements and branding themes must be defined in the portal before being used on a site.

Use Default Portal Assignments

Select for this site to display the same theme as the default (sponsor) portal. Themes assigned can vary depending on user roles.

Using the default portal assignments applies the role-based branding rules or portal branding defaults defined for the default portal. If you select the default portal theme after previously selecting a site-specific theme, data for site-specific branding is deleted.

Select Overridable Elements

Click to access the Select Branding Overrides page, where you can enable those elements that can be configured by the site administrator with site specific values. Overridable elements are optional. A new site can inherit the portal's branding theme without any changes.

Because you will not know what theme will apply, the list includes all elements that have been specified as overridable on the system elements page in the Branding feature. Be aware that you do not know which elements will ultimately be active in your user's displayed theme. The site may have overriding branding element values that never appear.
Use Site Specific Theme
Select to enable selection of a branding theme specifically for this site. All users will see the same branding theme.

If you select a site-specific theme after previously selecting Use Default Portal Assignments, data for the inherited theme overrides is deleted.

Select Theme and Overridables
Click to access the Select Branding Theme and Overrides page, where you can select a branding theme for this site, and to specify which elements used in that theme, if any, can be overridden by the site administrator.

Note: Branding themes cannot be created from the Authorize Site Branding page. Only existing branding themes defined in the default portal are available for use on sites.

Select Branding Overrides Page
Use the Select Branding Overrides page (EPPSM_ELT_ASSIGN) to choose to allow overrides of selected elements of the theme assigned by the main portal.

This can vary by user if role-based theme assignments have been specified.
Navigation

Click the Select Overridable Elements button on the Site Wizard - Authorize Site Branding page.

Image: Select Branding Overrides page

This example illustrates the fields and controls on the Select Branding Overrides page. You can find definitions for the fields and controls later on this page.

Before specifying site branding, you can examine the existing theme, header, and footer definitions by accessing the Site Manager Center page and navigating to Site Branding, Branding Queries. These queries enable you to see which theme each portal uses and therefore, what the site will inherit.

Effective Date    Specify the effective date for this site specific theme.
Override Section

Select from the drop-down list the section of the default theme for which you will select elements that can be overridden by the site administrator.

The override elements are grouped in three sections. Select from:

*Homepage Footer.*

*Homepage Header.*

*Target Page Header.*

Note that authorizing overrides does not specify or limit the resulting override; it merely authorizes the site administrator to override the selected element.

Overridable Elements

Use the Overridable Elements scroll area to specify if a site administrator can override each overridable element. The overridable elements available for selection are those elements defined as "overridable" on the System Elements page.

Select Branding Theme and Overrides Page

Use the Select Branding Theme and Overrides page (EPPSM_THM_ASSIGN) to authorize overrides of selected branding elements of the specified theme.
Navigation

Click the Select Theme and Overrides button on the Site Wizard - Authorize Site Branding page.

Image: Select Branding Theme and Overrides page

This example illustrates the fields and controls on the Select Branding Theme and Overrides page. You can find definitions for the fields and controls later on this page.

**Effective Date**
Specify the effective date for this site specific theme.

**Description**
Specify a description for this theme as used on this site.
Theme ID
Specify the theme ID of a theme to apply to this site. The theme must already exist, with an appropriate effective date, in the main portal.

Details
Click to access the Assemble Branding Theme page, where you can view details about the selected theme.

You can drill down to details about each theme element. Depending on your permissions, you can view, add, or edit the elements. You can also preview how the element will appear on the site.

See "Configuring Headers and Footers (PeopleSoft Interaction Hub 9.1: Branding)".

Override Section
Select the section of the default theme for which you will select elements that can be overridden by the site manager.

The override elements are grouped in three sections. Select from:

Homepage Footer.
Homepage Header.
Target Page Header.

Note that authorizing overrides does not specify or limit the resulting override, but only authorizes the site administrator to override the selected element.

Overridable Elements
This scroll area displays once you have selected a theme ID.

Use the Overridable Elements scroll area to specify if a site administrator can override each overridable element.

The available overridable elements available for selection depend on the elements defined as overridable in the theme’s header and footer definitions as of the effective date entered.

Site Wizard - Appoint Site Administrator Page
Use the Site Wizard - Appoint Site Administrator page (EPPSM_SITE_ADMIN) to specify the users or roles authorized to administer this site.
Navigation

- Click the Next button on the Site Wizard - Authorize Site Branding page.
- Click the icon for step 3 while you are on any page in the Site Wizard.

**Image: Site Wizard - Appoint Site Administrator page**

This example illustrates the fields and controls on the Site Wizard - Appoint Site Administrator page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Site Wizard</th>
<th>Step 3 of 6</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Site Wizard Image" /></td>
<td></td>
</tr>
</tbody>
</table>

**Appoint Site Administrator**

Specify who is authorized to perform site administration tasks on the new site.

<table>
<thead>
<tr>
<th>Security Privileges</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td><strong>Authorization Entry</strong></td>
</tr>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Role</td>
</tr>
<tr>
<td>[PAPP_SITE_MGMT_ADMIN]</td>
</tr>
<tr>
<td>Site Management Administrator</td>
</tr>
</tbody>
</table>

**Type**

Select the type of site administrator you want to define for this entry: *User* or *Role*.

**Authorization Entry**

Based on the value you selected in the Type field, specify an authorized administrator by user ID or role.

**Site Wizard - Select Site Features Page**

Use the Site Wizard - Select Site Features page (EPPSM_SITE_FEATURE) to specify the features you want to enable on the site.
Navigation

- Click the Next button on the Site Wizard - Appoint Site Administrator page.
- Click the icon for step 4 while you are on any page in the Site Wizard.

Image: Site Wizard - Select Site Features page

This example illustrates the fields and controls on the Site Wizard - Select Site Features page.

<table>
<thead>
<tr>
<th>Features</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Items</td>
<td>Access assignable task-based action items and lists</td>
</tr>
<tr>
<td>Categorized Content</td>
<td>Access the Categorized Content items for the site</td>
</tr>
<tr>
<td>Community Calendars</td>
<td>Access shared community-based calendars</td>
</tr>
<tr>
<td>Discussion Forums</td>
<td>Access threaded discussions topics within forums</td>
</tr>
<tr>
<td>Manage Navigation</td>
<td>Manage the navigational menu items for the site</td>
</tr>
<tr>
<td>Managed Content</td>
<td>Access the Managed Content items for the site</td>
</tr>
<tr>
<td>Navigation Collections</td>
<td>Create and update navigation collections</td>
</tr>
<tr>
<td>News Publications</td>
<td>Access the News Publication items for the site</td>
</tr>
<tr>
<td>Pagelet Wizard</td>
<td>Define Pagelet Wizard pagelets</td>
</tr>
<tr>
<td>Polls</td>
<td>Create and access Poll definitions</td>
</tr>
</tbody>
</table>

Use this page to enable features for your site. Features that are not selected still exist in the system, but will not be visible in the site unless they are selected. Data and content references are hidden from the portal navigation, but not deleted. The list of features comes from PS_SITETEMPLATE and includes content references, pagelets, and folders.

Site Wizard - Specify Site Templates Page

Use the Site Wizard - Specify Site Templates page (EPPSM_SITE_TEMPLTS) to specify the templates available to site publishers when adding links to the site menu navigation.
Navigation

- Click the Next button on the Site Wizard - Appoint Site Administrator page.
- Click the icon for step 5 while you are on any page in the Site Wizard.

Image: Site Wizard - Specify Site Templates page

This example illustrates the fields and controls on the Site Wizard - Specify Site Templates page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>PT_64X_DEFAULT_TEMPLATE</td>
<td>8.4x default template</td>
</tr>
<tr>
<td>DEFAULT_TEMPLATE</td>
<td>8.50 default template</td>
</tr>
<tr>
<td>PT_65X_FRAMES_TEMPLATE</td>
<td>8.50 frames template</td>
</tr>
<tr>
<td>BPNAVTEMPLATE</td>
<td>BP Nav Template</td>
</tr>
<tr>
<td>PAPEPPCM_NWHTML3COL</td>
<td>CM - News - HTML 3Column</td>
</tr>
<tr>
<td>EOPP_DEMO_TFPGLT_TEMPLATE</td>
<td>Demo Template PageletTemplate</td>
</tr>
<tr>
<td>PTCXM_DYNAMIC_CON_TEMPLATE</td>
<td>Dynamic Content Template - FRM</td>
</tr>
<tr>
<td>PTCXM_DYNAMIC_CON_IFRMTemplate</td>
<td>Dynamic Content Template -IFRM</td>
</tr>
<tr>
<td>PTCXM_LN_MANAGER</td>
<td>Dynamic Template Manager</td>
</tr>
<tr>
<td>PAPF_NAVFRAMETPL</td>
<td>EntPortNavFrame_tpl</td>
</tr>
<tr>
<td>PRTL_TEMPLATE_PASSWORD_EXP</td>
<td>Expired Password Template</td>
</tr>
<tr>
<td>PAPF_EO_PE_HOMEPAGE_DESIGN</td>
<td>Header, hover menu and target</td>
</tr>
<tr>
<td>HOMEPAGE_DESIGNER_TEMPLATE</td>
<td>Header, target only template</td>
</tr>
<tr>
<td>PT_HOVERRIDE_TEMPLATE</td>
<td>Hover nav iframe template</td>
</tr>
<tr>
<td>PT_IFRAME_TEMPLATE</td>
<td>Inline Frame Template</td>
</tr>
<tr>
<td>PAPF_DEFAULT_TEMPLATE</td>
<td>Interaction Hub Default</td>
</tr>
</tbody>
</table>

This initial set of templates is the complete list of available templates based on the PS_SITETEMPLATE registry. All templates are initially assigned to new sites. You can add or delete templates as required.

**Note:** Site publishers can only apply templates if the site administrator selects the Can select own template(s) option on the Set Publishing Defaults page accessed for the site. Otherwise, the default template specified during site definition always applies.

**Template Name**

This value is the content reference name assigned to the template in the PS_SITETEMPLATE template folder.

When a site is created, all of the templates in PS_SITETEMPLATE are copied to the site. You can add site templates from the templates in PS_SITETEMPLATE or from the default portal, but not from...
another site. If you delete a template from the site, the template is deleted only from this site, not from PS_SITETEMPLATE.

See the product documentation for *PeopleTools: Portal Technology*.

**Site Wizard - Specify Site Pagelets Page**

Use the Site Wizard - Specify Site Pagelets page (EPPSM_SITE_PAGELTS) to specify which pagelets will be available to site administrators when configuring the site homepage.

**Navigation**

- Click the Next button on the Site Wizard - Specify Site Templates page.
- Click the icon for step 6 while you are on any page in the Site Wizard.

**Image: Site Wizard - Specify Site Pagelets page**

This example illustrates the fields and controls on the Site Wizard - Specify Site Pagelets page. You can find definitions for the fields and controls later on this page.

```
<table>
<thead>
<tr>
<th>Pagelet Name</th>
<th>Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>PTACTGUIDE_IP_PCLT</td>
<td>Activity Guides - In Progress</td>
</tr>
<tr>
<td>PAFP_MENU_SCR</td>
<td>Enterprise Menu</td>
</tr>
<tr>
<td>PT_SC_PGT_MAIN_MENU</td>
<td>Main Menu</td>
</tr>
<tr>
<td>MENU</td>
<td>Menu</td>
</tr>
<tr>
<td>PT_64X_MENU</td>
<td>Menu - Classic</td>
</tr>
<tr>
<td>PT_PSRF_REPRT_PAGELET_GBL</td>
<td>My Reports</td>
</tr>
<tr>
<td>PTMENU_NEW_FEATURES</td>
<td>Top Menu Features Description</td>
</tr>
<tr>
<td>PSRF_RLIST_COMP_GEL</td>
<td>Report List</td>
</tr>
<tr>
<td>PAFP_R33_NEWS_SCR</td>
<td>Feed Reader</td>
</tr>
<tr>
<td>PAFP_EPPCM_FAV_PCLT_GBL</td>
<td>My Managed Content</td>
</tr>
<tr>
<td>PAFP_EPPCM_NWINBOX_PCLT_GBL</td>
<td>My News Content</td>
</tr>
<tr>
<td>PAFP_SITE_WELCOME</td>
<td>Site Welcome</td>
</tr>
<tr>
<td>ADMIN_EPPCM_CFOLDERNAVIGAT</td>
<td>Browse Managed Content</td>
</tr>
<tr>
<td>PAFP_SITE_MANAGER_HOMEPAGE</td>
<td>Site Manager Center</td>
</tr>
<tr>
<td>PAFP_SITE_PUBLISHER_HOMEP</td>
<td>Site Publisher Center</td>
</tr>
</tbody>
</table>
```

The initial list of pagelets is the complete list of pagelets based on the PS_SITETEMPLATE registry. All pagelets are initially assigned to new sites. You can add or delete pagelets as required.
Note: The portal administrator can copy any pagelet over from the default portal into the site using the portal's Structure and Content copy feature. Before doing so, the portal administrator must ensure that a pagelet's functionality is suitable for use on the site, both technically and functionally.

**Portal Pagelet Name**

Specify the portal pagelets available from the sponsor site that will be available to users of this site.

This value is the content reference name assigned to the pagelet in the PS_SITETEMPLATE pagelet folder.

Making a portal pagelet available does not automatically make the pagelet appear on a user's homepage. Each user can configure the homepage by adding and arranging pagelets.

**Related Links**

"Understanding PeopleSoft Interaction Hub-Delivered Pagelets (PeopleSoft Interaction Hub 9.1: Using Portal Features)"

**Managing Sites**

This section discusses how to maintain sites using the Maintain Existing Sites component (EPPSM_SITE_WIZARD).

**Page Used to Manage Sites**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Sites</td>
<td>EPPSM_MANAGE_SITES</td>
<td>Portal Administration, Site Management, Maintain Existing Sites</td>
<td>Access and manage portal sites.</td>
</tr>
</tbody>
</table>

**Manage Sites Page**

Use the Manage Sites page (EPPSM_MANAGE_SITES) to access and manage portal sites.

**Navigation**

Portal Administration, Site Management, Maintain Existing Sites

**Image: Manage Sites page**

This example illustrates the fields and controls on the Manage Sites page. You can find definitions for the fields and controls later on this page.
**Edit**
Click to access the Site Wizard - Site Definition page of the Site Wizard, where you can edit values entered when the site was created.

**Delete**
Click to delete the site. You will be prompted to confirm your deletion.

**Go to Site**
Click to access the site.

**Add New Site**
Click to access the Site Wizard - Site Definition page of the Site Wizard, where you can create a new site.
Chapter 16

Administering Sites

Administering Sites

These topics provide an overview of site administration and discuss how to:

• Define site security.
• Define site publication defaults.
• Configure the site homepage.
• Manage site branding.
• Run Branding queries.

Understanding Site Administration

Site administration activities can only be performed on a site created with the Site Wizard. The same functionality is not suitable for portal administration on the default portal.

An authorized site administrator performs these site administration tasks. A portal administrator assigns site administrators on the Site Wizard - Appoint Site Administrator page (step 3) when creating a site definition or maintaining existing site definitions.

Defining Site Security

This section discusses how to define site security.

Page Used to Define Site Security

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Security</td>
<td>EPPSM_SITE_SECURITY</td>
<td>Access a site. Navigate to Portal Administration, Site Management, Define Site Security</td>
<td>Specify site publishers and viewers by role or user ID.</td>
</tr>
</tbody>
</table>

Site Security Page

Use the Site Security page (EPPSM_SITE_SECURITY) to specify site publishers and viewers by role or user ID.
Navgation

Portal Administration, Site Management, Define Site Security

Image: Site Security page

This example illustrates the fields and controls on the Site Security page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Site Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify who is authorized to publish or view site content</td>
</tr>
</tbody>
</table>

The "Publisher" can view the site and update menu items and content for workgroup pagelets. The "Viewer" can access the site and view all applicable content.

| Site ID: PS_SITETEMPLATE |

Site Privilege

Select from:

- Publisher: A publisher can publish content on the site.

An authorized site administrator sets site security by specifying which users and roles can publish to or view the site.

Publishers can publish content on the site, post links to the site's menu navigation, and update content for homepage pagelets.

Viewers can only view the site and its contents. A publisher cannot view the site unless specifically defined as a viewer.

Site administrators do not have rights to view or publish to the site by default. Include the site administrator by user ID or role in the list of authorized site publishers and viewers, as required.

When creating a site, a user is granted access to features and given permissions to publish for a that specific site. Because PeopleTools will automatically propagate those permissions to all sites (including Employee, Supplier, and so on), PeopleSoft Interaction Hub uses a filter to hide those content references from the navigation to ensure that users do not have access to the content management content references or folders in main sites. This keeps publishers from a specific site from having access to publishing options on sites where they may not have specific permissions. Those links do not show in the navigation or navigation collection. Only permissions on the native site apply.
• **Viewer**: A viewer can view site content.

**Type**

Select the type of security authorization you want to define for this entry: *User* or *Role*.

**Authorization Entry**

Based on the value you selected in the Type field, specify a user ID or role.

## Defining Site Publication Defaults

This section discusses how to define site publication defaults.

### Pages Used to Define Site Publication Defaults

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Publishing Defaults</td>
<td>EPPSM_SITE_DEFAULT</td>
<td>Access a site. Navigate to Portal Administration, Site Management, Define Publishing Defaults</td>
<td>Specify default content publication and expiration dates and set the publisher template option.</td>
</tr>
</tbody>
</table>

**Set Publishing Defaults Page**

Use the Set Publishing Defaults page (EPPSM_SITE_DEFAULT) to specify default content publication and expiration dates and set the publisher template option.

**Navigation**

Portal Administration, Site Management, Define Publishing Defaults

**Image: Set Publishing Defaults page**

This example illustrates the fields and controls on the Set Publishing Defaults page. You can find definitions for the fields and controls later on this page.

**Set Publishing Defaults**

Specify the publishing defaults that apply to each new element added to the site unless specifically overridden on that element.

**Site ID**: PS_SITEMTEMPLATE

<table>
<thead>
<tr>
<th>Default Content Dates</th>
<th>Publisher Template Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication Date: 01/31/2012</td>
<td>Can select own template(s)</td>
</tr>
<tr>
<td>Expiration Date: 01/31/2013</td>
<td>Must use site default template</td>
</tr>
</tbody>
</table>

An authorized site administrator can set site defaults. The defaults set by the administrator affect the entries made on the Manage Navigation page accessed for the site.
Default Content Dates

Publication Date Specify the default publication date for new links created using the Manage Navigation page for the site. An authorized publisher can override the default publication dates of individual content entries.

Expiration Date Specify the default expiration date for new navigation links. The individual content expiration dates can be overridden by an authorized publisher.

Publisher Template Selection

Can select own template(s) Select to enable an authorized site publisher to select from the templates supplied to the site during site creation.

Must use site default template Select to require an authorized site publisher to use the default template specified on the Site Wizard - Site Definition page during step 1 of site creation.

Configuring the Site Homepage

This section discusses how to configure the site homepage.

Pages Used to Configure the Site Homepage

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure Homepage - Tab</td>
<td>PORTAL_TAB_CON_ADM</td>
<td>• Access the site. Navigate to Portal Administration, Pagelets, Configure Homepage.</td>
<td>Specify the pagelets included in the homepage definition for this site.</td>
</tr>
<tr>
<td>Configure Homepage - Tab</td>
<td></td>
<td>• Access the site. PeopleTools, Portal, Structure and Content. Click the Portal Objects link. Click the Homepage link. Click the Tabs link. Click the Edit link for the My Page label. Click the Tab Content tab.</td>
<td></td>
</tr>
</tbody>
</table>

Configure Homepage - Tab Content Page

Use the Configure Homepage - Tab Content page (PORTAL_TAB_CON_ADM) to specify the pagelets included in the homepage definition for this site.
Navigation

- Access the site. Navigate to Portal Administration, Pagelets, Configure Homepage.

- Access the site. PeopleTools, Portal, Structure and Content. Click the Portal Objects link. Click the Homepage link. Click the Tabs link. Click the Edit link for the My Page label. Click the Tab Content tab.

**Image: Configure Homepage Tab - Tab Content page**

This example illustrates the fields and controls on the Configure Homepage Tab - Tab Content page.

Select the pagelets that you want to appear on the site's homepage and specify each pagelet's behavior.

Pagelets selected to appear on the site homepage create the default homepage. If authorized to personalize their homepage, users can add pagelets and configure the homepage layout.
See the product documentation for *PeopleTools: Portal Technology*.

**Managing Site Branding**

This section provides an overview of site branding overrides.

**Understanding Site Branding Overrides**

If the portal administrator authorized overridable branding elements during site creation, a site administrator can define site-specific branding values to work in conjunction with the site's default theme. These options are discussed in detail in the PeopleSoft Interaction Hub Branding PeopleBook.

See "Defining Branding Overrides (*PeopleSoft Interaction Hub 9.1: Branding)*".

**Running Branding Queries**

Navigate to Portal Administration, Branding, Branding Queries to access a set of Branding queries you can use to facilitate your work with site branding.

See "Understanding Branding Queries (*PeopleSoft Interaction Hub 9.1: Branding)*".
Chapter 17

Publishing to a Site

Publishing to a Site

These topics discuss how to:

• Use the Site Publisher Center.
• Manage site navigation.
• Update homepage content.

Using the Site Publisher Center

The Site Publisher Center is a navigation collection that lists every feature that is used in publishing. Site administrators will have additional links beyond what the site publisher can access.

Managing Site Navigation

This section provides an overview of site navigation management and discusses how to manage site navigation.

Pages Used to Manage Site Navigation

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Navigation</td>
<td>EPPNA_REG_ADMIN</td>
<td>Access the site and navigate to Portal Administration, Navigation, Manage Navigation.</td>
<td>Add, delete, and manage menu folders and links for the site. Use the Manage Navigation page instead of directly addressing content references (CREFs) in the portal registry or through the Structure and Content pages. Provides simplified access to the portal registry for the current site. Provides a unified interface for management of the menu folders and links for the site.</td>
</tr>
<tr>
<td>Select New Parent Folder</td>
<td>EPPNA_NEW_PRNT</td>
<td>Click the Select New Parent Folder button on the Manage Navigation page.</td>
<td>Use a hierarchical representation of the portal registry to select the parent folder into which you want to move the selected element.</td>
</tr>
</tbody>
</table>

Manage Navigation Page

Use the Manage Navigation page (EPPNA_REG_ADMIN) to add, delete, and manage menu folders and links for the site.
Use the Manage Navigation page instead of directly addressing content references (CREFs) in the portal registry or through the Structure and Content pages. Provides simplified access to the portal registry for the current site. Provides a unified interface for management of the menu folders and links for the site.

**Navigation**


**Image: Manage Navigation page**

This example illustrates the fields and controls on the Manage Navigation page.

The Manage Navigation page provides an interface to the portal registry for tasks specific to the current site based on site defaults.

It is a front-end to the portal registry, which stores site navigation. Site administrators may not be familiar with the portal registry and may not have the security required to access portal administration functions. Authorized site administrators can manage their site's content and navigation without having access to the registry for other sites or to the default portal.

Site publishers can use the Manage Navigation page to post content to the site and manage its navigation. Publishers can specify the content source, template (if authorized in the Define Publishing Defaults component), and the content's placement in the site navigation, as well as create folders and delegate folder administration.

Only site administrators (as authorized by the portal administrator) and site publishers (as authorized by the site administrator) can manage site navigation. Site administrators can use the Manage Navigation page to change the navigation menu's structure or to create folders for new content, for example.
Publishers can use the Manage Navigation page to add or move folders for site content or add links to content, for example.

The Manage Navigation page initially displays the site's navigation menu and a Find group box. You can browse through the hierarchy by expanding and contracting folders. Alternatively, you can use the Find group box to locate a menu item by name.

Click on a folder or content reference link to select the item with which you want to work. The selected item will appear highlighted in yellow anywhere it appears on the page.

Managing Folders and Links

After you select or add a folder, the Folder Detail group box appears.

**Image: Folder Detail group box**

This example illustrates the fields and controls on the Folder Detail group box.
After you select or add a link, the Link Detail group box appears.

**Image: Link Detail group box**

This example illustrates the fields and controls on the Link Detail group box. You can find definitions for the fields and controls later on this page.

- **Add Folder**: Click to add a folder within the selected folder.
- **Add Link**: Click to add a new link within the selected folder.
- **Save**: Click to save the new or modified folder or link.
Cancel

Click to cancel the creation or modification of the folder or link.

Delete

Click to delete the folder or link. You will be prompted to confirm your deletion.

Label

Specify the label that will appear in the menu.

Long Description

Specify a description that will appear as the hover text for the label.

Link Type

This field displays in the Link Detail group box.

Select the link type from the drop-down list box, and specify the required information for the selected link type:

- **Content Management Folder.** Create a link to a content management folder.
- **External URL.** Create a link to a URL to an external site.
- **File Attachment.** Create a link to a file.
- **Managed Content.** Create a link to managed content.
- **PeopleSoft Query.** Create a link to a predefined PeopleSoft database query.
- **Portal/Site.** Create a link to any site or main portal accessible from the current site.

If you are a portal administrator managing navigation on the default portal, the following additional link types are available:

- **PeopleSoft Component.** Create a link to a PeopleSoft component.
- **PeopleSoft iScript.** Create a link to a PeopleSoft iScript, which can return anything. Generally, iScripts are used to return information placed on pagelets. In this case, you can point to an iScript as a target.
- **PeopleSoft Generic URL.** Create a link to a generic URL in your PeopleSoft database. This option enables you to point to any PeopleSoft object (iScript, component, and so forth) as a generic URL. You may choose to use this option rather than specifying an iScript or component when you are not required to inherit the security specified on that object. You can then place your own security on the target to which you are pointing.

Portal Name

Select a portal that contains the folder you want to link to using the Content Management Folder.

Node Name

Select the node through which the material to which you want to create a link should be accessed. Available nodes are comprised of defined content providers from which content can be retrieved and rendered.
This field displays in the Link Detail group box for the *PeopleSoft Component, External URL, PeopleSoft Generic URL,* and *PeopleSoft IScript* link types.

**Menu Name**
Enter the menu in which the component to which you want to create the link resides.

This field displays in the Link Detail group box for the *PeopleSoft Component* link type.

**Market**
Select the market for the component to which you want to link.

This field displays in the Link Detail group box for the *PeopleSoft Component* link type.

**Component**
Enter the name of the component to which you want to link.

This field displays in the Link Detail group box for the *PeopleSoft Component* link type.

**Additional Parameters**
Enter any additional parameters you want to use to locate the content to which you want to link.

This field displays in the Link Detail group box for the *PeopleSoft Component and PeopleSoft IScript* link types.

**URL**
Enter the URL to which you want to link, including the leading http://.

This field displays in the Link Detail group box for the *External URL* and *PeopleSoft Generic URL* link types.

**Add Attachment**
Click to access a page where you can browse for and upload the file attachment to which you want to create a link.

This button displays in the Link Detail group box for the *File Attachment* link type.

**Select Content**
Click to access the Select Managed Content page, where you can search for and select the managed content to which you want to create a link.

This button displays in the Link Detail group box for the *Managed Content* link type.

See "Importing Managed Content into Other Features (PeopleSoft Interaction Hub 9.1: Content Management System)."

**Record (Table) Name**
Enter the name of the record to which the iScript you want to link is associated.

This field displays in the Link Detail group box for the *PeopleSoft IScript* link type.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Enter the name of the field to which the iScript you want to link to is associated. This field displays in the Link Detail group box for the <em>PeopleSoft IScript</em> link type.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Name</td>
<td>Enter the name of the event to which the iScript you want to link to is associated. This field displays in the Link Detail group box for the <em>PeopleSoft IScript</em> link type.</td>
</tr>
<tr>
<td>IScript Name</td>
<td>Enter the name of the iScript to which you want to link. This field displays in the Link Detail group box for the <em>PeopleSoft IScript</em> link type.</td>
</tr>
<tr>
<td>Query Name</td>
<td>Enter the query to which you want to create a link. This field displays in the Link Detail group box for the <em>PeopleSoft Query</em> link type.</td>
</tr>
<tr>
<td>Site ID</td>
<td>Select the site to which you want to create a link. This field displays in the Link Detail group box for the <em>Portal Site</em> link type.</td>
</tr>
<tr>
<td>Go to the Portal Registry Entry for this CREF</td>
<td>Select to access the Content Ref Administration page, where you can access additional options for the selected link in the portal registry. This link displays in the Link Detail group box for an existing link or a newly created link that has been saved. See the product documentation for <em>PeopleTools: Portal Technology</em>, “Administering Portals,” Administering Content References.</td>
</tr>
<tr>
<td>Go to the Portal Registry Entry for this folder</td>
<td>Click to access the Folder Administration page, where you can access additional options for the selected folder in the portal registry. This link displays in the Folder Detail group box for an existing folder or a newly created folder that has been saved. See the product documentation for <em>PeopleTools: Portal Technology</em>, “Administering Portals,” Administering Folders.</td>
</tr>
</tbody>
</table>

**Note:** This option is only available to portal administrators.

| Additional Options | Select a template to apply to the new link. This option is only available if authorized by the site administrator. |
This field displays in the Link Details group box.

**No Template**
Select if you do not want to apply a template to the link content. When you select this option, the Template Name field does not display.

This field displays in the Link Details group box.

**Open Link in New Window**
Select to indicate that you want the link contents to open in a new browser window instead of in the current browser window.

This field displays in the Link Details group box.

**Publish Date**
Specify an effective date for this element.

**Expiration Date**
Specify an expiration date for this element.

**Search Key Words**
Specify keywords you want to use to identify this link in a search of this site. The search engine will pick up this text to be able to include the link in a search collection for the site.

**Placement in Folder**
Specify the placement of the element in the new parent folder.

**Select New Parent Folder**
Select the item or items that you want to move. The tree displays one level of the tree, enabling you to select a folder within that level. To select all folder items displayed in the tree, select the parent folder. To select one or more folder items in the tree, clear the check box for the parent and select the children items individually. For content references, the tree shows the parent folder and all of the sibling folders. If you select the parent, then all of the child items are selected.

**Select New Parent Folder**
Click to access the Select New Parent Folder page, where you can use a hierarchical representation of the portal registry.
to select the parent folder into which you want to move the selected element.

**Image: Select New Parent Folder page**

This example illustrates the fields and controls on the Select New Parent Folder page.

The items that you have selected to move to a new folder appear highlighted. Click the name of the folder that you want to move the items to, and the system will display a confirmation message ensuring that you want to proceed with the move. Click Cancel to not move the item.
Updating Site Homepage Content

This section provides an overview of updating homepage content and discusses how to:

- Update site homepage content.
- Update Content Management-based site pagelet content.

Pages Used to Update Site Homepage Content

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content Pagelets</td>
<td>EPPPB_WRKGRP_SRCH</td>
<td>Access the site and navigate to: Portal Administration, Pagelets, Content Pagelets</td>
<td>Access Content Management-based pagelets defined as site pagelets for the current site.</td>
</tr>
<tr>
<td>Modify Content Pagelet</td>
<td>EPPPB_WRKGRP_DET</td>
<td>Click the Edit button on the Content Pagelets page.</td>
<td>Update content for Content Management-based site pagelets.</td>
</tr>
<tr>
<td>Preview Workgroup Pagelet Content</td>
<td>EPPCM_PUB_VIEWHTML</td>
<td>Click the Content Title link on the Modify Content Pagelet page.</td>
<td>Preview the content that you have selected to display on the site pagelet.</td>
</tr>
<tr>
<td>Select Managed Content</td>
<td>EPPCM_PUB_SELECT</td>
<td>Click the Change Content button on the Modify Content Pagelet page.</td>
<td>Select the new content you want to display on the site pagelet.</td>
</tr>
</tbody>
</table>

Understanding Updating Site Homepage Content

A site administrator can use the Update Homepage Content page to update the content displayed on a site pagelet if the pagelet meets the following criteria:

- The pagelet was created with Pagelet Wizard.
- The pagelet's data source is Content Management.

For example, you can use this functionality in a scenario in which you prepare seasonal sales announcements in Content Management in advance and then access this page to post the content to the site pagelet on the date required.

Related Links

"PeopleSoft Interaction Hub Content Management System Features (PeopleSoft Interaction Hub 9.1: Content Management System)"

Content Pagelets Page

Use the Content Pagelets page (EPPPB_WRKGRP_SRCH) to access Content Management-based pagelets defined as site pagelets for the current site.
Navigation

Portal Administration, Pagelets, Content Pagelets

Image: Content Pagelets page

This example illustrates the fields and controls on the Content Pagelets page. You can find definitions for the fields and controls later on this page.

**Content Pagelets**

The following lists the content pagelets registered in the current site. These pagelets render a Managed Content HTML/Text item. Click 'Edit' to assign new content to the pagelet definition.

<table>
<thead>
<tr>
<th>Pagelet Title</th>
<th>Content Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Construction Update</td>
<td>New Headquarters Construction Update</td>
</tr>
</tbody>
</table>

**Edit**

Click to access the Modify Content Pagelet page, where you can assign new content to the pagelet definition.

**Edit Content for Pagelet Page**

Use the Edit Content for Pagelet page (EPPPB_WRKGRP_DET) to update content for Content Management-based site pagelets.
Navigation

Click the Edit button on the Content Pagelets page.

Image: Edit Content for Pagelet page

This example illustrates the fields and controls on the Edit Content for Pagelet page. You can find definitions for the fields and controls later on this page.

Content Pagelets

Edit Content for Pagelet

Click the content title to review the currently published content. Click Re-Select Content for the pagelet to display a different content item. Click Save to use the reselected content.

<table>
<thead>
<tr>
<th>Pagelet Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pagelet ID:</td>
</tr>
<tr>
<td>Pagelet Title:</td>
</tr>
<tr>
<td>Description:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Content Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content Title:</td>
</tr>
<tr>
<td>Content ID:</td>
</tr>
<tr>
<td>Folder Title:</td>
</tr>
</tbody>
</table>

Re-Select Content  Save  Return to List

Content Title

Click to access the Preview Workgroup Pagelet Content page, where you can preview the content that you have selected to display on the site pagelet.

Click the prompt button to select from a list of managed content.

Re-Select Content

Click to access the Look Up Managed Content page, where you can select the new content you want to display on the site pagelet.

See "Importing Managed Content into Other Features (PeopleSoft Interaction Hub 9.1: Content Management System)".
Chapter 18

Moving Sites Between Databases

Moving Sites Between Databases

This topic discusses how to move a site from one database to another.

Moving a Site Between Databases

This section discusses how to move a site and its associated data between databases. For example, you might create and configure a new site on a development database before transferring the site and its associated data to a production database.

Image: Insert into Project dialog box

This example illustrates the fields and controls on the Insert into Project dialog box.

To move a site and its associated data between databases:

1. In PeopleSoft Application Designer, create a project containing the entire registry definition for the site.
   a. Select Insert, Definitions into project.
   b. Select the Portal Registry Definitions value in the Definition Type drop-down list box.
c. Select Portal Registry Structures in the Related Definitions area.

d. Click Insert.

e. Select the name of the site in the Portal Name area.

f. Save the project.

2. Insert any additional structures associated with the site into the project.

These may include images, HTML objects, PeopleCode, and so forth, if such objects have been created for a customized site.

3. Move this project to the target database by navigation to Tools, Copy Project.

4. Move branding definitions associated with this site, such as headers, footers, themes, and overrides.

   See "Understanding Developing Custom Branding Themes (PeopleSoft Interaction Hub 9.1: Branding)".

5. Move pagelet definitions for any pagelets associated with this site that were defined with Pagelet Wizard.

   See the product documentation for PeopleTools: Portal Technology, “Using Pagelet Wizard.”

6. If you have implemented any other features such as Content Management, News Publications, or Discussion Forums, recreate them in the site on the target database.

   See the product documentation for PeopleTools: PeopleSoft Application Designer Developer's Guide.
Part V

Part 5: Integration
Chapter 19

Setting Up Integration with Third-Party Email and Calendar Systems

Setting Up Integration with Third-Party Email and Calendar Systems

These topics provide overview of the Email pagelet and Calendar Events pagelet, basic email and calendar setup steps, application and mail server configuration, and the Microsoft Exchange/Outlook integration. These topics also discuss how to:

- Integrate with Lotus Domino email and calendar.
- Configure the server for POP mail and IMAP mail.
- Assign primary mail systems.
- Set up additional mail systems.

Understanding Basic Email and Calendar Setup Steps

The following steps provide a roadmap for setting up the Email pagelet and Calendar Events pagelet.

Note: Detailed setup instructions for each third-party email system are described later in this topic.

1. The portal administrator configures application and email servers.
   - Lotus Domino.
     Install the delivered PeopleSoft jar file, com.peoplesoft.pa.pp.jar on the application server.
     Copy the Lotus Domino NCSO.jar file to the application server.
     Make the relevant changes on the Domino server end and perform other operating-system-related setting changes.
     See Integrating With Lotus Notes Email and Calendar.
   - Microsoft Exchange.
     Install the delivered PeopleSoft Active Server Page files in the relevant places and change the security.
   - POP mail.
     Download and install the required files from the Java site.
Install the delivered PeopleSoft jar file, com.peoplesoft.pa.pp.jar on the application server. Enter the POP mail server name and the URL for the POP mail inbox on the Email and Calendar Defaults page.

See Integrating With a POP Server.

- IMAP mail.

Download and install the required files from the Java site.

Install the delivered PeopleSoft jar file, com.peoplesoft.pa.pp.jar on the application server.

Enter the IMAP mail server name and the URL for the IMAP mail inbox on the Email and Calendar Defaults page.

See Configuring the Primary Email System to Use IMAP.

2. The portal administrator and individual users complete the integration with the Email pagelet and Calendar Events pagelet:
   a. The portal administrator selects and sets up the primary email and calendar on the E-mail and Calendar Defaults page.

   See Designating the Primary Mail System.

   b. Each user sets up the pagelet's user ID and password.

Understanding Application and Mail Server Configuration

In accordance with the primary email and calendar systems that are selected for the Email pagelet and Calendar Events pagelet, system administrators must configure servers with special settings, files, and views. It might also be necessary to configure the servers for any additional POP mail systems.

These topics provide information about setting up the following supported applications and mail server configurations:

- Microsoft Exchange/Outlook 2003 and 2007 Email and Calendar on Windows.
- Lotus Domino 6.5, 7.0, and 8.0 Email and Calendar.
- POP mail.
- IMAP mail.

See the product documentation for PeopleTools: Portal Technology.

Related Links
Setting Up Additional Mail Systems

Integrating With Microsoft Exchange 2003 and 2007

This section provides an overview of prerequisites for integrating with Exchange 2003 and discusses:
• How to install and configure ASP files for Microsoft Exchange 2003 and 2007.
• Implementation tips for integrating with Microsoft Exchange 2003 and 2007.

Understanding Integration with Microsoft Exchange
The Email pagelet on the portal homepage can display email from Microsoft Exchange when it is designated as the primary mail system. It requires Outlook Web Access (OWA), which enables access to Outlook using a browser. OWA requires that a Microsoft Internet Information Server (IIS) be running with access to an Exchange server. PeopleSoft Interaction Hub supports integration with Microsoft Exchange/Outlook 2003 and 2007 on Windows.

In the PeopleCode, an iScript makes a request to the ASPs on the Exchange server. The ASPs send back a response in HTML format. PeopleCode then extracts the HTML to get the relevant email and calendar data and then formats the information and displays it in the Email and Calendar Events pagelets.

On the Exchange server side, ASPs, based on the WebDAV (Web-based distributed authoring and versioning) protocol are installed. You can search the Microsoft website to learn more about WebDAV.

Related Links
Integrating With Microsoft Exchange 2003 and 2007

Prerequisites
Before integrating Microsoft Exchange with the PeopleSoft Interaction Hub, you must:

• Plan for the functionality that you need.
• Install the Windows 2003 server and related systems.

Exchange must be installed in a domain that contains a Windows 2003 server that is configured as a domain controller with a global catalog.

Note: During the Windows 2003 server setup, you must install the Network News Transfer Protocol (NNTP) service.

• Install the Microsoft Exchange 2003 or Microsoft Exchange 2007 server. Refer to the installation guide.
• Create mailboxes for users on the Exchange server.

Select Active Directory Users and expand the domain name to see the Users folder.

Installing and Configuring Active Server Page Files for Exchange
You can perform the following steps only after the Microsoft Exchange server has been installed.

To install and configure ASP files:

1. Create a new folder, such as c:\aspcodex, on the Microsoft Exchange machine.
2. Copy the following files into the newly created folder:

• For Microsoft Exchange 2003:
  Psmsinbox2003.asp
  Psmscal2003_1day.asp
• For Microsoft Exchange 2007:
  Psmsinbox2007.asp
  Psmcal2007_1day.asp


   a. Access ISM from your Windows machine by navigating to Start, Programs, Administrative Tools.

   b. Expand the left-side Domain name folder to see the Default Web Site folder.

   c. Right-click and select New, Virtual Directory.

      This starts a wizard, which takes you through the relevant steps.

   d. In the wizard, select the folder that contains all of the PeopleSoft ASP files as the source (for example, c:aspcodes).

      It is important that you select the same folder in which you installed the delivered PeopleSoft ASP files.

   e. For easy reference, give the virtual directory the same name as the folder in which you installed the delivered ASP files (for example, aspfolder).

      **Note:** Once you have mapped the folder to the virtual directory, you will see your virtual directory and its contents in the ISM folder's Default Web Site.

4. Ensure that the Basic Authentication value is used as the directory security for the virtual directory.

   a. Access ISM from your Windows machine by navigating to Start, Programs, Administrative Tools.

   b. Go to the Default Web Site in the domain folder and find your mapped virtual directory, as specified in step 3e.

   c. Right-click and select Properties.


   e. Select Basic Authentication.

*Important!* The URL that you use on the Email and Calendar Defaults page must use the format http://<servername>/<aspfolder>, where aspfolder is the folder name that is used in the virtual directory specified above. If this folder name is not the virtual folder name, the integration will not work.

When the configuration of applications and mail servers is complete, proceed to assigning the primary mail system in the PeopleSoft Interaction Hub.

See Designating the Primary Mail System.
Implementation Tips for Configuring Exchange

If the pagelet cannot display the messages, but the Microsoft Outlook link on the pagelet works, check the following:

1. In the browser, enter a URL using the following format, replacing the domain and user ID with the individual user's email account and user ID:

   http://<Outlook Web Access server name>/aspfolder/Psmsinbox2003.asp?
   mailbox=<userid>&exchsvr=
   <Exchange Server name>&numrows=5


2. If there is an error on this website (that is, on an ASP page), then the folder in which you stored the delivered PeopleSoft ASP files is not properly mapped as a virtual drive.

   If the virtual drive is correctly mapped, but this URL site still generates errors that are MAPI-related, then check the IMS security to ensure that the Basic Authentication value has been selected.

   See Installing and Configuring Active Server Page Files for Exchange.

3. If after changing the security you still receive MAPI-related errors when trying to access the above URL, then perform the following verifications on the Members Of tab of the User Properties in Active Directory Users and Computers.

   a. Navigate to the Members Of tab by going to Windows Start, Programs, Administrative Tools, Active Directory Users and Computers.

   b. Select the Users folder in the left-side domain folder.

   c. Right-click the appropriate user and select Properties.

   d. On the Members Of tab, look at all domains for which the user is a member and try to make the user a member of the relevant domains and directories.

   Correcting the Member Of properties can resolve several MAPI-related permission issues with the above URL.

Identifying Typos in Output Parameters

Make the following setting changes to display debugging information on the pagelet. It displays data that is being sent. Check the accuracy of this data.

To identify typos in output parameters:

1. In PeopleSoft Application Designer, open the record WEBLIB_EMAIL.

2. Open the FieldFormula PeopleCode.

3. Search for the following iScript function:

   Function IScript_mail()

4. Locate the second line of the function:

   &Debug = False;
5. Set the value to *True*.

6. The set of statements should now look like the following:

   Function IScript_mail()
   /* Set the debug flag to True, for getting all the debug information,
   * otherwise set it to false */
   &Debug = True;
   &titleStyle = "PABOLDBLUETEXT";

7. Save.

   The debugging information will display on the pagelet.

**Ensuring That Microsoft Exchange is Working Over the Web**

To ensure that Microsoft Exchange is working:

1. Click the Microsoft Outlook link that displays on the Email pagelet.

2. Supply the user ID and password in the dialog box.

   Ensure that you use the `<DOMAIN NAME>\<User Id>` format when specifying a user outside of the domain in which the Microsoft Exchange server resides.

3. If this link opens a web-based outlook, then proceed to the next section. If the link does not open, then contact the Exchange server administrator.

**Checking the Outlook Web Access URL**

To verify that the Outlook Web Access URL is working:

1. Use the following format for an Outlook Web Access URL:

   http://<Outlook Web Access name>/aspfolder/Psmsinbox2003.asp?
   mailbox=<userid>&exchsvr=<Exchange Server name>&numrows=5


2. Open a new browser window and enter the appropriate URL for your version of Exchange. Login when prompted. Tabular data consisting of mail headers should be returned.

   If this step does not work, then the errors may possibly be the result of a setup issue. Return to the Exchange administration steps to verify the setup issues.

   See Installing and Configuring Active Server Page Files for Exchange.

   If this step works, but email is still not accessible, then add a few emails to the account and try again.

   If this is working, then try the next section.

**Understanding Browser Errors**

This section explains several browser error messages that may display for the Email pagelet integration, along with possible associated errors.

- Page cannot be found error.
This error screen could mean that the file `psmsinbox2003.asp` (or `psmsinbox2003.asp`) is not available. This can happen because:

- Either the file is missing, or because the virtual folder is wrong or not mapped correctly.
- There's a typographical error in the file name.
- Network password error.

If the Enter Network Password dialog box displays after executing the OWA that was formed, it may be because the domain name, user ID, or password entered for the user is missing or wrong.

- Page cannot be displayed error.

This page can display under two circumstances.

- If this page appears when you place the OWA URL in the browser, verify that the OWA server name is correct.
- This page can also appear when the URL tries to access a resource that does not exist due to a wrong mailbox or a wrong Microsoft Exchange server name.

- You are not authorized to view this page.

This page appears if the either the user ID or password are incorrect.

### Integrating With Lotus Notes Email and Calendar

This section provides overviews of the Lotus Notes email and calendar integration and prerequisites, and discusses how to integrate with a Lotus Domino server to retrieve email and calendar information.

**Understanding Integration with Lotus Notes Email and Calendar**

The Email pagelet on the PeopleSoft Interaction Hub homepage can display email from Lotus Domino server when Lotus is designated as the primary mail system. Integration requires a specific configuration of the portal application server and a hub Domino server.

**How the Integration Works**

PeopleSoft Interaction Hub integrates with Lotus Notes mail files to retrieve an individual’s email and calendar appointment lists. To retrieve this information from each user’s mail file, PeopleSoft Interaction Hub uses the Notes Client Side Objects (NCSO) to interact with the Domino server. The NCSO uses Internet Inter-ORB Protocol (IIOP) to exchange data and communicate internally. A server task needs to be set up on the Lotus Domino server to work with the Domino Object Request Broker DIIOP (Domino Internet Inter-ORD Protocol) to allow the internal communication.

**Enabling iNotes**

iNotes is the web-enabled solution for Lotus Notes. To enable users to launch iNotes from the Email pagelet, you must specify the iNotes URL on the Email and Calendar Defaults page.

**Prerequisites**

The following prerequisites must be in place:
• All mail files at an organization must refresh from a single mail file template, or there must be some other easy way for a Lotus Notes administrator to add two hidden custom views to each user's mail file.

• There is a single Domino server that can run both the HTTP and DIIOP tasks for access by the portal. This server should use Java security and have the corporate name and address book on it.

• All users at the organization have an internet password stored in their Person document in the Lotus Name and Address Book on the Domino hub server.

• A custom view that is added to the address book provides the location and file name of each user's mailbox.

**Integrating With Lotus Notes**
Complete the steps outlined in this section to configure the Lotus Notes email and calendar functions.

**Placing the NCSO.Jar file on the Application Server Machine**
To place the NCSO.Jar file on the application server machine:

1. Copy the Lotus Domino NCSO.jar file from LOTUS_HOME\Domino\data\domino\java\NCSO.jar.
2. Place the NCSO.jar file on the PeopleSoft application server in the appropriate directory.
   For Windows-based application servers place the file in PS_CFG_HOME\class\.
   For UNIX-based application servers place the file in PS_CFG_HOME/appserv/classes/.
3. Add the NCSO.jar and com.peoplesoft.pa.pp.jar files to the environment variable CLASSPATH.

**Completing the Lotus Notes Integration**
After setting up your Lotus Notes client application servers, complete the following Lotus Notes setup steps.

This section discusses how to:

• Configure the Lotus Domino server.
• Place custom views in Lotus templates.

**Related Links**
**Designating the Primary Mail System**

**Configuring the Lotus Domino Server**
To configure the Lotus Domino Server:

2. Enable IIOP.
3. Set up Session Based Authentication.
Configuring Java/COM Restrictions on the Lotus Domino Server

To configure Java/COM restrictions on the Lotus Domino server:

1. Access the Lotus Domino Administrator.
2. Select Configuration tab from the navigation bar.
4. Double click your server name from the list (or on current server document if you have only one server).
5. Select Edit Server.
7. Scroll to the section labeled Run restricted Java/Javascript/COM and enter an asterisk character (*) in the text area provided.
8. Scroll to the section labeled Run unrestricted Java/Javascript/COM and enter an asterisk character (*) in the text area provided.
9. Click the Save and Close link.

Enabling IIOP

The Lotus Notes Pagelets implementation uses the Notes Client Side Objects to communicate with the Lotus Domino server. The Notes Client Side Objects internally use IIOP (Internet Inter-ORB Protocol) to communicate and exchange object data. To allow this communication, a server task that runs on the Lotus Domino Server and works with the Domino Object Request Broker DIIOP (Domino Internet Inter-ORB Protocol) needs to be enabled.

To enable IIOP:

1. Access the Lotus Domino Administrator.
2. Select the Configuration tab.
3. Double click your server name from the list (or on current server document if you have only one server).
4. Select the Ports: Internet Ports tab.
5. Click on the DIIOP tab to go to the IIOP Server screen.
6. Verify that TCP/IP Port number is 63148 (default port).
7. Verify that TCP/IP Port status is Enabled.
   If not, then select Enabled and click Save and Close to save the changes.
8. Now, if it is not already started, start the DIIOP server task on the Lotus Domino Server.
   To start the DIIOP server task, enter this command on Lotus Domino Server console: load diiop.
Setting Up Session Based Authentication

Before publishing the Lotus Notes Pagelets, you need to set up Session Based Authentication for Web clients who have access to a Domino Web server.

To set up session based authentication:

1. Access the Lotus Domino Administrator.
2. Select Configuration tab from the navigation bar.
4. Double click your server name from the list (or on current server document if you have only one server).
5. Select Edit Server.
7. In the HTTP Sessions section, for Session Authentication, select Single Server.
8. Click the Save and Close link.

Verifying Web settings

To verify web settings:

1. Access the Lotus Domino Administrator.
2. Select the Configuration tab from the navigation bar.
4. Double click your server name from the list (or on current server document if you have only one server).
5. Select Edit Server.
7. Under Authentication Options select Yes for the Anonymous option.

Placing Custom Views in Lotus Templates

To place custom views in Lotus templates:

1. The portal administrator sends the Portal_Lotus_Views.nsf file to the Lotus Notes administrator.

   This file is provided on the PeopleSoft Interaction Hub CD and can be found in PS_APP_HOME/scripts folder.

   **Note:** If the PeopleSoft Interaction Hub files were not installed in a separate PS_APP_HOME location, then this file will be found in PS_HOME instead.

   The Lotus Notes Administrator performs the following steps.
2. Open the Portal_Lotus_Views.nsf file in the Lotus Domino Designer.

3. Copy the two views, PS_PORTAL_MAIL and PS_PORTALCALENDAR, into the mail file template that is used for all mail files in the organization.

4. Copy the view PS_PORTAL_MAIL_LOCATION either into the Name and Address Book template in the organization (if one is used) or into the Name and Address Book of the hub Domino server that the portal application server accesses to retrieve user mail file information.
   
a. If the organization uses customized Domino user names that are not any of the entries listed in the User Name field of the Person document in the Name and Address Book, then customize the PS_PORTAL_MAIL_LOCATION view that you just copied.

b. To customize this view, open it in Lotus Domino Designer and change the first column of the view to reflect the customized Domino user names used in the organization.

   For example, if the entries in the User Name field are John Smith/ACME Corp and John Smith, but a custom Domino user name of jsmith is used, the column formula is @Left(FirstName;1)+LastName.

c. Change the first column of the PS_PORTAL_MAIL_LOCATION view only if the system uses custom Domino user names that are not any of the entries in the User Name field.

Integrating With a POP Server

This section provides an overview of post office protocol (POP) configuration and prerequisites, and discusses how to extract .jar files.

Understanding POP Configuration

The setup for POP mail is optional. It is required only when the portal administrator has designated a primary mail system that is POP-based or has set up additional email selections for the email pagelet. POP mail requires correct placement of third-party .jar files from the Sun website to the portal application server.

POP mail integration requires the following:

• If you access POP mail on an internal mail server, that mail server must be POP-enabled.

• If you access POP mail from an external mail system, the remote POP mail server to which you point must be POP-enabled.

   Also, users must set up their external mail accounts to POP forward.

Extracting .jar Files for POP Email Integration

This section discusses how to extract the following Sun .jar files into the <PS_CFG_HOME>\class Directory of the NT portal application server:

• mail.jar

• activation.jar

• pop3.jar
Note: When you transfer .jar files, be sure to use binary transfers, not ASCII transfers. Also, you must install the required Java files in the proper directory for each portal application server.

Extracting mail.jar (JavaMail)
To download mail.jar:
2. Extract the mail.jar file into the PS_CFG_HOME\class directory on each portal application server.
3. Delete the javamail1_1_3.zip file.

Extracting activation.jar (JavaBeans Activation Framework)
To download activation.jar:
2. Extract the activation.jar file into the PS_CFG_HOME\class directory on each portal application server.
3. Delete the jaf1_0_1.zip file.

Extracting pop3.jar (POP3 Provider)
To download pop3.jar:
2. Extract the pop3.jar file into the PS_CFG_HOME\class directory on each portal application server.
3. Delete the pop31_1_1.zip file.

Note: The Sun Microsystems website from which the drivers are downloaded is external to PeopleSoft, and its content and layout might change at any time. For assistance in locating files on the Sun Microsystems website, contact Sun Microsystems.

Integrating With an IMAP Server
Since IMAP is an internet protocol, the configuration required by the portal administrator are:

- Installing the delivered PeopleSoft jar file, com.peoplesoft.pa.pp.jar on the application server.
- Entering the IMAP mail server name and the URL for the IMAP mail inbox on the Email and Calendar Defaults page.

See Configuring the Primary Email System to Use IMAP.
Designating the Primary Mail System

The administrative information that you assign drives both the Email pagelet and Calendar Events pagelet. The portal supports Lotus Notes/Domino, Microsoft Outlook Web Access/Exchange, POP3, and IMAP systems for email, and Lotus and Microsoft for calendars. Remember that only one email and calendar system is designated as the portal's default system. The default system is considered primary and is the first email section on a user's pagelet. It is possible to override the system default for an individual user.

This section discusses:

- Designating the primary email and calendar system.
- Configuring the Primary Email System to Use Microsoft Outlook Web Access.
- Configuring the Primary Email System to Use Lotus Notes.
- Configuring the Primary Email System to Use POP.
- Configuring the Primary Email System to Use IMAP.
- Overriding email and calendar settings for individual user IDs.
- Support for SSL-enabled web servers.

**Note:** For the pagelets to be fully functional, you must complete setup procedures for the application and mail servers.

### Pages Used to Assign Mail Servers

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email and Calendar Defaults</td>
<td>EO_PE_ADMIN</td>
<td>Portal Administration, Pagelets, Email / Calendar, Email / Calendar Defaults</td>
<td>Designate the primary email and calendar system for the portal.</td>
</tr>
<tr>
<td>Email and Calendar by User</td>
<td>EO_PE_ADMIN_OPR</td>
<td>Portal Administration, Pagelets, Email / Calendar, Email / Calendar by User</td>
<td>Add overriding email and calendar settings for an individual user ID.</td>
</tr>
</tbody>
</table>

### Related Links

*Understanding Application and Mail Server Configuration*

### Email and Calendar Defaults Page

The Portal Administrator designates the primary email and calendar system.

Use the Email and Calendar Defaults page (EO_PE_ADMIN) to designate the primary email and calendar system for the portal.
Navigation

Portal Administration, Pagelets, Email / Calendar, Email / Calendar Defaults

**Image: Email and Calendar Defaults page**

This example illustrates the fields and controls on the Email and Calendar Defaults page. You can find definitions for the fields and controls later on this page.

---

**Email and Calendar Defaults**

Set the default primary email system for the Email pagelet and Calendar Events pagelet. To add additional, non-primary POP email systems, use the PeopleTools URL maintenance utility.

**Primary Email System**

- Microsoft (Outlook Web Access)
- POP (No Calendar)
- Lotus Notes
- IMAP (No Calendar)

**Microsoft Outlook Type**

- MS Outlook Exchange 2003
- MS Outlook Exchange 2007

**Hardware Configuration**

- Single Box
- Distributed (Different Boxes)

**URL for Mail Inbox:**

Outlook Web Access/Exchange Server URL

---

**Note:** The fields shown on this page vary depending on which email system is selected as the primary email system.

**Primary E-mail System**

Select the default email/calendar system for the portal. Additional fields display based on your selection. Available options are:

- **Microsoft (Outlook Web Access)**
- **Lotus Notes**
- **POP (No Calendar)**
- **IMAP (No Calendar)**
Configuring the Primary Email System to Use Microsoft Outlook Web Access

This sections discusses the configuration for Microsoft Outlook Web Access.

Image: Email and Calendar Defaults page with the Microsoft (Outlook Web Access) option selected

This example illustrates the fields and controls on the Email and Calendar Defaults page. You can find definitions for the fields and controls later on this page.

Access the Email and Calendar Defaults page and select the Microsoft (Outlook Web Access) option.

Microsoft Outlook Type

This field applies when you select the Microsoft (Outlook Web Access) option in the Primary E-mail System group box.

- MS Outlook 2003
- MS Outlook 2007

Hardware Configuration

These fields display when you select the Microsoft (Outlook Web Access) option in the Primary E-mail System group box.

- Single Box. Select if your hardware configuration is a single machine setup, that is, the OWA/ASP files are on the same machine of the Exchange server.
- Distributed (Different Boxes). Select if your hardware configuration is for a multiple machine setup, that is, the OWA/ASP files are on different machines of the Exchange server.

URL for Mail Inbox

For Microsoft, enter the URL typically used for Outlook Web Access/Exchange Server URL. The URL should have the form:

http://<server>/exchange, replacing <server> with the Exchange server name.
Use the folder name *exchange*. The *exchange* name is the mapped folder name in the IIS installation. It maps to the physical folder in which Exchange is installed. Always use *exchange* as the folder name in the URL for Mail Inbox field.

**Configuring the Primary Email System to Use Lotus Notes**

This sections discusses the configuration for Lotus Notes.

**Image: Email and Calendar Defaults page with the Lotus Notes option selected**

This example illustrates the fields and controls on the Email and Calendar Defaults page. You can find definitions for the fields and controls later on this page.

Access the Email and Calendar Defaults page and select the *Lotus Notes* option.

**Server**

This field displays when the *Lotus Notes* option is selected in the Primary E-mail System group box.

Enter the server name.

For Lotus Notes, enter the name of a Domino server on the network. Typically, this is a centralized hub server. This is the Domino server enabled with additional services and has the custom view PS_PORTAL_MAIL_LOCATION in the Name and Address Book.

**URL for Mail Inbox**

Enter a URL (the link on the pagelet transfers the user to this location in a new browser window).

For Lotus, this field is relevant only for web-enabled iNotes mail.

**File Name of Address Book**

This field displays when the *Lotus Notes* option is selected in the Primary E-mail System group box.
Enter the file name for the Lotus Notes name and address book.

**Configuring the Primary Email System to Use POP**
This section discusses the configuration for POP.

**Image: Email and Calendar Defaults page with the POP (No Calendar) option selected**
This example illustrates the fields and controls on the Email and Calendar Defaults page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Email and Calendar Defaults</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set the default primary email system for the Email pagelet and Calendar Events pagelet. To add additional, non-primary POP email systems, use the PeopleTools URL maintenance utility.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Primary Email System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft (Outlook Web Access)</td>
</tr>
<tr>
<td>Lotus Notes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Server:</th>
</tr>
</thead>
<tbody>
<tr>
<td>pop.mail.yahoo.com</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>URL for Mail Inbox</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://mail.yahoo.com">http://mail.yahoo.com</a></td>
</tr>
</tbody>
</table>

Access the Email and Calendar Defaults page and select the *POP (No Calendar)* option.

**Server**
Enter the POP mail server name. For example, for Yahoo!, enter *pop.mail.yahoo.com*.

**URL for Mail Inbox**
Enter the mail server URL (the link on the pagelet transfers the user to this location in a new browser window).
Configuring the Primary Email System to Use IMAP
This sections discusses the email configuration for IMAP.

Image: Email and Calendar Defaults page with the IMAP (No Calendar) option selected
This example illustrates the fields and controls on the Email and Calendar Defaults page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Email and Calendar Defaults</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set the default primary email system for the Email pagelet and Calendar Events pagelet. To add additional, non-primary POP email systems, use the PeopleTools URL maintenance utility.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Primary Email System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft (Outlook Web Access)</td>
</tr>
<tr>
<td>POP (No Calendar)</td>
</tr>
<tr>
<td>Lotus Notes</td>
</tr>
<tr>
<td>IMAP (No Calendar)</td>
</tr>
</tbody>
</table>

Server: imap.example.com
 IMAP Mail Server
URL for Mail Inbox: http://webmail.example.com
 Mail Server URL

Access the Email and Calendar Defaults page and select the IMAP (No Calendar) option.

Server
Enter the IMAP mail server name.

URL for Mail Inbox
Enter the mail server URL (the link on the pagelet transfers the user to this location in a new browser window).

Email and Calendar by User Page
Use the Email and Calendar by User page (EO_PE_ADMIN_OPR) to add overriding email and calendar settings for an individual user ID.
Navigation

Portal Administration, Pagelets, Email / Calendar, Email / Calendar by User

Image: Email and Calendar by User page

This example illustrates the fields and controls on the Email and Calendar by User page.

```
Email and Calendar by User
Set the primary email system for selected users to override the system-wide primary email server.

<table>
<thead>
<tr>
<th>User Override Settings</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>*User ID:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Additional E-mail Accounts
- Microsoft (Outlook Web Access)
- Lotus Notes
- POP (No Calendar)
- IMAP (No Calendar)

Microsoft Outlook Type
- MS Outlook Exchange 2003
- MS Outlook Exchange 2007

Hardware Configuration
- Single Box
- Distributed (Different Boxes)

URL for Mail Inbox:

Outlook Web Access/Exchange Server URL
```

Select the user ID for which you want to define overriding email and calendar information. The remaining fields function like those on the Primary E-mail and Calendar Defaults page. Entries on this page override the primary email system settings entered on that page for the specified user.

Related Links

Email and Calendar Defaults Page

Support for SSL-Enabled Web Servers
If your web server is SSL-enabled, in addition to specifying an HTTPS URL on the E-mail and Calendar Defaults page, you must do the following:

- For Microsoft Exchange, in the ASP file change the strProtocol value to https, or change the isFormBasedAuth flag to true, or both.
- For POP/IMAP, specify the SSL port number in the mail server URL.
- No extra steps are required for Domino.
Setting Up Integration with Third-Party Email and Calendar Systems

Chapter 19

Setting Up Additional Mail Systems

To enable users to add external POP email accounts to their Email pagelets, the portal administrator must set up a URL identifier and a URL for each POP mail system. Once these entries are stored in the URL Catalog, the POP mail system appears in the server and URL drop-down list boxes of the pagelet's Personalize Email Options - Add a Personal Email Account page.

This section discusses how to add and maintain mail system URLs.

**Note:** The POP mail system must have POP forwarding on a user's individual profile. Each user needs to set this with the external mail system. Some mail systems automatically activate POP forwarding; some (such as Yahoo!) require the user to change a profile setting, while others (such as Microsoft Hotmail) do not allow forwarding. Non-forwarding mail systems do not appear on the Email pagelet.

### Pages Used to Set Up Additional Mail Systems

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL Maintenance</td>
<td>URL_TABLE</td>
<td>PeopleTools, Utilities, Administration, URLs, URL Maintenance</td>
<td>Add a URL identifier and maintain a URL for a POP or IMAP mail server. This definition enables the selection on the Add a Personal Email Account page accessed from the Email pagelet.</td>
</tr>
</tbody>
</table>

### Related Links

"Working With the Email Pagelet (PeopleSoft Interaction Hub 9.1: Using Portal Features)"

**URL Maintenance Page**

Use the URL Maintenance page (URL_TABLE) to add a URL identifier and maintain a URL for a POP or IMAP mail server.

This definition enables the selection on the Add a Personal Email Account page accessed from the Email pagelet.
Navigation

PeopleTools, Utilities, Administration, URLs, URL Maintenance

Image: URL Maintenance page

This example illustrates the fields and controls on the URL Maintenance page. You can find definitions for the fields and controls later on this page.

URL Maintenance

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL Identifier</td>
<td>Enter a URL identifier. The URL identifier indicates whether the URL points to a web address or to a POP3 mail server that cannot be accessed through the web. For a webmail URL, the URL ID must start with MAIL_. For a POP3 mail server, the URL ID must start with SERVERMAIL_. Whatever follows the MAIL_ or SERVERMAIL_ prefix must be unique for each MAIL or SERVERMAIL ID. For example: MAIL_YAHOO or SERVERMAIL_YAHOO.</td>
</tr>
<tr>
<td>Description</td>
<td>This description appears in the Mail Account Server drop-down list box on the Add a Personal Email Account page. For example: Yahoo Mail Server or Yahoo Mail URL.</td>
</tr>
<tr>
<td>URL</td>
<td>Enter the URL associated with the URL identifier.</td>
</tr>
<tr>
<td>Comments</td>
<td>You may optionally enter comments. For example, you may enter your name and the date on which the URL was enabled for the Email pagelet.</td>
</tr>
</tbody>
</table>

Related Links

"Working With the Email Pagelet (PeopleSoft Interaction Hub 9.1: Using Portal Features)"
Chapter 20

Setting Up Instant Messaging in PeopleSoft Interaction Hub

Setting Up Instant Messaging in PeopleSoft Interaction Hub

This section provides an overview of instant messaging in PeopleSoft Interaction Hub and maintains how to:

- Set up instant messaging in PeopleSoft Interaction Hub.
- Enter your instant messaging information as an end user.

Understanding Instant Messaging in PeopleSoft Interaction Hub

The setup tasks described in this topic must be completed before you can use the instant messaging functionality that is available in the following areas of PeopleSoft Interaction Hub:

- Related contacts.
  See "Working With the Related Contacts Pagelet (PeopleSoft Interaction Hub 9.1: Using Portal Features)".

- Collaborative Workspace member profiles.
  See "Viewing Member Profiles (PeopleSoft Interaction Hub 9.1: Collaborative Workspaces)".

- Resource Finder profiles.
  See "Understanding Using Participant Profiles (PeopleSoft Interaction Hub 9.1: Resource Finder)".

- Content Management user profiles.
  See "Understanding Managed Content (PeopleSoft Interaction Hub 9.1: Content Management System)".

Prerequisites

Users that are utilizing instant messaging functionality will need to have an instant messaging client installed on the machine from which they’re accessing the PeopleSoft Interaction Hub product. If this functionality is going to be made available to users of a shared PC, then Oracle recommends that an instant messaging account be set up on the shared machine that is available for general use by anyone that has access to the shared PC.

Setting Up Instant Messaging

This section discuss how to:
• Load instant messaging information using a comma-delimited (CSV)-formatted file.
• Load instant messaging information using a component interface.
• Manage instant messaging information.

### Pages Used to Set Up Instant Messaging in PeopleSoft Interaction Hub

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import Instant Message Users</td>
<td>EPPRC_IM_IMPORT</td>
<td>Portal Administration, Instant Messaging, Import IM Users</td>
<td>Run the Import User Instant Message Information Application Engine process (EPPRC_IM_IMP) to load user instant message data contained in CSV-formatted files.</td>
</tr>
<tr>
<td>Maintain Instant Messaging Users</td>
<td>EPPRC_IM_ADMIN</td>
<td>Portal Administration, Instant Messaging, Maintain IM Users</td>
<td>Manually enter user instant messaging information. Once the Import User Instant Message Information process has completed successfully, review or edit loaded user instant messaging information.</td>
</tr>
</tbody>
</table>

### Import Instant Message Users Page

Use the Import Instant Message Users page (EPPRC_IM_IMPORT) to run the Import User Instant Message Information Application Engine process (EPPRC_IM_IMP) to load user instant message data contained in CSV-formatted files.

**Navigation**

Portal Administration, Instant Messaging, Import IM Users

**Image: Import Instant Message Users page**

This example illustrates the fields and controls on the Import Instant Message Users page. You can find definitions for the fields and controls later on this page.

The CSV-formatted file you use to load user instant message data should contain the following information in this order:
<PeopleSoft Interaction Hub user ID>,<instant message domain>,<domain screen name>

For example, the following user’s instant messaging information should appear in the CSV-formatted file entry as shown here:

**PeopleSoft Interaction Hub user ID**  VP1  
**Instant message domain**  YAHOO  
**Domain screen name**  pat_smith  
**CSV-formatted file line entry**  VP1,YAHOO,pat_smith  

Entries in the CSV-formatted file are case sensitive. For example, instant message domains must be capitalized (GTALK, SAMETIME, XMPP, or YAHOO), and the PeopleSoft Interaction Hub user ID and domain screen name in the CSV-formatted file must use the case formatting of your actual user ID and screen name.

In addition, there should be no spaces around commas in the CSV-formatted file.

You can generate a CSV-formatted file by creating a spreadsheet formatted like the one shown in the following example.

**Image: Spreadsheet to generate CSV-formatted file for import**

This example illustrates a spreadsheet formatted to generate CSV-formatted file.

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BMEADOWS</td>
<td>XMPP</td>
<td>bmeadows</td>
</tr>
<tr>
<td>2</td>
<td>PAPP_CONTENTA</td>
<td>XMPP</td>
<td>r_taylor</td>
</tr>
<tr>
<td>3</td>
<td>PAPP_EMPLOYEE</td>
<td>YAHOO</td>
<td>j_jones</td>
</tr>
<tr>
<td>4</td>
<td>PS</td>
<td>XMPP</td>
<td>l_martin</td>
</tr>
<tr>
<td>5</td>
<td>VP1</td>
<td>XMPP</td>
<td>p_smith</td>
</tr>
<tr>
<td>6</td>
<td>VP1</td>
<td>YAHOO</td>
<td>pat_smith</td>
</tr>
</tbody>
</table>

When you save the spreadsheet, select a Save as type value of CSV *(Comma delimited (*.csv)).*

If you open the file in a text editor, it should appear as shown in the following example.

**Image: Example of CSV-formatted file content**

This example illustrates a CSV-formatted file content.
Create one CSV-formatted line entry for each unique user ID and instant message domain combination.

**Server Name**
Select the server you want to use to run the process. Select a server that can access the designated file path to the CSV-formatted file.

**Select Files**

**ID**
Enter an identifier for the data in the designated CSV-formatted file.

**File Path**
Enter the full path to the CSV-formatted file that contains the user instant message data you want to load. The file path you enter must be accessible by the server selected in the Server Name field.

**Include**
Select to include the CSV-formatted file in your run of the Import User Instant Message Information process.

After the process has completed successfully, review or edit loaded user instant messaging information on the Manage Instant Messaging page.

**Loading Instant Messaging Information Using a Component Interface**
Rather than using a CSV-formatted file to load user instant messaging data, you can use the EPPRC_IM_USER_CI component interface (CI) with the Excel-to-CI spreadsheet load utility to load this data from a spreadsheet, or any other external application you want to create to interact with the CI.

The Excel-to-CI spreadsheet utility supports the automatic configuration of a Microsoft Excel spreadsheet to match the properties of a designated CI. For example, the fields related to the CI; PeopleSoft Interaction Hub user ID, instant message domain, and domain user ID as discussed earlier; appear as columns in the spreadsheet. After entering data into the spreadsheet, you load it into your PeopleSoft Interaction Hub database using the associated CI.

See the product documentation for *PeopleTools: PeopleSoft Component Interfaces*, “Using the Excel to Component Interface Utility.”

**Maintain Instant Messaging Users Page**
Use the Maintain Instant Messaging Users page (EPPRC_IM_ADMIN) to manually enter user instant messaging information.

After the Import User Instant Message Information process has completed successfully, review or edit loaded user instant messaging information.
Navigation

Portal Administration, Instant Messaging, Maintain IM Users

**Image: Maintain Instant Messaging Users page**

This example illustrates the fields and controls on the Maintain Instant Messaging Users page. You can find definitions for the fields and controls later on this page.

![Maintain Instant Messaging Users page](image)

Use the elements at the top of the page to enter user instant messaging information search criteria. Elements in the scroll area on the page display your search results. You can also use the elements in the scroll area to add, delete, and edit user instant messaging information.

<table>
<thead>
<tr>
<th>User ID</th>
<th>Domain</th>
<th>Screen Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>FS</td>
<td>XMPP</td>
<td>Cynni</td>
</tr>
<tr>
<td>VP1</td>
<td>XMPP</td>
<td>bbreken9</td>
</tr>
<tr>
<td>VP1</td>
<td>SAMETIME</td>
<td>BBreckenridge</td>
</tr>
<tr>
<td>VP1</td>
<td>YAHOO</td>
<td>bce_breakenridge</td>
</tr>
</tbody>
</table>

**User ID**
Enter the user ID of the user for which you want to view instant messaging information.

**Domain**
Select the domain name for which you want to view instant messaging information.

**Screen Name**
Enter the screen name of the user for which you want to view instant messaging information.

**Search**
Select to execute a search using any criteria you have entered in the User ID, Domain, and Screen Name fields. Your search results are displayed in the lower portion of the page.

**User ID**
Select a user’s PeopleSoft Interaction Hub user ID.

**Domain**
Select an instant messaging domain:

- **GTALK** — Google Talk.
- **SAMETIME** — IBM Lotus Sametime.
- **XMPP** — Extensible Messaging and Presence Protocol.
YAHOO — Yahoo! Messenger.

**Screen Name**

Add or edit a user’s screen name for the selected domain.
Chapter 21

Working With Internet News Content

Working With Internet News Content

These topics provide overview of internet news content, news feed configuration, and internet news content providers. These topics also discuss how to:

- Define internet news content providers.
- Define External News pagelets.
- Manage external news options.
- Schedule a news feed load.
- Manage loaded news article content.

Understanding Internet News Content

PeopleSoft Interaction Hub provides External News pagelets and Feed Reader pagelets that you can configure to provide access to internet news content. You set up these pagelets to display headlines from a variety of news sources in a personalized format. You can create more than one version of each type of pagelet.

External News pagelets are designed to be configured and centrally administered by a portal administrator. The administrator decides which content providers to use, which categories are visible, and which users can see those categories. Run the Schedule External News Feed Application Engine process (EO_PE_EXNEWS) periodically to harvest news headlines and URLs for all categories from the content provider. Your end users can then personalize their External News pagelets by selecting individual news categories from the overall list.

You can configure the External News pagelet to receive free and subscription-based news feeds.

A feed—also known as an RSS feed, an XML feed, syndicated content, or a web feed—is frequently updated content published by a website. Particularly suitable for listing news headlines, feeds have been adopted by content providers to supply users with a sampling of the content available on their websites.

The Feed Reader pagelet provides the following features:

- News feed title, a link back to the source website, and an optional image or logo.
- Headlines and links to the associated articles on the source website.
- Optional capability to search for content on the source website.

Note: PeopleSoft cannot guarantee that content providers will continue to support the integration of internet content. PeopleSoft supports the integration as long as it has a solid partnership with a vendor. The vendor content descriptions in this topic are subject to change. Check the vendor's website for the latest content descriptions.
Common Elements Used in Internet News Content
Creation Date, Last Update User ID, These fields are automatically generated. They are provided for and Last Update Date/Time reference.

Understanding News Feed Configuration

The delivered External News pagelet is pre-configured to gather news content from partners. Administrative setup involves running the Schedule External News Feed process to gather the news periodically.

PeopleSoft Interaction Hub offers features that assist each organization in customizing news feeds and integrating subscription-based news. For example, you can deactivate news categories that are gathered by the batch process if the news is not appropriate for your users. You can then view the categories and decide which ones to make available to the rest of the organization. With this feature, you can allow users to see only business-related news by deactivating all consumer-related topics.

With additional features, you can:

• Create custom news pagelets for specialized news feeds and distribution to selected groups.

  For example, you can add customized news feeds about competitors and display them in an existing External News pagelet or in a newly created pagelet.

• Focus the audience on a specific news feed or category.

  For example, you can enable managers to view competitive intelligence.

Understanding Internet News Content Providers

There are two types of Internet news content providers you can use to supply news on External News pagelets and RSS News pagelets: free and subscription-based.

Free News Content Providers

You can use PeopleSoft Interaction Hub news-related pagelets with free out-of-the-box solutions from these content providers to access the news feeds they offer. You can select and view these news feeds without additional implementation steps.

<table>
<thead>
<tr>
<th>Provider</th>
<th>Sample News Sources</th>
<th>Content</th>
</tr>
</thead>
</table>

Related Links
Defining External News Pagelets

Defining Internet News Content Providers

This section discusses how to define an internet news content provider.
Chapter 21 Working With Internet News Content

Page Used to Define Internet News Content Providers

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>News Provider Maintenance</td>
<td>EO_PE_PROV_PG</td>
<td>Portal Administration, Pagelets, External News, Providers</td>
<td>Define an internet news content provider in your system. Maintain news content provider data, including a URL used to retrieve the news feed.</td>
</tr>
</tbody>
</table>

**News Provider Maintenance Page**

Use the News Provider Maintenance page (EO_PE_PROV_PG) to define an internet news content provider in your system.

Maintain news content provider data, including a URL used to retrieve the news feed.

**Navigation**

Portal Administration, Pagelets, External News, Providers

**Image: News Provider Maintenance page**

This example illustrates the fields and controls on the News Provider Maintenance page. You can find definitions for the fields and controls later on this page.

```
News Provider Maintenance

*Description:*

```

```
URLID: http://xmlapi.multexexpress.com/multexapi/04_00/multexapi.asp?app=p
```

```
Query URL: i-x-schema:http://xmlapi.multexexpress.com/multexapi/04_00/schemas
```

```
Image URL: http://clientapi.xmlapi.multexexpress.com/clientapi/01_00/peoplesoft/brapi
```

```
Newsfeed Format: RSS 0.91 XML
```

```
Content Access Type: Registration required
```

```
Default Lifespan (in days): 30
```

```
User ID: OracleAPI@21851
```

```
Password: *********
```

```
Last Update User ID: VP1
```

```
Last Update Date/Time: 02/28/2013 8:57:14PM Creation Date: 11/13/2002
```

**Note:** The term *provider* can refer to both the news feed source (for example, the company), or the specific query URL(s) that the company provides to access the news. For example, a news feed source may provide a single query URL value to which different URL parameters can be appended to access different news categories. Alternatively, a news feed source may supply multiple query URLs, in which case each query URL becomes its own news feed provider.
URL
Enter the URL for the homepage of the source website. This URL is used to display links to the provider source website on the External News pagelet and personalization page.

Query URL
Enter the URL provided by the source website to retrieve data for this news feed.

Image URL
Enter a URL for a logo or image to display for news feeds for the source website.

Newsfeed Format
Select the news feed format. The Schedule External News Feed Application Engine process (EO_PE_EXNEWS) uses this value to determine how to parse the news feed data.

*RSS 0.91 XML*

Content Access Type
Select the type of content access. Selecting any value other than *Free* enables you to enter values in the User ID and Password fields. Available types are:

- *Company Subscription*
- *Free*
- *Registration required*
- *User Subscription.*

Default Lifespan (in days)
Enter the number of days during which most articles will be valid in your system. After the specified time, articles may be purged from your portal database. The recommended life span is 30 days.

You can override this value for individual articles on the News Article Maintenance page.

---

**Defining External News Pagelets**

This section provides an overview of defining External News pagelets and discusses how to:

- Create an External News pagelet.
- Define and maintain External News pagelet news groups.
- Define and maintain External News pagelet news categories.

**Pages Used to Define External News Pagelets**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
### Chapter 21 Working With Internet News Content

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>News Group Maintenance</td>
<td>EO_PE_NEWSGROUP_PG</td>
<td>Portal Administration, Pagelets, External News, Groups</td>
<td>Define news groups that you want to use to organize news categories that you want to make available on the External News pagelet you are defining.</td>
</tr>
<tr>
<td>News Category Maintenance</td>
<td>EO_PE_CATEG_PG</td>
<td>Portal Administration, Pagelets, External News, Categories</td>
<td>Define a news category within a news group.</td>
</tr>
<tr>
<td>News Article Maintenance</td>
<td>EO_PE_ARTICLE_PG</td>
<td>Portal Administration, Pagelets, External News, Articles</td>
<td>View and maintain news feed article data. You can define an article removal date that overrides the default article lifespan set for the article's new provider on the News Provider Maintenance page. While you can access news feed article data on this page, you do not define article data in your system. News feed article data is loaded into your system when you run the Schedule External News Feed process.</td>
</tr>
</tbody>
</table>

#### Understanding Defining External News Pagelets

You can also display news feeds on External News pagelets.

To display these news feeds, you must first create a specific instance of an External News pagelet, which is assigned a unique component ID. Once you have created this pagelet definition, you can create and associate news groups and categories from news providers with the pagelet. These news groups and categories are then available on the new pagelet.

You may choose to create a new pagelet for an existing provider, such as Multex, to display specific news categories to specific users. In essence, you can split off news to specialized communities.

**Note:** While you can access news feed article data on the News Article Maintenance page, you do not define article data in your system. News feed article data is loaded into your system when you run the Schedule External News Feed process.

#### External News Pagelet Publications Page

Use the External News Pagelet Publications page (EO_PE_NEWSCOM_SET) to define an external news pagelet with a unique component ID.
Navigation

Portal Administration, Pagelets, External News, Publications

Image: External News Pagelet Publications page

This example illustrates the fields and controls on the External News Pagelet Publications page. You can find definitions for the fields and controls later on this page.

| Component ID: | 0000000005 |
| Pagelet Title: | Worldwide News |
| Description: | Worldwide News |
| Default News Category: | 000000000000 Sample news |

For New Categories in Newsfeed

Role Name: PAPP_EMPLOYEE

Create HomePage Pagelet

| Pagelet Folder: | PAPP_NEWS |
| News | |
| Portal Object Name: | |

Create HomePage Pagelet

Component ID

System-generated value that is used to identify the External News pagelet you are defining. This component ID is used to identify the pagelet when associating it with news groups and categories.

Pagelet Title

Enter a title for the pagelet that is used to populate the title/label field for the component reference. This text becomes the title displayed on the pagelet title bar.

Default News Category

You cannot enter a code until you have defined news categories for this pagelet component ID on the News Category Maintenance page. Once you have completed this definition, return to this page to select the code for the default news category that you want users to see on the External New pagelet when no personalizations have been defined.

For New Categories in NewsFeed

The field in the For New Categories in NewsFeed group box applies to news loaded through the Schedule External News Feed process.
Role Name

Select the default role name to associate with new categories that are loaded by the Schedule External News Feed process.

This enables you to associate a role with news categories that are automatically created by the process. Selecting a value here ensures that you have at least one viewer role assigned to automatically created categories.

Create Homepage Pagelet

The Create Homepage Pagelet group box displays registry information generated upon saving the page. You use this information to register the pagelet in the portal registry.

Pagelet Folders

Displays PAPP_NEWS. The system stores all External News pagelets in this portal registry folder.

Public Access

Select if you want to make access to this External News pagelet available to all users. You can restrict use of the pagelet to specific groups of users using the portal registry.

See the product documentation for PeopleTools: Portal Technology, “Administering Portals.”

Registered

Displays as selected once the pagelet has been entered into the portal registry.

Portal Object Name

Displays once the pagelet has been registered and saved.

Create HomePage Pagelet

Click to register the External News pagelet.

News Group Maintenance Page

Use the News Group Maintenance page (EO_PE_NEWSGROUP_PG) to define news groups that you want to use to organize news categories that you want to make available on the External News pagelet you are defining.
Navigation

Portal Administration, Pagelets, External News, Groups

Image: News Group Maintenance page

This example illustrates the fields and controls on the News Group Maintenance page. You can find definitions for the fields and controls later on this page.

```
| Description: | Multex Track Folders |
| Active for all categories: | ✓ |

News Providers

<table>
<thead>
<tr>
<th>Provider ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multex</td>
</tr>
</tbody>
</table>

Creation Date: 10/14/2001
Last Update User ID: VP1
Last Update Date/Time: 02/28/2013 9:05:05PM

<table>
<thead>
<tr>
<th>Required Field</th>
</tr>
</thead>
</table>

Description

Enter a news group description.

Active for all categories

Clear this option to disable user access to all categories in the selected news group without having to disable each individual category.

Provider ID

Select the providers that you want to associate with the news group. This establishes an association between the content provider query URL and the selected news group.

News Category Maintenance Page

Use the News Category Maintenance page (EO_PE_CATEG_PG) to define a news category within a news group.
Navigation

Portal Administration, Pagelets, External News, Categories

Image: News Category Maintenance page

This example illustrates the fields and controls on the News Category Maintenance page. You can find definitions for the fields and controls later on this page.

**News Category Maintenance**

*News Category Title: Sample news  [Active]
Provider ID: Multex
*News Group ID: Multex Track Folders
Feed Type: System Maintained
URLID: 
URL Parameter:  
Language Code:  

**Viewer Roles**

<table>
<thead>
<tr>
<th>Select</th>
<th>Role Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PAPL_GUEST</td>
</tr>
<tr>
<td>✓</td>
<td>PAPP_CUSTOMER</td>
</tr>
<tr>
<td>✓</td>
<td>PAPP_EMPLOYEE</td>
</tr>
<tr>
<td>✓</td>
<td>PAPP_GUEST</td>
</tr>
<tr>
<td>✓</td>
<td>PAPP_SUPPLIER</td>
</tr>
<tr>
<td></td>
<td>PAPP_USER</td>
</tr>
</tbody>
</table>

Creation Date: 09/18/2000
Last Update User ID: VP1
Last Update Date/Time: 02/28/2013 0:00:20PM

**News Category Title**
Enter a news category title. For some news providers, the news category title text must match the news category title the provider uses. The Schedule External News Feed process attempts to match this title with the title string from the provider.

**Provider ID**
Select the associated news provider. The news provider you select identifies which query URL should be used for the category.

Providers are defined on the News Provider Maintenance page.
News Group ID

Select the news group in which the end user should be able to access this category when personalizing the External News pagelet.

News groups are defined on the News Group Maintenance page.

Newsfeed Type

Select the method to use to load the news category.

*SQL Server to XML Load.* Reserved for future use.

*System Maintained.*

URL

Enter a URL that you want to use to override the query URL value you provided on the News Provider page.

URL Parameter

Enter text you want to be appended to the query URL provided by the news provider.

Language Code

Select the language for the news category.

Viewer Roles

Select

Select for the roles that you want to be able to view and select the news category. Users who do not belong to a selected role cannot access the category when personalizing an External News pagelet or view articles in the category.

For example, you can use this option to restrict access to subscription-based content.

Role Name

This is a subset of all PeopleSoft roles defined by an administrator on the Maintain Viewer Roles page. This is a list of valid viewers for news, rather than a list of all roles in the PeopleTools Roles table.

Managing External News Options

This section discusses how to manage external news options.
### Page Used to Manage External News Options

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage External News</td>
<td>EO_PE_CATEG_ADMIN</td>
<td>Portal Administration, Pagelets, External News, Manage External News</td>
<td>Set general options for the selected External News pagelet. For example, you can determine whether news articles appear in the current browser window or in a new window. There are typically many news categories available for an External News pagelet; this page provides a central location from which you can administer multiple news categories.</td>
</tr>
</tbody>
</table>

### Manage External News Page

Use the Manage External News page (EO_PE_CATEG_ADMIN) to set general options for the selected External News pagelet.

For example, you can determine whether news articles appear in the current browser window or in a new window. There are typically many news categories available for an External News pagelet; this page provides a central location from which you can administer multiple news categories.

**Navigation**

Portal Administration, Pagelets, External News, Manage External News

**Image: Manage External News page**

This example illustrates the fields and controls on the Manage External News page. You can find definitions for the fields and controls later on this page.
News Component
Displays the component ID and name of the External News pagelet for which you are managing external news option.

Default Category Status
Specify the default status for new categories automatically loaded into your system. You can change their individual statuses on the News Category Maintenance page.

Categories marked "new" (days)
Enter the number of days for which newly loaded categories are marked as such on the External News pagelet personalization page.

Display Article in New Window
Select to have news articles accessed from the External News pagelet appear in a new browser window. When articles are displayed in a new browser window, they are not wrapped in the PeopleSoft Interaction Hub. Clear to display them in the same browser window.

The default (and recommended setting) is to have news articles appear in the same browser window.

Category
View Categories
Select a value you want to use to filter the display of categories. Available values are:

- All
- Inactive
- New
- Old

New
Displays an icon if the news category was added to the Personalize Worldwide News − Categories (page name depends on the name of the pagelet you are personalizing) within the number of days specified in the Categories marked "new" (days) field.

Active
Select to make news categories accessible to users. Clear to make them inaccessible. You can also do this individually on the News Category Maintenance page or by news group on the New Group Maintenance page.

News Group ID
Select a value to change the news group that contains the category. You can do this individually on the News Category Maintenance page.

Scheduling a News Feed Load
This section discusses how to configure and run the Schedule External News Feed process.
This is a batch process you can configure to periodically load current internet news content headlines. This periodic load is necessary as news headlines are cached locally in the database to reduce network traffic.

**Page Used to Schedule a News Feed Load**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule External News Feed</td>
<td>RUN_EO_PE_EXNW</td>
<td>Portal Administration, Pagelets, External News, Run External News Feed</td>
<td>Configure and run the Schedule External News Feed process.</td>
</tr>
</tbody>
</table>

**Schedule External News Feed Page**

Use the Schedule External News Feed page (RUN_EO_PE_EXNW) to configure and run the Schedule External News Feed process.

**Navigation**

Portal Administration, Pagelets, External News, Run External News Feed

**Image: Schedule External News Feed page**

This example illustrates the fields and controls on the Schedule External News Feed page. You can find definitions for the fields and controls later on this page.

**Schedule External News Feed**

**Provider**

Select the news provider for which you want to load Internet news content using the query URL you defined on the News Provider Maintenance page.

Oracle recommends that you create different run control IDs to schedule news feed loads from different providers. Each provider has its own recommended news feed refresh cycle, such as hourly or twice daily.

**Run/Schedule**

Click to access the Process Scheduler Request page, where you can specify process parameters, including the server on which the process should be run, as well as how often you want the process to run.
Managing Loaded News Article Content

This section discusses how to manage loaded news article contents.

Pages Used to Manage Loaded News Article Content

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>News Article Maintenance</td>
<td>EO_PE_ARTICLE_PG</td>
<td>Portal Administration, Pagelets, External News, Articles</td>
<td>Review article information for headlines automatically harvested from a content provider.</td>
</tr>
</tbody>
</table>

News Article Maintenance Page

Use the News Article Maintenance page (EO_PE_ARTICLE_PG) to review article information for headlines automatically harvested from a content provider.
Navigation

Portal Administration, Pagelets, External News, Articles

Image: News Article Maintenance page

This example illustrates the fields and controls on the News Article Maintenance page. You can find definitions for the fields and controls later on this page.

### News Article Maintenance

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article ID</td>
<td>System-generated value that is used to identify the Article you are defining.</td>
</tr>
<tr>
<td>Article Headline</td>
<td>The headline for the article.</td>
</tr>
<tr>
<td>Harvest Date/Time</td>
<td>The date and time article was harvested.</td>
</tr>
<tr>
<td>Article Summary</td>
<td>Description of the article.</td>
</tr>
<tr>
<td>Provider ID</td>
<td></td>
</tr>
<tr>
<td>Article Source</td>
<td></td>
</tr>
<tr>
<td>Content Type</td>
<td></td>
</tr>
<tr>
<td>URLID</td>
<td></td>
</tr>
<tr>
<td>Additional URL Text</td>
<td></td>
</tr>
<tr>
<td>Article Text</td>
<td></td>
</tr>
<tr>
<td>Access Type</td>
<td></td>
</tr>
<tr>
<td>Publish Dt</td>
<td></td>
</tr>
<tr>
<td>Remove Dt</td>
<td></td>
</tr>
</tbody>
</table>

**Article ID**

System-generated value that is used to identify the Article you are defining.

**Article Headline**

The headline for the article.

**Harvest Date/Time**

The date and time article was harvested.

**Article Summary**

Description of the article.
<table>
<thead>
<tr>
<th><strong>Provider ID</strong></th>
<th>The associated news provider. Providers are defined on the News Provider Maintenance page.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Article Source</strong></td>
<td>Source of article.</td>
</tr>
<tr>
<td><strong>Content Type</strong></td>
<td>Text or URL.</td>
</tr>
<tr>
<td><strong>URL</strong></td>
<td>Enter a URL that you want to use for the article.</td>
</tr>
<tr>
<td><strong>Additional URL Text</strong></td>
<td>Enter URL parameter</td>
</tr>
<tr>
<td><strong>Article Text</strong></td>
<td>Body of the article</td>
</tr>
<tr>
<td><strong>Access Type</strong></td>
<td>Select the access:</td>
</tr>
<tr>
<td></td>
<td>• Free</td>
</tr>
<tr>
<td></td>
<td>• Registration Required</td>
</tr>
<tr>
<td></td>
<td>• Company Subscription</td>
</tr>
<tr>
<td></td>
<td>• User Subscription</td>
</tr>
<tr>
<td><strong>Publish Dt</strong></td>
<td>Date article is published.</td>
</tr>
<tr>
<td><strong>Remove Dt</strong></td>
<td>Date article is to be removed.</td>
</tr>
</tbody>
</table>
Chapter 22

Working With Internet Content Pagelets

Working With Internet Content Pagelets

This topic discusses how to create and register HTML-, Java-, and HTML-object-based pagelets.

Creating HTML- and JavaScript-Based Pagelets

You can create homepage pagelets based on HTML or JavaScript, as well as HTML objects. Rather than using PeopleTools to accomplish this, you can use the Manage HTML Pagelets page delivered with the PeopleSoft Interaction Hub. This page is designed specifically to transform your HTML or JavaScript code into a pagelet for display within the PeopleSoft Interaction Hub.

Page Used to Create HTML- and JavaScript-Based Pagelets

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage HTML Pagelets</td>
<td>EO_PE_HTML_PAGELET</td>
<td>Portal Administration, Pagelets, Internet, Manage HTML Pagelets</td>
<td>Create and register HTML-, JavaScript-, and HTML-object-based homepage pagelets.</td>
</tr>
</tbody>
</table>

Manage HTML Pagelets Page

Use the Manage HTML Pagelets page (EO_PE_HTML_PAGELET) to create and register HTML-, JavaScript-, and HTML-object-based homepage pagelets.
Navigation

Portal Administration, Pagelets, Internet, Manage HTML Pagelets

**Image: Manage HTML Pagelets page**

This example illustrates the fields and controls on the Manage HTML Pagelets page. You can find definitions for the fields and controls later on this page.

**Manage HTML Pagelets**

Enter the HTML (or provide an URL) below. Specify a name which will be used to register and access this new pagelet.

*HTML Pagelet Name:* DMO_DICTIONARY

*Description:* Sample Demo Dictionary.com

*Pagelet Source Type:* JavaScript

**HTML Area:**

```javascript
<SCRIPT LANGUAGE="JavaScript">
<!--

function jump2form()
{
    document.dict_form.term.select();
    document.dict_form.term.focus();
}

function isblank(s)
{
```

**Create HomePage Pagelet**

- **Public Access**
- **Registered**

**Last Update Date/Time**

<table>
<thead>
<tr>
<th>Creation Date:</th>
<th>06/22/2000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Update User ID:</td>
<td>VP1</td>
</tr>
<tr>
<td>Last Update Date/Time:</td>
<td>02/28/13 10:24:44PM</td>
</tr>
</tbody>
</table>

**HTML Pagelet Name**

Enter a pagelet name. This label appears in the pagelet's title bar. This name is used to register the pagelet.

**Pagelet Source Type**

Select the pagelet source type.

- **HTML**
- **HTML Object**
### HTML Area
When the Pagelet Source Type is set to **HTML**, enter the HTML code for the pagelet you want to create and register.

When the Pagelet Source Type is set to **JavaScript**, enter the JavaScript code for the pagelet you want to create and register. Once you enter HTML and refresh the page, the URL field no longer displays.

This field does not appear when the Pagelet Source Type is set to **HTML Object**.

### HTML Object Name
You can create an HTML object in Application Designer that contains static HTML. Enter the HTML object name to reference one of these objects.

### Create Homepage Pagelet

<table>
<thead>
<tr>
<th><strong>Pagelet Folders</strong></th>
<th>Select the pagelet folder in which you want to register the pagelet.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public Access</strong></td>
<td>Select to indicate that you want the pagelet to have public access. When this check box is clear, the security default is to provide access to only the user who registered the pagelet. You can modify pagelet security by accessing the content reference.</td>
</tr>
<tr>
<td><strong>Registered</strong></td>
<td>This check box displays as selected if the pagelet has already been registered.</td>
</tr>
<tr>
<td><strong>Portal Object Name</strong></td>
<td>Displays the object name of a registered pagelet.</td>
</tr>
<tr>
<td><strong>Create HomePage pagelet</strong></td>
<td>Click to create and register the pagelet.</td>
</tr>
<tr>
<td><strong>Last Update Date/Time</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Creation Date</strong></td>
<td>Displays the date on which the selected pagelet was created.</td>
</tr>
<tr>
<td><strong>Last Update User ID</strong></td>
<td>Displays the user ID of the user who last updated the pagelet.</td>
</tr>
<tr>
<td><strong>Last Update Date/Time</strong></td>
<td>Displays the date and time at which the pagelet was last updated.</td>
</tr>
</tbody>
</table>
Obtaining Pagelet Code

You can use your own HTML code to create pagelets on the Manage HTML Pagelets page, or you can use HTML code supplied by Internet sources. In the following example, a source has supplied the HTML code to include a source search box pagelet on your homepage.

Image: Search box pagelet HTML code

This example illustrates a search-box pagelet HTML code.

```html
<!-- Begin Search Box -->
<form action="http://cgi.trip.com/search/cgi-bin/search.cgi" method="get">
  Search for Socks: <input type="text" name="searchstring" size="15" maxlength="40">
  <input type="submit" value="Find!">
</form>
```

Insert this HTML code in the HTML Area field on the Manage HTML Pagelets page to create and register the search box pagelet for use in your PeopleSoft Interaction Hub.
Chapter 23

Using the Integrated Task List

Using the Integrated Task List

This topic provides overviews of the Integrated Task List configuration requirements and integration setup.

Related Links
"Working With the Tasks and Tasks Pagelet (PeopleSoft Interaction Hub 9.1: Using Portal Features)"

Understanding Integrated Task List Configuration Requirements

To enable your Integrated Task List feature to work as designed, ensure that your configuration meets the following requirements:

- Ensure that the Tasks page uses the PAPP_NO_NAV_HTML template, or any Hypertext Markup Language (HTML) template, for registration so that the proxy is automatic.
- Ensure that the Task Details page uses the PAPP_NO_NAV_FRAME, or any frame template, for registration. This enables the File Attachment feature.
- Ensure that the Personalize Tasks page uses the PORTAL_HOME_PAGE_DESIGNER template, or any HTML template, to enable the Return to Home link.
- Ensure that the WORKLIST and WORKLIST_DETAIL components are registered in an HTML template.
- Ensure that you activated public or permission list security for all registered content references.

Understanding Integrated Task List Integration Setup

The Integrated Task List leverages PeopleSoft Integration Broker and XML technology to enable you to integrate tasks from any system in your implementation. This is also useful to aggregate worklists across PeopleSoft applications.

To use the Integrated Task List integration features, you must include the following setup in your configuration:

- Schedule the Worklist Replicate process according to how frequently near-real-time updates are sent to and from the portal database.
- Set PeopleSoft Integration Broker for standard operator and user security.
- Specify a file storage location for file attachment functions using the URL Maintenance page in the portal database (select PeopleTools, Utilities, Administration, URLs). File attachments can be stored either on a File Transfer Protocol (FTP) server or in a database table. The URL identifier TASKS is reserved for the Integrated Task List feature. This identifier is used throughout the task PeopleCode.
The Worklist Replicate process should be run using the PeopleTools Worklist Replicate Application Engine process (WL_REPLICATE). To set up and run the Worklist Replicate process, you need to set up Integration Broker and configure routings on the sender and receiver nodes.

See the product documentation for *PeopleTools: Workflow Technology*. 
Chapter 24

Publishing Content from Third-Party Applications

Publishing Content from Third-Party Applications

These topics provide an overview of web services related to incoming third-party content and discuss how to:

- Set up on the PeopleSoft side.
- Set up on the third-party side.
- View published content in the PeopleSoft Interaction Hub.
- Understand Enterprise Integration Points for the PeopleSoft Interaction Hub.

Note: The Resource Finder integration used to import participant data is documented in the Importing Participant Data topic.

Related Links
"Understanding Importing Participant Data (PeopleSoft Interaction Hub 9.1: Resource Finder)"
Understanding Public Web Services

Understanding Web Services for Incoming Third-Party Content

This section discusses:

- Prerequisites.
- Publication of content from third-party applications to the PeopleSoft Interaction Hub.
- The process flow for publishing content.
- PeopleSoft-delivered objects.

There are two parts to publishing content from third-party applications:

- PeopleSoft.
- Third-party application.

On the PeopleSoft side, you need to define the PeopleSoft Integration Broker Gateway, nodes, and routings.

On the third-party side, you must generate and post XML messages containing metadata about the content you are publishing. PeopleTools provides the Send Master utility that you can use to test posting messages to Integration Broker.
Note: The PeopleSoft Interaction Hub provides a basic prototype for web services. This is only a sample. You can adapt this prototype for your organization, but must also take into account additional factors that might apply in your organization in order to implement web services effectively.

See the product documentation for PeopleTools: PeopleSoft Integration Broker, PeopleTools: Integration Broker Testing Utilities and Tools.

Prerequisites
Before implementing web services, you must have installed:

- PeopleTools 8.4 or later.
- Portal database.
- PeopleSoft Pure Internet Architecture.
- PeopleSoft Application Server and Process Scheduler, configured using PSADMIN (a utility program that is located in your PeopleTools home directory).

Publication of Content from Third-Party Applications to the PeopleSoft Interaction Hub
You can publish three types of content from a third-party application to the PeopleSoft Interaction Hub. Each type of content has a category type, expressed as a code:

<table>
<thead>
<tr>
<th>Type of Content</th>
<th>Category Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Publications</td>
<td>N (News)</td>
</tr>
<tr>
<td>Managed Content</td>
<td>R (Regular content)</td>
</tr>
<tr>
<td>Categorized Content</td>
<td>B (Browse)</td>
</tr>
</tbody>
</table>

The codes are part of the metadata that is used in the XML files that are brought over to the PeopleSoft Integration Broker.

Related Links
"Understanding News Publications (PeopleSoft Interaction Hub 9.1: Content Management System)"
"Understanding Managed Content (PeopleSoft Interaction Hub 9.1: Content Management System)"
"Understanding Categorized Content (PeopleSoft Interaction Hub 9.1: Content Management System)"
Content Publication Process Flow

Image: Content publishing process

The following diagram illustrates the process flow for publishing content from third-party applications to the PeopleSoft Interaction Hub.

The content publishing process is as follows:

1. Deploy third party, system-managed content to a production server.
2. Create XML file with metadata about content.
3. Push XML to PeopleSoft Integration Broker.
4. Process and route the XML.
5. In the PeopleSoft Interaction Hub, navigate to the Manage Content menu to view the three different types of content.

PeopleSoft-Delivered Objects

The following objects are delivered with the PeopleSoft Interaction Hub:

<table>
<thead>
<tr>
<th>Description</th>
<th>Object Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message definition for web services.</td>
<td>EPPNV_NEWS_MSG</td>
</tr>
<tr>
<td>Message channel for web services.</td>
<td>EPPNV_IN_NEWS</td>
</tr>
<tr>
<td>Message node.</td>
<td>Provide any message node, but one node has to be the default local node.</td>
</tr>
<tr>
<td>File layout definition for web services.</td>
<td>EPPNV_IN_NEWS</td>
</tr>
</tbody>
</table>
Setting Up on the PeopleSoft Side

This section discusses how to:

- Set up the publish/subscribe servers using the PSADMIN utility.
- Set up the PeopleSoft Integration Broker gateway.
- Define a message node to represent the third-party application that will be publishing content messages.
- Define message channels.

Setting Up the Publish/Subscribe Servers

To set up the publish/subscribe server:

1. Access the PSADMIN menu to set up your application server for the database.
2. In the Configure this domain option, keep selecting the default values by pressing the ENTER key until you see the message *Do you want the Publish/Subscribe servers configured (y/n)?*
3. Be sure that *y* is selected.
   The system loads the new configuration.
4. Boot the domain.

See the product documentation for *PeopleTools: System and Server Administration*.

Setting Up the PeopleSoft Integration Broker Gateway

The PeopleSoft Integration Broker Gateway receives incoming data.

To set up the PeopleSoft Integration Broker Gateway:

1. Select PeopleTools, Integration Broker, Gateways, Find an Existing Value.
2. Search for an existing value named *Local* and click Search.
3. If *Local* does not already exist, access the Add a New Value page and add *Local* in the Integration Gateway ID field. Click Add. This action takes you to the Gateway page.
   The Gateway page is blank initially. After you save and click the Load button, this page is populated with information.
4. Ensure that the Local Gateway check box is selected.
5. Enter a URL in the Gateway URL field. If you are using the SendMaster utility, this URL should be *http://<server hostname>/PSIGW/PeopleSoftListeningConnector*.
6. Click the Save button.
7. Click the Load button. A message appears to confirm that the loading process was successful.
8. Click the Refresh button.
9. Click the Save button.
Note: There may be slight variations on different platforms. You may also need to configure the Integration gateway.properties file for the Gateway.

**Defining An External Message Node**
Define an external node per the instructions in the Integration Broker PeopleBook, specifying these items:

- Enter EXT as the node name.
- For Node Type, select *External*.
- Select Active Node.
- Add a routing to the node definition, and in the routing select the appropriate service operation.
- Go your portal node definitions, access the EXT node you defined, and specify the PeopleTools and PeopleSoft Interaction Hub release levels.

See the product documentation for *PeopleTools: PeopleSoft Integration Broker*.

**Activating Service Operations**
Activate the appropriate service operation on the Service Operations page in Integration Broker.

See the product documentation for *PeopleTools: PeopleSoft Integration Broker*.

**Setting Up on the Third-Party Side**
This section discusses how to:

- Create the XML file.
- Execute the batch file that will then post the XML file to the PeopleSoft Integration Broker.

**Creating the XML File**
In the third-party application, you need to create an XML file. The XML file should be comprised of three sections:

- Record and field definitions that match the PeopleSoft message definition.
- The PeopleSoft common application message attributes (PSCAMA) record.
- Integration Broker Gateway data.
Record and Field Definitions in the XML that Match the PeopleSoft Message Definition

The table below lists all the fields that can be used by the message definition. These fields are being sent by the third-party application and are the only fields shown in the XML sample. At any time, more fields can be added to the message definition, but they will also need to be added to the XML definition.

Image: Fields used by the Integration Gateway Broker

This example illustrates the fields used by the Integration Gateway Broker.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Alias</th>
<th>Include</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPPCM_CATG_TY</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>PORTAL_NAME</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>EPPCM_CATGID</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>EPPCM_CONTENT</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>EPPCM_TITLE</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>DESCR</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>EPPCM_AUTHOR</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>EPPCM_CONT_ST</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>EPPNV_PUBLISH</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>EPPNV_EXPIRE_D</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>EPPCM_SOURCE</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>URL</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

PSCAMA Fields

Define the structure of the PSCAMA record. PSCAMA is a record that PeopleTools requires for every level of the message structure during processing.

This table lists the field names and their descriptions that you'll find in the XML files.

Note: The AUDIT_ACTN field must have a value of A for the purpose of this solution.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LANGUAGE_CD</td>
<td>Required. Indicates the language in which the message is published. When publishing from components, the system sets this field to the operator's default language code. The application developer can override this if necessary. The value in the sample XML file is ENG (English).</td>
</tr>
<tr>
<td>AUDIT_ACTN</td>
<td>Required. Audit action code that identifies the row of data as an Add transaction.</td>
</tr>
<tr>
<td>BASE_LANGUAGE_CD</td>
<td>Optional. Indicates the base language of the publishing database. Used by the generic full table subscription PeopleCode to help determine which tables to update.</td>
</tr>
</tbody>
</table>
### Field Name | Description
---|---
MSG_SEQ_FLG | Optional. Indicates whether the message is a header (H), trailer (T), or contains data (blank). The subscribing database can use this field to initiate processes. For example, the header message may cause staging tables to be cleared, while the trailer indicates that all the data has been received and an update job should be initiated.

PROCESS_INSTANCE | Optional. Process instance of the batch job that created the message. Along with the publishing node and publication ID, this field can be used by the subscribing database to uniquely identify a group of messages from the publishing node.

PUBLISH_RULE_ID | Optional. Indicates which publish rule was invoked to create the message. Used by routing PeopleCode to locate the appropriate chunking rule, which then determines to which nodes the message gets published.

MSGNODENAME | Optional. The node to which the message is published. This field is passed to the Publish utility by the Application Engine program. Routing PeopleCode must look for a value in this field and return that value to the application server.

### Integration Broker Gateway Data
Enter the actual data for the record and field definitions that match the PeopleSoft message definition, as well as the PSCAMA fields.

### Sample XML
The following example shows the XML code that you'll find for Company News.

- The first section of the sample XML code is where you define the attributes for the Integration Gateway Broker data. This is where you bring in the information about the record and field definitions that match the PeopleSoft message definition.

  The first section in the example below starts with the `<EPPNV_NWS_URL class="R">` line and ends with the `</EPPNV_NWS_URL>` line.

- The second section of the sample XML code is where you define the attributes for the PSCAMA records.

  The second section in the example below starts with the `<PSCAMA class="R">` line and ends with the `</PSCAMA>` line.

- The third section of the sample XML code is where you define the actual data for the record and field definitions as well as for the PSCAMA records.

  The third section in the example below starts with the `<Transaction>` line and ends with the `</Transaction>` line.

```xml
<?xml version="1.0"?>
```
Posting XML Content from Third-Party Applications to PeopleSoft Integration Broker

To post the XML file to PeopleSoft Integration Broker, use the Send Master utility.

To use Send Master to post an XML file:

1. Access Send Master.
2. Create a new project and assign a name to the session.
3. Set the Project Type value to X.X Integration Broker (MIME).
4. Enter a Server URL value. This should be the same URL you specified when configuring your PeopleSoft Integration Broker Gateway.
5. Enter a Time out value greater than 0.

6. Access the Headers tab in the Input Information group box.

7. Set the Requesting node value to EXT. This is the external node you previously configured.

8. Set the external operation name to <Service Operation Name>.VERSION_1, as in `EPPNV_NEWS_MSG.VERSION_1`.

9. Set the Operation Type value to `async`.

10. Enter a Password value, if the requesting node has a password.

11. Set the Destination node value. This may be your target portal database node, for example.

12. Access the Input File tab in the Input Information group box.

13. Open the file containing your sample XML message.

14. Click the Post button to send the message.

15. The Output Information group box displays a response. A MsgID value of 10000 indicates success.

At this point, if you received a MsgID value of 10000, your message has been successfully transmitted to PeopleSoft Integration Broker.

If the message was valid and PeopleSoft Integration Broker has been configured properly, the message should have been processed by the Content Management web service, and the new content represented in the message should have been stored in the PeopleSoft Interaction Hub database.

You can view your message results using the PeopleSoft Integration Broker Monitor. Any message subscription errors will appear in the monitor.

See the product documentation for *PeopleTools: PeopleSoft Integration Broker*.

### Viewing Published Content in the PeopleSoft Interaction Hub

After content has been published in the PeopleSoft Interaction Hub, you can view the content using the Content Management menu. This section lists the pages used to:

- View News Publication published content.
- View Managed Content published content.
- View Categorized Content published content.

#### Pages Used to View Published Content in the PeopleSoft Interaction Hub

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
Enterprise integration points (EIPs) are interfaces between PeopleSoft applications and third-party applications. They allow publication and transfer of data from a third-party application to the PeopleSoft database.

The PeopleSoft Interaction Hub uses an EIP for web services based on PeopleSoft Integration Broker gateway technology. The following table lists the message received by the PeopleSoft Interaction Hub.

<table>
<thead>
<tr>
<th>Message Name</th>
<th>Channel</th>
<th>Message Subscription</th>
<th>Record</th>
<th>File Layout</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPPNV_NEWS_MSG</td>
<td>EPPNV_IN_NEWS</td>
<td>EPPNV_NEWS_MSG</td>
<td>EPPNV_NEWS_URL</td>
<td>EPPNV_IN_NEWS</td>
</tr>
</tbody>
</table>

The PeopleSoft Integration Broker gateway uses this EIP. The message name is based on the record, which is based on the file layout. The message subscription is what is executed when an XML file is posted to the PeopleSoft Integration Broker gateway for this transaction.

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

The Resource Finder integration used to import participant data is documented in Importing Participant Data.

**Related Links**
"Understanding Importing Participant Data (PeopleSoft Interaction Hub 9.1: Resource Finder)"
Using Public Web Services

Understanding Public Web Services

These public web services enable an external system to send values to PeopleSoft Interaction Hub to create content in features such as Collaborative Workspaces, Content Management, and Discussions. In the case of CWService.FindWorkSpaceByContextData, public web service can also be used to view PeopleSoft Interaction Hub content from within the external system.

The following public web services are available:

- Collaborative Workspaces: CWService.CreateWorkSpace
  Enables an external system to create Collaborative Workspaces for use with the PeopleSoft Interaction Hub database.

- Collaborative Workspaces: CWService.FindWorkSpaceByContextData
  Enables an external system to access a Collaborative Workspace based on contextual data defined for the Collaborative Workspace.

- Collaborative Workspaces: CWService.AddMembers
  Enables an external system to add members to a Collaborative Workspace.

- Content Management: CMService.AddContent
  Enables an external system to add content to the Content Management feature.

- Discussion Forums: DiscussionService.PostMessage
  Enables an external system to post a message to a Discussion Forum.

Enabling Public Web Services

Public web service access to PeopleSoft Interaction Hub APIs requires the use of PeopleSoft Integration Broker.

To enable public web services, perform the following steps:

1. Enable publish/subscribe on the application server.
Configure the appropriate application server to enable Pub/Sub Servers.

See the product documentation for *PeopleTools: System and Server Administration*, “Setting Application Server Domain Parameters.”

2. Activate the message definition EO_PE_SOAPTOCI.

Using PeopleSoft Application Designer, open the EO_PE_SOAPTOCI message. Access the message properties and ensure that the Use tab Status value is set to *Active*.

3. Enable the message channel IB_CHNL.

Using PeopleSoft Application Designer, open the IB_CHNL message channel. Access the message channel properties and ensure that the Use tab Message Channel Status value is set to *Run*.

4. Set up the integration broker gateway URL and integrationGateway.properties file.

5. Set up the local portal node.

6. Create a new external node and add EO_PE_SOAPTOCI message transactions to it.

7. Add security to the associated component interfaces and SOAPTOCI web libraries.

   Associated component interfaces include EPPCM_ADDCONTENT, EPPCM_GETCONTENT, EPPCW_ADDMEMBER, EPPCW_CREATEWS, EPPCW_FINDWS, and EPPDF_ADDPOST.

8. Use SendMaster to test SOAP calls to the component interfaces using WSDL.

**Using Content Management Public Web Services Schemas**

This section presents examples of SOAP requests (this does not represent a complete reference to all available web services):

- Add content to Content Management with a Save SOAP request.
- Get content in Content Management with a Get SOAP request.
- Get content in Content Management with a Find SOAP request.

**Adding Content with a Save SOAP Request**

Following is an example of a Save SOAP request to add content:

```xml
```
The response from PeopleSoft, which uses a cloned SOAPTOCI message, is:

```xml
```

### Getting Content with a Get SOAP Request

Following is an example of a Get SOAP request to get content:

```xml
```

The response from PeopleSoft is:

```xml
```

### Getting Content with a Find SOAP Request

Following is an example of a Find SOAP request to get content:

```xml
```
<?xml version="1.0" encoding="UTF-8" ?> SOAP-ENV:Envelope
SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/
xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
<SOAP-ENV:Header>
<Security_Request>
<Username>PS</Username>
>Password>PS</Password>
</Security_Request>
</SOAP-ENV:Header>
<SOAP-ENV:Body>
<Find_CompIntfc_EPPCM_GETCONTENT>
<OPRID>VP1</OPRID>
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
</Find_CompIntfc_EPPCM_GETCONTENT>
</SOAP-ENV:Body>
</SOAP-ENV:Envelope>

Following is the response from PeopleSoft:

<?xml version='1.0' encoding='UTF-8' ?>
<SOAP-ENV:Envelope
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/
SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/">
<SOAP-ENV:Header />
<SOAP-ENV:Body>
<Find_CompIntfc_EPPCM_GETCONTENTResponse
xmlns:psfttemp="http://psfttemp.org">
<EPPCM_GETCONTENT>
<OPRID>VP1</OPRID>
<PORTAL_NAME>EMPLOYEE</PORTAL_NAME>
<EPPCM_CATG_TYPE>R</EPPCM_CATG_TYPE>
<EPPCM_CATGID>1001</EPPCM_CATGID>
<EPPCM_GETCONTENTID>2001</EPPCM_GETCONTENTID>
<EPPCM_TITLE>Michele</EPPCM_TITLE>
</EPPCM_GETCONTENT>
</Find_CompIntfc_EPPCM_GETCONTENTResponse>
</SOAP-ENV:Body>
</SOAP-ENV:Envelope>
Chapter 26

Administering Unified Navigation in PeopleSoft Interaction Hub

Administering Unified Navigation in PeopleSoft Interaction Hub

These topics provide an overview of unified navigation and discuss how to:

- Complete initial system configuration.
- Configure the integration gateway.
- Set up single signon.
- Set up unified navigation.
- Set up related content.
- Import pagelets from content provider systems.

Understanding Unified Navigation

This section provides an overview of:

- Unified navigation in PeopleSoft Interaction Hub.
- The Unified Navigation WorkCenter.
- Default local nodes and portal host nodes.
- Remote content references and templates.
- Remote dashboards.
- Limitations in PeopleTools 8.53.
- Support information for customers who have not installed PeopleSoft Interaction Hub.

Unified Navigation in PeopleSoft Interaction Hub

Unified navigation provides a framework to federate PeopleSoft applications under a single portal system, the PeopleSoft Interaction Hub. Using the delivered Unified Navigation WorkCenter page and activity guide, you can configure and federate portal registries from content provider systems into a unified system. Your administrators and users will log into the portal system to access local resources on the portal system as well as remote resources made available through unified navigation. Once unified navigation is configured, your users and administrators will be able to:

- Access remote content references and resources, which includes:
  - Accessing remote navigation pages through the main drop-down menu of the portal system.
• Adding remote content references as My Links (or Favorites) on the portal system.

• Accessing remote dashboards through the main drop-down menu of the portal system.

• Accessing remote WorkCenter pages with remote pagelets through the main drop-down menu of the portal system.

• Creating related content services in the portal system using the either local or remote content references.

• Creating related content services in the content provider system using content references local to that system.

• Assigning local (to the portal system) or remote content references (from a content provider system) as related content services (or related actions) to content references on the portal system.

• Assigning local (to the content provider system) or remote content references (from a different content provider system) as related content services (or related actions) to content references on the content provider system.

• Tracking usage of remote content references with iTracker.

• Synchronize user system profiles, or user personalization data, or both from the portal system to the content provider systems.

**Image: Content from a content provider system displayed through unified navigation**

The following diagram illustrates how content from the content provider system is rendered in the portal system and identifies which pieces of the page are rendered from which system.

In this example:

• The URL in the address field indicates that the portal system is the current system and that the content resides on a content provider node (HRMS).
• The page header (Home and Sign out links, search, and so on), the drop-down menu, and homepage tabs are generated by the portal system. This ensures that portal functions and navigation remain local to the portal system.

• The content in the target area of the page comes from the content provider system. (If the content reference in the content provider system is defined with a specific template, then the content is also rendered using that template.)

• Related content services defined for the remote content reference are displayed. In this example, the related content has been defined as related actions.

Related Links
Remote Content References and Templates

The Unified Navigation WorkCenter
The Unified Navigation WorkCenter provides an activity guide that lists the steps that need to be completed to configure your portal system for unified navigation.

To access the Unified Navigation WorkCenter, select Portal Administration, Unified Navigation WorkCenter:

Image: Unified Navigation WorkCenter with configuration of the portal system completed

This example illustrates the Unified Navigation WorkCenter with a completed configuration: the portal system and two remote content provider systems have been federated.

When you click links in the Unified Navigation activity guide pagelet, transaction pages are displayed within the portal system on which you need to enter information to configure unified navigation. The Unified Navigation activity guide pagelet presents the tasks in the order that you need to complete them.
Note: In addition, some configuration is required on the content provider systems.

Configuration of unified navigation consists of seven procedures, which are documented in these topics:

1. Complete initial system configuration.
   See Completing Initial System Configuration.

2. Configure the integration gateway (click the IB Network WorkCenter link in the pagelet).
   See Configuring the Integration Gateway.

3. Define remote nodes (click the Configure Node for SSO link in the pagelet).
   See Defining Remote Nodes.

4. Identify trusted nodes (click the Define Trusted Nodes link in the pagelet).
   See Identifying All Trusted Nodes.

5. Add remote nodes to the integration network (once again, click the IB Network WorkCenter link in the pagelet).
   See Adding Remote Nodes to the Integration Network.

6. Set up the unified navigation node network and test the single signon configuration (click the Unified Navigation Node Network link in the pagelet).
   See Setting Up the Unified Navigation Node Network.

7. Add remote folders to the drop-down menu (click the Configure Drop Down Menu link in the pagelet).
   See Adding Remote Folders to the Drop-Down Menu.

After configuration of unified navigation has been completed, you can configure related content to take advantage of remote content and remote services. Related content can be configured from the Unified Navigation WorkCenter page:

- You can create a service to manage related content for a content provider system.
  See Creating a Service to Manage Related Content for a Content Provider System.

- You can create and assign related content for the portal system and for content provider systems.
  See Creating and Assigning Related Content Within the Unified Navigation Framework.

Note: While the Unified Navigation WorkCenter includes an activity guide pagelet, it uses the standard WorkCenter template, and not the WorkCenter template for activity guides. Therefore, the Next and Previous buttons to navigate between tasks are not present. For more information on the icons and controls available in activity guides, see the product documentation for, “Using PeopleSoft Application Pages,” Using WorkCenter Pages, Using Activity Guides.

Default Local Nodes and Portal Host Nodes
Unified navigation requires that two types of nodes be defined on both the local portal system and the remote content provider systems:
• Default local nodes – The default local node designates the system on which the database is installed. Default local nodes generate security artifacts, such as PS_TOKEN, and participate in PeopleSoft Integration Broker integrations. In the context of unified navigation, each participating default local node must have an active definition in the PeopleSoft Interaction Hub system, must be identified to the integration gateway, must be established as in-network for the integration node network, and must be established as a trusted node for single signon.

• Portal host nodes – A portal host node is the node that hosts a specific portal and the portal’s content. For example, ERP, HRMS, and EMPL all host the EMPLOYEE portal on PeopleSoft FSCM, PeopleSoft HRMS, and PeopleSoft Interaction Hub, respectively. In the context of unified navigation, each participating portal host node must have an active definition in the system and is used as the content provider node for remote folders and pagelets.

Remote Content References and Templates
When a menu item (content reference) from a content provider system is selected from the drop-down menu, the information that is displayed comes from multiple sources as follows:

• The page header (Home, Sign out, and other links) plus the drop-down menu come from the portal system.

• The target area content is fetched from the content provider system.

• The template for the target area content is also fetched from the remote system and is used to render the target content. However, if a content reference with the same name is registered in the local portal system, then the template for the local content reference is used to render the remote content reference. In addition, if the remote content reference is defined without a template, then the default template for the local portal system is used to render the remote content reference.

• When remote content is displayed, the New Window, Help, Customize Page, and other links invoke actions that are relative to the content provider system or the portal system, depending on which link is clicked:

  • The New Window link opens a new window redisplaying the current content—that is, the header and drop-down menu come from the portal system and the content comes from the content provider system.

  • The Help link displays the help topic from the help system that is configured for the content provider system.

  • The Personalize Page link replaces the target area with the page personalization information from the content provider system.

  • The Copy URL icon button copies the URL of the current page—that is, a URL on the portal system that includes the content provider node and content reference.

Note: Templates from the portal system or from the content provider system are not cached.

Custom Templates
Oracle delivers unified navigation with support for PeopleTools-delivered, iframe-based templates (for example, DEFAULT_TEMPLATE and PT_IFRAME_TEMPLATE) and WorkCenter templates. If your remote content references use custom templates or other PeopleSoft-delivered non-iframe templates, then those templates must conform with the following standards:
The template HTML must include the PeopleSoft header and drop-down menu pagelets:

For example, to include the PeopleSoft header, use HTML code similar to the following:

```html
<div>
    <pagelet name="UniversalNavigation">
        <source node="LOCAL_NODE" href="s/WEBLIB_PT_NAV.ISCRIPT1.FieldFormula.IScript⇒_UniHeader_Frame?c=%Bind(:5)" />
    </pagelet>
</div>
```

In addition, to include the PeopleSoft drop-down menu, use HTML code similar to the following:

```html
<div>
    <pagelet name="Nav">
        <source node="LOCAL_NODE" href="s/WEBLIB_PT_NAV.ISCRIPT1.FieldFormula.IScript⇒_PT_NAV_INFRAME?navtype=dropdown&c=%Bind(:5)" />
    </pagelet>
</div>
```

**Important!** In both examples, the source element’s node attribute *must* be set to LOCAL_NODE. Otherwise, unified navigation will fail to operate on the remote content reference.

The following HTML code represents a template that has been modified to adhere to the preceding standards. In this example, the relevant portions of the code are highlighted in bold:

```html
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01//EN" "http://www.w3.org/TR/html4/strict.dtd">
<html dir="%Direction" lang="%LanguageISO">
<head>
<meta http-equiv="X-UA-Compatible" content="IE=8">
<meta http-equiv="content-type" content="text/html; charset=UTF-8">
</head>
<body class="PSPAGE" id="ptifrmtemplate">
    <div>
        <pagelet name="UniversalNavigation">
            <source node="LOCAL_NODE" href="s/WEBLIB_PT_NAV.ISCRIPT1.FieldFormula.IScript⇒_UniHeader_Frame?c=var" />
        </pagelet>
    </div>
    <div>
        <pagelet name="Nav">
            <source node="LOCAL_NODE" href="s/WEBLIB_PT_NAV.ISCRIPT1.FieldFormula.IScript⇒_PT_NAV_INFRAME?navtype=dropdown&c=var" />
        </pagelet>
    </div>
    <div id="ptifrmcontent">
        <div id="ptifrmtarget">
            <iframe id="ptifrmtgtframe" name="TargetContent" title="Target_Title" frameborder="0" scrolling="auto" onload="ptrc.onLoadTC()" src="" name="TargetContent" title="Target_Title" frameborder="0" scrolling="auto" onload="ptrc.onLoadTC()" src="">
                <target Name="target" params="var" />
            </iframe>
        </div>
    </div>
</body>
</html>
```

**Errors When Accessing Remote Content Through Navigation Pages**

When a remote content reference is accessed through a remote navigation page, a “not authorized” error can occur even though the user is authorized to access to the content reference on the content provider system. This error usually occurs because the portal registry definition for the remote content reference uses LOCAL_NODE, instead of a specific node. Under unified navigation, LOCAL_NODE will resolve to the portal host node on the portal system, and not a node on the content provider system. Because the
content reference (component and page) does not exist on the portal system, the “not authorized” error results.

To resolve this issue, you must identify and update content references on the content provider system to use the portal host node of the content provider system. In the following example for a PeopleSoft HCM application, a SQL statement updates the node value to HRMS, the portal host node:

\[
\text{update PSPRSMDEFN set PORTAL_CNTPRV_NAM='LOCAL_NODE' where PORTAL_REFTYPE='C' and PORTAL_CNTPRV_NAM='HRMS' and PORTAL_NAME='EMPLOYEE';}
\]

Remote Dashboards
Since dashboards are accessed through content references, remote dashboards defined in a content provider system can be accessed through a remote folder that is configured for unified navigation.

**Note:** However, because homepages (unlike dashboards) are displayed only when a user directly signs into a system, homepages from content provider systems are not accessible through unified navigation.

Remote dashboards are subject to the following limitations:

- A pagelet on a remote dashboard will not function properly if the pagelet performs a JavaScript document.write or document.writeln operation.
- When the portal system's drop-down menu is used to navigate to the remote dashboard, then the menu breadcrumbs are updated properly. However, if the PeopleCode RedirectURL method is used to load the remote dashboard, then the menu breadcrumbs are not updated.


**Limitations and Additional Considerations in PeopleTools 8.53**
Unified navigation can be used with these limitations and additional considerations in PeopleTools 8.53:

- Configuration of unified navigation must be completed on the portal system with associated configuration steps performed on the content provider system. Use of unified navigation features (for example, navigation to remote content references) must also occur on the portal system.

  **Note:** A PeopleTools license allows for installation of a PeopleSoft Interaction Hub database for the purpose of configuring and using unified navigation and other restricted uses. See your PeopleTools license for details. See Licensing Notes for Oracle's PeopleTools 8.53 [ID 1524240.1].

- Navigation to menu items on content provider systems is supported through the portal system's drop-down menu only.

  **Note:** You cannot use homepage menu pagelets such as the Enterprise Menu pagelet or the Main Menu pagelet to navigate to remote menu items. The remote folders are hidden and will appear in these pagelets.

- Pagelet icon images used in remote pagelets must be copied from the content provider system to the portal system. In addition, if both systems do not use the same style (for example, one uses TANGERINE, and the other uses a custom style), the cascading style sheets (CSS) must copied from the content provider system to the portal system.

- Templates for remote content references must conform to the standards outlined in this document.
See Remote Content References and Templates.

- Do not use the following special characters in the labels for a remote folder: { } #.

- Unified navigation supports same portal integration only—for example, EMPLOYEE portal to EMPLOYEE portal, CUSTOMER portal to CUSTOMER portal, or PARTNER portal to PARTNER portal, and so on. However, you should always use the content provider system's portal host node to create remote folders or import pagelets.

- Remote dashboards must conform to the standards outlined in this document.

See Remote Dashboards.

Support Information for Customers Who Have Not Installed PeopleSoft Interaction Hub
As stated previously, configuration and use of unified navigation features (for example, navigation to remote content references) must occur on the portal system.

Note: A PeopleTools license allows for installation of a PeopleSoft Interaction Hub database for the purpose of configuring and using unified navigation and other restricted uses. See your PeopleTools license for details. See Licensing Notes for Oracle's PeopleTools 8.53 [ID 1524240.1].

However, in certain situations, some peer-to-peer configurations can achieve limited functionality that resembles what is available with unified navigation. Specifically, you can create a local related content service on a content provider system using a content reference from a different content provider system without federating the content provider systems under unified navigation. To achieve this, you must manually copy the content references from the remote content provider system to the local content provider system and then manually synchronize security between the two systems.

See the product documentation for PeopleTools: Portal Technology, “Developing and Configuring Related Content Services.”

Completing Initial System Configuration
You should complete the following steps prior to using the Unified Navigation WorkCenter to configure unified navigation on your systems:

1. On both the portal system and the content provider system, set the authentication domain to the lowest level domain shared by all systems—for example, if all systems share the same subdomain, then .us.mycompany.com would be appropriate; otherwise, use .mycompany.com instead.


2. Stop and restart each web server after making these changes.

3. On both the portal system and the content provider system, enable the drop-down menu.

Configuring the Integration Gateway

To configure the Integration Broker integration gateway and start the setup of the integration network on your portal system:

1. Select Portal Administration, Unified Navigation WorkCenter to open the Unified Navigation WorkCenter page.

2. In the Unified Navigation pagelet, select the IB Network WorkCenter link to open the integration network's Configuration Status page.

   Alternatively, select PeopleTools, Integration Broker, Integration Network, Configuration Status.

   **Image: Configuration Status page showing that the Integration Network is not configured**

   This example illustrates the Configuration Status page showing that the Integration Network is not configured.

   ![Configuration Status page](image)

   - Gateway Not Configured
   - Node Network Not Configured
   - No Domain Active

   See the product documentation for *PeopleTools: PeopleSoft Integration Broker Administration*, “Using the Integration Network,” Using the Configuration Status Page.

3. Click the Gateway Not Configured link.

   The Gateways page appears.

   See the product documentation for *PeopleTools: PeopleSoft Integration Broker Administration*, “Using the Integration Network,” Verifying and Managing Integration Gateway Configuration.

4. Configure the integration gateway:
a. Enter the machine name and complete URL to the PeopleSoftListeningConnector in the Gateway URL field:

    Image: Gateways page with the gateway URL configured

    This example illustrates the fields and controls on the Gateways page with a gateway URL configured.

    **Gateways**

    | Gateway ID | LOCAL | Load Balancer |
    |------------|-------|---------------|
    |            | Local Gateway | Load Balancer |
    |            | URL: http://PHSERVER.example.com:80/PSGW/PeopleSoftListeningConnector | |

    **Gateway Setup Properties**

b. Click the Ping Gateway button.

    The status should return as active.

c. Click the Load Gateway Connectors button to load the gateway connectors.

    **Image: Gateways page with connectors loaded**

    This example illustrates the fields and controls on the Gateways page with connectors loaded.

    **Gateways**

    | Gateway ID | LOCAL | Load Balancer |
    |------------|-------|---------------|
    |            | Local Gateway | Load Balancer |
    |            | URL: http://PHSERVER.example.com:80/PSGW/PeopleSoftListeningConnector | |

    **Gateway Setup Properties**

    | Connectors | Personalize | Find | 0 | First | 1 | 11 | of 11 | Last |
    |------------|------------|-----|---|-------|---|----|-------|------|
    | 1 AS2TARGET | AS2TargetConnector | | Properties | | | | |
    | 2 EXAMPLETARGETCONNECT | ExampleTargetConnector | | Properties | | | | |
    | 3 FILEOUTPUT | SimpleFileTargetConnector | | Properties | | | | |
    | 4 FTPTARGET | FTPTargetConnector | | Properties | | | | |
    | 5 EMAILTARGET | GetMailTargetConnector | | Properties | | | | |
    | 6 HTTPTARGET | HTTPTargetConnector | | Properties | | | | |
    | 7 JMSTARGET | JMSTargetConnector | | Properties | | | | |
    | 8 PSF81TARGET | ApplicationMessagingTargetConnector | | Properties | | | | |
    | 9 PSFTTARGET | PeopleSoftTargetConnector | | Properties | | | | |
    | 10 SFTPTARGET | SFTPTargetConnector | | Properties | | | | |
    | 11 SMTPTARGET | SMTPTargetConnector | | Properties | | | | |

    **Load Gateway Connectors**

d. Click the Save button to save your changes.

5. Click the Gateway Setup Properties link.

The PeopleSoft Node Configuration page appears.

See the product documentation for *PeopleTools: PeopleSoft Integration Broker Administration*, “Managing Integration Gateways,” Setting Oracle Jolt Connection Properties.

a. Enter the URL to the gateway and other values in the Gateway Default App. Server group box.

b. At a minimum, enter the values for the default local node in the PeopleSoft Nodes group box.

**Image: PeopleSoft Node Configuration page**

This example illustrates the fields and controls on the PeopleSoft Node Configuration page.

c. Click the Save button.

d. Click the Ping Node button.

The status should return as success.

e. On the Ping Node Results page, click the Return button.

f. If you have the information now, you can define other participating nodes in the PeopleSoft Nodes group box at this time. For each content provider system, create entries for the default local node.

**Image: PeopleSoft Node Configuration page with a shared gateway configuration**

This example illustrates the PeopleSoft Node Configuration page with a shared gateway configured.
Note: Alternatively, you can return to this PeopleSoft Node Configuration page once you have identified and defined these nodes.

See Understanding Remote Nodes.

g. Save your changes.

h. Then, for each default local node defined, click the Ping Node button.

The status might not return success if the node is not yet defined with the same parameters in both systems.

Note: If you click the Ping Node button for a any node that is a portal host node, the following error will result:
Integration Broker Service: Destination node does not match the local node. (158,506)

7. On the PeopleSoft Node Configuration page, click the Advanced Properties Page link.

The Gateway Properties page appears.

See the product documentation for PeopleTools: PeopleSoft Integration Broker Administration, “Managing Integration Gateways,” Using the integrationGateway.properties File.
a. Enter the full path to the keystore file and enter the encrypted keystore password:

Image: Gateway Properties page (setting the keystore location and encrypted password)

This example illustrates the fields and controls on the Gateway Properties page.

Gateway Properties

| URL | http://<webservice>:<port>/PSIGW/PeopleSoftListeningConnector |

<table>
<thead>
<tr>
<th>Gateway Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td># Example:</td>
</tr>
<tr>
<td>#</td>
</tr>
<tr>
<td>#secureFileKeystorePath=&lt;fileLocation&gt;</td>
</tr>
<tr>
<td>#secureFileKeystorePasswd=&lt;password&gt;</td>
</tr>
<tr>
<td>#</td>
</tr>
<tr>
<td>secureFileKeystorePath=C:/Appserv_853/webserv/P91E1501/piaconfig/keystore/pskey</td>
</tr>
<tr>
<td>secureFileKeystorePasswd={V1.1}7m4OtVwXFNyLc1j6pZG69Q==</td>
</tr>
<tr>
<td>#</td>
</tr>
<tr>
<td>## End of Integration Gateway CERTIFICATE Section</td>
</tr>
<tr>
<td>#</td>
</tr>
<tr>
<td>#</td>
</tr>
<tr>
<td>## Transformation Section Example:</td>
</tr>
</tbody>
</table>


b. Click the OK button.

8. On the PeopleSoft Node Configuration page, click the Save button again.

9. Click the OK button.

10. On the Gateways page, click the Return to Configuration Status link.

11. Click the Node Network Not Configured link (or the Node Network Configured link if that is displayed instead).
12. Ensure that the portal system’s default local node is selected as in network (it is selected by default).

**Image: Node Network page showing default local nodes as in network**

This example illustrates the Node Network page showing the portal’s default local node (PSFT_PA) and one remote default local node (PSFT_HR) as in-network.

**Node Network**

<table>
<thead>
<tr>
<th>Default Local Node</th>
<th>Node</th>
<th>In Network</th>
<th>Configured in Gateway</th>
<th>Active Node</th>
<th>Remote Gateway Node</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSFT_CR</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSFT_FO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSFT_GF</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSFT_JM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSFT_LM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSFT_LS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSFT_FF</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSFT_CIS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CIS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CRM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EIM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>STAF</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ELM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PT_LDAP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PT_LOCAL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CUST</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EMFL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ENTP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GOVT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSFT_PA</td>
<td></td>
<td>✔️</td>
<td></td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>PART</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SUPP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PSFT_HR</td>
<td></td>
<td>✔️</td>
<td></td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>HRMS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CAMP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

13. Click Save, then click the Return to Configuration Status link.

14. Click the No Domain Active link.
The Domain Status page appears.

**Image: Domain Status page with an activated domain**

This example illustrates the Domain Status page with an activated domain.

**Domain Status**

<table>
<thead>
<tr>
<th>Domain Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Grace Period for all Domains (Minutes)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Purge Domain Status</td>
</tr>
<tr>
<td>All Domains Active</td>
</tr>
<tr>
<td>All Domains Inactive</td>
</tr>
<tr>
<td>Failover Disabled</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Refresh Update</td>
</tr>
</tbody>
</table>

15. Return to the Configuration Status page (click the Return to Configuration Status link).

The status should show that all three steps have been completed and that your integration gateway and integration network are configured.

**Image: Configuration Status page showing a configured integration network**

This example illustrates the Configuration Status page showing a configured integration network.

**Configuration Status**

- Gateway Configured
- Node Network Configured
- Domain Active

**Additional Links**

- Service Configuration: Configure Server, Schema Namespaces and Target Locations
- Monitor Setup: Enable gateway logging and Data View size limit
- System Setup: Set maximum recursion level and enable IB Profiling
- Node Network Password: Update Integration Node Network Password
Important! While this integration network is active, its configuration might not yet be complete if you have not added all remote nodes to the integration gateway.

Setting Up Single Signon

This section provides an overview of single signon and remote nodes, and discusses how to:

- Define remote nodes.
- Identify all trusted nodes.
- Adding remote nodes to the integration network.
- Testing single signon.

Understanding Single Signon for Unified Navigation

In a PeopleSoft environment, single signon is deployed for a number of reasons. For users, single signon provides the ability for them to navigate freely within a environment of multiple applications after being authenticated only once. For integration of PeopleSoft applications and systems, single signon identifies those systems that are trusted participants in the integration. With unified navigation, single signon is deployed for both purposes: to identify those trusted systems and to allow users to navigate freely to resources on those trusted systems.
**Understanding Remote Nodes**

The first step to configuring single signon is to define the participating nodes from each content provider system in the portal system, and conversely, to define the default local node of the portal system in each content provider system.

**Image: Remote nodes in a unified navigation configuration**

The following diagram illustrates four systems participating in unified navigation: PIH (the portal system), FSCM, and HCM.

Under each system, the default local node is highlighted in bold and identified with the notation (DLN). For example, on the PIH system, the default local node is PSFT_PA. On the HCM system, the default local node is named PSFT_HR. The portal host nodes are identified with the notation (PHN). On the FSCM system, the portal host node is named ERP. On the HCM system, the portal host node is named HRMS.

**Important!** Unified navigation supports same portal integration only—for example, EMPLOYEE portal to EMPLOYEE portal, CUSTOMER portal to CUSTOMER portal, or PARTNER portal to PARTNER portal, and so on. However, you should always use the content provider system's portal host node to create remote folders or import pagelets.
Finally, under each system, the remote nodes that need to be defined are identified with the notation (RN). For example, on the PIH system, four remote nodes would need to be defined: PSFT_EP, ERP, PSFT_HR, and HRMS. On each of the content provider systems, two remote nodes would need to be defined at a minimum: PSFT_PA and EMPL.

In addition, if content from one content provider is to be configured as related content on any other content provider, then the applicable nodes from each system need to be defined in the other system. For example, if salary information from FSCM is to be added as related content on the HCM system, then PSFT_EP and ERP need to be added to HCM as remote nodes; similarly, PSFT_HR and HRMS need to be added to the FSCM system as remote nodes. These optional remote nodes are also designated with (RN) and are highlighted in italics.

**Defining Remote Nodes**

This section discusses how to:

- Define remote nodes on the portal system.
- Define remote nodes on a content provider system.

**Defining Remote Nodes on the PeopleSoft Interaction Hub System**

To define remote nodes on the portal system:

1. Select Portal Administration, Unified Navigation WorkCenter to open the Unified Navigation WorkCenter page.

2. In the Unified Navigation pagelet, expand the Single Signon Setup section and select the Configure Node for SSO link to open the Nodes page in the target area.

   Alternatively, select PeopleTools, Integration Broker, Integration Setup, Nodes.

3. If the remote node is already defined in the PeopleSoft Interaction Hub database, then select that node definition. Otherwise, add a new value for the remote node.

4. Select the Node Definitions page:
   a. Enter a description for the remote node.
   b. Verify that the node type is PIA.
   c. For default local nodes only, set the authentication option to Password or Certificate. If the authentication type is password, enter the password defined for the remote node.
   d. Enter the default user ID as defined on the remote node.
Important! If necessary, add a user profile for this default user ID.

Image: Node Definitions page showing a remote default local node

This example illustrates the fields and controls on the Node Definitions page showing a remote default local node.

<table>
<thead>
<tr>
<th>Node Definitions</th>
<th>Connectors</th>
<th>Portal</th>
<th>WS Security</th>
<th>Routings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Node Name</td>
<td>PSFT_HR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>PS HCM - Local Node</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Node Type</td>
<td>P/A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Authentication</td>
<td>Password</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Node Password</td>
<td>************</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Default User ID</td>
<td>PS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hub Node</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Master Node</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Company ID</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IB Throttle</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Image Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Codeset Group Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


5. Select the Connectors page:
   a. Enter the integration gateway in the Gateway ID field. If the remote node will use the locally defined integration gateway, enter LOCAL as the gateway ID.
b. Enter PSFTTARGET as the connector ID.

**Image: Connectors page showing a remote default local node**

This example illustrates the fields and controls on the Connectors page showing a remote default local node.

```plaintext
<table>
<thead>
<tr>
<th>Node Definitions</th>
<th>Connectors</th>
<th>Portal</th>
<th>V/S Security</th>
<th>Routings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Node Name</td>
<td>PSFT_HR</td>
<td>Ping Node</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

Details

- **Gateway ID**: LOCAL
- **Connector ID**: PSFTTARGET
- **Delivery Mode**: Guaranteed Delivery

This connector does not have properties. Use Gateway Setup Properties to add properties.

See the product documentation for *PeopleTools: PeopleSoft Integration Broker Administration*, "Adding and Configuring Nodes," Specifying Gateways and Connectors.

c. For default local nodes only, if the remote node will use the locally defined integration gateway and you did not add this node to the gateway configuration previously, do so now.

Click the Gateway Setup Properties link to add the remote node to the integration gateway.

See Configuring the Integration Gateway.

After the remote node has been added to the integration gateway, click the OK button to return to the Connectors page.

6. Select the Portal page:

   a. Enter values for the Content URI Text field and the Portal URI Text field as defined for the remote node.
b. Ensure that a value is defined for the Tools Release field.

Image: Portal page showing a remote default local node

This example illustrates the fields and controls on the Portal page showing a remote default local node.

<table>
<thead>
<tr>
<th>Node Name</th>
<th>PSFT_HR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>PS HCM - Local Node</td>
</tr>
<tr>
<td>Tools Release</td>
<td>8.53</td>
</tr>
<tr>
<td>Application Release</td>
<td>HRMS 9.20.00.222</td>
</tr>
<tr>
<td>Content URI Text</td>
<td>Example: <a href="http://some.server/psc/pshome/">http://some.server/psc/pshome/</a></td>
</tr>
<tr>
<td>Portal URI Text</td>
<td>Example: <a href="http://PIHERSERVER.example.com:80/ps/hf/">http://PIHERSERVER.example.com:80/ps/hf/</a></td>
</tr>
</tbody>
</table>

7. Repeat steps 2 through 6 for each default local node and portal host node that needs to be defined as a remote node in the portal system.

**Defining Remote Nodes on a Content Provider System**

To define remote nodes on a content provider system:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.

2. If the default local node for the portal system (PSFT_PA) is already defined in the content provider database, then select that node definition. Otherwise, add a new value for PSFT_PA.

3. Select the Node Definitions page:
   a. Enter a description for the remote node.
   b. Verify that the node type is PIA and that the Authentication Option field value is Password or Certificate. If the authentication type is password, enter the password defined for the remote node.
   c. Enter the default user ID as defined on the remote node.
Important! If necessary, add a user profile for this default user ID.


4. Select the Connectors page:
   a. Enter the integration gateway in the Gateway ID field. If the remote node will use the locally defined integration gateway, enter LOCAL as the gateway ID.
   b. Enter PSFTTARGET as the connector ID.
       See the product documentation for PeopleTools: PeopleSoft Integration Broker Administration, “Adding and Configuring Nodes,” Specifying Gateways and Connectors.
   c. For default local nodes only, the remote node will use the locally defined integration gateway, click the Gateway Setup Properties link.
   d. Log in on the Gateway Properties page.
   e. Enter the default local node in the PeopleSoft Nodes group box:
   f. Click the Save button.
   g. Click the Ping Node button for the remote node that is the default local node.

   Note: A central gateway should be used by all databases in the same portal cluster.

   The status should return as success.

   Note: If you click the Ping Node button for a remote node that is a portal host node, the following error will result:
   Integration Broker Service: Destination node does not match the local node. (158,506)

   h. On the Ping Node Results page, click the Return button.
   i. Click the OK button to return to the Connectors page.

5. Select the Portal page:
   a. Enter values for the Content URI Text field and the Portal URI Text field as defined for the remote node.
   b. Ensure that a value is defined for the Tools Release field.
   c. Save the definition of the remote node.
6. Repeat steps 1 through 5 for each portal host node (EMPL, CUST, PART, SUPP, and ENTP) from the portal system.

7. Repeat steps 1 through 5 for each default local node and portal host node from the other content provider systems that needs to be defined as a remote node in this content provider database.

8. Repeat steps 1 through 7 on each content provider system.

**Identifying All Trusted Nodes**

After the remote nodes have been defined on each system, all the nodes participating in the single signon configuration need to be identified on each system.

**Identifying Trusted Nodes on the PeopleSoft Interaction Hub System**

To identify the trusted nodes on the portal system:

1. Select Portal Administration, Unified Navigation WorkCenter to open the Unified Navigation WorkCenter page.

2. In the Unified Navigation pagelet, expand the Single Signon Setup section and select the Define Trusted Nodes link to open the Single Signon page in the target area.


   **Image: Single Signon page listing all trusted nodes**

   This example illustrates the Single Signon page listing all trusted nodes.

   **Single Signon**

<table>
<thead>
<tr>
<th>Authentication Token expiration time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expiration Time in minutes: 720 Valid values are 1 - 10,000</td>
</tr>
</tbody>
</table>


3. Add the default local node from each content provider system as a trusted node.

4. Save the list of trusted nodes.

**Identifying Trusted Nodes on a Content Provider System**

To identify the trusted nodes on a content provider system:


2. Add the default local node (PSFT_PA) from the portal system as a trusted node.
3. If single signon is also to be implemented between content provider systems, then add the default local node from each content provider system as a trusted node.

4. Save the list of trusted nodes.

5. Repeat steps 1 through 4 on each content provider system.

**Adding Remote Nodes to the Integration Network**

Once content provider nodes have been defined in the portal system, only default local nodes need to be added to the integration network to complete the network configuration.

**Note:** If added portal host nodes from the content provider systems to the integration network previously, then you might not need to complete this procedure.

See [Configuring the Integration Gateway](#).

To add portal host nodes from the content provider systems to the integration network:

1. Select Portal Administration, Unified Navigation WorkCenter to open the Unified Navigation WorkCenter page.

2. In the Unified Navigation pagelet, select the IB Network WorkCenter link to open the integration network's Configuration Status page.

3. Click the Node Network Configured link.

   Alternatively, select PeopleTools, Integration Broker, Integration Network, Network Setup.

   See the product documentation for *PeopleTools: PeopleSoft Integration Broker Administration*, “Using the Integration Network,” Viewing Node Network Status.
4. For each remote node that is a portal host node, select the option to make the node in network.

**Image: Node Network page showing default local nodes as in network**

This example illustrates the Node Network page showing the portal’s default local node (PSFT_PA) and one remote default local node (PSFT_HR) as in-network.

**Node Network**

<table>
<thead>
<tr>
<th>Network Nodes</th>
<th>Secure Keystore Value Defined</th>
<th>Return to Configuration Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Local Node</td>
<td>Node</td>
<td>In Network</td>
</tr>
<tr>
<td>PSFT_PA</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>PSFT_HR</td>
<td>☑</td>
<td>☑</td>
</tr>
</tbody>
</table>

5. Save the changes to the integration network.

**Testing Single Signon**

You can test your single signon configuration from the portal system after the remote nodes have been defined and added to the integration network. The Unified Navigation Node Network page includes a
button that allows you to test single signon for each remote node that has been defined as part of the integration network.

In addition, successfully testing single signon requires that you complete the initial configuration steps.

**Related Links**
- Setting Up the Unified Navigation Node Network
- Completing Initial System Configuration

**Setting Up Unified Navigation**

This section discusses:

- Setting up the unified navigation node network.
- Adding remote folders to the drop-down menu.
- Importing pagelets.

**Pages Used to Setup Unified Navigation**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unified Navigation Node Network</td>
<td>PTUN_REMOTENODECFG</td>
<td>Portal Administration, Unified Navigation WorkCenter&lt;br&gt;Expand the Unified Navigation Setup section.&lt;br&gt;Click the Unified Navigation Node Network link.</td>
<td>Test single signon for each remote node. Optionally, specify whether to synchronize user system profiles and user personalization data.</td>
</tr>
<tr>
<td>Configure Drop Down Menu</td>
<td>PTUN_DDMENUCFG</td>
<td>Portal Administration, Unified Navigation WorkCenter&lt;br&gt;Expand the Unified Navigation Setup section.&lt;br&gt;Click the Select Remote Content link.</td>
<td>Add a remote menu folder and configure its location in the portal system's drop-down menu.</td>
</tr>
<tr>
<td>(untitled)</td>
<td>PTUNDATA</td>
<td>• Click the lookup button for the remote Folder Name.&lt;br&gt;• Click the lookup button for the Local Parent Folder Name.</td>
<td>Displays the name of the selected node and portal.</td>
</tr>
<tr>
<td>(untitled)</td>
<td>PTUN_TREE</td>
<td>• Click the lookup button for the remote Folder Name.&lt;br&gt;• Click the lookup button for the Local Parent Folder Name.</td>
<td>Displays the menu tree for the selected node and portal.</td>
</tr>
</tbody>
</table>
**Setting Up the Unified Navigation Node Network**

To set up the unified navigation node network on the portal system:

1. Select Portal Administration, Unified Navigation WorkCenter to open the Unified Navigation WorkCenter page.

2. In the Unified Navigation pagelet, expand the Unified Navigation Setup section and click the Unified Navigation Node Network link to open the Unified Navigation Node Network page in the target area.

**Image: Unified Navigation Node Network page**

This example illustrates the fields and controls on the Unified Navigation Node Network page. You can find definitions for the fields and controls later on this page.

**Unified Navigation Node Network**

<table>
<thead>
<tr>
<th>Node Label</th>
<th>Node Name</th>
<th>Test Single Sign on</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 PS FDM - Local Node</td>
<td>PSFT_EP</td>
<td>Test Single Sign on</td>
</tr>
<tr>
<td>2 Portal Node - ERP</td>
<td>ERP</td>
<td>Test Single Sign on</td>
</tr>
<tr>
<td>3 PS HCM - Local Node</td>
<td>PSFT_HR</td>
<td>Test Single Sign on</td>
</tr>
<tr>
<td>4 Portal Node - HRMS</td>
<td>HRMS</td>
<td>Test Single Sign on</td>
</tr>
</tbody>
</table>

- **Test Single Signon**
  
  Click the Test Single Signon button to validate the single signon configuration for that remote node.

- **Sync User Personalization**
  
  Select this option to synchronize user personalization settings (My Personalizations settings such as time zone) from the portal system to all other remote systems defined in this node network.

- **Sync User System Profile**
  
  Select this option to synchronize user profile settings (My System Profile settings such as email addresses) from the portal system to all other remote systems defined in this node network.

**Adding Remote Folders to the Drop-Down Menu**

Configuring the drop-down menu provides access to the menu structure of the remote system within the main drop-down menu of the portal system. When a remote folder is added to the drop-down menu, it can be added under a unique local parent folder. Alternatively, multiple remote folders can be added under a single local parent folder.

To add remote folders to the drop-down menu:

1. Select Portal Administration, Unified Navigation WorkCenter to open the Unified Navigation WorkCenter page.
2. In the Unified Navigation pagelet, expand the Unified Navigation Setup section and click the Select Remote Content link to open the Configure Drop Down Menu page in the target area.

**Image: Configure Drop Down Menu page**

This example illustrates the fields and controls on the Configure Drop Down Menu page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Configure Drop Down Menu</th>
<th>Find</th>
<th>View All</th>
<th>New</th>
<th>First</th>
<th>1-20 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Node Name</td>
<td>Portal Name</td>
<td>Folder Label</td>
<td>Folder Name</td>
<td>Local Parent Folder Name</td>
<td>Find</td>
<td>View All</td>
</tr>
<tr>
<td>1. ERP</td>
<td>EMPLOYEE</td>
<td>Financial Supply Chain</td>
<td>PORTAL_ROOT_OBJECT</td>
<td>PORTAL_ROOT_OBJECT</td>
<td>Find</td>
<td>View All</td>
</tr>
<tr>
<td>2. HRMS</td>
<td>EMPLOYEE</td>
<td>Human Resources</td>
<td>PORTAL_ROOT_OBJECT</td>
<td>PORTAL_ROOT_OBJECT</td>
<td>Find</td>
<td>View All</td>
</tr>
</tbody>
</table>

**Node Name**
Select a portal host node from the list of defined content provider nodes.

**Portal Name**
The current portal name is automatically filled in after you select the remote folder.

**Folder Label**
Enter the label for the folder as it will appear in the portal system's drop-down menu.

**Folder Name**
Click the lookup button, navigate the tree of folders, and select the folder from the folders defined on the node of the selected content provider system.

The selected folder and all menu items and subfolders contained within it will be available in the drop-down menu on the portal system.

**Local Parent Folder Name**
Click the lookup button, navigate the tree of folders, and select the folder from the folders defined on the portal system.

This folder becomes the parent of the selected remote folder.

### Configuring Multiple Remote Folders in the Same Local Parent Folder

Two or more remote folders can be configured under the same local parent folder. To configure multiple remote folders:

1. In the Configure Drop Down Menu grid, click the Add row button to add a new row.

2. In the Node Name field, enter or select a portal host node from the list of defined content provider nodes.

3. In the Folder Label field, enter the label for the folder as it will appear in the portal system's drop-down menu.

**Important!** Do not use the following special characters in the labels for a remote folder: { } #.
4. In the Folder Name field, click the lookup button, navigate the tree of folders, and select the folder from the folders defined on the node of the selected content provider system.

5. If the next remote folder is on the same remote node, skip to the next step. Otherwise, in the Node Name field, enter or select a different portal host node from the list of defined content provider nodes.

6. In the Folder Name field, click the lookup button, navigate the tree of folders, and select the folder from the folders defined on the node of the selected content provider system.

7. Repeat steps 5 and 6 for each folder to be added under the local parent folder.

8. Click Save to save the configuration.

**Image: One local parent folder with multiple remote folders**

In the following example, the local folder labelled Self Service includes two remote folders from different content providers: HRMS:CO_EMPLOYEE_SELF_SERVICE and ERP:CO_EMPLOYEE_SELF_SERVICE.

### Importing Pagelets

Once unified navigation configuration is complete, you can import pagelets from content provider systems for use in the portal system. Your PeopleSoft Interaction Hub system offers three methods for importing pagelets:

- You can import or update all pagelets in bulk from a remote node.
- You can import or update an individual pagelet for use within a specific PeopleTools feature, such as homepage tab content, a WorkCenter, or as a related content service.
- You can use PeopleSoft Interaction Hub-specific facilities to define a source application and import a specific pagelet.

See **Importing Pagelets from Content Provider Systems** for details on each of these methods.

### Setting Up Related Content

This section provides an overview of setting up related content and discusses how to:

- Create a service to manage related content for a content provider system.
- Create and assign related content within the unified navigation framework.

**Understanding the Setup of Related Content Within Unified Navigation**

Related content on a PeopleSoft Interaction Hub system relies on the PeopleTools Related Content Framework. You use the same PeopleTools pages and methodologies as on any other PeopleSoft application system. However, with unified navigation, you have additional options for defining remote resources as related content as well as configuring related content for content references on content provider systems.
Once unified navigation has been configured to incorporate one or more content provider systems, you have expanded options for configuring related content including:

• Create related content services in the portal system using the either local or remote content references.

Creating a service that allows you to manage related content for a content provider system is an example of a service that is local to the portal system but is built on a remote content reference.

See Creating a Service to Manage Related Content for a Content Provider System.

• Create related content services in the content provider system using content references local to that system.

• Assign local (to the portal system) or remote content references (from a content provider system) as related content services (or related actions) to content references on the portal system.

• Assign local (to the content provider system) or remote content references (from a different content provider system) as related content services (or related actions) to content references on the content provider system.

For example, this would allow you to assign the content reference for employee expenses from PeopleSoft FSCM to the content reference for employee information from PeopleSoft HCM.

Creating a Service to Manage Related Content for a Content Provider System

The Unified Navigation pagelet of the Unified Navigation WorkCenter is delivered with a link that allows you to manage related content on the (local) portal system. Once unified navigation is configured, you can create a service on the portal system that will allow you to manage related content for a content provider system. Once created, this service will appear as a link under the Related Content Service section of the Unified Navigation pagelet.

Image: Unified Navigation pagelet

The following example illustrates how such a service appears as the HRMS System link in the Unified Navigation pagelet along with the Manage Related Content for Content References page from the remote system.

To create a service that allows you to manage related content for a content provider system:
1. Select Portal Administration, Unified Navigation WorkCenter to open the Unified Navigation WorkCenter page.

2. In the Unified Navigation pagelet, expand the Related Content Setup section and click the Local Portal System link to open the Manage Related Content Configuration page in the target area.
   Alternatively, select PeopleTools, Portal. Related Content Service, Manage Related Content Service.

3. Click the Create a New Related Content Service link to create a new service.

4. Specify a new service ID, for example, RCSETUPHRMS, and click Add.

   **Note:** This new service will be similar to the delivered RCSETUPLOCAL service.

5. In the Service Name field, enter a value that identifies the content provider system—for example, HRMS System.

6. Ensure that *PeopleSoft Component* is the selected URL type.

7. In the Node Name field, select the portal host node from the content provider system.

8. Select the following component parameters:
   - Menu Name: *PTCSSERVICES*
   - Component Name: *PTCS_SRVCFGSRCHGBL*
   - Market: *GBL*
   - Page Name: *PTCS_SRVCFG_SRCH*

9. In the Service URL Parameters group box, enter the following parameter and value:
   - Parameter Name: *UniNavRcPglt*
   - Description: *true*

10. Retain the other default values for this service.
11. Save the new service definition. The following shows a completed service definition, which will result in the FSCM System link appearing in the Unified Navigation pagelet:

**Image: Service definition to manage related content on a content provider system**

This example illustrates the fields and controls on the Define Related Content Service page.

See the product documentation for *PeopleTools: Portal Technology*, “Developing and Configuring Related Content Services,” Defining Related Content Services, Creating and Maintaining PeopleSoft Component Related Content Service Definitions.

**Creating and Assigning Related Content Within the Unified Navigation Framework**

This section provides high-level procedures for how to:

- Create related content services.
- Assign related content to application pages on the portal system.
- Assign related content to application pages on a content provider system.

**Creating Related Content Services**

Creating a related content service within PeopleSoft Interaction Hub uses standard Related Content Framework pages delivered in PeopleTools. However, you can begin from the Unified Navigation WorkCenter as documented here:
1. Select Portal Administration, Unified Navigation WorkCenter to open the Unified Navigation WorkCenter page.

2. In the Unified Navigation pagelet, expand the Related Content Setup section and select one of the following links:
   - To create a service on the portal system, click the Local Portal System link.
   - To create a service on a content provider system, click the link for that system—for example, FSCM System—if one has been created.

   See Creating a Service to Manage Related Content for a Content Provider System.

3. Click the Create a New Related Content Service link.

4. Add a new value.

   The Define Related Content Service page is displayed.

5. Define the related content service:
   - For a service on the portal system, you can base the service on a local resource or on a content reference from a content provider system.
   - For a service on a content provider system, you can base the service on a resource local to that content provider system.

   The PeopleTools PeopleBooks contain detailed information on creating various types of related content services.

   See the product documentation for PeopleTools: Portal Technology, “Developing and Configuring Related Content Services,” Defining Related Content Services.

**Assigning Related Content to Application Pages on the Portal System**

Assigning related content within PeopleSoft Interaction Hub uses standard Related Content Framework pages delivered in PeopleTools. However, you can begin from the Unified Navigation WorkCenter as documented here:

1. Select Portal Administration, Unified Navigation WorkCenter to open the Unified Navigation WorkCenter page.

2. In the Unified Navigation pagelet, expand the Related Content Setup section.

3. To assign related content on the portal system, click the Local Portal System link.

4. Click the Assign Related Content to Application Pages link.

   The Select a Content Reference page is displayed.

5. Browse the menu structure and select a content reference on the portal system.

   The Assign Related Content page is displayed.

6. Assign one of the following service types from the following sources:
Assigning Related Content to Application Pages on a Content Provider System

Assigning related content within PeopleSoft Interaction Hub uses standard Related Content Framework pages delivered in PeopleTools. However, you can begin from the Unified Navigation WorkCenter as documented here:

1. Select Portal Administration, Unified Navigation WorkCenter to open the Unified Navigation WorkCenter page.

2. In the Unified Navigation pagelet, expand the Related Content Setup section.

3. To assign related content on a content provider system, click the link for that system—for example, FSCM System—if one has been created.

   See Creating a Service to Manage Related Content for a Content Provider System.

4. Click the Assign Related Content to Application Pages link.

   The Select a Content Reference page is displayed.

5. Browse the menu structure and select a content reference on the content provider system.

   The Assign Related Content page is displayed.

6. Assign one of the following service types from the following sources:

   - Content reference – From the content provider system or from a different remote content provider system.
   - Pagelet – From the content provider system or from a different remote content provider system.
   - Service – From the content provider system.

The PeopleTools PeopleBooks contain detailed information on assigning related content to a content reference.

See the product documentation for PeopleTools: Portal Technology, “Developing and Configuring Related Content Services,” Assigning and Managing Related Content Services.
Importing Pagelets from Content Provider Systems

Once unified navigation configuration is complete, you can import pagelets from content provider systems for use in the portal system. Your PeopleSoft Interaction Hub system offers three methods for importing pagelets:

- You can import all pagelets in bulk from a remote node. After importing pagelets, if changes are made to one or more pagelets on the content provider system, you can update the pagelets in bulk.

- You can import or update an individual pagelet for use within a specific PeopleTools feature, such as homepage tab content, a WorkCenter, or as a related content service.

- You can use PeopleSoft Interaction Hub-specific facilities to define a source application (remote node) and import a specific pagelet.

Pages Used to Import Pagelets from Content Provider Systems

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pagelet Import</td>
<td>PTUN_DDMENUCFG</td>
<td>1. Portal Administration, Unified Navigation WorkCenter</td>
<td>Import or update pagelets in bulk from a content provider system.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Expand the Unified Navigation Setup section.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Click the Select Remote Content link.</td>
<td></td>
</tr>
<tr>
<td>Pagelet Search</td>
<td>PTUN_PGLTSRCH_SEC</td>
<td>• On the Tab Content page, click the Pagelet Search button.</td>
<td>Import or update a single pagelet to be used within that PeopleTools feature—for example, on a homepage tab or in a WorkCenter.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• On the Configure WorkCenter Page page, click the Select button in the Pagelets grid.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• On the Assign Related Content page, select Pagelet as the service type and click the Select button.</td>
<td></td>
</tr>
<tr>
<td>Define Source Applications</td>
<td>EPPPB_SOURCE_APPS</td>
<td>Portal Administration, Pagelets, Consume Pagelet</td>
<td>Define a content provider as a source application.</td>
</tr>
<tr>
<td>Add Pagelet</td>
<td>EPPPB_CP_ADD</td>
<td>• Click the Add Pagelet button on the Define Source Applications page.</td>
<td>Select a pagelet definition from a source application and add it to the portal system or to a specific workspace.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Add Related Pagelet button on the workspace Administration - Modules page.</td>
<td></td>
</tr>
</tbody>
</table>
Importing Pagelets in Bulk from a Content Provider System
Use the Pagelet Import page (PTUN_DDMENUCFG) to import or update all of the pagelets from a content provider system making them available for use on the portal system.

Note: Security is checked at runtime and does not have to be manually copied for imported pagelets.

Navigation

1. Select Portal Administration, Unified Navigation WorkCenter to open the Unified Navigation WorkCenter page.

2. In the Unified Navigation pagelet, expand the Unified Navigation Setup section.

3. Click the Select Remote Content link to open the Configure Drop Down Menu page in the target area.

The Pagelet Import section is displayed beneath the Configure Drop Down Menu section.

Image: Pagelet Import section of the Configure Drop Down Menu page

This example illustrates the fields and controls in the Pagelet Import section of the Configure Drop Down Menu page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Pagelet Import</th>
</tr>
</thead>
<tbody>
<tr>
<td>Node Name</td>
</tr>
<tr>
<td>HRMS</td>
</tr>
</tbody>
</table>

Node Name
Select a portal host node from the list of defined content provider nodes.

Portal Name
The current portal name is automatically filled in after you select the remote folder.

Import/Synchronize
Click the Import/Synchronize button to import all pagelets from the content provider into the portal system.

After importing pagelets, if changes are made to one or more pagelets on the content provider system, click the Import/Synchronize button to update the pagelets in bulk.

Using the PeopleTools Pagelet Search Page
Use the Pagelet Search page (PTUN_PGLTSRCH_SEC) to import or update a single pagelet to be used within that PeopleTools feature—for example, on a homepage tab or in a WorkCenter.
Navigation

- On the Tab Content page, click the Pagelet Search button.
- On the Configure WorkCenter Page page, click the Select button in the Pagelets grid.
- On the Assign Related Content page, select Pagelet as the service type and click the Select button.

**Image: Pagelet Search page**

This example illustrates the fields and controls on the Pagelet Search page showing a completed search on a remote node.

**Pagelet Search**

This pagelet search will allow the user to search the local and remote pagelets based on the search criteria and the node selection.

- **Node Name**: ERP
- **Search by**: Title
- **Search**: Contains Project

<table>
<thead>
<tr>
<th>Pagelet Title</th>
<th>Category</th>
<th>Origin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Project Accounting</td>
<td>Cross-Financials</td>
<td>ERP</td>
</tr>
<tr>
<td>Top Projects</td>
<td>Project Coding</td>
<td>ERP</td>
</tr>
<tr>
<td>Project Transactions Pivot</td>
<td>Project Coding</td>
<td>ERP</td>
</tr>
<tr>
<td>Project Amount By Department</td>
<td>Grants</td>
<td>ERP</td>
</tr>
<tr>
<td>Expiring Projects</td>
<td>General Ledger</td>
<td>ERP</td>
</tr>
<tr>
<td>Manage Programs &amp; Projects</td>
<td>Cross-Financials</td>
<td>ERP</td>
</tr>
<tr>
<td>Issue Priority by Project</td>
<td>Program Management</td>
<td>ERP</td>
</tr>
<tr>
<td>Project Revenue Variance</td>
<td>General Ledger</td>
<td>ERP</td>
</tr>
<tr>
<td>Critical Issues by Project</td>
<td>Program Management</td>
<td>ERP</td>
</tr>
</tbody>
</table>

**Defining a Source Application and Using the Add Pagelet Page**

This topic discusses how to:

- Define a content provider as a source application.
- Add a content provider pagelet as a homepage pagelet.
- Add a content provider pagelet as a workspace pagelet.

**Define Source Applications Page**

Use the Define Source Applications page (EPPPB_SOURCE_APPS) to define a content provider as a source application.
Navigation

Portal Administration, Pagelets, Consume Pagelet

Image: Define Source Applications page

This example illustrates the fields and controls on the Define Source Applications page. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Source Application Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Define Source Applications</strong></td>
</tr>
<tr>
<td>Define the source applications to look for pagelet definitions.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Source Applications</th>
<th>Find</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Description</td>
<td>Content Provider</td>
<td>Site Name</td>
</tr>
<tr>
<td>1 CUSTOMER</td>
<td>CUSTOMER Portal</td>
<td>Always use local</td>
<td>CUSTOMER</td>
</tr>
<tr>
<td>2 EMPLOYEE</td>
<td>EMPLOYEE Portal</td>
<td>Always use local</td>
<td>EMPLOYEE</td>
</tr>
<tr>
<td>3 PARTNER</td>
<td>PARTNER Portal</td>
<td>Always use local</td>
<td>PARTNER</td>
</tr>
<tr>
<td>4 SUPPLIER</td>
<td>SUPPLIER Portal</td>
<td>Always use local</td>
<td>SUPPLIER</td>
</tr>
<tr>
<td>5 FSCM</td>
<td>FSCM System</td>
<td>ERP</td>
<td>EMPLOYEE</td>
</tr>
</tbody>
</table>

Use the Define Source Applications page to define a content provider system as a source application.

**ID**
Specify an ID for the content provider system.

**Description**
Specify a description of the content provider system.

**Content Provider**
Select the portal host node from the content provider system.

**Important!** The *default local node* of the content provider system must be defined as a trusted system in the single signon configuration.

See Identifying All Trusted Nodes.

**Site Name**
Specify the corresponding portal for the portal host node.

**Note:** The default value is the EMPLOYEE portal.

**Save**
Click the Save button to save your changes.

**Add Pagelet**
Click the Add Pagelet button to add a content provider pagelet as a homepage pagelet on the portal system.

**Add Pagelet Page**
Use the Add Pagelet page (EPPPB_CP_ADD) to select a pagelet definition from a source portal and add it to a template.
Navigation

- Click the Add Pagelet button on the Define Source Applications page.
- Click the Add Related Pagelet button on the workspace Administration - Modules page.

**Image: Add Pagelet page**

This example illustrates the fields and controls on the Add Pagelet page. You can find definitions for the fields and controls later on this page.

### Add Pagelet

Select a pagelet definition from the selected source application, and add it to the current site.

- **Source Application:** FSCM System
- **Pagelet Folder:** Billing
- **Pagelet Name:** Invoice Analysis by Month

#### Pagelet

- **Pagelet ID:** EP_INVOICE_ANALYSIS_BY_MONTH
- **Pagelet Title:** Invoice Analysis by Month
- **Description:**

#### Pagelet Security

- **Publish as Public**
- **Publish with Security Roles**
- **Author Access**

#### Workspace Tabs

- **Select Workspace Tab**
- **Pagelet Behavior**

Use the Add Pagelet page to add an already defined pagelet to be available as a homepage pagelet.

**Source Application**

Select the portal registry that is the source of the pagelet definition.
To select the portal registry from the node of a content provider system, that node must already be defined as a source application.

See Defining a Source Application and Using the Add Pagelet Page.

<table>
<thead>
<tr>
<th>Pagelet Folder</th>
<th>Select the portal folder that is the source of the pagelet definition.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pagelet Name</td>
<td>Select the pagelet definition.</td>
</tr>
<tr>
<td>Pagelet Name</td>
<td>Displays the ID of the pagelet.</td>
</tr>
<tr>
<td>Pagelet Title</td>
<td>Displays the title of the pagelet, which you can modify.</td>
</tr>
<tr>
<td>Description</td>
<td>(Optional) Enter a description for the pagelet.</td>
</tr>
<tr>
<td>Pagelet Folder</td>
<td>Select the folder in which the pagelet definition will be stored.</td>
</tr>
<tr>
<td></td>
<td>PeopleSoft Applications is the default folder for homepage pagelets.</td>
</tr>
<tr>
<td>Pagelet Security</td>
<td>Select a pagelet security option:</td>
</tr>
<tr>
<td></td>
<td>• Publish as Public — Select to designate that all users can access the pagelet.</td>
</tr>
<tr>
<td></td>
<td>• Publish with Security Roles — Select to use the already assigned role- or permission list-based security for the pagelet.</td>
</tr>
<tr>
<td>Author Access</td>
<td>Select to provide the pagelet author with access to the pagelet regardless of any security restrictions assigned to the pagelet. This access is granted based on the author’s user ID.</td>
</tr>
<tr>
<td>Select</td>
<td>Select one or more homepage tabs for this pagelet:</td>
</tr>
<tr>
<td></td>
<td>• Administration</td>
</tr>
<tr>
<td></td>
<td>• Guest</td>
</tr>
<tr>
<td></td>
<td>• Investor Portal</td>
</tr>
<tr>
<td></td>
<td>• My Page</td>
</tr>
<tr>
<td>Pagelet Behavior</td>
<td>Select the default behavior for the pagelet:</td>
</tr>
<tr>
<td></td>
<td>• Optional — The pagelet will not automatically appear on the homepage. However, it is available for selection when users personalize their homepages. This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.</td>
</tr>
<tr>
<td></td>
<td>• Optional-Default — The pagelet will appear on all user homepages if they have access to the pagelet. The pagelet can be removed when users personalize their homepages.</td>
</tr>
</tbody>
</table>
This setting should not be used for guest homepage pagelets because guest users do not have personalization privileges.

- **Required** — The pagelet will appear on all user homepages if they have access to the pagelet. The placement of the pagelet cannot be changed and the pagelet cannot be removed from the homepage.

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

**Note:** Once a pagelet definition has been added, the definition is modifiable on the Content Ref Administration page through Structure and Content, similar to other pagelet definitions.

See the product documentation for *PeopleTools: Portal Technology*, “Administering Portals,” Administering Content References, Defining Content References.

### Adding a Content Provider Pagelet as a Workspace Pagelet

When a content provider has been defined as a source application, pagelets from that content provider can be added to workspaces and workspace templates.

See "Administering Workspace Modules (*PeopleSoft Interaction Hub 9.1: Collaborative Workspaces")".

See "Adding or Editing Related Pagelets in a Template (*PeopleSoft Interaction Hub 9.1: Collaborative Workspaces")".
Chapter 27

Maintaining Business Attributes on User Profiles

Maintaining Business Attributes on User Profiles

These topics provide an overview of business attribute usage, list prerequisites, and discuss how to:

• Maintain business attribute definitions.
• Load business attribute data tables.
• Populate the PeopleSoft Interaction Hub User Profile table.
• Add new business attributes.

Related Links
"Administering Content Management Business Attribute Security (PeopleSoft Interaction Hub 9.1: Content Management System)"
"Content Data Attributes Page (PeopleSoft Interaction Hub 9.1: Content Management System)"

Understanding Business Attribute Usage

This feature enables Interaction Hub administrators to configure business attributes that are associated with portal users by way of the Portal User Profile. These business attributes can include items such as department, job code, location, and so on. Business attributes can be used as controls within PeopleSoft Interaction Hub; for example, you can use them to control access to Managed Content. This enables you to target content to a specific subset of users, based on the business attributes assigned to that content and the specific attribute value associated with each user. For example, if you define a business attribute for department, you can designate which department a managed content item is associated with, then only portal users whose user ID is associated with that department would be permitted access to that item.

The business attribute data can be imported from PeopleSoft applications, such as PeopleSoft HCM, or other applications. A set of predefined business attributes for PeopleSoft HCM are provided as sample data, but you can create your own, as needed. To do so you must be familiar with the record structure for that data, because when you configure a business attribute, you must identify the domain table name and key that attribute is based on. Examples provided within this documentation are for configuring and using this feature with PeopleSoft HCM.

Maintaining Business Attributes

Administrators use the Profile Configuration page to set up and maintain business attributes. Using this page, they define the business attributes, designate the database records that contain their values, specify the key field, and indicate whether the attribute is used to control access to managed content.
Assigning Business Attributes to Users

The business attributes that a user is associated with are stored in the PeopleSoft Interaction Hub User Profile table (EPPCW_PROF_HDR and EPPCW_PROF_ATT). To assign business attributes to users, you can import the data into the User Profile table. You can use the User Business Data Attributes page to view the attributes associated with a specific user ID.

The User Business Data Attributes page relies on the PeopleSoft User ID to retrieve user profile details. If the data source that populates the User Profile table does not contain the PeopleSoft User ID, it will be necessary to make an association between the User Profile key and the PeopleSoft User ID. For example, in the delivered sample User Profile data source, the HCM Workforce integration contains EMPLID to identify employees, but not the related PeopleSoft User ID. The PeopleTools PSOPRDEFN table, whose key is based on the PeopleSoft User ID, provides a ready-made association between the PeopleSoft User ID and the EMPLID. Therefore, this association requires the EMPLID to be populated in the PSOPRDEFN table in the Interaction Hub database. The handler that loads the User Profile can then determine which PeopleSoft User's profile is being updated.

Implementation Steps

The steps to implement business attribute controls are:

• Maintain business attribute definitions.
• Load the business attribute data tables.
• Populate the PeopleSoft Interaction Hub User Profile table.
• Add new business attributes.

You use the links listed in the Related Links area for more information about these implementation steps.

Related Links

Adding the Portal User Roles to All User IDs

Prerequisites

The following items are required to use business attributes:

• Configure the Integration Broker integration gateway.
• Setup and activate single sign-on (this provides for PeopleTools User Profile synchronization).

See the product documentation for PeopleTools: Security Administration, “Working with User Profiles Across Multiple PeopleSoft Databases.”

Maintaining Business Attribute Definitions

This section discusses how to:

• Define business attributes.
• Review assigned business attributes.
Pages Used to Maintain Business Attribute Definitions

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Configuration</td>
<td>EPPCW_PROF_CONFIG</td>
<td>Portal Administration, Profile Management, Profile Configuration</td>
<td>Define business attributes.</td>
</tr>
<tr>
<td>User Business Data Attributes</td>
<td>EPPCW_VIEWPROFILE</td>
<td>Portal Administration, Profile Management, View Profile</td>
<td>Review assigned business attributes.</td>
</tr>
</tbody>
</table>

Profile Configuration Page

Use the Profile Configuration page (EPPCW_PROF_CONFIG) to define business attributes.

Navigation

Portal Administration, Profile Management, Profile Configuration

Image: Profile Configuration page - Attributes tab

This example illustrates the fields and controls on the Profile Configuration page - Attributes tab. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Attribute ID</th>
<th>Enter a unique identifier for the attribute. This field is used as the attribute key.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute Label</td>
<td>Enter a description for the attribute. This is the label that a portal user sees when they select an attribute to assign to managed content items.</td>
</tr>
<tr>
<td>Prompt Table</td>
<td>Select the record name of the table that contains the values for the attribute.</td>
</tr>
<tr>
<td>Key 1</td>
<td>Select the field that is the primary key for the associated prompt table.</td>
</tr>
</tbody>
</table>
Key 2, Key 3, Key 4  
Select additional key fields, if applicable.

**Image: Profile Configuration page - Selection Details tab**

This example illustrates the fields and controls on the Profile Configuration page - Selection Details tab. You can find definitions for the fields and controls later on this page.

<table>
<thead>
<tr>
<th>Display Order</th>
<th>Active</th>
<th>Secure Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>✓ 10</td>
<td>✓</td>
</tr>
<tr>
<td>2</td>
<td>✓ 20</td>
<td>✓</td>
</tr>
<tr>
<td>3</td>
<td>✓ 30</td>
<td>✓</td>
</tr>
<tr>
<td>4</td>
<td>✓ 40</td>
<td>✓</td>
</tr>
</tbody>
</table>

**Display Order**

Enter a value to specify the order in which the attribute appears in the User Business Data Attributes page. Attributes appear in ascending order based on their display order value.

**Active**

Select to enable usage of the business attribute. Only active attributes appear on the Member Profile page.

**Secure Content**

Select to enable use of the attribute to secure access to managed content.

See "Administering Content Management Business Attribute Security (PeopleSoft Interaction Hub 9.1: Content Management System)".

**User Business Data Attributes Page**

Use the User Business Data Attributes page (EPPCW_VIEWPROFILE) to review assigned business attributes.
Navigation

Portal Administration, Profile Management, View Profile

Image: User Business Data Attributes page

This example illustrates the fields and controls on the User Business Data Attributes page.

Select a User ID for which to review attribute values, then click Search.

Loading Business Attribute Tables

These topics provide an overview of the business attribute table loading procedure and discuss how to:

- Use a DataMover script to load business attributes.
• Use the PeopleSoft Publish utility to load business attributes.
• Synchronize business attributes.

See the product documentation for *PeopleTools: Data Management*, "Using the Publish Utility."

**Understanding the Business Attribute Table Loading Procedure**

System administrators are responsible for importing the record definition of the business attribute tables into the PeopleSoft Interaction Hub database, if they do not already exist, as well as running the necessary integrations to load the tables. This step needs to be done only once, at implementation time. The tables are used to retrieve the description of the attributes for display on the User Business Data Attributes page. System administrators can use PeopleSoft DataMover scripts or other utilities to export the business attribute source table contents and import them into the Interaction Hub tables, or use some of the more common integrations that may already exist. For example, when the business attributes data source is PeopleSoft HCM, you can use the HR COMPANY_FULLSYNC service operation, which uses Integration Broker to transport data from PeopleSoft HCM to another node, to load the Company table. For ongoing synchronization, the incremental service operations could be used. The following example describes how to load the business attributes from PeopleSoft HCM.

**Loading Business Attributes from PeopleSoft HCM**

To load business attribute data from PeopleSoft HCM to PeopleSoft Interaction Hub:

1. Using Application Designer, login to the PeopleSoft HCM database, copy the record definition of the business attribute table and any defined subrecords into a project, then export the project to a file.

   For example, for the Department business attribute, you would export the record PS_DEPT_TBL and its Related Language record.

2. Using Application Designer, login to the PeopleSoft Interaction Hub database, import the project from the previous step and build the record definition.

   **Note:** Steps 1 and 2 have been completed for these sample delivered PeopleSoft HCM 9.1 records: BU_UNIT_TBL_HR, COMPANY_TBL, DEPT_TBL, LOCATION_TBL. If you are using a different record version due to a different PeopleSoft HCM release or patch level, you will need to export the record definition from PeopleSoft HCM and import that record definition into the PeopleSoft Interaction Hub database.

3. For the initial data load, populate the tables using either a DMS script or the PeopleSoft Publish utility.

**Using a DataMover Script to Load Business Attribute Data**

To use a DataMover (DMS) script:

1. Using DataMover, log in to the PeopleSoft HCM database and export the table to a flat file.

2. Using DataMover, log in to the PeopleSoft Interaction Hub database and import the file from the previous step.

**Sample Export DMS Script**

This is an example of a DMS script to export company data from PeopleSoft HCM.

```
set log c:\temp\company_exp.log;
set output c:\temp\company.dat;
```
Sample Import DMS Script

This is an example of a DMS script to import the company data that was exported from PeopleSoft HCM into PeopleSoft Interaction Hub.

```
set log c:\temp\company_imp.log;
set UPDATE_DUPS;
set input c:\temp\company.dat;
import *;
```

Using the PeopleSoft Publish Utility to Load Business Attribute Data

To use the PeopleSoft Publish utility:

1. Configure Integration Broker in PeopleSoft HCM.
2. Configure Integration Broker in PeopleSoft Interaction Hub.
3. Run the PeopleSoft Publish utility in PeopleSoft HCM.
4. Verify the results in the PeopleSoft Interaction Hub database.

Note: In some cases, improved performance with FULLSYNC messages can be achieved by decreasing the message size to be within the range of 25,000–100,000 bytes.

The following sample configuration describes the steps for the BU_UNIT_TBL_HR full sync.

Configuring Integration Broker in PeopleSoft HCM

To configure Integration Broker in PeopleSoft HCM:

1. Navigate to PeopleTools, Integration Broker, Integration Setup, Service, and select BUS_UNIT_HR_FULLSYNC.
2. Select the default service operation and set it to active.
3. Activate the routing to publish to the PeopleSoft Interaction Hub node. If no routing exists, add one.

Configuring Integration Broker in PeopleSoft Interaction Hub

To configure Integration Broker in PeopleSoft Interaction Hub:

1. Navigate to PeopleTools, Integration Broker, Integration Setup, Service.
2. Select and activate service BUS_UNIT_HR_FULLSYNC.
   - If none exists, add a new service.
3. Select and activate the default service operation.
   - If this is a new service, add an asynchronous one-way service operation BUS_UNIT_HR_FULLSYNC.VERSION_1 using the corresponding message for the service.
   - If no message exists, add a rowset-based message called BUS_UNIT_HR_FULLSYNC, version VERSION_1 and add record definition BUS_UNIT_TBL_HR to the root.
• If the service operation already exists for the Resource Finder feature and it uses a nonrowset-based message, continue to next step. A new handler will be created downstream to update the business attribute table.

• Set the Queue name to match the one for the service operation in HR, for example, HR_SETUP.

4. Verify that the service operation permission is set. If none exists, set the service operation security to use permission list PAPP9000.

5. Activate handler. Depending on whether a handler already exists or not, proceed as follows:

• If no handler exists, add an application package/class in Application Designer using the sample handler PeopleCode provided in “Sample Business Attributes Service Operation Handler PeopleCode.” The application package is usually the same name as the service.


  In PIA, add a handler to the service operation with the new application class.

• If a handler already exists for the Resource Finder feature, in Application Designer add a new application class to the existing application package using the sample handler PeopleCode in “Sample Business Attributes Service Operation Handler PeopleCode.”

  See Case 2: A Nonrowset-Based Message Exists in PeopleSoft Interaction Hub for the Same-Name Service Operation in PeopleSoft HCM.

  In PIA, add a new handler to the service operation with the newly added application class.

6. Activate the routing.

If none exists, generate an Any-to-Local routing on the General tab of the Service Operation.

7. Select the Routing Parameters tab and verify the EXTERNAL alias matches the expected incoming message name and version (BUS_UNIT_HR_FULLSYNC.VERSION_1 in this example).

Running the PeopleSoft Publish Utility in PeopleSoft HCM

To run the PeopleSoft Publish utility, complete these steps in PeopleSoft HCM:

1. Navigate to Enterprise Components, Integration Definitions, Full Data Publish Rules.

2. Select Service Operation BUS_UNIT_HR_FULLSYNC and verify that it is active. Select Create Message Header and Create Message Trailer if they are not already selected.


4. Add a run control or use an existing one.

5. Set Service Operation to BUS_UNIT_HR_FULLSYNC and click Run.

6. Select the Full Table Data Publish process and click OK.

7. Verify process goes to Success.

9. Select the Publication Contracts page and verify transaction(s) are successful.

**Verifying the Results in the PeopleSoft Interaction Hub Database**

To verify the results, in PeopleSoft Interaction Hub complete these steps:


2. Select the Subscription Contracts page and verify transaction(s) are successful.

3. Verify the User Profile has been populated by querying the BUS_UNIT_TBL_HR table.

**Synchronizing Business Attributes**

For incremental synchronization of the business attributes, repeat steps 1, 2, and 4 in Using the PeopleSoft Publish Utility to Load Business Attribute Data, using service operation BUS_UNIT_HR_SYNC.

See **Using the PeopleSoft Publish Utility to Load Business Attribute Data**.

**Populating the PeopleSoft Interaction Hub User Profile Table**

A sample integration based on the Workforce service operation is provided to populate job-related data from the PeopleSoft HCM database. You must configure Integration Broker for the source database and the PeopleSoft Interaction Hub database, then run the PeopleSoft Publish utility for the source database, and verify the results in the PeopleSoft Interaction Hub database.

To populate the PeopleSoft Interaction Hub User Profile table using the delivered service:

1. Configure Integration Broker in PeopleSoft HCM:
   b. Open the WORKFORCE_FULLSYNC service.
   c. Select the default service operation WORKFORCE_FULLSYNC.INTERNAL and set it to active.
   d. Add a routing from PeopleSoft HCM to PeopleSoft Interaction Hub.
   e. Select the Routing Parameters tab, and enter the following values to transform the transaction to the VERSION_2 service operation:

<table>
<thead>
<tr>
<th>External Alias</th>
<th>WORKFORCE_FULLSYNC.VERSION_2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message.Ver into Transform 1</td>
<td>WORKFORCE_FULLSYNC.INTERNAL</td>
</tr>
<tr>
<td>Message.Ver out of Transforms</td>
<td>WORKFORCE_FULLSYNC.VERSION_2</td>
</tr>
</tbody>
</table>
Note: Some earlier PeopleSoft HCM 9.1 builds have WORKFORCE_FULLSYNC.VERSION_2 as the default service operation version instead of WORKFORCE_FULLSYNC.INTERNAL. In that case the transformation step is not needed, as the external alias should match the service operation external alias in PeopleSoft Interaction Hub (WORKFORCE_FULLSYNC.VERSION_2).

Note: If a routing already exists for the Resource Finder integration, a separate routing should be created since the Resource Finder routing requires the WORKFORCE_FULLSYNC.VERSION_2 to be transformed to WORKFORCE_FULLSYNC.VERSION_1.

2. Configure Integration Broker in PeopleSoft Interaction Hub:
   b. Open the WORKFORCE_FULLSYNC service.
   c. Select the service operation WORKFORCE_FULLSYNC_V2.VERSION_2 and set it to active.
   d. Activate the handler.
   e. Activate the Any-to-Local routing.
   f. Select the Parameters tab and verify External Alias = WORKFORCE_FULLSYNC.VERSION_2.

3. In PeopleSoft HCM, run the PeopleSoft Publish utility:
   b. Select the WORKFORCE_FULLSYNC service and select the Create Message Header and Create Message Trailer options if they are not already selected.
   d. Add a run control, or use an existing one.
   e. Set Service Operation to WORKFORCE_FULLSYNC and click Run.
   f. Select the Full Table Data Publish option and click OK.
   g. Verify the process status updates to Success.
   i. Go to the Publication Contracts page and verify the transactions are successful.

4. Verify the results in PeopleSoft Interaction Hub:
b. Access the Subscription Contracts page and verify the transactions are successful.

c. Verify the user profile has been populated by querying the EPPCW_PROF_HDR table.

**Incremental Synchronization of User Profile**

Repeat steps 1, 2, and 4, using WORKFORCE_SYNC instead of WORKFORCE_FULLSYNC:

- In PeopleSoft HCM, use the service operation WORKFORCE_SYNC.VERSION_2 or WORKFORCE_SYNC.INTERNAL transformed to VERSION_2.
- In PeopleSoft Interaction Hub, use service operation WORKFORCE_SYNC_V2.VERSION_2.

**Adding New Business Attributes**

The delivered service operation, WORKFORCE_FULLSYNC_V2.VERSION_2, extracts only these business attributes for all active jobs from PeopleSoft HCM: business unit, company, department, and location. To add additional business attributes, you can either modify the delivered WORKFORCE_FULLSYNC_V2.VERSION_2 service, or create a custom service.

**Modifying the WORKFORCE_FULLSYNC_V2.VERSION_2 Service Operation**

To modify the delivered WORKFORCE_FULLSYNC_V2.VERSION_2 service operation to extract additional user profile attributes:

1. Access the Profile Configuration page by selecting Portal Administration, Profile Management, Profile Configuration, and define the new business attributes.

   See [Profile Configuration Page](#).

2. Load the business attributes table.

   See [Loading Business Attribute Tables](#).

3. Modify the transform programs XSLT_WORKFORCEUSERPROFILE_FS (for the full sync) and XSLT_WORKFORCEUSERPROFILE_SYNC (for the incremental) sync as follows:
   
a. In Application Designer, open HTML object.

   b. Locate the “attribute” element XSLT, for example: `<xsl:element name="attribute">`.

   c. Within the “attribute” element, duplicate an “attribute” child element and update attributeName, fieldName, fieldValue.

   The following example shows these elements:

   ```xml
   <xsl:element name="attribute">
     <xsl:attribute name="attributeName">BUSINESSUNIT</xsl:attribute>
     <xsl:element name="attributeField">
       <xsl:attribute name="fieldName">BUSINESS_UNIT</xsl:attribute>
       <xsl:attribute name="fieldValue" select="(PER_ORG_ASGN/JOB[HR_STATUS='A']){last()}/BUSINESS_UNIT"/>
     </xsl:element>
   </xsl:element>
   ```
Refer to the “Sample XSLT for the WORKFORCE_FULLSYNC User Profile Message” section for details on the delivered XSLT.

4. Load the User Profile table.

See Populating the PeopleSoft Interaction Hub User Profile Table.

**Creating a Custom Service**

To create your own custom service:

- Access the Profile Configuration page by selecting Portal Administration, Profile Management, Profile Configuration, and define the new business data attributes.

  See Profile Configuration Page.

- Load the business data attributes table.

  See Loading Business Attribute Tables.

- Create a service to publish from the source database.

  If the source database is a PeopleSoft database, you can use the delivered WORKFORCE_FULLSYNC as a model for your custom service, making any changes required for your specific situation.

- In PeopleSoft Interaction Hub, create a XSL transformation to transform the incoming XML, if applicable.

  You can use the delivered XSLT_WORKFORCEUSERPROFILE_FS as a model for the Full Sync XSL transformation and XSLT_WORKFORCEUSERPROFILE_SYNC as a model for the Incremental Sync XSL transformation.

**Sample XSLT for the WORKFORCE_FULLSYNC User Profile Message**

This section includes an example of XSLT for the WORKFORCE_FULLSYNC User Profile message. The XSLT has the following structure:

- For each transaction, there is a top “profile” element.

- The “profile” element has an attribute “profileType”, such as Employment record.

- The “profile” element has child elements “profileKeys” and “attributes.”

  - The “profileKey” elements are nested within “profileKeys” and represent the values that uniquely identify each profile occurrence.

  - The “attribute” elements are nested within the “attributes” element. The related attribute “attributeName” identifies individual user profile attributes, for example, BUSINESSUNIT.
- The “profileKey” and “attributeField” have attribute pairs “fieldName” and “fieldValue”, for example, attributeField fieldName=BUSINESS_UNIT, fieldValue=xsl:value-of select="(PER_ORG_ASGN/JOB[HR_STATUS='A'][last()]/BUSINESS_UNIT.

<xsl:for-each select="WORKFORCE_FULLSYNC/MsgData/Transaction">
  <xsl:element name="profile">
    <xsl:attribute name="profileType">EMPLOYMENT_RCD</xsl:attribute>
    <xsl:element name="profileKeys">
      <xsl:element name="profileKey">
        <xsl:attribute name="fieldName">EMPLID</xsl:attribute>
        <xsl:attribute name="fieldValue"><xsl:value-of select="(PER_ORG_ASGN/EMPLID)"/></xsl:attribute>
      </xsl:element>
      <xsl:element name="profileKey">
        <xsl:attribute name="fieldName">EMPL_RCD</xsl:attribute>
        <xsl:attribute name="fieldValue"><xsl:value-of select="(PER_ORG_ASGN/EMPLID)[last()]/EMPL_RCD"/></xsl:attribute>
      </xsl:element>
    </xsl:element>
    <!-- Identify Attribute -->
    <xsl:element name="attributes">
      <xsl:element name="attribute">
        <xsl:attribute name="attributeName">BUSINESSUNIT</xsl:attribute>
        <xsl:element name="attributeField">
          <xsl:attribute name="fieldName">BUSINESS_UNIT</xsl:attribute>
          <xsl:attribute name="fieldValue"><xsl:value-of select="(PER_ORG_ASGN/JOB[HR_STATUS='A'][last()]/BUSINESS_UNIT)"/></xsl:attribute>
        </xsl:element>
      </xsl:element>
      <xsl:element name="attributes">
        <xsl:element name="attribute">
          <xsl:attribute name="attributeName">DEPARTMENT</xsl:attribute>
          <xsl:element name="attributeField">
            <xsl:attribute name="fieldName">SETID</xsl:attribute>
            <xsl:attribute name="fieldValue"><xsl:value-of select="(PER_ORG_ASGN/JOB[HR_STATUS='A'][last()]/SETID_DEPT)"/></xsl:attribute>
          </xsl:element>
        </xsl:element>
        <xsl:element name="attributeField">
          <xsl:attribute name="fieldName">DEPTID</xsl:attribute>
          <xsl:attribute name="fieldValue"><xsl:value-of select="(PER_ORG_ASGN/JOB[HR_STATUS='A'][last()]/DEPTID)"/></xsl:attribute>
        </xsl:element>
      </xsl:element>
    </xsl:element>
  </xsl:element>
</xsl:for-each>
Appendix A

PeopleSoft-Delivered Security Data

These topics summarize the PeopleSoft-delivered security data and discuss:

• Permission lists and roles cloned when creating sites.
• Permission lists with special uses in PeopleSoft Interaction Hub.
• Roles.
• User IDs.
• Delivered PeopleTools roles.
• Adding the portal user roles to all user IDs.

Summary of Delivered Security Data

The following list provides an overview of important security information:

• Every component, PeopleCode Web library, interface, registry item, and so on, specific to PeopleSoft Interaction Hub is assigned to two permission lists. These permission lists are:
  • A system administer permission list in the form xxxx9000.
  • One of the feature-specific permission lists in the form xxxxNNNN.
• Pagelet permission lists include the pagelet, the personalization, and usually the enhancement pages that are accessible from the pagelet.
• PeopleSoft Interaction Hub security for each feature is divided into three groups:
  • Administrator
    Feature implementation and set up.
    Highest security level.
  • Manager
    Feature maintenance, distribution, and usage.
    Medium security level.
  • User
Feature access, viewing, and usage.

Low security level.

- All logged on user IDs (except for the Guest user) must contain the roles PeopleSoft User and PAPP_USER, or a cloned version of the roles.

- The GUEST user ID must contain the roles PeopleSoft Guest and PAPP_GUEST, or a cloned version of the roles.

- The required roles (PAPP_USER, PAPP_GUEST, PeopleSoft User, and PeopleSoft Guest) contain specific permission lists that are necessary to access the base portal features.

You can adjust cloned roles to as needed, but you must keep the following permission lists on the specified role:

- PTPT1000 is necessary to access the PeopleTools portal base features (included in the role PeopleSoft User).

- PAPP0000 is necessary to access the PeopleSoft Interaction Hub base features (included in the roles PAPP_USER and PAPP_GUEST).

- PAPP0001 is necessary for the Guest tab (included in the role PAPP_GUEST).

- PAPP0002 is necessary for the homepage Personalization (included in the role PAPP_USER).

**Note:** When enabling role grant security, you must include the roles PeopleSoft User and PAPP_USER. These roles are required for access to base portal functionality.

---

**Permission Lists and Roles Cloned When Creating Sites**

When you create sites, the system clones and uses special permission lists and roles on the site. This section describes:

- Permission lists cloned when creating sites.

- Roles cloned when creating sites.

**Permission Lists Cloned When Creating Sites**

When you create a site, the system clones and uses the following permission lists on the site content and folder definitions. The Installation Options page lists which permission lists to clone during site creation. These are delivered as PAPP5000, PAPP5060, PAPP5070. The generated permission lists are listed in the following table, where XXX represents the site name.
Permission Lists

This section describes:

- Permission lists that have special meaning and usage in PeopleSoft Interaction Hub.
- All permissions delivered with PeopleSoft Interaction Hub.

Permission Lists with Special Uses

The following table describes permission lists that have special meaning and usage in PeopleSoft Interaction Hub.

<table>
<thead>
<tr>
<th>Permission List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SITE_XXX_ADM</td>
<td>Gives site-specific access for the site administrator to set navigation defaults, set security access to the site, and review and override Branding elements for the site. It is generated by cloning PAPP5000 during site creation.</td>
</tr>
<tr>
<td>SITE_XXX_PUB</td>
<td>Gives site-specific access for publishing menu items in the navigation of the site. It is generated by cloning PAPP5060 during site creation.</td>
</tr>
<tr>
<td>SITE_XXX_VWR</td>
<td>Gives site-specific access to view the site. It is generated by cloning PAPP5070 during site creation.</td>
</tr>
</tbody>
</table>

Roles Cloned When Creating Sites

When you create a site, the following roles are generated and assigned site-specific permission lists. These roles are attached to the appropriate user who is assigned security access to the site.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SITE_XXX_ADM</td>
<td>Gives site-specific access for the site administrator to set navigation defaults, set security access to the site, and review and override Branding elements for the site. It contains the matching permission list SITE_XXX_ADM which is generated during site creation.</td>
</tr>
<tr>
<td>SITE_XXX_PUB</td>
<td>Gives site-specific access for publishing menu items in the navigation of the site. It contains the matching permission list SITE_XXX_PUB which is generated during site creation.</td>
</tr>
<tr>
<td>SITE_XXX_VWR</td>
<td>Gives site-specific access to view the site. It contains the matching permission list SITE_XXX_VWR which is generated during site creation.</td>
</tr>
</tbody>
</table>

Related Links

Permission Lists with Special Uses
<table>
<thead>
<tr>
<th>Permission List</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP9000</td>
<td>Includes every delivered PeopleSoft Interaction Hub object (excluding Pagelet Wizard and Resource Finder objects). This permission list is included in the role PAPP_SYSTEM_ADMIN.</td>
</tr>
<tr>
<td>PAPX9000</td>
<td>Includes every delivered Resource Repository object. This permission list is included in the role PAPP_SYSTEM_ADMIN.</td>
</tr>
<tr>
<td>PAPP0000</td>
<td>Required to access the PeopleSoft Interaction Hub base features. This permission list is included in the roles PAPP_USER and PAPP_GUEST.</td>
</tr>
<tr>
<td>PAPX0000</td>
<td>Required to access the Resource Repository base features. This permission list is included in the roles PAPP_USER and PAPP_GUEST.</td>
</tr>
<tr>
<td>PAPP0001</td>
<td>Required for the Guest tab. This permission list is included in the role PAPP_GUEST.</td>
</tr>
<tr>
<td>PAPP0002</td>
<td>Required for Personalize Content and Layout links on the homepage and the My Links feature in the portal header. This permission list is included in the role PAPP_USER.</td>
</tr>
<tr>
<td>PAPQnnnn</td>
<td>Required for access to Internal Controls Enforcer Portal items in the left navigation and for access to Internal Controls Enforcer pagelets.</td>
</tr>
<tr>
<td>PAPJnnnn</td>
<td>Required for access to EnterpriseOne applications from the PeopleSoft Interaction Hub.</td>
</tr>
<tr>
<td>PTPT1000</td>
<td>Required to access the PeopleTools base portal features. This permission list is included in the PeopleTools role PeopleSoft User. If you use a cloned version of this permission list, make sure to retain the needed iScripts and component interfaces security required to access the portal and end-user base access items, such as changing a password.</td>
</tr>
<tr>
<td>PTPT1400</td>
<td>Required to access the PeopleTools base portal features for a guest user. This permission list is included in the PeopleTools role PeopleSoft Guest.</td>
</tr>
</tbody>
</table>

**Delivered Permission Lists**

The following table lists all permission lists delivered with PeopleSoft Interaction Hub.
<table>
<thead>
<tr>
<th>Permission List</th>
<th>Description</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP0000</td>
<td>Base PeopleSoft Interaction Hub objects.</td>
<td>Base access to the navigation and template iScripts (Web Libraries), portal search results page, Take a Survey page, Workspace error access page, Site Manager error access page, template pagelets (Content Ratings, Related Information, Related Contacts), menu item file attachment viewer pages, and the Language Selection pagelet. This permission list is required for all users, including GUEST.</td>
</tr>
<tr>
<td>PAPP0001</td>
<td>Base Guest objects.</td>
<td>Access the homepage tab Guest Page and the Sign On pagelet. This permission list is required for the GUEST user.</td>
</tr>
<tr>
<td>PAPP0002</td>
<td>Logged in user access.</td>
<td>Access the homepage Personalize Content and Layout pages, and My Links pages, the user profile pages, and the Related Discussion Template pagelet. Required access for all users, except Guest.</td>
</tr>
<tr>
<td>PAPP0010</td>
<td>PeopleTools Notification.</td>
<td>Access the email notification pages from the PeopleTools Notify button.</td>
</tr>
<tr>
<td>PAPP1000</td>
<td>External News pagelets.</td>
<td>Access the integrated External News feed and RSS News pagelets.</td>
</tr>
<tr>
<td>PAPP1100</td>
<td>Company News pagelets.</td>
<td>Access the News Publication pagelets, pagelet personalization, and pagelet enhancement pages for viewing sections and published articles.</td>
</tr>
<tr>
<td>PAPP1110</td>
<td>Company Promotions pagelet.</td>
<td>Access the Company Promotions pagelet and pagelet personalization.</td>
</tr>
<tr>
<td>PAPP1130</td>
<td>Promotions by Role pagelet.</td>
<td>Access the Promotions by Role pagelet. To access the results page, roles with this permission list must also include permission list PAPP2030 (Manage Company Promotions).</td>
</tr>
<tr>
<td><strong>Permission List</strong></td>
<td><strong>Description</strong></td>
<td><strong>Usage</strong></td>
</tr>
<tr>
<td>---------------------</td>
<td>----------------</td>
<td>-----------</td>
</tr>
<tr>
<td>PAPP1140</td>
<td>My Managed Content Pagelet.</td>
<td>Access the My Managed Content pagelet and pagelet personalization. <strong>Note:</strong> To access the links on this pagelet, roles with this permission list must also include permission list PAPP2010 (Access Content Management).</td>
</tr>
<tr>
<td>PAPP1150</td>
<td>My News Content Pagelet.</td>
<td>Access the My News Content pagelet. <strong>Note:</strong> To access the links on this pagelet, roles with this permission list must also permission list PAPP2010 (Access Content Management). To access the Review for Publishing link, roles with this permission link must also include permission list PAPP2020 (Publish News Articles).</td>
</tr>
<tr>
<td>PAPP1160</td>
<td>Submitted Promotions pagelet.</td>
<td>Access the Submitted Promotions pagelet. To access the links on this pagelet, roles with this permission list must also include permission list PAPP4110 (Submit Promotion Items).</td>
</tr>
<tr>
<td>PAPP1170</td>
<td>Poll Pagelet.</td>
<td>Access published Poll pagelets to respond to the current poll question. <strong>Note:</strong> Users must be included in the Poll definition's respondent roles to respond or view any given poll. Users do not need member privileges or access to the Poll definition in order to respond to a poll question.</td>
</tr>
<tr>
<td>PAPP1200</td>
<td>Tasks pagelet.</td>
<td>Access the Integrated Task List pagelet, pagelet personalization, pagelet enhancement pages, and to the PeopleTools Worklist and Worklist Details pages. <strong>Note:</strong> To access links for action items, roles with this permission list must also include permission list PAPP5600 (Access Action Items).</td>
</tr>
<tr>
<td>Permission List</td>
<td>Description</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------</td>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PAPP1210</td>
<td>View Community Calendars.</td>
<td>View Community Calendars in display-only mode. Access the Community Calendar search results page. Calendar access is restricted by member privileges on the Calendar definition.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> This permission list is required to view the links on the Pagelet Wizard generated Community Calendar pagelets.</td>
</tr>
<tr>
<td>PAPP1300</td>
<td>Email/Calendar pagelets.</td>
<td>Access the Email and Calendar pagelets and pagelet personalization pages.</td>
</tr>
<tr>
<td>PAPP1500</td>
<td>Internet Information pagelets.</td>
<td>Access the Internet HTML pagelets and associated component interfaces and web libraries.</td>
</tr>
<tr>
<td>PAPP1600</td>
<td>Saved Searches pagelets.</td>
<td>Access the Saved Searches pagelets, pagelet personalization, and pagelet enhancement Search Results pages.</td>
</tr>
<tr>
<td>PAPP2000</td>
<td>Access Published Content.</td>
<td>Access the Content Management published content viewer pages, hierarchy viewer pages, and Browse by Category viewer pages. Content and folder access is restricted by member privileges on the Folder definition, or content viewer roles on the Content definition, or folder viewer roles on the Folder definition.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> This permission list is needed for all users when Content Management folders and content items are published as menu items in the left navigation or published as pagelets or available from the portal search.</td>
</tr>
<tr>
<td>PAPP2010</td>
<td>Access content management.</td>
<td>Access the hierarchy management pages, hierarchy search pages, content definition pages, folder definition pages, the My Content Status pages, and the content web services. Content Management access and actions are restricted by member privileges on the Folder definition, or to users listed as Top Administrators for the Content Management feature.</td>
</tr>
<tr>
<td>Permission List</td>
<td>Description</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PAPP2020</td>
<td>Publish News Articles.</td>
<td>Access the News Publications Publish Articles page, the Unpublish Articles page, and the Choose Top Stories page. <strong>Note:</strong> To access the pages for viewing and editing content, roles with this permission list must also include permission list PAPP2010 (Access Content Management)</td>
</tr>
<tr>
<td>PAPP2025</td>
<td>Administer News content.</td>
<td>Administer News Publication articles and images. These pages allow the user to delete, add, and update news articles and images, ignoring the privilege set or status of the content. This permission list should only be granted to high-level content administrators. To access the pages for viewing and editing news content, roles with this permission list must also include permission list PAPP2010 (Access Content Management).</td>
</tr>
<tr>
<td>PAPP2030</td>
<td>Manage Company Promotions.</td>
<td>Manage Company Promotions by publishing submitted promotions, and inquiring on viewer roles assigned to Company Promotion items.</td>
</tr>
<tr>
<td>PAPP2035</td>
<td>Administer Company Promotions.</td>
<td>Administer Company Promotions by creating and updating promotion targets and categories.</td>
</tr>
<tr>
<td>PAPP2045</td>
<td>Run Categorization Spider.</td>
<td>Run the Categorization Spider process to pull categories and content into the Categorized Content feature. <strong>Note:</strong> Users with this permission list should also be listed as a Top Administrator for the Categorized Content feature.</td>
</tr>
<tr>
<td>PAPP2050</td>
<td>Administer Content Management.</td>
<td>Administer Managed Content by assigning top category administrators, creating privilege sets, assigning viewer roles, and defining attachment locations. This permission list should only be granted to high-level content administrators.</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Permission List</th>
<th>Description</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP2070</td>
<td>Review Content Access/Location.</td>
<td>Review Content stored in the Content Management system. The inquiry lists where the content can be accessed, who can access the content, and a preview of the content for users who are viewing members for this content. Access the Render Content URL page to generate the content's rendering URL for use in third-party applications.</td>
</tr>
<tr>
<td>PAPP2080</td>
<td>Query Content Management.</td>
<td>Access the Content Management tables and views on the PeopleSoft Interaction Hub query tree.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> This permission list should only be granted to high level content administrators to limit access to all content.</td>
</tr>
<tr>
<td>PAPP2300</td>
<td>Administer External News.</td>
<td>Administer External News by creating and updating External News publication pagelets, providers, groups, categories, articles, and news feed batch process.</td>
</tr>
<tr>
<td>PAPP2310</td>
<td>Manage External News.</td>
<td>Manage External News by changing the publish and expire dates of news feed articles to remove offensive articles.</td>
</tr>
<tr>
<td>PAPP2800</td>
<td>Administer Integrated Tasks.</td>
<td>Administer the Integrated Task pagelet by access to the PeopleTools Worklist, Worklist Details, and Worklist administration pages.</td>
</tr>
<tr>
<td>PAPP3100</td>
<td>Administer Weather pagelet.</td>
<td>Administer Weather pagelet by getting a customer ID or running the Update City List process.</td>
</tr>
<tr>
<td>PAPP3200</td>
<td>Administer HTML pagelets.</td>
<td>Administer HTML pagelets by creating and registering HTML pagelets.</td>
</tr>
<tr>
<td>PAPP3300</td>
<td>Administer Email/Calendar pagelet.</td>
<td>Administer the Email and Calendar pagelets by defining the email and calendar system and user values.</td>
</tr>
<tr>
<td>PAPP3550</td>
<td>Administer integration content.</td>
<td>Access the SOAP to component interface iScripts (WEBLIB) web services.</td>
</tr>
<tr>
<td>PAPP3560</td>
<td>Administer integration workspaces.</td>
<td>Access the Collaborative Workspace component interface web services.</td>
</tr>
<tr>
<td>Permission List</td>
<td>Description</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>PAPP4002</td>
<td>Administer Homepage Tabs.</td>
<td>Administer the Homepage Tab Layout and Content definition.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> The user must have the Portal Administrator role or have the site-specific administrator role to modify the tab definition from the Configure Homepage menu item.</td>
</tr>
<tr>
<td>PAPP4003</td>
<td>Administer Portal Settings.</td>
<td>Administer the Portal General Settings page to set the site and node templates, the folder navigation options, and the portal search options.</td>
</tr>
<tr>
<td>PAPP4004</td>
<td>Run Processes.</td>
<td>Access to Process Monitor and the delivered process groups. Use as the process profile permission list on the User Profile definition page.</td>
</tr>
<tr>
<td>PAPP4005</td>
<td>Publish Pagelets to Sites.</td>
<td>Access the component to copy pagelet content references from one site to another.</td>
</tr>
<tr>
<td>PAPP4006</td>
<td>Run Base User Processes.</td>
<td>Access the delivered base user process group for alert and subscribed notifications.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> Use this permission list as the process profile permission list on the User Profile definition page for end-users.</td>
</tr>
<tr>
<td>PAPP4020</td>
<td>Manage Menu Item Requests.</td>
<td>Manage menu item requests by approving or rejecting requests, and defining the users notified by email for submitted requests.</td>
</tr>
<tr>
<td>Permission List</td>
<td>Description</td>
<td>Usage</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------</td>
<td>-------</td>
</tr>
<tr>
<td>PAPP4025</td>
<td>Administer Menu Item Requests.</td>
<td>Administer menu item requests by approving or rejecting requests, registering approved requests, and defining the users notified by email for submitted requests.</td>
</tr>
<tr>
<td>PAPP4040</td>
<td>Administer Privilege Sets.</td>
<td>Administer the Privilege Set definitions for Collaborative Workspaces, Community Calendars, Action Items, Polls, and Discussion Forums. <strong>Note:</strong> Use permission list PAPP2050 (Administer Content Management) to administer the Content Management Privilege Sets.</td>
</tr>
<tr>
<td>PAPP4050</td>
<td>Administer Portal Search.</td>
<td>Administer Search by defining search indexes, search groups, search run controls and search notification. <strong>Note:</strong> Search groups determine which search collections are associated with a specific search results page.</td>
</tr>
<tr>
<td>PAPP4060</td>
<td>Administer Viewer Roles.</td>
<td>Administer Viewer Roles by listing the roles available to secure News Publication articles and Company Promotion items. <strong>Note:</strong> This permission list should only be granted to high level content administrators.</td>
</tr>
<tr>
<td>PAPP4100</td>
<td>Submit Menu Item requests.</td>
<td>Submit Menu Item Requests to request items to be added to the portal navigation.</td>
</tr>
<tr>
<td>PAPP4110</td>
<td>Submit promotion items.</td>
<td>Submit company promotion items.</td>
</tr>
<tr>
<td>PAPP4120</td>
<td>Submit news articles.</td>
<td>Submit News Articles for publication. <strong>Note:</strong> This permission list is needed to enable the Submit Article link on News Publication pagelets that allow submits from the pagelet.</td>
</tr>
<tr>
<td>PAPP4130</td>
<td>Take a survey.</td>
<td>Take a survey. Access is limited to the survey definition's distribution group.</td>
</tr>
<tr>
<td>Permission List</td>
<td>Description</td>
<td>Usage</td>
</tr>
<tr>
<td>----------------</td>
<td>------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>PAPP4300</td>
<td>Manage Content Ratings.</td>
<td>Manage Content Ratings by creating content rating questions, assigning menu items to the content rating definition, and viewing the respondent results of the content rating questions.</td>
</tr>
<tr>
<td>PAPP4310</td>
<td>Access Poll definitions.</td>
<td>Access Poll Definitions. Poll Definition access and actions are restricted by member privileges on the Poll Definition.</td>
</tr>
<tr>
<td>PAPP4350</td>
<td>Administer Content Ratings.</td>
<td>Administer Content Ratings by assigning Result Viewers, setting non registered URL's, and inquiring on the invisible iTracker results.</td>
</tr>
<tr>
<td>PAPP4355</td>
<td>Administer Poll definition.</td>
<td>Administer Poll Definitions by assigning member privileges or deleting a poll. These Poll Definition actions are not restricted by member privileges.</td>
</tr>
<tr>
<td>PAPP4360</td>
<td>Create Poll Definitions.</td>
<td>Create Poll Definitions and assign member privileges to the created poll.</td>
</tr>
<tr>
<td>PAPP4400</td>
<td>Access Account Signon Utility.</td>
<td>Access the Account Signon Utility by updating the stored user ID and password.</td>
</tr>
<tr>
<td>PAPP4450</td>
<td>Administer Account Signon Utility.</td>
<td>Administer the Account Signon Utility by creating the Sign On forms and URLs to access external secured sites.</td>
</tr>
<tr>
<td>PAPP4500</td>
<td>Administer portal options.</td>
<td>Define installation, system, and registry options.</td>
</tr>
<tr>
<td>PAPP4600</td>
<td>Administer context assignment.</td>
<td>Administer Context Manager by assigning the default template pagelets as well as the individual template pagelets to a specified Menu Item.</td>
</tr>
</tbody>
</table>
| PAPP4700       | Manage Related Content.      | Manage Related Content by adding Related Content online to Menu Items that are assigned a Related Content template pagelet. 

This permission list is for general page access. Access to add content to a Menu Item/Related Content publication combination is restricted via assigned Topic Experts as well as access to the Menu Item in the navigation.
<table>
<thead>
<tr>
<th>Permission List</th>
<th>Description</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP4710</td>
<td>Review Related Content.</td>
<td>Access the Related Content Inquiry Pages listing content according to the assigned Topic Expert or the Menu Item.</td>
</tr>
<tr>
<td>PAPP4750</td>
<td>Administer Related Content.</td>
<td>Administer Related Content by creating or updating Related Content Publications and assigning the Topic Experts to add the content.</td>
</tr>
<tr>
<td>PAPP4800</td>
<td>Discussion Forums pagelet.</td>
<td>Access the Discussion Forums pagelet and pagelet personalization. The displayed forums are limited by member privileges on the Forum definition.</td>
</tr>
<tr>
<td>PAPP4810</td>
<td>Access Discussion Forums.</td>
<td>Access Discussion Forums. Discussion Forum access and actions are restricted by member privileges on the Forum definition.</td>
</tr>
<tr>
<td>PAPP4820</td>
<td>Access Guest Discussion Forums.</td>
<td>View Discussion Forums in display-only mode. Access is restricted by member privileges on the Forum definition.</td>
</tr>
<tr>
<td>PAPP4850</td>
<td>Administer Discussion Forums.</td>
<td>Administer Discussion Forums by assigning member privileges, editing metadata or deleting a Forum. These Discussion Forum actions are not restricted by member privileges.</td>
</tr>
<tr>
<td>PAPP4855</td>
<td>Manage Related Discussions.</td>
<td>Administer Related Discussions template pagelet by assigning moderators. Contributor and viewer privileges are automatically granted to all users who can access the Menu Item that contains the related discussion.</td>
</tr>
<tr>
<td>PAPP4860</td>
<td>Create Discussion Forums.</td>
<td>Create Discussion Forums and assign member privileges to the created Forum.</td>
</tr>
<tr>
<td>PAPP4910</td>
<td>Define pagelets with the Wizard.</td>
<td>Create, delete, and clone Pagelet Wizard pagelets definitions. Pagelet Wizard access and actions are restricted by the security on the Pagelet Wizard definition.</td>
</tr>
<tr>
<td>PAPP4920</td>
<td>Define Pagelet Wizard data.</td>
<td>Create and update Pagelet Wizard footers, headers, and categories and review existing pagelet definitions.</td>
</tr>
<tr>
<td>PAPP4950</td>
<td>Administer Pagelet Wizard.</td>
<td>Create and update Pagelet Wizard data types, display formats, transform types, and pagelet XSL. Create Data Mover scripts to export and import pagelet definitions.</td>
</tr>
<tr>
<td>Permission List</td>
<td>Description</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PAPP5000</td>
<td>Administer Site - Template.</td>
<td>This permission list is the Site Manager template permission list for site administrators. It grants site-specific access to the following: define site navigation defaults, define site security, define visible site features, configure homepage display, override allowed branding elements, view Branding queries, and publish pagelets to multiple sites.</td>
</tr>
<tr>
<td>PAPP5050</td>
<td>Create sites / Allow overrides.</td>
<td>Create portal sites and assign allowed Branding overrides using the Site Wizard.</td>
</tr>
<tr>
<td>PAPP5060</td>
<td>Publish in Sites - Template.</td>
<td>This permission list is the Site Manager template permission list for site publishers. This permission list is cloned for each created site. It grants site-specific access to the following: manage a site's navigation by publishing men items to the site, update the content IDs used in existing Pagelet Wizard Content Management pagelets, create Action Item Lists, create Community Calendars, create and access Poll Definitions, create and access Content Management, and create Discussion Forums.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> Users with this permission list should also have the following permission lists (delivered on the base user role PAPP_USER): PAPP4810 (Access Discussion Forums), PAPP5600 (Access Action Items), PAPP1210 (View Community Calendars) and PAPP5500 (Access Community Calendars).</td>
</tr>
<tr>
<td>PAPP5070</td>
<td>View Sites - Template.</td>
<td>This permission list is the Site Manager template permission list for site viewers. This permission list is cloned for each created site. It is a placeholder permission list for the site-specific home link to access the created site.</td>
</tr>
<tr>
<td>PAPP5100</td>
<td>Maintain Branding roles.</td>
<td>Assign security roles to Branding themes.</td>
</tr>
<tr>
<td>PAPP5150</td>
<td>Maintain Branding data.</td>
<td>Create and maintain Branding themes, headers, and footers.</td>
</tr>
<tr>
<td>Permission List</td>
<td>Description</td>
<td>Usage</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------</td>
<td>-------</td>
</tr>
<tr>
<td>PAPP5200</td>
<td>Manage Navigation Collections.</td>
<td>Manage Navigation Collections by creating and updating Navigation Collection definitions. <strong>Note:</strong> This permission list does not grant access to delete Navigation Collections.</td>
</tr>
<tr>
<td>PAPP5300</td>
<td>Access Workspaces.</td>
<td>Access Collaborative Workspaces. Access is granted to: links, members, documents, polls, search and browsing. Workspace access and actions are restricted by member privileges on the workspace definition. Note: Users with this permission list should also have the following permission lists (delivered on the base user role PAPP_USER): PAPP4810 (Access Discussion Forums), PAPP5600 (Access Action Items), PAPP1210 (View Community Calendars) and PAPP5500 (Access Community Calendars).</td>
</tr>
<tr>
<td>PAPP5350</td>
<td>Administer Workspaces.</td>
<td>Create and administer Collaborative Workspaces and Templates. Administer Workspace categories, and batch import Workspaces. Administer existing Workspaces by activating, deactivating, or deleting a workspace. These Workspace actions are not restricted by member privileges on the Workspace definition. Workspace access is restricted by member privileges on the Workspace definition.</td>
</tr>
<tr>
<td>PAPP5360</td>
<td>Manage Workspaces.</td>
<td>Create and manage Collaborative Workspaces. Manage existing Workspaces by activating, deactivating, or deleting a workspace. Workspace access and actions are restricted by member privileges on the Workspace definition.</td>
</tr>
<tr>
<td>PAPP5400</td>
<td>Access My Alerts.</td>
<td>Access to the user-defined alerts.</td>
</tr>
<tr>
<td>PAPP5450</td>
<td>Administer Alerts.</td>
<td>Administer Alerts Notifications including the Notification batch process, and defining features, email options, and alert subscriptions.</td>
</tr>
<tr>
<td><strong>Permission List</strong></td>
<td><strong>Description</strong></td>
<td><strong>Usage</strong></td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------</td>
<td>----------</td>
</tr>
<tr>
<td>PAPP5500</td>
<td>Access Community Calendars.</td>
<td>Access Community Calendars. Calendar access and actions are restricted by member privileges on the Calendar definition.</td>
</tr>
<tr>
<td>PAPP5550</td>
<td>Administer Community Calendars.</td>
<td>Administer Community Calendars by assigning member privileges or deleting a Calendar. These actions are not restricted by member privileges.</td>
</tr>
<tr>
<td>PAPP5560</td>
<td>Create Community Calendars.</td>
<td>Create Community Calendars and assign member privileges to calendars.</td>
</tr>
<tr>
<td>PAPP5600</td>
<td>Access Action Items.</td>
<td>Access Action Items. Action Item access and actions are restricted by member privileges on the List definition or the assigned user.</td>
</tr>
<tr>
<td>PAPP5650</td>
<td>Review Action Items.</td>
<td>Review Action Items. Action Item access and actions are restricted by member privileges on the List definition or the assigned user.</td>
</tr>
<tr>
<td>PAPP5655</td>
<td>Administer Action Items.</td>
<td>Administer Action Item Lists by assigning member privileges or deleting a List. These actions are not restricted by member privileges.</td>
</tr>
<tr>
<td>PAPP5660</td>
<td>Create Action Item List.</td>
<td>Create Action Item lists and assign member privileges.</td>
</tr>
<tr>
<td>PAPP9900</td>
<td>System setup data.</td>
<td>Access to the pages displaying system data that should not be changed or customized.</td>
</tr>
<tr>
<td>PAPP9999</td>
<td>Demo examples and testing.</td>
<td>Access to delivered demo, testing, and SDK material.</td>
</tr>
<tr>
<td>PAPX0000</td>
<td>Base Repository objects.</td>
<td>Base access to Resource Finder profile display and the Related Resources template pagelets. Required access for all users, including Guest.</td>
</tr>
<tr>
<td>PAPX2050</td>
<td>Manage Resource profiles.</td>
<td>Manage Resource profiles by updating or creating a profile definition (create an Employee profile type).</td>
</tr>
</tbody>
</table>
### Permission List

<table>
<thead>
<tr>
<th>Permission List</th>
<th>Description</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPX2060</td>
<td>Administer Repository.</td>
<td>Administer Resource Finder Repository by creating profile attributes or entering a profile not obtained from a feed.</td>
</tr>
<tr>
<td>PAPX9000</td>
<td>All Repository objects.</td>
<td>Access to all Resource Finder Repository objects.</td>
</tr>
<tr>
<td>PAPX9999</td>
<td>Demo examples and testing.</td>
<td>Testing Resource Finder application classes.</td>
</tr>
</tbody>
</table>

### Roles

This section describes:

- Roles that have special usage in PeopleSoft Interaction Hub.
- Roles associated with major PeopleSoft Interaction Hub areas.
- Viewer roles.
- All delivered roles.

### Roles with Special Uses

The following table lists roles that have special meaning and usage in PeopleSoft Interaction Hub.

**Note:** In PeopleSoft Interaction Hub 9, the base object permission lists have been streamlined to include only those components that all users need and are cannot access directly from the left navigation. Additional permission lists have been created for some components and added to the PAPP_USER role. The components My Discussion Forums, My Alerts, and Browse by Category were removed from the PAPP000n permission list. This enables you to disable a given feature by removing the feature’s base permission list from the PAPP_USER role.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description/Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_USER</td>
<td>Must be assigned to every user ID, except the default signon user ID GUEST.</td>
</tr>
<tr>
<td>PeopleSoft User</td>
<td>Must be assigned to every user ID, except the default signon user ID GUEST.</td>
</tr>
<tr>
<td>PAPP_GUEST</td>
<td>Must be assigned to the default signon user ID GUEST.</td>
</tr>
<tr>
<td>PeopleSoft Guest</td>
<td>Must be assigned to the default signon user ID GUEST.</td>
</tr>
</tbody>
</table>
### PeopleSoft-Delivered Security Data

**Role** | **Description/Usage**
--- | ---

PAPP_SYSTEM_ADMIN | Used only during installation and implementation and is assigned to VP1 and PS.

PeopleSoft Administrator | Used only during installation and implementation and is assigned to VP1 and PS. It gives access into all the pages regardless of the user's assigned permission lists.

Portal Administrator | Used in the production system. It gives access to the portal registry structure (content references and folder references), but not the actual component/pages and pagelets.

Be aware that users who have this role will see all pagelets and all menu items (all content references), but they may not be able to access the actual pages.

If a user with this role attempts to access a pagelet or a page where they do not have that pagelet or pages's security, a "You are not authorized" error message displays.

---

### Roles Associated with Major PeopleSoft Interaction Hub Areas

The major areas within PeopleSoft Interaction Hub are associated with roles. These areas and roles contain overlap. The major areas and roles are shown in the following table.

**Area** | **Role** | **Description**
--- | --- | ---

Content | PAPP_CONTENT_ADMIN | Administer internally-created and external content, including External News, Internal News, Context Manager and Content Management.

Navigation | PAPP_NAVIGATION_ADMIN | Administer how users navigate the portal sites, including Menu Items requests, manage navigation, Portal Registry Load, and Navigation Collections.

Users who have this role should also have the role of Portal Administrator.

Portal sites | PAPP_PORTAL_ADMIN | Administer the portal and portal sites, including install options, site creation, Logon Statistics, Search, Menu Items requests, manage navigation, Portal Registry Load, Navigation Collections, Collaborative Workspaces, Branding, Account Signon Utility, pagelet Personalization, and Context Manager.

Users who have this role should also have the role of Portal Administrator.

Presentation | PAPP_DISPLAY_ADMIN | Administer the presentation of portal sites, including Branding, Pagelet Wizard headers/footers, default templates, and homepage tab layouts.
<table>
<thead>
<tr>
<th>Area</th>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Finder</td>
<td>PAPX_REPOSITORY_ADMIN</td>
<td>Administer the Resource Finder Repository feature.</td>
</tr>
<tr>
<td>Security</td>
<td>PAPP_SECURITY_ADMIN</td>
<td>Administer portal row-level security, including Manage Content privilege sets, Viewer roles, Related Context topic experts, Discussion moderators, pagelet Personalization, and Menu Item Inquiry. Users who have this role may also have the role of Security Administrator.</td>
</tr>
<tr>
<td>Integration</td>
<td>PAPP_INTEGRATION_ADMIN</td>
<td>Administer integration content in PeopleSoft Interaction Hub, including external content, Internet content, email, account signon utility, and Pagelet Wizard.</td>
</tr>
</tbody>
</table>

**Viewer Roles**

The following roles are delivered as viewer roles, and are used by Content Management to secure individual content items for viewing. To change which roles are designated as viewer roles, select Portal Administration, Content, Viewer Roles.

<table>
<thead>
<tr>
<th>Role</th>
<th>Usage / Long Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_CUSTOMER</td>
<td>Access to applicable customer homepage pagelets and assigned content viewing.</td>
</tr>
<tr>
<td>PAPP_EMPLOYEE</td>
<td>Access to applicable employee homepage pagelets, assigned content viewing, submit pages (promotions, articles, menu items), and edit account signon information.</td>
</tr>
<tr>
<td>PAPP_GUEST</td>
<td>Access to applicable Guest homepage pagelets, assigned content viewing, Guest homepage tab, and base PeopleSoft Interaction Hub access.</td>
</tr>
<tr>
<td>PAPP_SUPPLIER</td>
<td>Access to applicable supplier homepage pagelets and assigned content viewing.</td>
</tr>
</tbody>
</table>

**Delivered Roles**

The following table lists the roles delivered with PeopleSoft Interaction Hub.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Usage/Long Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_ACCOUNT_SIGNON_ADMIN</td>
<td>Account signon administrator.</td>
<td>Administer the User Account Signon Utility.</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
<td>Usage/Long Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PAPP_AUTHOR</td>
<td>Content author.</td>
<td>Access the submit pages for News, Promotions, and Menu Items. Access Content Management common pages, where the privilege sets limit the access.</td>
</tr>
<tr>
<td>PAPP_BRANDING_ADMIN</td>
<td>Branding administrator.</td>
<td>Administer the Branding feature.</td>
</tr>
<tr>
<td>PAPP_COMPANY_PROMOTIONS_ADMIN</td>
<td>Company Promotions administrator.</td>
<td>Administer the Company Promotions feature.</td>
</tr>
<tr>
<td>PAPP_CONTCATG_ADMIN</td>
<td>Content Categorization administration.</td>
<td>Administer the Content Categorization feature manually.</td>
</tr>
<tr>
<td>PAPP_CONTENT_ADMIN</td>
<td>Content administrator.</td>
<td>Administer internally created and external content, including External News, Internal News, Context Manager and Content Management.</td>
</tr>
<tr>
<td>PAPP_CONTENT_MANAGER</td>
<td>Content Manager.</td>
<td>Manage internally created and external content, including External News, Internal News, Context Manager and Content Management.</td>
</tr>
<tr>
<td>PAPP_CONTENT_RATINGS_ADMIN</td>
<td>Content Ratings administrator.</td>
<td>Administer the Content Ratings related context feature.</td>
</tr>
<tr>
<td>PAPP_CONTENT_USER</td>
<td>Content Management user.</td>
<td>Access Content Management common pages, where assigned privilege sets limit the access. Access the Managed Content pagelet, the News Article In-Box pagelet, and the Submit News Article page. Use this role as a general access role, then create additional roles to assign to the privilege sets within each created category.</td>
</tr>
<tr>
<td>PAPP_CONTEXT_ADMIN</td>
<td>Related Context administrator.</td>
<td>Administer the Context Manager feature including the contextual content.</td>
</tr>
<tr>
<td>PAPP_CONTEXT_MANAGER</td>
<td>Related Context Manager.</td>
<td>Manage the contextual content used with the Context Manager feature.</td>
</tr>
<tr>
<td>PAPP_DEMO_ADMIN</td>
<td>Demo/Test Items administrator.</td>
<td>Sample. Administer the sample features, including the Demo Item pagelet and Context Manager Item tester.</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
<td>Usage/Long Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PAPP_DISPLAY_ADMIN</td>
<td>Presentation administrator.</td>
<td>Administer the presentation of the portal sites, including Branding, Pagelet Wizard headers/footers, default templates, and homepage tabs layout.</td>
</tr>
<tr>
<td>PAPP_EMAIL_CALEDAR_ADMIN</td>
<td>Email / Calendar administrator.</td>
<td>Administer the Email and Calendar pagelets.</td>
</tr>
<tr>
<td>PAPP_EMPLOYEE</td>
<td>Portal employee.</td>
<td>Access to applicable employee homepage pagelets, assigned content viewing, submit pages (Promotions, Articles, Menu Items), find a resource, and edit account signon information.</td>
</tr>
<tr>
<td>PAPP_EXTERNAL_NEWS_ADMIN</td>
<td>External News administrator.</td>
<td>Administer the External News pagelet.</td>
</tr>
<tr>
<td>PAPP_GUEST</td>
<td>Guest user access.</td>
<td>Access to applicable Guest homepage pagelets, assigned content viewing, Guest homepage tab, and base PeopleSoft Interaction Hub access.</td>
</tr>
<tr>
<td>PAPP_GUEST_ADMIN</td>
<td>Guest user administrator.</td>
<td>Administer pagelet Personalization for a Guest user, or any user, and access the Guest homepage tab.</td>
</tr>
<tr>
<td>PAPP_INSTALL_OPTIONS_ADMIN</td>
<td>Install options administrator.</td>
<td>Administer the Install Options for the PeopleSoft Interaction Hub features.</td>
</tr>
<tr>
<td>PAPP_INTEGRATED_TASKS_ADMIN</td>
<td>Integrated tasks administrator.</td>
<td>Administer the Tasks pagelet.</td>
</tr>
<tr>
<td>PAPP_INTEGRATION_ADMIN</td>
<td>Integration administrator.</td>
<td>Administer integration content in the PeopleSoft Interaction Hub, including External Content, Internet Content, Email, Account Signon Utility, and Pagelet Wizard.</td>
</tr>
<tr>
<td>PAPP_INTERNET_PAGELETS_ADMIN</td>
<td>Internet pagelets administrator.</td>
<td>Administer Internet pagelets.</td>
</tr>
<tr>
<td>PAPP_LDAP</td>
<td>LDAP default access.</td>
<td>Contains the required permission lists needed to access the PeopleSoft Interaction Hub database. Use as the default role for LDAP access.</td>
</tr>
<tr>
<td>PAPP_NAVIGATION_ADMIN</td>
<td>Navigation administrator.</td>
<td>Administer how users navigate the portal, including, Menu Items requests, Portal Registry Load, and Navigation Collections. Users who have this role should also have the Portal Administrator role.</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
<td>Usage/Long Description</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PAPP_PAGELET_ADMIN</td>
<td>Pagelet administrator.</td>
<td>Administer the creation of pagelets using pagelet wizard. Administer Navigation Collections. Administer Integration pagelets. Assign user pagelet personalization. Users who have this role should also have the Portal Administrator role and the Pagelet User role.</td>
</tr>
<tr>
<td>PAPP_PAGELET_USER</td>
<td>Pagelet access user.</td>
<td>Access the homepage pagelets.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>To configure the layout of a homepage tab, the user must be either assigned the Portal Administrator role, or the user must have access to PAPP4002 as well as all of the homepage pagelet permission lists on the homepage tab.</td>
</tr>
<tr>
<td>PAPP_PORTAL_ADMIN</td>
<td>Portal administrator.</td>
<td>Administer the portal and portal sites, including install options, site creation, Logon Statistics, Search, Menu Items requests, navigation collections, Portal Registry Load, Branding, Account Signon Utility, pagelet Personalization, alerts and Context Manager. Users who have this role should also have the Portal Administrator role.</td>
</tr>
<tr>
<td>PAPP_PUBLISHER</td>
<td>Content publisher.</td>
<td>Manage, review, and publish content to a viewing audience in the New Publications and Company Promotions features.</td>
</tr>
<tr>
<td>PAPPRELATEDCONTENTADMIN</td>
<td>Related Content administrator.</td>
<td>Administer features of Context Manager.</td>
</tr>
<tr>
<td>PAPP_SEARCH_ADMIN</td>
<td>Search administrator.</td>
<td>Administer the portal Search feature.</td>
</tr>
<tr>
<td>PAPP_SECURITY_ADMIN</td>
<td>Security administrator.</td>
<td>Administer portal row-level security, including Managed Content privilege sets, viewer roles, related context topic experts, Discussion moderators, pagelet Personalization, and Menu Item inquiry. Users who have this role may also have the Security Administrator role.</td>
</tr>
</tbody>
</table>
### Appendix A  PeopleSoft-Delivered Security Data

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Usage/Long Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAPP_SITE_MGMT_ADMIN</td>
<td>Site Management administrator.</td>
<td>Administer the Site Management feature, including creating sites and site Branding.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Users who have this role should also have the Portal Administrator role.</td>
</tr>
<tr>
<td>PAPP_SUPPLIER</td>
<td>Portal supplier.</td>
<td>Access to applicable supplier homepage pagelets and assigned content viewing.</td>
</tr>
<tr>
<td>PAPP_USER</td>
<td>PeopleSoft Interaction Hub user.</td>
<td>Access the base objects in the PeopleSoft Interaction Hub. Every user in the system,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>other than Guest, must be assigned this role along with the PeopleSoft User role.</td>
</tr>
<tr>
<td>PAPP_WEB_MAGAZINE_ADMIN</td>
<td>Web Magazine administrator.</td>
<td>Administer the Web Magazine pagelet and content.</td>
</tr>
<tr>
<td>PAPP_WORKSPACE_ADMIN</td>
<td>Workspace Administrator.</td>
<td>Administer and create collaborative workspaces.</td>
</tr>
<tr>
<td>PAPP_WORKSPACE_MANAGER</td>
<td>Workspace Manager.</td>
<td>Manage collaborative workspaces.</td>
</tr>
<tr>
<td>PAPP_WORKSPACE_USER</td>
<td>Workspace User.</td>
<td>Access the Collaborative workspace components. Individual workspaces are also secured</td>
</tr>
<tr>
<td></td>
<td></td>
<td>by members to that workspace.</td>
</tr>
<tr>
<td>PAPX_PROFILE_MANAGER</td>
<td>Resource profile manager.</td>
<td>Manage the Resource Finder profiles.</td>
</tr>
<tr>
<td>PAPX_REPOSITORY_ADMIN</td>
<td>Repository administrator.</td>
<td>Administer the Resource Finder feature.</td>
</tr>
<tr>
<td>PAPX_SEARCH_ADMIN</td>
<td>Profile Search administrator.</td>
<td>Administer the Resource Profile Search.</td>
</tr>
</tbody>
</table>

### Delivered Roles and Associated Permission Lists

You can obtain this information online, including any security fixes, by using the delivered PeopleSoft Query PAPP_SECURITY_ROLE_PERM.

### User IDs

This section discusses:

- User IDs with special uses in PeopleSoft Interaction Hub.
- User IDs delivered with PeopleSoft Interaction Hub.
User IDs with Special Uses

The following table lists user IDs with special uses in PeopleSoft Interaction Hub.

<table>
<thead>
<tr>
<th>User ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GUEST</td>
<td>The default signon user.</td>
</tr>
<tr>
<td>PS</td>
<td>The system administrator to access all of the PeopleSoft Interaction Hub database and the HRMS database.</td>
</tr>
<tr>
<td>VP1</td>
<td>The system administrator to access all of the PeopleSoft Interaction Hub database and the FSCM, EPM, and CRM databases.</td>
</tr>
</tbody>
</table>

Delivered PeopleTools Roles

The following table shows the delivered PeopleTools roles and their associated permission lists.

<table>
<thead>
<tr>
<th>PeopleTools Role</th>
<th>PeopleTools Permission List</th>
<th>Permission List Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft User</td>
<td>PTPT1000</td>
<td>PeopleSoft-User</td>
</tr>
<tr>
<td>PeopleSoft Guest</td>
<td>PTPT1400</td>
<td>PeopleSoft-Guest</td>
</tr>
<tr>
<td>Security Administrator</td>
<td>PTPT1100</td>
<td>Maintain Security</td>
</tr>
<tr>
<td>PeopleTools</td>
<td>PTPT1200</td>
<td>PeopleTools</td>
</tr>
<tr>
<td>PeopleSoft Administrator</td>
<td><strong>special</strong></td>
<td>Behind-the-scenes coding</td>
</tr>
<tr>
<td>Portal Administrator</td>
<td>PTPT1300</td>
<td>Behind-the-scenes to PeopleSoft Interaction Hub</td>
</tr>
<tr>
<td>Portal Manager</td>
<td>PTPT1600</td>
<td>Pagelet Wizard, Navigation Collections</td>
</tr>
</tbody>
</table>

Adding the Portal User Roles to All User IDs

To navigate and use common features and pages, every user ID (except for the Guest user IDs) must include the delivered roles PAPP_USER and PeopleSoft User. During a PeopleTools upgrade, the role PeopleSoft User is added to all existing roles. You can update the existing user IDs to include the PAPP_USER role with the delivered PeopleSoft Data Mover script PORTAL_ADD_ROLE.DMS.

Note: Every newly created user ID should include both roles PeopleSoft User and PAPP_USER. Guest user IDs should not include these roles. After running the script, manually update the Guest user ID by replacing the PeopleSoft User role and the PAPP_USER role with the PeopleSoft Guest role and the PAPP_GUEST role.
Use PeopleSoft Data Mover to update the existing user IDs in PeopleSoft Interaction Hub to include the necessary PAPP_USER role.

There are two ways to start PeopleSoft Data Mover:

- Using the Data Mover shortcut in your PeopleSoft program group, as in Start, Programs, <PeopleSoft Group>, Data Mover.
  
  This access method only applies to the Windows Development Environment.

- Using the command line interface.
  
  This executes PeopleSoft Data Mover in a console for Windows and a Telnet session for UNIX.

To update the user IDs:

1. Start PeopleSoft Data Mover and sign on to the PeopleSoft Interaction Hub database.

2. Open the script PORTAL_ADD_ROLE.DMS in the PS_APP_HOME/scripts directory.

   **Note:** If the PeopleSoft Interaction Hub files were not installed in a separate PS_APP_HOME location, then this file will be found in PS_HOME instead.

3. Run the script against the PeopleSoft Interaction Hub database.


See the product documentation for *PeopleTools: Data Management*. 
Appendix B

Understanding Web Services for Remote Portlets (WSRP)

These topics discuss:

- Producing WSRP-compliant portlets for PeopleSoft Interaction Hub
- Configuring WSRP-enabled pagelets

Understanding Producing WSRP-Compliant Portlets for the PeopleSoft Interaction Hub

PeopleSoft Enterprise provides support for consuming and producing portlets using WSRP technology. Most PeopleSoft Interaction Hub pagelets can be produced as WSRP-compliant portlets. Also, a set of end-user oriented pages is supported for production as WSRP-compliant portlets.

Pagelets and pages that are supported for WSRP are marked as producible in the portal registry. Additional pages can be marked as producible, but you should first determine if they are WSRP-compliant or not by using the WSRP validation test in Application Designer as well as doing general testing in a WSRP host environment.

To see all the pagelets and pages that have been marked as WSRP-producible, navigate to PeopleTools, Portal, WSRP Production. This page shows all the items that have been marked as WSRP-producible. If you set any additional pages as producible (beyond the set that is delivered with the product), they are displayed on this page, as well.


Understanding How to Configure WSRP-Enabled Pagelets

PeopleTools provides an infrastructure that enables WSRP functionality to be configured in various ways. For example, the pages that a WSRP-enabled PeopleSoft Interaction Hub pagelet are linked to can be rendered within the host environment or within the PeopleSoft Interaction Hub environment.

The PeopleSoft Interaction Hub has been configured so that links from the PeopleSoft Interaction Hub pagelet take the user to pages that are rendered in the PeopleSoft Interaction Hub. This enables you to achieve a consistent functional experience across the full range of PeopleSoft Interaction Hub pagelets.
In this way, users get the benefit of a consolidated and consistent homepage and dashboard. At the same time, it provides users of the PeopleSoft Interaction Hub a familiar environment in which to interact with the PeopleSoft Interaction Hub applications as they extend from the homepage environment.

While this general approach may be appropriate in many situations, it may be that your implementation requires a different approach. The PeopleTools infrastructure allows for customizing of the behavior for PeopleSoft Interaction Hub pagelets when they are rendered in a host environment.

See the product documentation for *PeopleTools: Portal Technology*, “Understanding Web Services for Remote Portlets (WSRP).”
Using Common Functions That Reference a Password Data Store

This topic provides overviews of the common functions that reference a password data store and the interactive flow for a sign on password data store. This topic also provides details of the common functions.

Note: This topic is intended for use by programmers.

Understanding Common Functions that Reference a Password Data Store

The common functions discussed in this topic can be combined to reference a password database store. These functions can help achieve a sign on point between the portal and other target system software.

For each target system (email, web-based, and so forth), the user ID and password are stored and usually encrypted. When attempting to access information through PeopleSoft Interaction Hub features that need to retrieve information from these target systems, such as the Email pagelet, the PeopleSoft Interaction Hub performs the connection to the system using the user credentials stored in the password data store.

Note: This is a one-way integration. No data is written to the target system, such as Microsoft Exchange. A login is performed and data is retrieved, but user credentials or data is never updated in the target system.

The PeopleSoft Interaction Hub uses these functions for third-party email and calendar integration:

- **InsertUpdateUsrNamePsswd.**
  Used for inserting and updating.

- **GetUsrNamePsswd.**
  Returns the user name and password that are associated with a Uniform Resource Locator (URL) identifier and a portal user ID.

- **DeleteUsrNamePsswd.**
  Used for deleting.

For example, when accessing the Email pagelet, the Get function is called. It retrieves the user credentials from the data store, which can then be passed to the target system. The Insert/Update is used when the
user sets up the pagelet for the first time, or subsequently updates his user ID or password. The Delete is used when the user deletes these stored credentials from the password data store.

**Related Links**

Understanding Basic Email and Calendar Setup Steps
Using Common Functions That Reference a Password Data Store

Understanding the Interactive Flow for a Sign On Password Data Store

Image: Interactive flow for a sign on password data store

The following diagram illustrates a way in which the InsertUpdateUsrNamePsswd, GetUsrNamePsswd, and DeleteUsrNamePsswd common functions could be used.

1. **Calling Program** passes unencrypted data to function

   **Function:** InsertUpdateUsrNamePsswd

   Function encrypts E0_PE_USER_NAME and E0_PE_PASSWORD, and determines whether an update or insert is needed.

2. **Calling Program** passes unencrypted data to function

   **Function:** GetUsrNamePsswd

   Function searches for URL_ID and PRTL_USER_ID. When an entry is found, the function decrypts the entry and passes back values using the E0_PE_USER_NAME and E0_PE_PASSWORD variables.

3. **Calling Program** passes unencrypted data to function

   **Function:** DeleteUsrNamePsswd

   Function searches for entry using URL_ID and PRTL_USER_ID. When an entry is found, it's deleted from the table.
Common Functions

This section discusses the common functions used to reference a password data store.

InsertUpdateUsrNamePsswd

Syntax

InsertUpdateUsrNamePsswd(URL_ID, EO_PE_USER_NAME, EO_PE_PASSWORD)

Description

InsertUpdateUsrNamePsswd takes the URL identifier (URL_ID) and the portal user ID (PRTL_USER_ID) and searches the table for an entry that already exists. If an entry exists, an update is performed; if no entry exists, a new entry is inserted.

The values for the user ID (EO_PE_USER_NAME) and password (EO_PE_PASSWORD) that are associated with the URL_ID and PRTL_USER_ID are encrypted when placed in the table.

This is the technical design in PeopleCode:

Function InsertUpdateUsrNamePsswd(&URL_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD)

&found = "";
&PRTL_USER_ID = %UserId;
&EO_PE_USER_NAME = Encrypt("", &EO_PE_USER_NAME);
&EO_PE_PASSWORD = Encrypt("", &EO_PE_PASSWORD);
SQLExec("select EO_PE_USER_NAME from PS_EO_PE_SS_LOGIN
where URL_ID = :1 and PRTL_USER_ID = :2", &URL_ID, &PRTL_USER_ID, &found);

If &found = "" Then
SQLExec("INSERT INTO PS_EO_PE_SS_LOGIN( URL_ID, PRTL_USER_ID,
EO_PE_USER_NAME, EO_PE_PASSWORD) VALUES (:1, :2, :3, :4)",
&URL_ID, &PRTL_USER_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD);
Else
SQLExec("UPDATE PS_EO_PE_SS_LOGIN SET EO_PE_USER_NAME = :1,
EO_PE_PASSWORD = :2 WHERE URL_ID = :3 AND PRTL_USER_ID = :4",
&EO_PE_USER_NAME, &EO_PE_PASSWORD, &URL_ID, &PRTL_USER_ID);
End-If;
End-Function;

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL_ID</td>
<td>URL identifier.</td>
</tr>
<tr>
<td>EO_PE_USER_NAME</td>
<td>User name that is needed to access the account that is referenced by the URL_ID.</td>
</tr>
<tr>
<td>EO_PE_PASSWORD</td>
<td>Password that is associated with the EO_PE_USER_NAME.</td>
</tr>
</tbody>
</table>
Returns

The function returns no value.

Example

In this example, the function is used with hardcoded values. In most cases, variables are used as parameters.

InsertUpdateUsrNamePsswd("Yahoo_Mail_Account", "Name", "Password");

Name and password are encrypted and placed in the table. The table appears as follows:

<table>
<thead>
<tr>
<th>URL_ID</th>
<th>PRTL_USER_ID</th>
<th>EO_PE_USER_NAME</th>
<th>EO_PE_PASSWORD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yahoo_Mail_Name</td>
<td>Portal Login Name</td>
<td>ASDFG#$%MDSF</td>
<td>ASKDKFJ@W#$RFGMS</td>
</tr>
</tbody>
</table>

GetUsrNamePsswd

Syntax

GetUsrNamePsswd(URL_ID, EO_PE_USER_NAME, EO_PE_PASSWORD);

Description

GetUsrNamePsswd takes the URL_ID and PRTL_USER_ID and searches the table for the associated EO_PE_USER_ID and EO_PE_PASSWORD. GetUsrNamePsswd decrypts EO_PE_USER_ID and EO_PE_PASSWORD. The decrypted user ID and password are passed back.

This is the technical design in PeopleCode:

```poplecode
Function GetUsrNamePsswd(&URL_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD)

&PRRL_USER_ID = %UserId;

SQLExec("select EO_PE_USER_NAME, EO_PE_PASSWORD from PS EO_PE_SS LOGIN where URL_ID = :1, and PRTL_USER_ID = :2",
&URL_ID, &PRRL_USER_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD);

&EO_PE_USER_NAME = Decrypt("", &EO_PE_USER_NAME);
&EO_PE_PASSWORD = Decrypt("", &EO_PE_PASSWORD);

End-Function;
```

Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL_ID</td>
<td>URL identifier.</td>
</tr>
<tr>
<td>EO_PE_USER_NAME</td>
<td>Empty variable that is used to store the value for the user name that is associated with the URL_ID. The decrypted value can be retrieved from the function without using a return.</td>
</tr>
</tbody>
</table>
Using Common Functions That Reference a Password Data Store

Appendix C

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>EO_PE_PASSWORD</td>
<td>Empty variable that is used to store the value for the password that is associated with the URL_ID. The decrypted value can be retrieved from the function without using a return.</td>
</tr>
</tbody>
</table>

**Returns**

The function returns no value.

**Example**

The value for URL_ID is hardcoded. Usually, this parameter is a variable.

```plaintext
&UserName = "";
&Password = "";
GetUsrNamePsswd("Yahoo_Mail_Account", UserName, Password);
```

**DeleteUsrNamePsswd**

**Syntax**

`DeleteUsrNamePsswd(&URL_ID);`

**Description**

DeleteUsrNamePsswd deletes entries in the table by searching with the URL_ID and the PRTL_USER_ID and removing those items when it finds a match.

This is the technical design in PeopleCode:

```plaintext
Function DeleteUsrNamePsswd(&URL_ID)
    &PRTL_USER_ID = %UserId;

    SQLExec("Delete from PS_EO_PE_SS_LOGIN Where URL_ID = :1 and PRTL_USER_ID = :2", &URL_ID, &PRTL_USER_ID);
End-Function;
```

**Parameters**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL_ID</td>
<td>URL identifier.</td>
</tr>
</tbody>
</table>

**Returns**

The function returns no value.
Example

In this example, the value for URL_ID is hardcoded. Usually, this parameter is a variable.

DeleteUsrNamePsswd("Yahoo_Mail_Account");
Appendix D

Sample Business Attributes Service Operation Handler PeopleCode

Sample Business Attributes Service Operation Handler PeopleCode

This topic provides sample PeopleCode for business attributes service operations. This sample PeopleCode calls functions from the PeopleSoft-delivered subscription library which processes rowset-based transactions. The sample code can be copied into an application class for Business Data Attributes handlers.

Sample PeopleCode is provided for these cases:

• Case 1: A nonrowset-based message does not exist for the service operation in PeopleSoft Interaction Hub.

• Case 2: A nonrowset-based message exists in PeopleSoft Interaction Hub for the same-name service operation in PeopleSoft HCM.

Case 1: A Nonrowset-Based Message Does Not Exist for the Service Operation in PeopleSoft Interaction Hub

Examples are provided for full synchronization and incremental synchronization.

Full Synchronization

Use this example for full synchronization:

/* Start of sample code */
import PS_PT:Integration:INotificationHandler;

class BusUnitTblHRFullSync implements PS_PT:Integration:INotificationHandler
     method BusUnitTblHRFullSync();
     method OnNotify(_MSG As Message);
end-class;

Declare Function Subscribe_FullReplication PeopleCode FUNCLIB_EOEIP.SUBSCRIBE_MSG_P⇒
C FieldFormula;
Declare Function Delete_Existing_Data PeopleCode FUNCLIB_EOEIP.SUBSCRIBE_MSG_PC Fie⇒
lDFormula;

/* constructor */
method BusUnitTblHRFullSync
end-method;

method OnNotify
   /+ &_MSG as Message +/

Local Message &msg;
Local Rowset &msgRowset;

&msg = &_MSG;
&msgRowset = &msg.GetRowset();

Evaluate &msgRowset(1).PSCAMA.MSG_SEQ_FLG.Value
When "H"
   Delete_Existing_Data(&msg);
   Break;
When "T"  
   rem *********** put code for cleanup here *******************;
   Break;
When-Other
   Subscribe_FullReplication(&msg);
   Break;
End-Evaluate;

end-method;
/* End of sample code */

Incremental Synchronization

Use this example for full synchronization:

/* Start of sample code */
import PS_PT:Integration:INotificationHandler;
class BusUnitTblHRSync implements PS_PT:Integration:INotificationHandler
   method BusUnitTblHRSync();
   method OnNotify(&_MSG As Message);
end-class;
Declare Function Subscribe_IncrReplication PeopleCode FUNCLIB_EOEIP.SUBSCRIBE_MSG_P⇒
   C FieldFormula;
/* constructor */
method BusUnitTblHRSync
end-method;
method OnNotify
   /* &_MSG as Message */
   /* Extends/implements PS_PT:Integration:INotificationHandler.OnNotify */
   /* Variable Declaration */

   Local Message &msg;
   &msg = &_MSG;
   Subscribe_IncrReplication(&msg);
   end-method;
   /* End of sample code */

Case 2: A Nonrowset-Based Message Exists in PeopleSoft Interaction Hub for the Same-Name Service Operation in PeopleSoft HCM

Examples of these service operations are ones used by the Resource Finder feature where the service operation is defined with a rowset-based message in PeopleSoft HCM but uses a nonrowset-based message in PeopleSoft Interaction Hub, such as COMPANY_FULLSYNC, DEPT_FULLSYNC, LOCATION_FULLSYNC, PERSON_BASIC_FULLSYNC. To leverage the PeopleSoft subscription utilities which process rowset-based transactions:

1. Create a rowset-based message in PIA (this message will be used in the handler PeopleCode.
2. Because the message needs to be assigned to a default service operation, create a “dummy” service and service operation of the same name for the message (no routing and handler need to be defined).

For example, for the Company business data integration, use COMPANY_FULLSYNC_RS VERSION_1 as there is already a message with the name COMPANY_FULLSYNC VERSION_1

3. Insert this message name in string variable &sMsgName and the version in &sMsgVer in the sample code below.

Peoplecode examples are provided below for full synchronization and incremental synchronization.

**Full Synchronization**

The following sample is for full synchronization:

```peoplecode
/* Start of sample code */
import PS_PT:Integration:INotificationHandler;

class CompanyFullSync implements PS_PT:Integration:INotificationHandler
    method CompanyFullSync();
    method OnNotify(&_MSG As Message);
end-class;

Declare Function Subscribe_FullReplication PeopleCode FUNCLIB_EOEIP.SUBSCRIBE_MSG_P⇒C FieldFormula;
Declare Function Delete_Existing_Data PeopleCode FUNCLIB_EOEIP.SUBSCRIBE_MSG_PC Fie⇒ldFormula;

/* constructor */
method CompanyFullSync
end-method;

method OnNotify
    /* Variable Declaration */
    Local Message &msg;
    Local Rowset &msgRowset;
    Local XmlDocument &inXMLDoc;
    Local boolean &ret;
    Local string &sMsgName = "<insert rowset-based message name>";
    Local string &sMsgVer = "<insert message version>";

    /* instantiate variable for rowset-based message */
    &msg = CreateMessage(@("Message." | &sMsgName));
    &msgRowset = &msg.GetRowset();

    /* substitute incoming XML root name to rowset-based message name */
    &inXMLDoc = &_MSG.GetXmlDoc();
    &inXMLDoc.DocumentElement.NodeName = &sMsgName;

    /* copy XML to message rowset */
    &ret = &inXMLDoc.CopyToRowset(&msgRowset, &sMsgName, &sMsgVer);

    /* call library function to update table */
    Evaluate &msgRowset(1).PSCAMA.MSG_SEQ_FLG.Value
    When "H"
        /* If the current message is the header msg, then prepare the table for inser*/
        Delete_Existing_Data(&msg);
        Break;
    When "T"
        rem ********** put code for cleanup here *******************;
        Break;
    When-Other
        Subscribe_FullReplication(&msg);
end-method;
```

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/* End of sample code */

**Incremental Synchronization**

The following sample is for full synchronization:

```人民代码
incremental Synchronization

The following sample is for full synchronization:

/* Start of sample code */
import PS_PT:Integration:INotificationHandler;
class CompanySync implements PS_PT:Integration:INotificationHandler
    method CompanySync ();
    method OnNotify(&_MSG As Message);
end-class;
Declare Function Subscribe_IncrReplication PeopleCode FUNCLIB_EOEIP.SUBSCRIBE_MSG_P⇒
C FieldFormula;
/* constructor */
method CompanySync
end-method;
method OnNotify
    /+ &_MSG as Message +/
    /+ Extends/implements PS_PT:Integration:INotificationHandler.OnNotify +/
    /* Variable Declaration */
    Local Message &msg;
    Local Rowset &msgRowset;
    Local XmlDoc &inXMLDoc;
    Local boolean &ret;
    Local string &sMsgName = "<insert rowset-based message name>";
    Local string &sMsgVer = "<insert message version>";
    /* instantiate variable for rowset-based message */
    &msg = CreateMessage(@("Message." | &sMsgName));
    &msgRowset = &msg.GetRowset();
    /* substitute incoming XML root name to rowset-based message name */
    &inXMLDoc = &_MSG.GetXmlDoc();
    &inXMLDoc.DocumentElement.NodeName = &sMsgName;
    /* copy XML to message rowset */
    &ret = &inXMLDoc.CopyToRowset(&msgRowset, &sMsgName, &sMsgVer);
    Subscribe_IncrReplication(&msg);
end-method;
/* End of sample code */
```