Oracle® Fusion Middleware
Using Portals in Oracle WebCenter Portal

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Contents

2 Exploring WebCenter Portal

3 Searching for Information with Elasticsearch

4 Managing Your Profile

5 Setting Your Personal Preferences

6   Using WebCenter Portal Impersonation

Part II   Working with Portals and Pages

7   Working In the Home Portal

8   Creating and Managing Personal Pages

9   Exploring Portals

Part III   Connecting and Collaborating with Other Users

10   Managing Your Contacts

11   Using Instant Messaging and Presence Viewer

12   Sending and Viewing Mail

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13 Working with Feedback and the Message Board

14 Liking, Commenting On, and Sharing Items

15   Viewing and Participating in Discussions

Part IV   Adding Content to a Portal

16   Introduction to Adding Content to a Portal

23   Tracking Portal Activities

24   Working with Announcements

25   Monitoring RSS Feeds

Part VI   Staying Organized

26   Managing Your Favorites

27   Working with Calendars and Events

28   Managing Your Notes

29   Working with Lists

30   Linking Information

31   Working with Tags

A   Appendix

Preface

This guide explains how to work with portals as a knowledge worker in WebCenter Portal. It provides instructions for tasks such as working in a personal environment in the Home portal; working in a portal as a portal member; working with content; and sending and receiving instant messages with peers.

Topics:

- Audience
- Documentation Accessibility
- Related Documents
- Conventions

Audience

This guide is intended for knowledge workers who consume or update information presented in portals built with Oracle WebCenter Portal. For a complete description of this role and other WebCenter Portal personas, see Who's Who.

Documentation Accessibility

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

Access to Oracle Support

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

Related Documents

Documentation for Oracle WebCenter Portal is available in the Oracle Fusion Middleware library on the Oracle Help Center.

Conventions

The following text conventions are used in this document:

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

Who's Who

The WebCenter Portal documentation is organized so that the tasks in a particular guide address a specific user *persona*. Each persona is associated with a set of skills required to work with WebCenter Portal, from basic to advanced.

This preface introduces you to the WebCenter Portal personas and describes the ways in which they might interact with WebCenter Portal. Each persona is assigned a default role provided out-of-the-box with WebCenter Portal. The default roles are given a unique set of permissions appropriate for the work that each persona will typically do. Note that you can modify these default roles or configure new roles to meet the unique needs of your organization.

The people who interact with WebCenter Portal typically work together as a team that is comprised of the following personas:

- Knowledge Worker
- Application Specialist
- Web Developer
- Developer
- System Administrator

This guide is aimed at the *knowledge worker* persona.

Knowledge Worker

Karen is a *knowledge worker* who typically uses WebCenter Portal to contribute and review content, participate in social interactions, and leverage the Home portal to manage her own documents and profile.

At the application level, Karen has permissions such as those granted to the default `Authenticated-User` role, which may be customized for the specific needs of the

organization. At the portal level, the portal manager will likely assign Karen a role that includes `View Pages` and `Customize Pages` permissions.

For more information about roles and permissions, see About Roles and Permissions for a Portal in *Building Portals with Oracle WebCenter Portal*.

Knowledge Worker Tasks in WebCenter Portal

Tasks that are typical of a knowledge worker like Karen include:

- Editing and updating pages for which she has been assigned content contribution permissions

- Connecting to and collaborating with other WebCenter Portal users by sharing information, files, and links; and by interacting through instant messaging, mail, message boards, wikis, and blogs

- Uploading, sharing, and managing documents stored in Content Server

- Joining a team or project portal

- Keeping up with changes in WebCenter Portal by receiving notifications when content is updated, viewing the activities of the portals she is a member of and users she's connected to, and monitoring WebCenter Portal RSS feeds

- Staying organized through the use of favorites, notes, calendars, lists, links to portal objects, and tags

As Karen becomes more familiar with the functionality available in WebCenter Portal, she may begin to perform more advanced tasks, such as creating portals. As a more advanced knowledge worker, her role may evolve to overlap with application specialist tasks.

Information targeted to knowledge workers like Karen is in *Using Portals in Oracle WebCenter Portal*. Advanced tasks that overlap with those of an application specialist are covered in *Building Portals with Oracle WebCenter Portal*.

Application Specialist

Ari is an *application specialist* who works in WebCenter Portal to create and administer portals, their structure (hierarchy of pages, navigation, security), and their content (components on a page, layout, behavior, and so on). In a typical project, Ari

coordinates the efforts of Karen (knowledge worker), Wendy (web developer), and Dave (developer).

At the application level, Ari has permissions such as those granted to the default `Application Specialist` role, which may be customized for the specific needs of the organization. In a portal that Ari creates, he performs actions available to the `Portal Manager` role to manage the portal.

For more information about roles and permissions, see About Roles and Permissions for a Portal in *Building Portals with Oracle WebCenter Portal*.

Application Specialist Tasks in WebCenter Portal

Tasks that are typical of an application specialist like Ari include:

- Planning and creating new portals
- Editing and administering the portals he owns
- Creating and building portal pages using the page editor and the resource catalog to add and configure page components
- Creating and managing portal assets, tools, and services
- Managing shared assets and portal templates across all portals

Information targeted for application specialists like Ari is in *Building Portals with Oracle WebCenter Portal*. To work with his personal view of the Home portal, Ari will also refer to *Using Portals in Oracle WebCenter Portal*.

Web Developer

Wendy is a *web developer* who focuses on delivering a consistent, branded look and feel to all portals. Wendy provides graphics designs and HTML markup from which Ari (application specialist in WebCenter Portal) or Dave (developer in JDeveloper) can create content or page style templates, skins, and so on. Once these assets are created, Ari can leverage them to create portal pages. Wendy typically does not interact with WebCenter Portal directly.

Web Developer Tasks in WebCenter Portal

Tasks that are typical of a web developer like Wendy include:

- Developing a corporate portal look and feel

- Designing new page templates

Information targeted to web developers like Wendy is in Creating a Look and Feel for Portals in *Building Portals with Oracle WebCenter Portal*.

Developer

Dave is a *developer* who is primarily responsible for developing components (such as task flows, page templates, and content templates), which are published and leveraged by Ari (the application specialist). Dave works with JDeveloper to develop and extend assets for use in WebCenter Portal.

Developer Tasks

Tasks that are typical of a developer like Dave include:

- Developing custom assets such page templates and resource catalogs for portals in WebCenter Portal
- Developing Java portlets
- Developing and deploying task flows, managed beans, and other custom components
- Developing custom personalization components
- Maintaining the source control system
- Maintaining a build system

Information targeted to developers like Dave is in *Developing for Oracle WebCenter Portal*.

System Administrator

Syed is a *system administrator* who fields requests from IT employees and business users to set up new machines; clone or back up existing applications systems and databases; install patches, packages, and applications; and perform other administration-related tasks. As the system administrator, Syed works with other tools such as Fusion Middleware Control and command line tools. He leverages Enterprise Manager to configure portal settings, and also configures integrations such as WebCenter Content and other Fusion Middleware products and Oracle applications.

In WebCenter Portal, he has permissions such as those granted to the default `Administrator` role, which provides exclusive access to administer and set global options for all portals (including the Home portal).

For more information about application level roles and permissions, see About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.

System Administrator Tasks

Tasks that are typical of a system administrator like Syed include:

- Uses WebCenter Portal administration to administer all portals (including import and export of portals) and security site-wide
- Uses WebCenter Portal administration to manage site-wide system pages, business role pages, and personal pages
- Leads security, taxonomy, metadata, workflow, governance
- Uses the management console for administrative functions
- Executes command line utilities for administrative functions
- Installs and configures production versions of developers' efforts
- Performs patching of the production versions and the operating system
- Creates clones and backups of the production versions
- Performs restores of production versions
- Monitors the operating system for issues with the production version
- Deploys and redeploys applications

Information targeted to system administrators like Syed is in *Administering Oracle WebCenter Portal* and *WebCenter WLST Command Reference Reference*.

Part I

Getting Started

This part of *Using Portals in Oracle WebCenter Portal* provides an overview of the features available to you in WebCenter Portal. It includes information about setting up your personal environment, updating your personal profile, and finding your way around the portal and to specific information.

- Introduction to WebCenter Portal
- Exploring WebCenter Portal
- Searching for Information with Oracle Secure Enterprise Search
- Managing Your Profile
- Setting Your Personal Preferences
- Using WebCenter Portal Impersonation

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1

Introduction to WebCenter Portal

Explore WebCenter Portal knowledge worker concepts and tasks.

Topics:

- About This Guide
- WebCenter Portal Concepts
- Basic WebCenter Portal Tasks

About This Guide

This guide is for the knowledge worker who interacts with information and users through WebCenter Portal.

WebCenter Portal Concepts

This section includes the following topics:

- What Is Oracle WebCenter Portal?
- What Is a Portal?
- What Is the Home Portal?
- What Are Pages?
- What Are Portal Components?
- What Are Portal Tools and Services?

What Is Oracle WebCenter Portal?

Companies use Oracle WebCenter Portal to build enterprise-scale intranet and extranet portals that provide a foundation for the next-generation user experience (UX) with Oracle Fusion Middleware and Oracle Fusion Applications. Portals built with WebCenter Portal commonly support thousands of users who create, update, and access content and data from multiple back-end sources. WebCenter Portal delivers intuitive user experiences by leveraging the best UX capabilities from a significant portfolio of leading portal products and related technologies. From the user's perspective, the integration is seamless.

Figure 1-1   The Home Page of a Portal
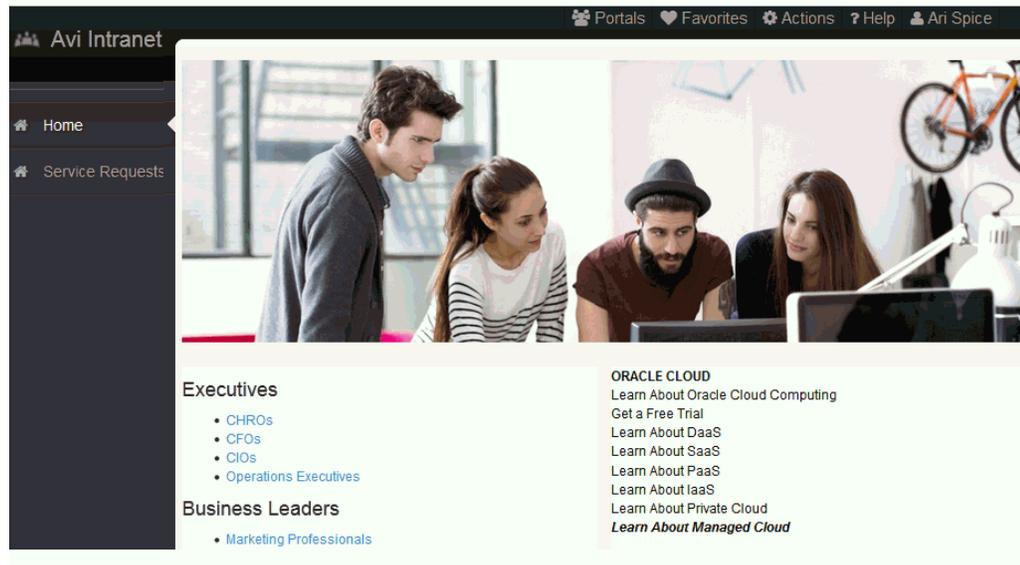
Figure 1-1 shows the basic structure of a portal in WebCenter Portal, showing the initial landing page, named Avi Intranet. It includes branding in the header region with a company logo and navigation areas, content areas, and so on.

Where can users access their portals? Anywhere! WebCenter Portal is mobile-enabled through responsive page design and page variants, which can be optimized to render on specific devices, such as mobile phone and tablets.

Business users can easily assemble new portals or composite applications using Portal Composer and a page editor that includes a library of prebuilt reusable components. They can enhance user experience by wiring components together on the page, configuring content personalization, enabling the use of integrated social tools, and creating data visualizations.

WebCenter Portal provides users with a personalized, secure, and efficient way of consuming information and interacting with people and applications in the context of business processes. It optimizes the connections between people, information, and applications; provides business activity streams so users can navigate, discover, and access content in context; and offers dynamic personalization of applications, portals, and sites to provide a customized experience.

> **Note:**
>
> When you move around in WebCenter Portal, use application navigation rather than your browser's **Back** button. Using application navigation keeps you reliably in the application context and prevents a loss of functionality that has been observed when browser navigation is used.

With WebCenter Portal, you can:

- Enable business users to quickly create dynamic portals and contribute media-rich content

- Easily build composite applications and mash-ups using browser-based tools

- Leverage prebuilt interactions with Oracle BI, BPM, SOA, and Oracle and third party applications

- Employ complete enterprise content management capabilities

- Enrich applications with built-in social and collaboration tools

- Improve business productivity with intuitive user experiences

- Leverage powerful tools and rich frameworks to develop custom assets rapidly with a comprehensive user experience solution and tighter integration with Oracle JDeveloper

- Use DevOps to monitor portal development and deployment to proactively tune WebCenter Portal to best performance and to manage portal life cycle

- Leverage existing investments

What Is a Portal?

A *portal* is an online gateway to a wide variety of purposes. It can be an intranet, where employees actively share both profile and project information across teams. It can be a partner network that provides a single entry point for accessing your company's news, marketing, sales, training, inventory, and order details. It can be a supplier network that runs between departments or between your company and its suppliers, enabling a smooth route from order to fulfillment. Or you might be working with a self-service portal, either internal or external, that enables your business or other businesses to initiate and complete different types of actions, like registration, order entry, or data retrieval. Some portals are focus areas for small teams, others are loaded with functionality for use by thousands of members.

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

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

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

What Is the Home Portal?

The *Home portal* is the area where you have access to your profile, preferences, and available portals. It's also a place where you can customize certain elements of your own view. You can create your own *personal pages* in the Home portal, and system

administrators can expose *system pages* and *business role pages* to selected audiences.

For more information, see Exploring WebCenter Portal.

What Are Pages?

You will encounter several types of *pages* in WebCenter Portal. These may be out-of-the-box or user-created.

Out-of-the-box pages in WebCenter Portal include the following page types:

- *System pages* are utility pages, such as the **Login** page and the **Documents** page. System pages are prepopulated with input fields and boilerplate text. System pages are managed by system administrators.

- *Business role pages* are role-based pages that can be populated with information of relevance to a particular business role, like salesperson, accountant, or marketing associate. You can push business role pages into the Home portal views of those who are assigned a particular role. Business role pages are managed by the system administrator.

No matter how your portal is structured, there is always a need for new pages besides those that are available out-of-the-box. You and other WebCenter Portal users can create new pages to meet your needs:

- *Personal pages* are pages you create for your own exclusive use in the Home portal. By default, personal pages can be seen in the Home portal only by you (the person who created them), but you can also allow others to see your personal pages. For more information about personal pages, see Creating and Managing Personal Pages. While you are primarily responsible for managing the content of your personal pages, a system administrator has the authority to administer all personal pages.

- *Portal pages* are intended for use by a wider audience. They may serve all users of your portal or a limited group of users. For example:

  – The portal manager may create pages that are designed to contribute to the knowledge base of the portal. Typically, these are made available to all members of the portal.

  – A portal member may selectively expose a portal page for their own use or for sharing with other selected portal members. While such pages may not be exposed to all portal members, a portal manager has the authority to administer all portal pages.

  Anyone with permissions to create pages can create portal pages.

  You can change your personal view of a page by rearranging items, expanding or collapsing viewers, and resizing areas.

  Portal pages can have any number of *subpages* and *page variants*, which are optimized for display on other devices, such as tablets or mobile phones.

What Are Portal Components?

As you use WebCenter Portal, you will work with elements on the pages. These elements are many and varied, and are collectively referred to as *portal components*.

Portal components include views/viewers, portlets, content containers, and other types of resources such as images and links.

What Are Portal Tools and Services?

WebCenter Portal offers many tools and services that allow you to collaborate and communicate with other WebCenter Portal users. If WebCenter Portal is installed and configured correctly and your system administrator has set up valid connections to the required external back-end servers, tools and services are available for use in WebCenter Portal.

Tools and services can be exposed on their own page in a portal with a separately addressable URL, or as one of many components on a page. Tools and services include: documents, events, tags, instant messaging and presence, links, mail, notes, and notifications.

Basic WebCenter Portal Tasks

This section provides an overview of the tasks that knowledge workers typically perform in WebCenter Portal. These tasks are described step-by-step in the chapters of this guide:

- Where Do I Start?
- Working with Portals and Pages
- Connecting and Collaborating with Other Users
- Adding Content to a Portal
- Staying Informed
- Staying Organized

Where Do I Start?

Getting Started information and tasks are covered in the following chapters:

- Exploring WebCenter Portal
- Searching for Information with Oracle Secure Enterprise Search
- Managing Your Favorites
- Managing Your Profile
- Setting Your Personal Preferences
- Using WebCenter Portal Impersonation

Working with Portals and Pages

Working with Portals and Pages information and tasks are covered in the following chapters:

- Working In the Home Portal
- Creating and Managing Personal Pages
- Exploring Portals

Connecting and Collaborating with Other Users

Connecting and Collaborating with Other Users information and tasks are covered in the following chapters:

- Managing Your Contacts
- Using Instant Messaging and Presence Viewer
- Sending and Viewing Mail
- Working with Feedback and the Message Board
- Liking, Commenting On, and Sharing Items
- Viewing and Participating in Discussions

Adding Content to a Portal

Adding Content to a Portal information and tasks are covered in the following chapters:

- Introduction to Adding Content to a Portal
- Contributing and Publishing Content
- Adding and Managing Documents
- Working with Wikis
- Working with Blogs

Staying Informed

Staying Informed information and tasks are covered in the following chapters:

- Getting Notified When Things Change
- Tracking Portal Activities
- Working with Announcements
- Monitoring RSS Feeds

Staying Organized

Staying Organized information and tasks are covered in the following chapters:

- Working with Calendars and Events
- Managing Your Notes
- Working with Lists
- Linking Information
- Working with Tags

2

Exploring WebCenter Portal

Get started in WebCenter Portal by registering, working in the portal browser, searching, saving favorites, setting preferences, and accessing help.

> ✎ **Permissions:**
>
> The tasks described in this chapter are available to any WebCenter Portal user minimally assigned the role `Authenticated-User`; that is, any user who is logged in.

> ✎ **Note:**
>
> • If you are using Internet Explorer, turn off Compatibility Mode before trying to access WebCenter Portal. In Internet Explorer, from the **Tools** menu, select **Compatibility View Settings**. In the Compatibility View Settings dialog, deselect all the options, and click **Close**.
>
> • WebCenter Portal supports only single browser tab or window viewing. It will not function properly if you try to view WebCenter Portal in multiple browser tabs or windows simultaneously.

Topics:

- Registering Yourself with WebCenter Portal
- Working In the Portal Browser
- Searching WebCenter Portal
- Saving Favorite Web Pages
- Working with Your Profile
- Setting Preferences
- Accessing WebCenter Portal Online Help

Registering Yourself with WebCenter Portal

Your system administrator may enable self-registration with WebCenter Portal. This allows you to create your own login credentials to become aWebCenter Portal authenticated user. The privileges of authentication are many: your own view of the Home portal, access to other features based on your assigned user role, a broader range of available interactive features, to name a few.

> **Note:**
>
> Whether self-registration is available depends on how your system administrator configures the application.

To register yourself as a WebCenter Portal user:

1. Open WebCenter Portal.

   For example:

   ```
   http://host:port/webcenter
   ```

   Where *host:port* refers to the host name and port number of the system where WebCenter Portal is installed. By default, WebCenter Portal is installed on port 8888.

2. On the Login page, click the **Register** link (Figure 2-1).

> **Note:**
>
> Your system administrator can customize the look and feel of the Login page, but the information depicted in Figure 2-1 is essentially the same whatever the customization.

Figure 2-1   The Register Link on the Welcome Page
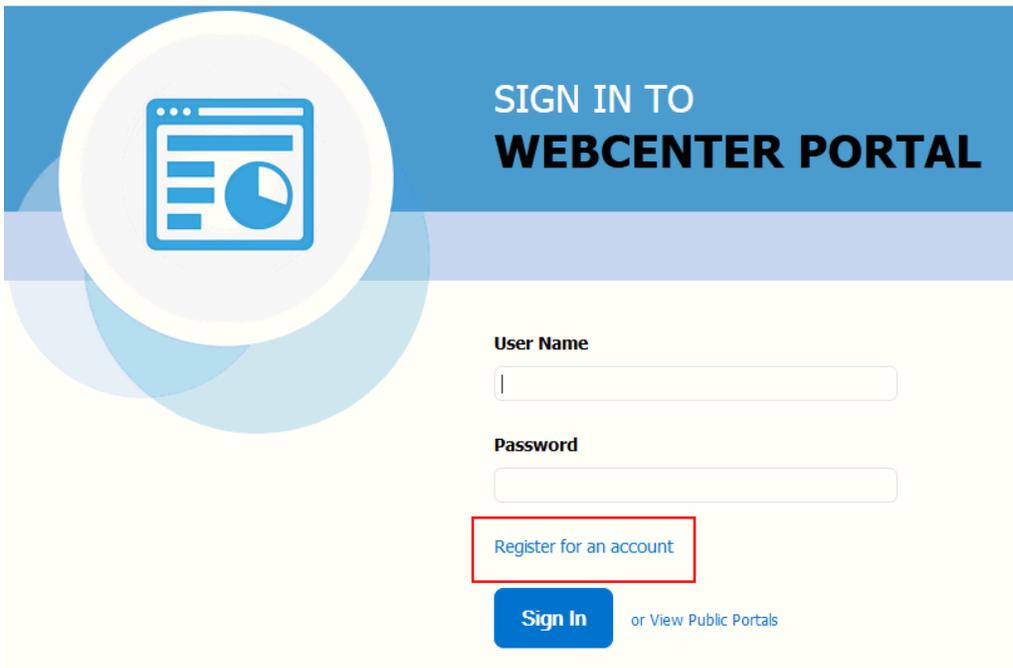
3. On the resulting **Self-Registration** page (Figure 2-2), enter your user information:

   Fields marked with an asterisk require a value.

> **Tip:**
>
> Your system administrator can customize the Self-Registration page, so it may not appear exactly as shown in Figure 2-2.

Figure 2-2   WebCenter Portal Self-Registration Page

Before you begin, you should know that the user name and password policy is set by the underlying identity store. Your system administrator may customize the **Self-Registration** page to include information that explains your organization's user name and password policy.

a. Enter your preferred user name in the **Choose User Name** field.

> **Note:**
>
> If your company uses email addresses as user names, enter your email address.

b. Click **Check User Name Availability** to ensure the uniqueness of your chosen user name.

If the name you entered is in use, provide another user name and test that it is unique.

c. Provide a password in the **Choose Password** field.

d. Reenter the password in the **Re-enter Password** field.

e. Enter your first name in the **First Name** field.

f. Enter your last name (that is, your surname) in the **Last Name** field.

g. Enter your company email address in the **Email Address** field.

> **Note:**
>
> You can create only one user account per email address.

4. Click **Register**. If you experience no response when you attempt to register with WebCenter Portal, refresh your browser and try again.

If the data you entered is accepted, a log-in dialog opens, enabling you to log in to WebCenter Portal.

> **Note:**
>
> By default, if a user name with the same mail ID exists, when you click **Register**, a dialog opens informing you that the mail ID exists. The dialog includes a button for sending a message to the mail ID associated with the existing user name.
>
> Because you are not yet authenticated, your message is sent to a public mail box, provided your system administrator has configured public mail credentials.
>
> Note that this default behavior may be overridden by customizations provided by your portal developers.

Working In the Portal Browser

When you log in to WebCenter Portal, the default landing page is the *portal browser* (Figure 2-3). Your system administrator may have changed the landing page to the Home portal, or a specific portal or page.

> **Note:**
>
> All WebCenter Portal users must be directed to the default landing page that has been configured for the user or group. If you get a Page Not Found error after logging in when accessing an unauthorized page or portal, let your administrator know that a default landing page needs to be configured for your login user name or group.

For information about working with portals in the portal browser, see Viewing and Accessing Available Portals.

Figure 2-3   Portal Browser
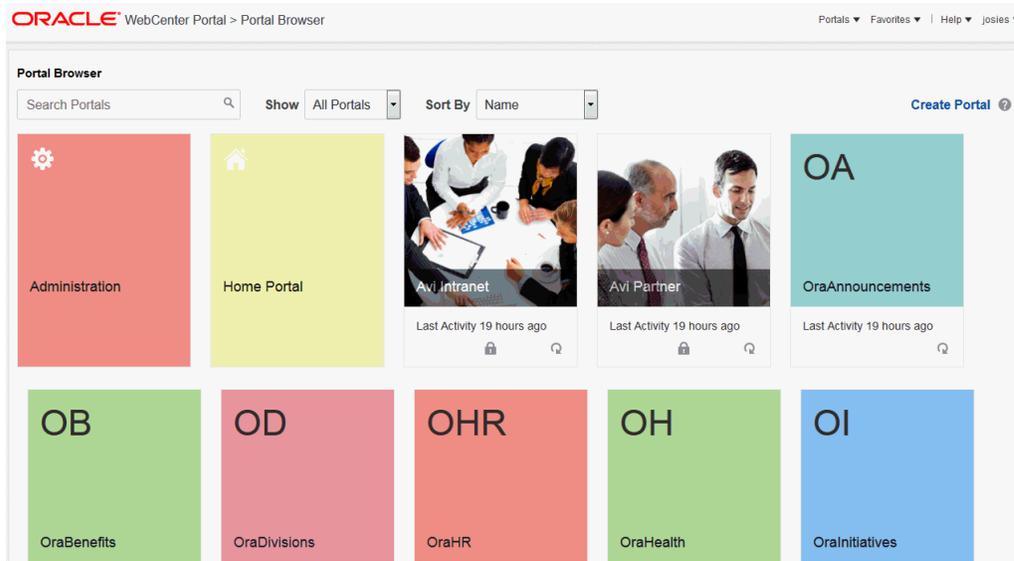
Searching WebCenter Portal

When Search is configured in WebCenter Portal (for example, Oracle SES), a global (application-wide) search (Figure 2-4) field becomes available in the application skin. Click the **Search** icon to expand the **Search** box. For more information, see Searching for Information with Oracle Secure Enterprise Search .

Figure 2-4   Search Box
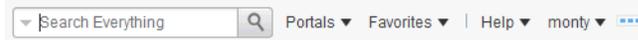
Saving Favorite Web Pages

Use Favorites (Figure 2-5) to keep your own personal list of favorite web sites and pages to access from any browser you choose. For information, see Managing Your Favorites.

Figure 2-5   Favorites Menu
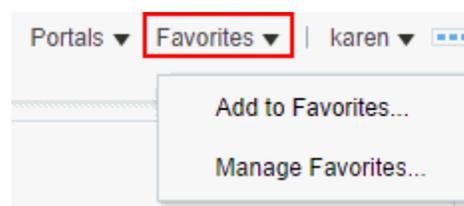
Working with Your Profile

Your profile is a collection of useful data about you. You can open it through the user menu in the menu bar. Your profile can include contact information, a photo, your location within the company hierarchy, and so on. The social networking capabilities in WebCenter Portal enable you to view and manage your own profile and to view the profiles of others if they have made them available to you. For information about how to view and manage your profile, see Managing Your Profile.

Setting Preferences

Your personal preferences, accessed through your username menu (Figure 2-6), provide easy configuration settings for tailoring the application to your particular working style. These include settings for your preferred application display language; your preferred application look and feel; your WebCenter Portal password; and the like. Additionally, WebCenter Portal preferences provide an accessibility setting to optimize the application user interface for use with a screen reader, such as JAWS. For information, see Setting Your Personal Preferences.

Figure 2-6   Preferences Link
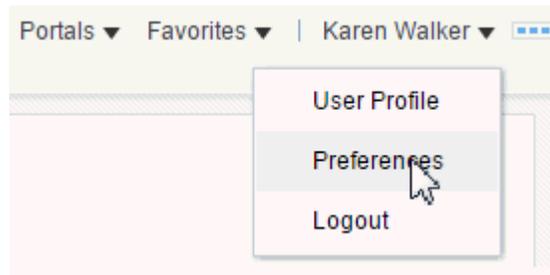
Accessing WebCenter Portal Online Help

Wherever you see a **Help** link or a help icon, click it to access help.

The **Help** link (Figure 2-7) opens the application's main help page. From there, you can navigate to topics of interest.

Figure 2-7   Help Link

Help icons ( ) open help topics that provide context-sensitive help (describing the user interface from which you launched help).

3

Searching for Information with Elasticsearch

Use WebCenter Portal to find your information quickly with a global search, narrowing your results using filters and facets.

Topics:

- About Searching in WebCenter Portal with Elasticsearch
- Searching Using Elasticsearch

> ✎ **Permissions:**
>
> The tasks described in this chapter are available to any WebCenter Portal user with access to a page that contains search.

About Searching in WebCenter Portal with Elasticsearch

WebCenter Portal provides global (application-wide) search. By default, the search field is at the top-right of the application. Information is searched by name and content. A search looks for your search terms in every searchable object enabled in the application, returning only the results you are authorized to view. For example, if you are not a member of the *Finance* portal, then any search results from that portal do not display.

WebCenter Portal can be configured with Elasticsearch for searching your application. In addition to WebCenter Portal's search, the Documents tool provides its own search engine for file searches. This saves time and increases the relevancy of results by narrowing the scope of a search to files. The Documents tool searches within a specific portal's document library.

Global Search is available only when Oracle WebCenter Portal is configured with Elasticsearch. See Configuration Roadmap for Elasticsearch in WebCenter Portal.

> ✎ **Note:**
>
> System administrators and Portal Managers can customize the search user interface, so your screen shots may look different. They can configure the scope of searches to specific portals, tools or services, and document types; they can add or hide attributes provided with search results; and they can change the size of the search box.

Elastic search supports only Facet search and provides result for the following assets-

- Documents, including wikis and blogs

- Announcements and Discussions. (available only for portals upgraded from prior releases)

- Portals, lists, page metadata, and people

The supported wildcard is *. By default the search term is appended with the * character and the user can also explicitly specify the * character in the beginning or in the middle of the search term.

For example,

1. If you search for *monty*, you can see *monty* and *monty_coi* in the search result.

2. If you have three users, for example, *monty*, *monty_coi* and *monica* and when you search for *mon*coi*, you can see *monty_coi* in the search result.

3. If you search for **admin*, all the terms with admin are listed in the search result, for example, *fmwadmin*, *orcladmin*, *psradmin1*, *psradmin2*, and so on.

We do not recommend searching a term with * character in the beginning.

When you search for a phrase, for example , *dare to dream*, all results that contain the words in the phrase are listed (that is *dare*, *to*, *dream*) and the records that match all three phrases are also listed higher in the list of results.

Searching Using Elasticsearch

Your search environment varies depending on how your system administrator or portal manager configured search. The way you access search depends on how the portal is designed. The application specialist might also provide you with a pretty URL to access the page. Elasticsearch supports only Facet search.

This section includes the following topics:

- Running a Global Search with Elasticsearch

- Running Faceted Searches to Narrow Results with Elasticsearch

- Running Filtered Searches to Narrow Results with Elasticsearch

- Running Sorted Searches to Organize Results with Elasticsearch

- Searching Using Custom Attributes in Elasticsearch

Running a Global Search with Elasticsearch

To perform a global search:

1. Locate the global search field, and enter a search term.

Figure 3-1　Search Field

2. Press Enter or click the Search icon next to the global search field.

Figure 3-2   Search Icon

Results display in the search results page.

Figure 3-3   Search Results

> ✏️ **Note:**
>
> Thumbnails for documents appear in place of icons when thumbnail creation is enabled in WebCenter Content and when single sign-on is configured on both WebCenter Portal and WebCenter Content.

Running Faceted Searches to Narrow Results with Elasticsearch

You can use facets to navigate indexed data without running a new search. Some search terms can provide massive results, but faceted navigation within search lets you narrow the results exactly what you are looking for, or even discover something new.

The following facets are included by default, although your system administrator may configure different facets:

- Author

- Last Modified Date

- Mimetype

- Tags

- Portal

The following figure shows a search filtered to show only results for last 7 days under **Last Modified Date**. You can add more facets to continue narrowing this search.

Figure 3-4   Faceted Result List
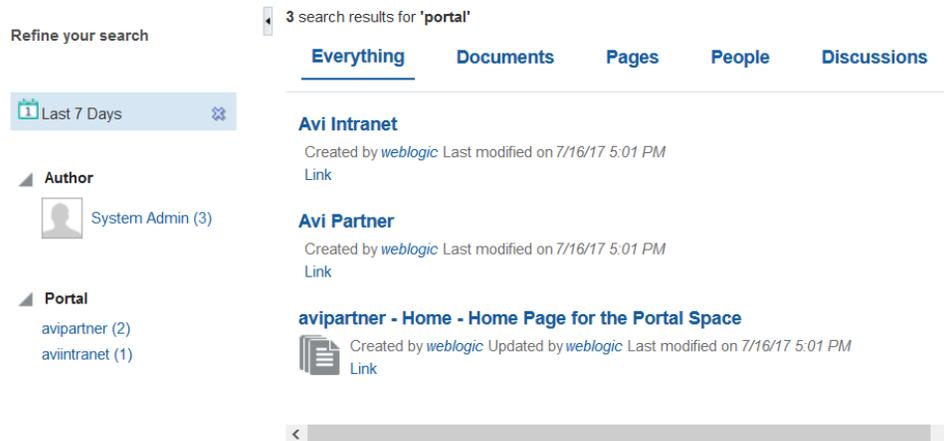
Click the **Remove Filter** icon to remove each facet and return to a complete result list.

Running Filtered Searches to Narrow Results with Elasticsearch

You can narrow your results using the filter list available on the top of the search result.

Figure 3-5   Filtered Search
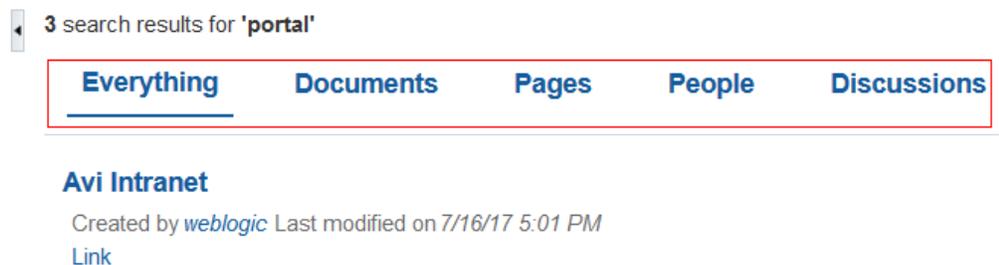
The following are the available filters:

- Everything

- Documents

- Pages

- People

- Portals

- Blogs

- Discussions

- Announcements

Running Sorted Searches to Organize Results with Elasticsearch

You can organize your results using the **Sort by** drop-down list to the right of page.

By default, searches are sorted with the most relevant results first, with the following sorting options available:

- Date: Newest First

- Date: Oldest First

- Author: Ascending

- Author: Descending

- Title: Ascending

- Title: Descending

Figure 3-6   Sorting in Search
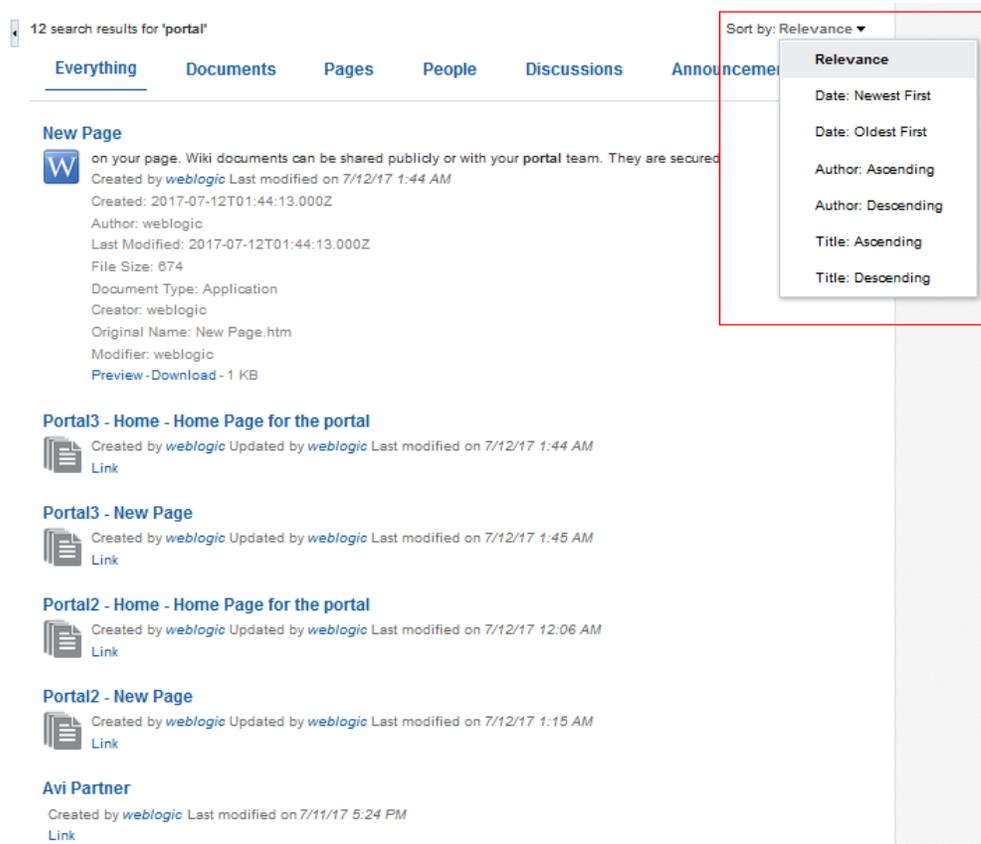
Searching Using Custom Attributes in Elasticsearch

You can enrich your search results using the custom search attributes available in WebCenter Portal. Ensure that your system administrator has selected the required custom search attributes in the Search settings in WebCenter Portal administration. An attribute displays in the search results only if there is a value for it.

The following figure shows search results that include the custom attributes:

Figure 3-7   Search Results Including Custom Attributes

Everything	Documents	Pages	People	Discussions

New Page

on your page. Wiki documents can be shared publicly or with your **portal** team. They are
Created by *weblogic* Last modified on *7/12/17 1:44 AM*

Created: 2017-07-12T01:44:13.000Z
Author: weblogic
Last Modified: 2017-07-12T01:44:13.000Z
File Size: 674
Document Type: Application
Creator: weblogic
Original Name: New Page.htm
Modifier: weblogic
Preview - Download - 1 KB

4
Managing Your Profile

Your WebCenter Portal profile is a collection of useful data about you, such as contact information, a photo, and your location within the company hierarchy.

> **✎ Note:**
>
> The social networking capabilities in WebCenter Portal enable you to view and manage your own profile and to view the profiles of others if they have made them available to you. For information on viewing other users' profiles, see Viewing Another User's Profile.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you need the application-level permission `People Connections: Update People Connections Data`.

Topics:

- About Profiles
- Viewing a Profile
- Editing Your Profile
- Setting Profile Preferences

About Profiles

Connecting with other users through People Connections gives you access to their profiles and gives them access to yours. Your profile can include contact information, a streaming view of the portal activity of your connections, a list of your connections, access to your personal document library, and a map of your location in your organization's hierarchy.

You can use your profile preferences to control how much of your profile a connection can see. For information about setting your profile preferences, see Setting Profile Preferences.

Your system administrator can set global defaults that affect what all users may see and do with their own and other users' profiles (for more information, see Configuring Profile in *Administering Oracle WebCenter Portal*).

Some information included in your profile is pulled from the user database used by WebCenter Portal. Depending on the settings configured by your system administrator, you might not see all the information discussed in this chapter and you

might not be able to edit some of the information when you edit your profile. Because your system administrator can customize the available profile information, the screenshots provided in the documentation might not match what you see in your organization's version of WebCenter Portal.

> **Note:**
>
> - The Profile user interface was updated in 12*c* (12.2.1). Depending on how your system administrator configured your installation of WebCenter Portal, you might see the legacy Profile user interface. For information on the legacy Profile user interface, see Managing Your Profile in *User's Guide for Oracle WebCenter Portal: Spaces* for 11*g* Release 1 (11.1.1.7.0).
> - Empty fields (fields without any content) do not appear in some profile views.

Viewing a Profile

You can view a profile, including your own, by clicking a user name wherever you see it in WebCenter Portal. Depending on where you click in the portal, you either see a brief, popup view of the user profile or you see a full profile view on the WebCenter Portal **Profile** page.

For more information, see one of the following sections:

- Profile Popup
- Profile Page

You can also view profile information in one of the following profile views that can be added to a page in a portal:

- Organization View
- Profile
- Profile Gallery
- Profile Snapshot

Profile Popup

You can view a brief, popup profile view (Figure 4-1) for yourself, one of your connections, or a member of a portal to which you have access by clicking a user name wherever it appears in the application context.

Figure 4-1   Profile Popup
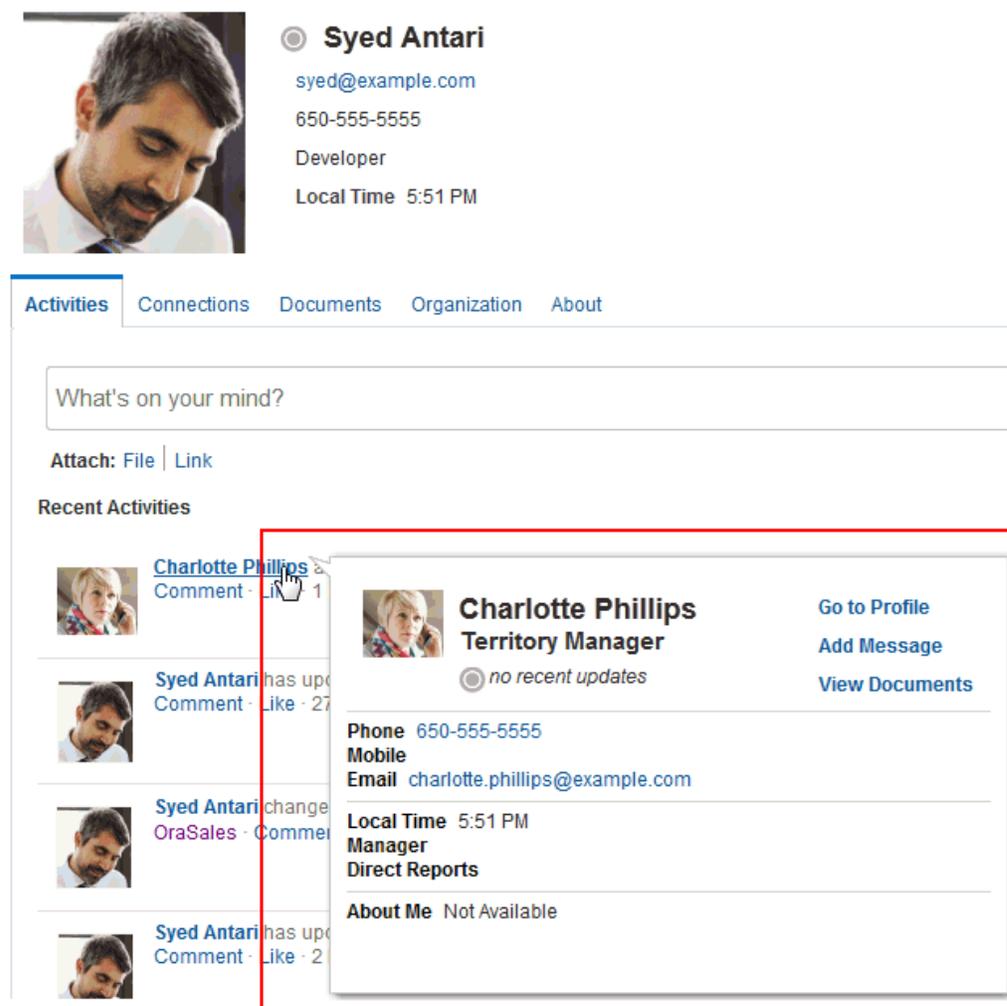
In the popup, click **Go to Profile** to view the user's full profile on the WebCenter Portal **Profile** page (described next).

Profile Page

You can view the full details of a user's profile on the WebCenter Portal **Profile** page (Figure 4-2) by clicking your user name at the top of the application (highlighted in Figure 4-2), or **Go to Profile** in the profile popup.

Figure 4-2   Profile Page
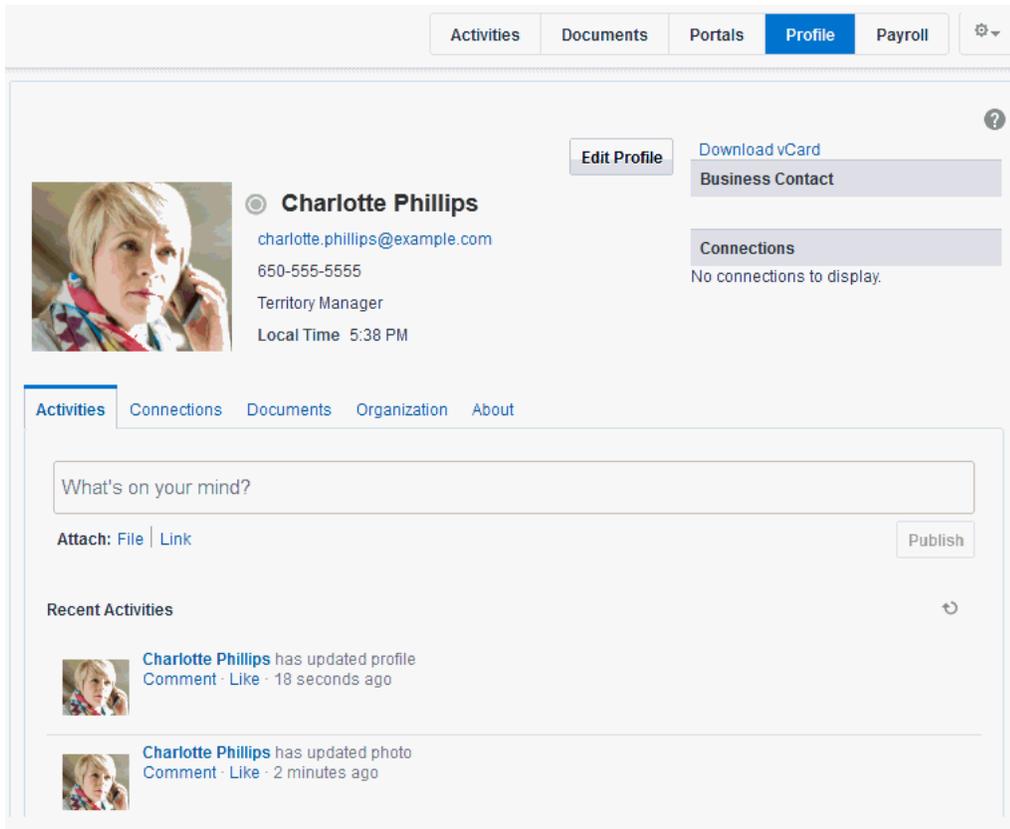
> **Note:**
>
> The **Profile** page is a business role page included in the Home portal of all authenticated users (users who are logged in to WebCenter Portal).

Your administrator establishes the default appearance of all users' profile pages. Consequently, the information on the **Profile** page may vary. For example, the **Profile** page may present the following information:

- Your contact information, such as photo, email address, position, business phone number and address, and so on.

- A view of your activities and those of your connections on the **Activities** tab.

    For more information, see Tracking Portal Activities.

- A brief list of your connections on the main **Profile** page, and a detailed view of your connections on the **Connections** tab.

    For more information, see Managing Your Contacts.

- A view of the documents and folders in the Public folder of your personal document library on the **Documents** tab.

    For more information, see Adding Content to a Portal.

> **✎ Note:**
>
> You must access the **Documents** page in the Home portal at least once before accessing the **Documents** tab in your profile. Accessing the **Documents** page in the Home portal initializes the Documents feature. If you do not first access the **Documents** page in the Home portal, you will see the following message: "`The user does not currently have any public documents.`"

- A chart view of your location within the organization on the **Organization** tab.
- A view of additional profile details on the **About** tab.

Figure 4-3   About Tab on Profile Page

- A list of recommended connections.
- A list of your top contributions (your personal documents that you access most).

> **✎ Note:**
>
> The type of information and number of items displayed in under Top Contributions can be customized by selecting the Edit (pencil) icon.

Your system administrator can revise the default **Profile** business role pages to include additional components, remove existing components, and revise the page look and feel. Consequently, the page described in this guide may be different than the **Profile** page that you see. However, the basic profile functionality should remain about the same.

> ✎ **Note:**
>
> Empty fields (fields without any content) do not appear on the Profile page.

Organization View

The Organization View (Figure 4-4) can be added to a portal page to present a graphical depiction of the user's position within the company—that is, a detail of the overall organization chart. In Organization View, you can click through three views of the user's profile information, including contact information; the user's address and current time in the user's locale; and a summary About Me statement. You can also expand the Organization View to show the user's reports or managers.

Figure 4-4   Organization View
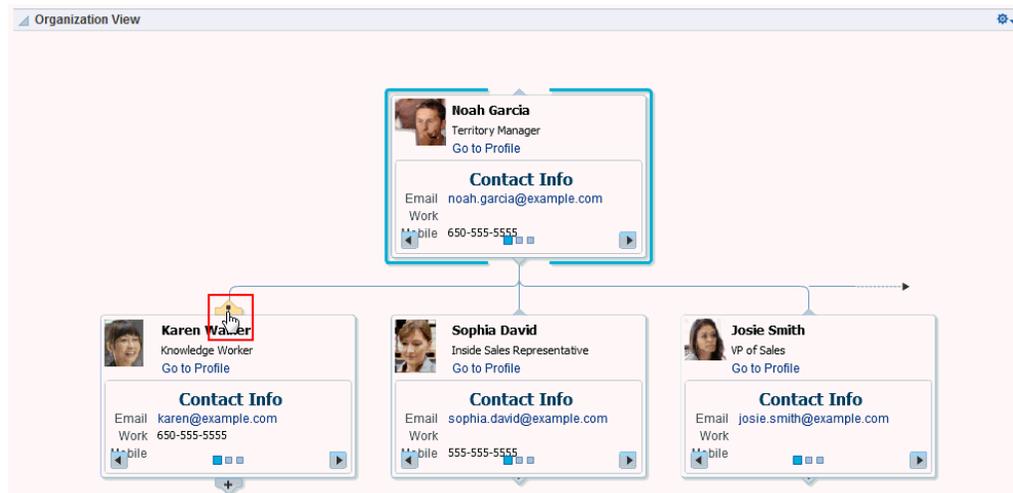
Profile

The Profile viewer (Figure 4-5) can be added to a portal page to display a user's profile details. If you are viewing your own profile, the Profile viewer allows you to upload a profile photo and (if enabled) allows you to edit your profile details.

Figure 4-5   Profile

Profile Gallery

The Profile Gallery (Figure 4-6) can be added to a portal page to provide access to all of your social networking information.

Figure 4-6   Profile Gallery
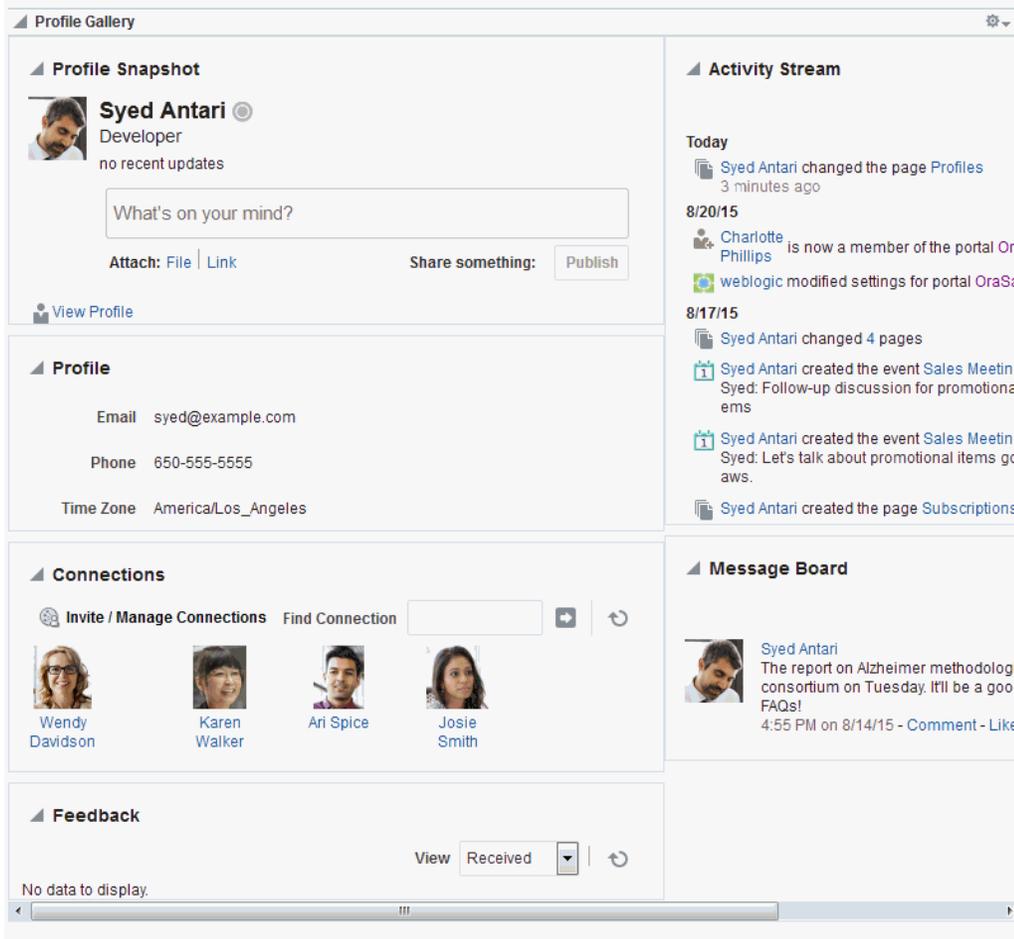
> **✎ Note:**
>
> Empty fields (fields without any content) do not appear in the Profile Gallery views.

Profile Snapshot

The Profile - Snapshot viewer (Figure 4-7) can be added to a portal page to display a user's photo and status message.

Figure 4-7   Profile - Snapshot
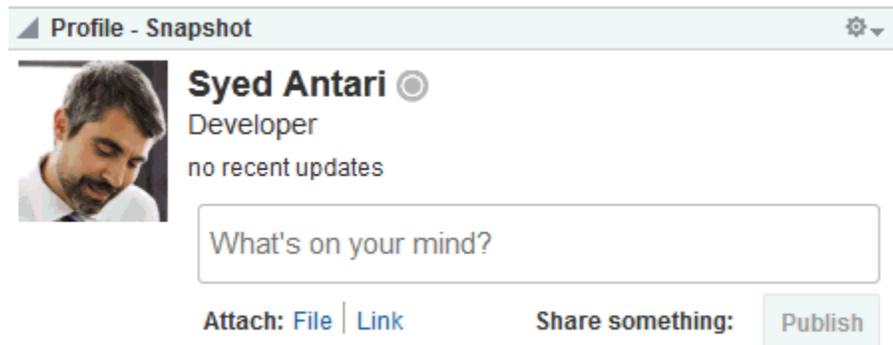
Editing Your Profile

Your system administrator determines how much of your personal profile you may revise. When you have permission to revise your profile, an **Edit Profile** button is shown on the **Profile** page (Figure 4-8). In addition, when you place your cursor over information that is editable, a gray box appears around the information.

Figure 4-8   Edit Profile Button and Editable Information on a Profile
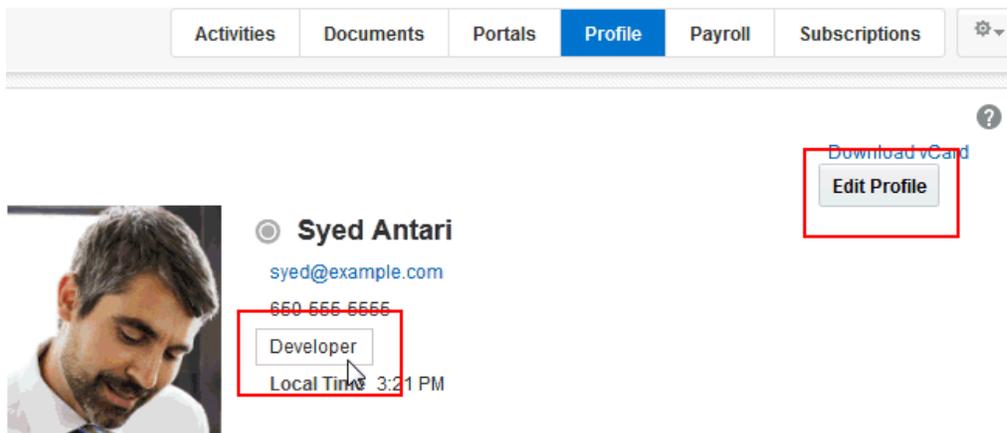
Click the **Edit Profile** button or one of the editable pieces of information to open an edit view of your personal profile.

> **Note:**
>
> - Even if your system administrator has enabled the editing of a particular profile section, it is possible that some fields in that section are read-only. For example, you should generally not be able to change the value for your manager.
> - Some web browsers lack the support to show text box labels. However, if you click a text box a tooltip appears that describes the text box.

To edit your personal profile:

1. Open your **Profile** page (as described in Profile Page).
2. Click **Edit Profile** or some editable profile text to open your profile in edit mode (Figure 4-9).

Figure 4-9   Profile in Edit Mode

3. Make your changes, and click **Save**.

Uploading and Updating a Personal Profile Picture

Provided the profile viewer is configured to allow it, users with a personal profile can upload or update their profile image.

> **Note:**
>
> The file must have the mime-type *image*, and cannot have the extension `*.ico`. For best results, your photo should be 150x150 pixels.

To upload or update your profile image:

1. Open your **Profile** page (as described in Profile Page).

2. Click **Edit Profile**.

3. Upload, change, or remove your photo:

   To upload or change your photo:

   a. Click **Change** to open the Upload Photo dialog (Figure 4-10).

   Figure 4-10   Change Photo Link and Upload Photo Dialog
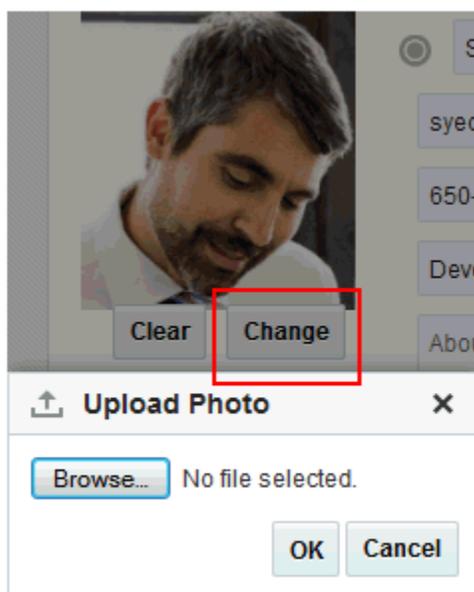
   b. Click **Browse** to locate and select a photo.

   c. Click **OK** to complete the upload.

   To remove your photo, click **Clear**.

> **Note:**
>
> You do not need to click **Save** on the Profile page to save your photo.

Setting Profile Preferences

The profile details that are affected by your preferences settings appear in your full profile view, for example, in the Profile viewer and on the **About** tab of the default **Profile** business role page.

Figure 4-11   About Tab on Profile Page

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

> ✏ **Note:**
>
> Your system administrator can control every user's access to the user's own profile information. For example, the system administrator can control whether a profile section is shown, whether a given section is editable, and who can see what profile information. Consequently, the control you can exercise over your own profile preferences is determined by the actions of your system administrator.

Use profile preferences to specify who can view different types of information associated with your personal profile.

To set profile preferences:

1. From your user menu in the menu bar, select **Preferences** (see Accessing the Preferences Pages).

2. On the **People** page, click the **Profile** tab.

Figure 4-12   Preferences - People Page: Profile Tab
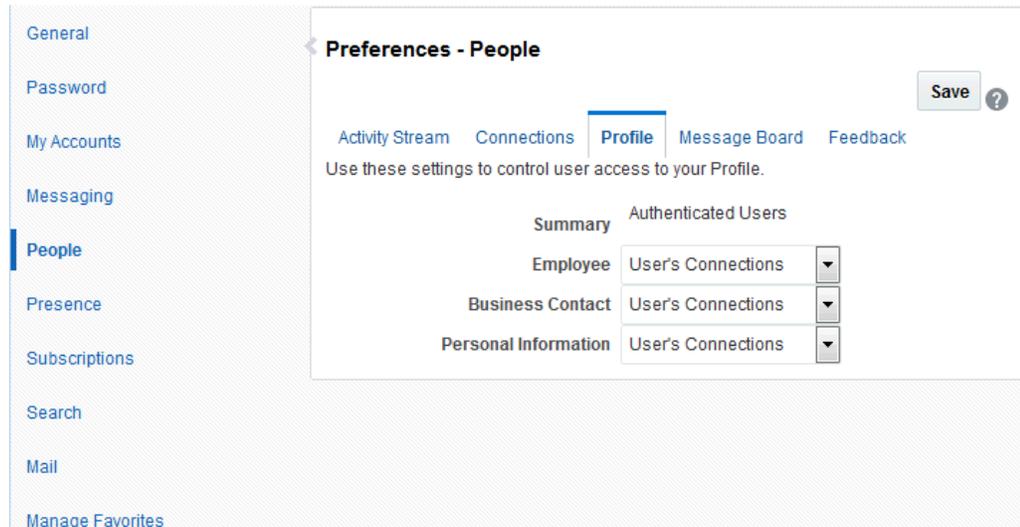
For each section of your personal profile, specify the users who can view it:

- **Everyone**—All users, including users who are not logged in, can view the associated section of your profile.

- **Authenticated Users**—Only users who are logged in can view the associated section of your profile.

- **User's Connections**—Only you and your connections can view the associated section of your profile.

- **User Only**—Only you can view the associated section of your profile.

3. Click **Save**.

5
Setting Your Personal Preferences

Your personal preferences provide easy configuration settings for tailoring WebCenter Portal to your particular working style.

Personal preferences include settings for your preferred display language, your preferred look and feel. your WebCenter Portal password, and more. Additionally, WebCenter Portal preferences provide an accessibility setting to optimize the application user interface for use with a screen reader, such as JAWS. Preferences settings are a user-level customization that affect only your view of WebCenter Portal.

> ✎ **Permissions:**
>
> The tasks described in this chapter are available to any WebCenter Portal user.

> ✎ **See Also:**
>
> Preferences associated with specific areas of WebCenter Portal are discussed in the chapters that cover each area.
>
> For information about Messaging, Subscription, and Notifications preferences, see:
>
> - Establishing and Managing Your Messaging Channels and Filters
> - Subscribing to the Application, to Portals, and to Objects
> - Viewing and Cancelling Your Subscriptions
>
> For information about People Connections preferences, see:
>
> - Setting Profile Preferences
> - Setting Connections Preferences
> - Setting Feedback Preferences
> - Setting Message Board Preferences
> - Setting Activity Stream Preferences
>
> For information about Instant Messaging and Presence preferences, see Identifying Your Preferred Instant Messaging Provider.
>
> For information about Search preferences, see Setting Individual Preferences for Search Results.
>
> For information about Mail preferences, see Selecting Your Preferred Mail Connection.

5-2

Topics:

- Accessing the Preferences Pages
- Choosing Your Preferred Display Language
- Setting Date and Time Preferences
- Setting Your Accessibility Options for WebCenter Portal
- Changing the Look and Feel of Your View
- Changing Your Application Password
- Providing Login Information for External Applications

Accessing the Preferences Pages

To access the pages of your personal preferences:

- From your user menu in the menu bar, select **Preferences** (Figure 5-1) to open Preferences on the **General** page (Figure 5-2).

Figure 5-1   Accessing Preferences
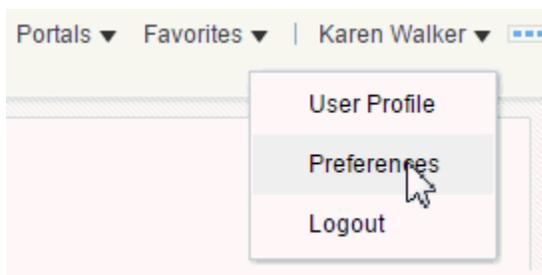
Figure 5-2   Preferences - General Page
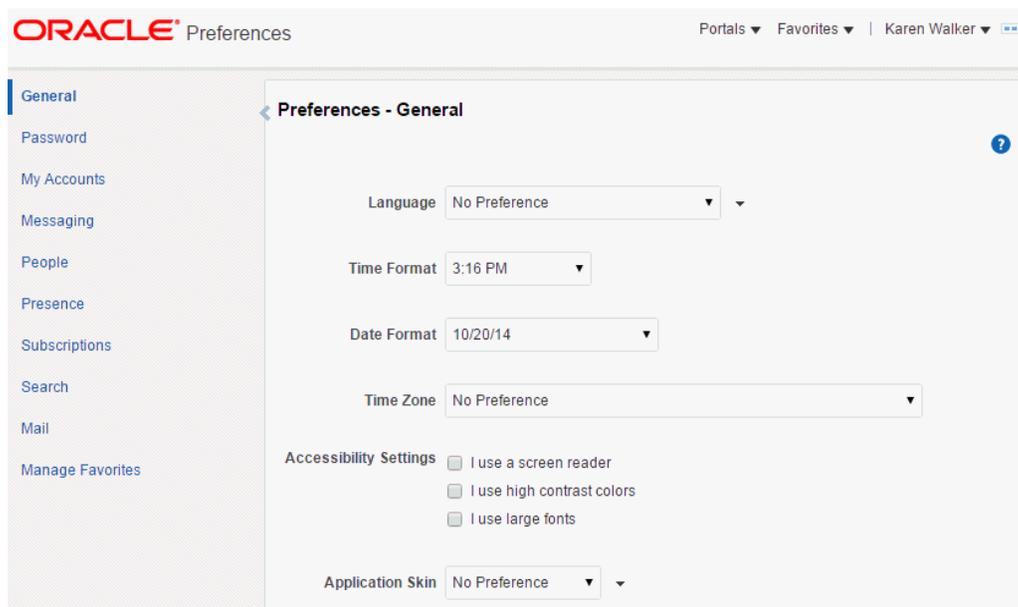
Choosing Your Preferred Display Language

The display language controls the language for user interface (UI) elements in your browser. UI elements include button and field labels, application links, screen text, and so on. The display language also provides options for identifying the current locale, which determines symbols, such as monetary symbols, and reading direction for UI text.

To set a display language:

1. From your user menu, select **Preferences**.

2. On the **General** page, from the **Language** drop-down list, select your preferred display language locale.

   Alternatively, select **No Preference** to accept the application-level default set by your system administrator.

   Your change is applied immediately, and the page refreshes in the selected language.

> ✏ **Note:**
>
> You can also set a display language on the Welcome page before you log in. Select a language in the language switcher.

Figure 5-3   Language Switcher on Welcome Page
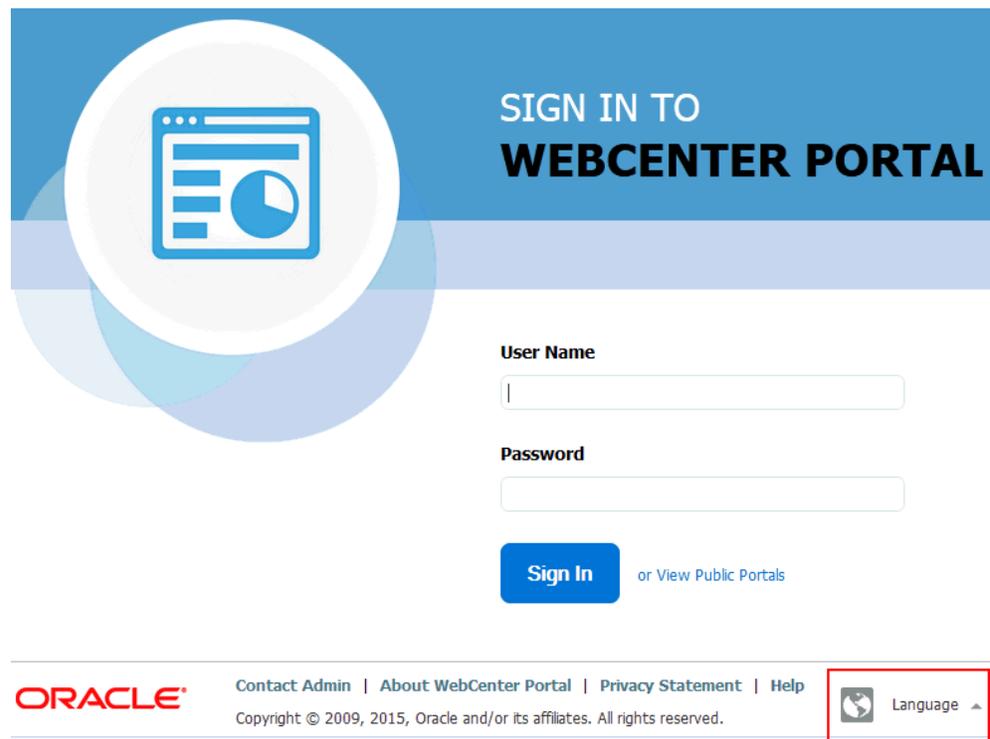
Setting Date and Time Preferences

Use date and time preferences to specify your preferred date and time formats and your current locale's time zone.

> **✎ Note:**
>
> Some content may be developed with an intrinsic time display format. In such cases, this content is not influenced by your date and time format selections.

To set your preferred time format, date format, and time zone:

1. From your user menu in the menu bar, select **Preferences**.

2. On the **General** page, set your date and time preferences as shown in the following table.

Table 5-1   Date and Time Preference Settings

Preference	Description
Time Format	Select a display default for time information in WebCenter Portal. This setting controls the format for showing time for the services that receive time data from WebCenter Portal preferences. (Some services provide their own time format defaults.)
	Note: The available time formats depend on the locale selected in the **Language** list or by your browser locale. For example, if you select `English-United Kingdom [en-GB]`, the AM/PM is not included in the time format.
	• **No Preference**—To display the default Time Format established by your system administrator
	• **H:M AM/PM**—To display hour, minutes, and AM or PM, such as `4:47 PM`
	• **H:M:S AM/PM**—To display hour, minutes, seconds, and AM or PM, such as `4:47:52 PM`
	• **H:M:S AM/PM Time Zone**—To display hour, minutes, seconds, AM or PM, and the abbreviation of the specified time zone, such as `4:47:52 PM PDT`
	• **H:M:S o'clock Time Zone**—(Not available for all locales.) To display hour, minutes, seconds, "o'clock", and the abbreviation of the specified time zone, such as `4:47:52 o'clock PDT`

Table 5-1   (Cont.) Date and Time Preference Settings

Preference	Description
Date Format	Select a default format for date information in WebCenter Portal. This setting controls format for showing dates for the services that receive date data from WebCenter Portal preferences. (Some services provide their own date format defaults.)
	Note: The available date formats depend on the locale selected in the **Language** list or by your browser locale. For example, if you select `English-United Kingdom [en-GB]`, the dates are listed in day, month, year order.
	• **No Preference**—To use the default date format set by your system administrator
	• **M/D/YY**—To use a number format, such as `4/21/09`
	• **MON D, YYYY**—To use an abbreviation format and the full year, such as `Aug 21, 2017`
	• **MONTH D, YYYY**—To display the full month name and the full year, such as `Aug 21, 2017`
	• **DAY, MONTH D, YYYY**—To display the full month name, the full year, and include the day of the week, such as `Tuesday, August 21, 2017`
Time Zone	Select a time zone default. This setting helps to determine the time to show for time-stamped objects, such as uploaded and modified documents.
	Alternatively select **No Preference** to accept the application-level default set by your system administrator.

Setting Your Accessibility Options for WebCenter Portal

Use accessibility options to optimize the application user interface (UI) for use with screen readers; to enable support of high-contrast colors; and to enable support for large fonts.

This section includes the following topics:

- About Application Accessibility Options
- Applying Accessibility Options

About Application Accessibility Options

WebCenter Portal Cloud accessibility options appear on the **General** panel of the **Preferences** page. Accessibility options assist visually and non-visually impaired users in navigating the application user interface.

The next topic, Applying Accessibility Options, describes how to apply WebCenter Portal Cloud accessibility options.

> **Note:**
>
> The color contrast of disabled actions—which are gray—against a white screen may be difficult to discern for some users. Because disabled actions are not selectable, this issue does not affect the use of WebCenter Portal.

Applying Accessibility Options

To apply accessibility options to the application UI:

1. From your user menu in the menu bar, select **Preferences**.

2. On the **General** page, select your preferred **Accessibility Settings**:

   - **I use a screen reader**—Specifically for visually impaired users, enables the use of JAWS, the screen reader software.

   - **I use high contrast colors**—Makes the WebCenter Portal user interface compatible with operating systems or browsers that have high-contrast features enabled. For example, WebCenter Portal changes its use of background images and CSS styles in high-contrast mode to prevent the loss of visual information.

     > **Note:**
     >
     > High-contrast mode is more beneficial if used in conjunction with your browser's or operating system's high-contrast mode. Also, some users might find it beneficial to use large-font mode along with high-contrast mode.
     >
     > The color contrast of disabled actions—which are gray—against a white screen may be difficult to discern for some users. Because disabled actions are not selectable, this issue does not affect the use of WebCenter Portal.

   - **I use large fonts**—Provides browser-zoom-friendly content. In default mode, most text and many containers have a fixed font size to provide a consistent and defined look. In large-font mode, text and containers are more scalable. This allows WebCenter Portal to be compatible with browsers that are set to larger font sizes and to work with browser-zoom capabilities.

     > **Note:**
     >
     > If you are not using large-font mode or browser-zoom capabilities, you should disable large-font mode. Also, some users might find it beneficial to use high-contrast mode along with the large-font mode.

Changing the Look and Feel of Your View

Use application skins to change the look and feel of your view of the Home portal. Application skins specify the application background color, screen fonts, and, with some skins, the shapes and images used for application buttons and icons. The skin you select through Preferences affects only the look and feel of your view of the Home portal. No other users' views and no other areas of the application are affected.

To change the Home portal skin in your view:

1. From your user menu in the menu bar, select **Preferences** (Figure 5-1).

2. On the **General** page, select your preferred **Application Skin**:

- **No Preference**—To defer to the application's configured skin setting

- *Skin_Name*—To select a predefined application skin from the list of skins available to you

> ✎ **Note:**
>
> The available skins are determined by your system administrator.

Your change is applied immediately. Go to the Home portal to see the selected skin.

Changing Your Application Password

If your system administrator has enabled the capability, you can change your WebCenter Portal password.

To change your WebCenter Portal password:

1. From your user menu in the menu bar, select **Preferences** .

2. On the **Password** page, in the **Old Password** field, enter your current password.

Figure 5-4   Preferences - Password Page
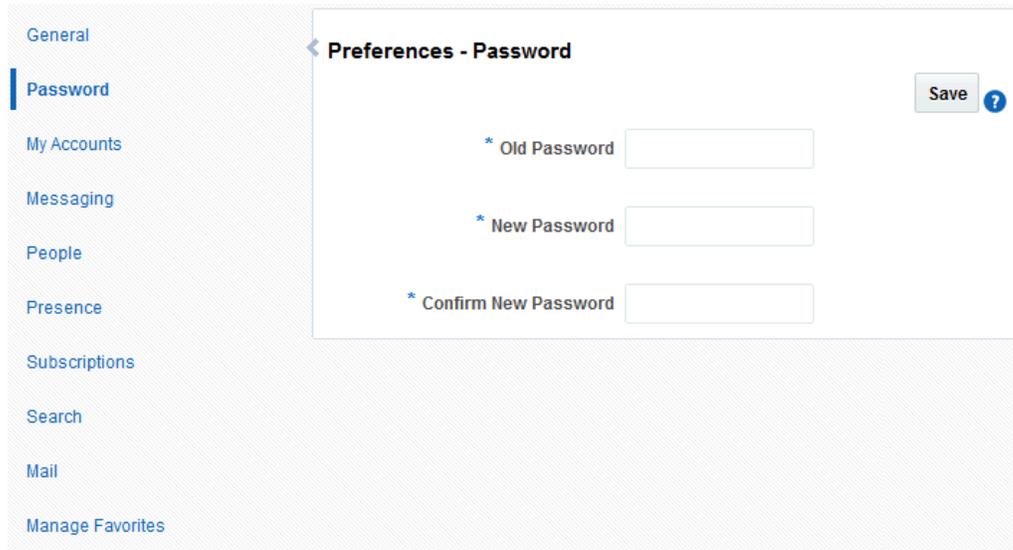
3. In the **New Password** field, enter your new password.

> **✎ Note:**
>
> The requirements for this password are driven by the identity store that manages WebCenter Portal application users. Every ID store has its own password policy that enforces rules such as password length, password history, and so on. If you have issues setting a new password, contact your system administrator for the password requirements and restrictions of your ID store.

4. In the **Confirm New Password** field, enter your new password again.

5. Click **Save** to save your change.

Providing Login Information for External Applications

The **My Accounts** page enables you to provide login credentials for all external applications that are configured to be accessed through WebCenter Portal. After you have provided your credentials, every time you access an external application within WebCenter Portal, the login credentials are provided automatically.

> **✎ Note:**
>
> If you change the login credentials for an application, you must enter them again on the **My Accounts** page.

To provide login credentials for external applications:

1. From your user menu in the menu bar, select **Preferences**.

2. On the **My Accounts** page, select an application from the list.

Figure 5-5   Preferences - My Accounts Page

3. Enter login credentials as required for the selected application. Fields requiring values are marked with an asterisk (*).

> 💡 **Tip:**
>
> The applications you see on the **My Accounts** page are those that were configured by your system administrator. Contact your system administrator to request additional applications.

> ✎ **Note:**
>
> Login credentials vary from one application to another. For example, some applications may require user name and password, while others may require those values along with additional values, such as your mail address.

4. Select **Remember My Login Information** to enable automatic authentication to the selected application every time you log in to WebCenter Portal.

> **Note:**
>
> If you do not select **Remember My Login Information**, the login information that you enter is used only for the current user session. This means the next time you log in to WebCenter Portal, you must also log in to this application.

5. Click **Apply**.

6

Using WebCenter Portal Impersonation

WebCenter Portal Impersonation lets designated users impersonate other WebCenter Portal users and perform operations as those users. It provides instructions for initiating an impersonation session (by the impersonator) and allowing an impersonation session (by the impersonatee).

Topics:

- About WebCenter Portal Impersonation
- Allowing an Impersonation Session
- Initiating an Impersonation Session
- Troubleshooting

> **Note:**
>
> Tasks discussed in this chapter are not available if WebCenter Portal Impersonation is not enabled for the current WebCenter Portal domain. For more information, see Preparing WebCenter Portal for Personalization in *Administering Oracle WebCenter Portal*.

> **Permissions:**
>
> The tasks for granting impersonation rights described in this chapter are available to any WebCenter Portal user. Tasks for initiating impersonation sessions are available only to users who have been configured as "impersonators" by the system administrator. For more information, see Configuring Impersonators in *Administering Oracle WebCenter Portal*.

About WebCenter Portal Impersonation

WebCenter Portal Impersonation allows a WebCenter Portal administrator assign impersonation rights to a user ("impersonators"), so that the user can impersonate another WebCenter Portal user and perform operations as that user ("impersonatees").

> **Note:**
>
> You cannot assign impersonation rights to a enterprise group.

This may be useful in the following instances:

- A customer support representative may want to perform actions as another user in order to understand the issues being faced by that user

- An administrator may want to perform operations on behalf of a user

- A company executive may need to delegate someone to act on his or her behalf while away

How impersonation is used will depend on choices that have been made locally. Note that the user to be impersonated must also first grant rights to the intended impersonator.

Allowing an Impersonation Session

As a WebCenter Portal user, you can grant impersonation rights to designated impersonators.

You can allow someone to impersonate you during a specified time slot using the My Impersonators screen. Note that impersonators will not be able to access the My Impersonators screen during an impersonation session.

To allow an impersonation session:

1. In the Home portal, select the **WebCenter Portal Impersonation** tab.

2. On the **Users who can Impersonate me** page, enter the **User** name or use the Search function to find the user to set up with an impersonation session. Note that only users with impersonator privileges are displayed.

Figure 6-1   Preferences - Impersonation Page

3. Select the time slot during which the impersonator can impersonate you, and then click **Add** to add the user to the list of impersonators that can impersonate you.

> **Note:**
>
> You are granting rights to the user to impersonate you across all applications to which you have access. Exercise caution when choosing the impersonator and keep the access duration to a minimum duration.

You can select:

- **For Next 1 hour** to allow an impersonator to initiate an impersonation session during the next hour.

- **Today** to allow an impersonator to initiate an impersonation session during the current day. Note that "today" means the end of today as defined by your selected time zone and preferences.

- **For a specific time period** to allow an impersonator to conduct an impersonation session during a specific time slot for your time zone and preferences.

Figure 6-2   Impersonation Page with Impersonator
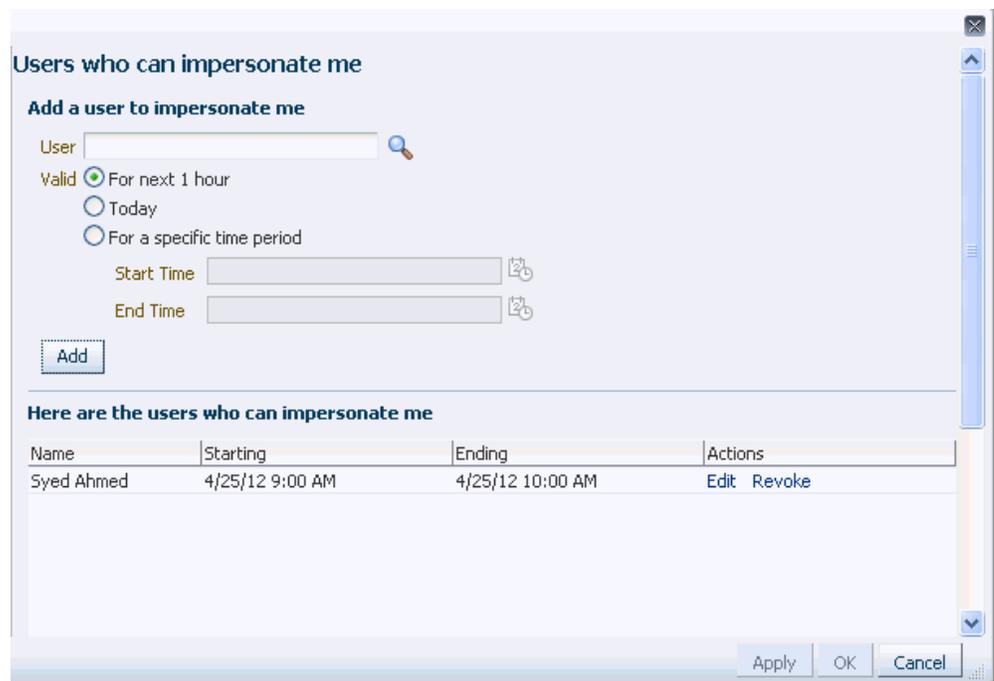
The impersonator can now conduct an impersonation session during the allotted time.

4. After adding an impersonator, you can change the time slot or revoke impersonation rights.

- To edit the impersonation session time slot, click **Edit**, change the start and end times, and click **OK**.

- To revoke an impersonation grant, click **Revoke** and then click **Revoke** again when prompted.

Note that impersonation grants that have already expired, or grants for users whose rights as a designated impersonator have been revoked by the administrator, will not appear in this list.

Initiating an Impersonation Session

This section describes how impersonators can initiate an impersonation session using either the Impersonation preferences page or using a hot key.

This section includes the following topics:

- Initiating an Impersonation Session Using the Impersonation Preferences Page
- Initiating an Impersonation Session Using a Hot Key

Initiating an Impersonation Session Using the Impersonation Preferences Page

You can view the impersonatees that have granted you impersonation rights and can initiate impersonation sessions using the Impersonation preferences page. Note that you must have been granted impersonation rights to access this screen by the administrator.

To view or start impersonation sessions:

1. From your user menu in the menu bar, select **Preferences**.

2. On the **Impersonation** page, scroll down past the list of users who can impersonate you to the list of the users that have granted you impersonation rights. Note that unless you have been configured as an impersonator, you will not be able to impersonate other users and the list will be empty.

Figure 6-3   Preferences - Impersonation Page

Figure 6-4   Preferences - Impersonation Page (Bottom)

Users whom I can impersonate

You are permitted to switch to following users to perform actions in the portal on their behalf

Name	Starting	Ending	Actions
Monty	7/1/2013 4:06 PM	7/1/2013 11:59 PM	Switch User

If **Switch User** appears as an action in the list, it means that you can begin an impersonation for that user; **No Action Possible** means that the grant has expired or is for a future point in time.

3. To initiate an impersonation session from the Impersonation preferences page:

   a. Click **Switch User** to select the user to impersonate.

   b. When prompted, confirm your credentials to start the impersonation session.

   You will be taken to the impersonatee's home page and all ensuing actions during the session will be done on the impersonatee's system as if they were done by the impersonatee. The only exception to this is that during the session you will not be able to access the impersonatee's Impersonation page.

   Figure 6-5   Impersonation Session - Impersonatee's Screen with Impersonation Overlay

   c. Click **Stop Impersonation** on the impersonation overlay, or from your (the impersonator's) Impersonation preferences page to end the impersonation session.

Initiating an Impersonation Session Using a Hot Key

You can initiate an impersonation session using a hot key from within WebCenter Portal at any time, provided you have been granted impersonation rights (see Configuring Impersonators in *Administering Oracle WebCenter Portal*), and that one or more impersonatees have set up an impersonation session with you as the impersonator.

To initiate an impersonation session using a hot key:

1. After logging into WebCenter Portal, press Ctrl+Shift+I from anywhere within the application.

   > **Note:**
   >
   > Although Ctrl+Shift+I is the default impersonation hot key, it can be reset to some other key sequence by the application administrator. If the default key sequence doesn't work, contact your administrator to check if the key has been reconfigured.

The impersonation overlay displays (see Figure 6-6).

Figure 6-6   Impersonation Overlay
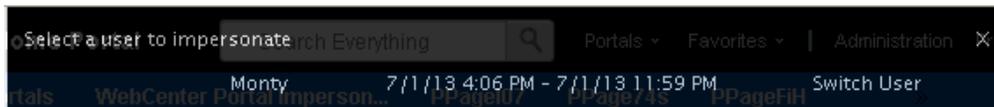
The overlay shows a list of those users who you can impersonate ordered by the impersonation session start time.

2. Click **Switch User** to select the user to impersonate.

   You can also click **X** to dismiss the overlay if you decide not to start impersonating now, or the user has not yet granted you impersonation rights. Press Ctrl+Shift+I again to invoke the overlay while you still have impersonation rights for one or more users.

3. When prompted, confirm your credentials to start the impersonation session.

   You will be taken to the impersonatee's home page and all ensuing actions during the session will be done on the impersonatee's system as if they were done by the impersonatee.

4. Click **Stop Impersonation** on the impersonation overlay (see Figure 6-5), or from the impersonatee's Impersonation preferences page, click **Stop Impersonation** to end the impersonation session.

Troubleshooting

This section describes common error conditions and their solutions

- Clicking Switch User Produces an Error
- Clicking Stop Impersonation Produces an Error

Clicking Switch User Produces an Error

Problem

When you click **Switch User** you are taken to an error page rather than a screen where you can enter your credentials.

Solution

The access time may not fall within the impersonation session's allotted time slot. Check the duration on the Impersonation preferences page and try again. Alternatively, you can ask the impersonatee to revoke your impersonation rights and grant them to you again. If this fails to resolve the problem then contact the system administrator to inspect the OAM logs to determine the problem. Also, if you enter incorrect credentials on the consent page the impersonation session will not begin and you will be taken to an error page. To resolve this error, return to your home page and begin the impersonation session again.

One final reason why initiating impersonation session may fail, even when it looks like you are trying to impersonate within the correct duration, is because the OAM server and WebCenter Portal server clocks are not in sync. If you have checked that you are

trying to start a session within the correct time frame, and that your credentials are correct contact your administrator to see if this may be the case. Configuring OAM and WebCenter Portal's server clock settings is described in Configuring WebCenter Portal for Impersonation in *Administering Oracle WebCenter Portal*.

Clicking Stop Impersonation Produces an Error

Problem

You are taken to an error page when you click when you click **Stop Impersonation**.

Solution

If you are taken to an error page when you click **Stop Impersonation**, go to the home page and check if the impersonation session has ended. If not, click **Logout** to explicitly end your impersonation session and your own session and then contact the system administrator to inspect the OAM logs to determine the cause.

Part II

Working with Portals and Pages

This part of *Using Portals in Oracle WebCenter Portal* provides information about the Home portal, personal pages, and working with user-created portals.

- Working In the Home Portal
- Creating and Managing Personal Pages
- Exploring Portals

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7

Working In the Home Portal

The Home portal is where you have access to WebCenter Portal activities, your personal documents, the portal browser, your profile, and your personal pages.

Topics:

- About the Home Portal
- How do I access the Home portal?
- What You Can Do In the Home Portal
- Opening a Page in the Home Portal
- Customizing Your View of a Page in the Home Portal
- Resetting All of Your User Customizations on a Page in the Home Portal
- Rearranging Page Order in the Home Portal
- Showing or Hiding Pages in Your View of the Home Portal

About the Home Portal

In addition to having access to WebCenter Portal activities, your personal documents, available portals, and your profile, you can create your own *personal pages* . The Home portal can also be customized to expose *System pages* and *business role pages* to selected audiences.
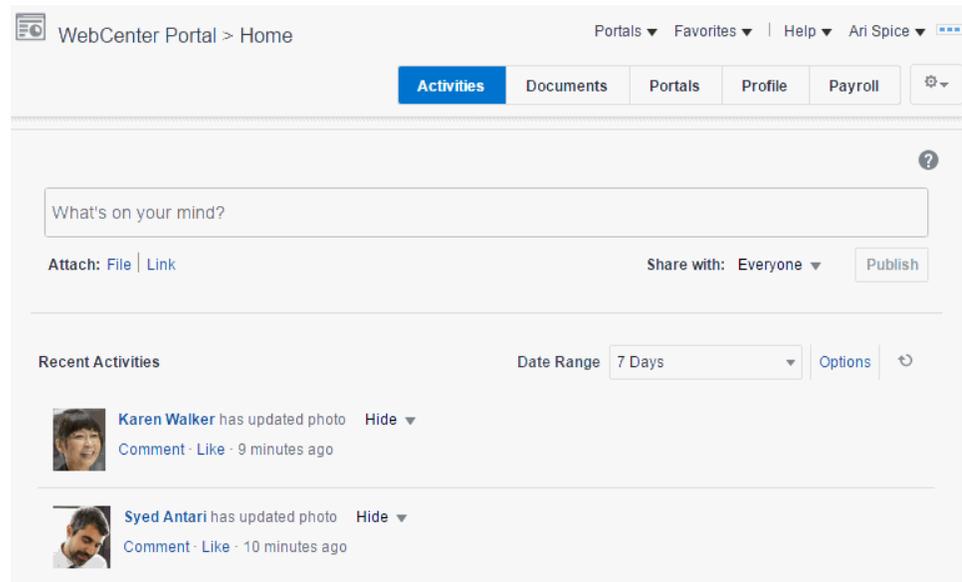
These pages are available to you in the Home portal. For instructions on how to show pages that are hidden by default, see Showing or Hiding Pages in Your View of the Home Portal.

To create your own personal pages to display here, see Creating and Managing Personal Pages.

Pages	Description	More Information
Activities	Make statements about your personal status and provide links to external or internal objects using Publisher; View information about activities using Activity Stream.	See Sharing Messages, Files, and URLs and Tracking Portal Activities
Documents	Create, view, and manage your documents in your personal document library.	See Adding Content to a Portal
Portals	Access available portals, and manage your portal memberships.	see Exploring Portals
Profile	View personal information, such as contact information, a photo, your location within the company hierarchy, and so on. You can also access to your *connections*, other WebCenter Portal users with whom you communicate or collaborate.	See Managing Your Profile and Managing Your Contacts
Portal Templates	If you are an advanced user, you can build portals and custom portal templates using this page. This page is hidden by default.	See Working with Portal Templates in *Building Portals with Oracle WebCenter Portal*
Tag Center	Allows you to view and manage tags on WebCenter Portal objects. Tags provide a means of applying your own meaningful terms to and bookmarking application objects, making them easy to locate the next time you go looking for them. This page is hidden by default.	See Working with Tags
WebCenter Portal Impersonation	Lets you assign the right for someone else to impersonate you and lets you impersonate a user for whom you have been given impersonation rights. For example, impersonation might be useful if a customer support representative needs to perform actions on your behalf to understand issues you are experiencing, a system administrator might need to perform operations on your behalf, or you might be delegated someone else's responsibilities while they are away. This page is hidden by default.	See Using WebCenter Portal Impersonation

How do I access the Home portal?

You can access the Home portal using any one of these methods.

- Use the URL `http://host:port/webcenter/portal/home`

- In the toolbar, click your user name and then select **User Profile** .

- In the portal browser, select **Home Portal** .

- From the **Portals** menu, select **Home Portal**, as shown.
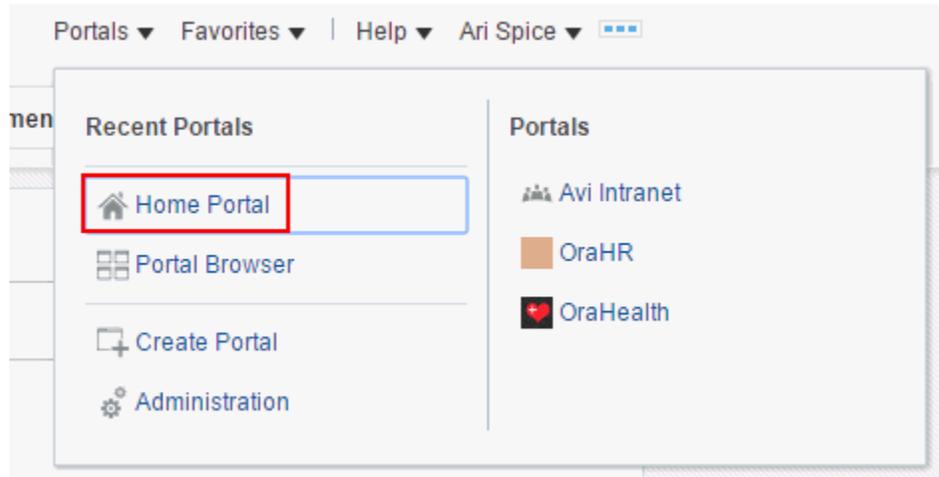
What You Can Do In the Home Portal

You can perform the following actions in the Home portal:

- Work with system pages and business role pages made available to you on the **Personalize Pages** page. See the remaining sections of this page to customize, rearrange, show, and hide these pages.

- Work with personal pages. For information, see Creating and Managing Personal Pages.

- Manage your contacts, connect with them through instant messaging and email, and collaborate with other WebCenter Portal users. For more information, see the chapters in Connecting and Collaborating with Other Users.

- Create and manage documents, collaborate with others on documents, and publish content. For more information, see the chapters in Adding Content to a Portal.

- Use tools and services to notify you when things change, track activities, and monitor RSS feeds. For more information, see the chapters in Staying Informed.

- Use tools and services to manage your schedule and work environment through calendars, notes, links, tags, and bookmarks. For more information, see the chapters in Staying Organized.

Opening a Page in the Home Portal

In the Home portal, you have access to your personal pages, system pages, and other pages to which you have been granted access.

The way that you access pages in the Home portal depends on the page template that is defined for the Home portal and the controls that the application specialist has made available. In all configurations, however, you can open pages using a *pretty URL*.

To open a page in the Home portal:

- Click the page name in the Home portal navigation, such as tabs along the top.

- Enter the following URL in your browser:

  http://*host:port*/webcenter/portal/profile/*userName*/page/*pageName*

> ✎ **See Also:**
>
> WebCenter Portal Pretty URLs in *Building Portals with Oracle WebCenter Portal*.

- Open the **Personalize Pages** page, and click the name of the page you want to open (Figure 7-1).

> 💡 **Tip:**
>
> The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙▾ menu.

Figure 7-1   Personalize Pages: Opening a Page

Customizing Your View of a Page in the Home Portal

You can change your view of a given page in the Home portal in many ways, including rearranging your view of page content, hiding components, and resizing components. All of these options are *user customizations*, which affect only your view. The views of all other users who have access to the page remain unchanged.

This section describes the user customizations you can perform on a page:

- About User Customizations on a Page

- Rearranging Page Content

- Removing Components from Your View of a Page

- Resizing Components

- Collapsing and Expanding Components

About User Customizations on a Page

You can customize the way pages appear in your own personal view of the page in many ways. For example, you can change page layout, reposition, remove, resize, and collapse components, all within just your view of a page.

User customizations are yours and yours alone. That is, the changes you make through the procedures described in the following sections affect only your view of the page. No other users are affected by your changes.

> **Note:**
>
> When you revise a component in page view mode while another user deletes the same component in page edit mode, an error page opens. Simply navigate back to the original page. The deleted component does not appear, and you can continue working on other components.

Whether you can customize a page depends on permissions granted to you or your application role and on how user customizations are configured. You can tell if you have such permission by the presence or absence of the controls discussed in this section. If you do not see these controls, contact your system administrator to ask for a higher-level of access or for a configuration change.

Rearranging Page Content

Components can be repositioned by dragging and dropping them on the page.

To rearrange components by dragging and dropping:

*   Click and hold the header of the component you want move, drag it to its target position, and release your mouse button.

    A shadow indicates where the component is placed when you drop it (Figure 7-2).

Figure 7-2   Dragging and Dropping a Component on a Page
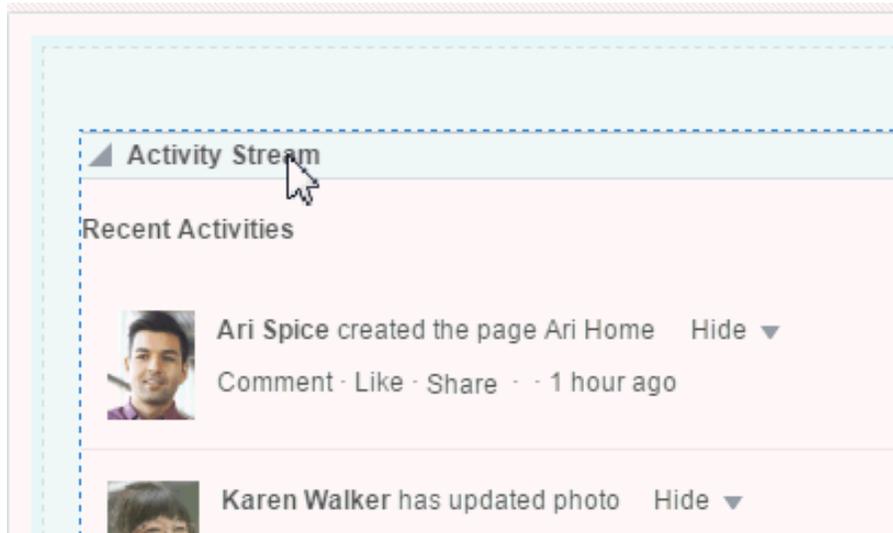
Removing Components from Your View of a Page

If you find that a component, such as a document viewer or portlet, is not useful to you and the component displays a **Remove** icon, you can remove it from your view of the page. The Remove icon is exposed by the component Display Options properties.

Keep in mind that you can restore a removed component only by editing the page and adding a new component instance.

To remove a component from your view of a page:

• Click the **Remove** icon on the component header (see Figure 7-3).

Figure 7-3   Remove Icon on a Component
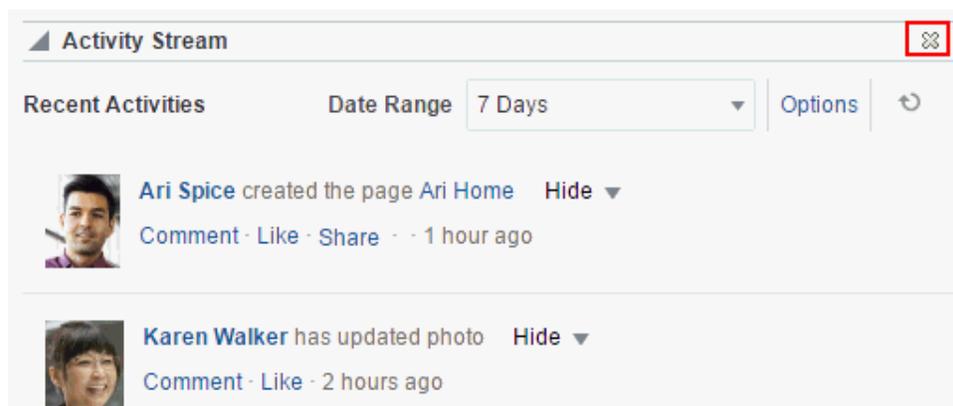
The component is removed from your view of the page.

Resizing Components

The border and header surrounding a component is also known as *chrome*. Chrome can clarify the boundaries of the component and provide an access point for component actions, such as those on the **Actions** menu and those embedded in the chrome itself. In the latter case, the chrome may include a **Resize** handle that you can use to increase or decrease the height of the component (Figure 7-4).

Figure 7-4   Resize Handle on a Component
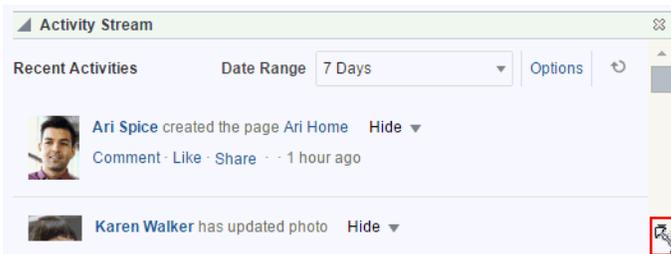
> **Note:**
>
> The position of the resize handle differs for bidirectionally displayed components. Those components displayed in a right-to-left orientation display the resize handle on the left side.

To use this feature, click and hold the **Resize** handle and drag it up to decrease the height of the component or down to increase the height of the component.

Collapsing and Expanding Components

With one click, you can collapse some components so that they roll up like a window shade, useful for removing the visual noise of an unused component from your application view. Collapse is available when a component shows a header. With another click, you can expand a collapsed component.

To collapse and expand components on a page:

1. Click the **Collapse** icon on the component header to roll the component up like a window shade (Figure 7-5).

Figure 7-5   Collapse/Expand Icon on a Component
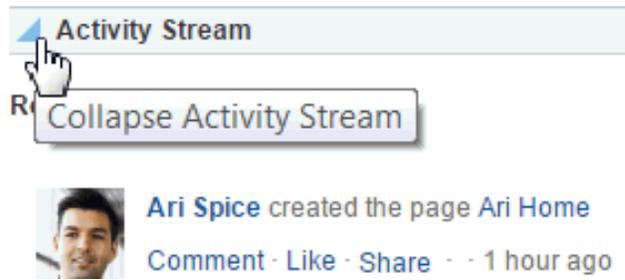
2. Click the **Expand** icon on the component header to restore the full component to view (Figure 7-6).

Figure 7-6   Collapsed Component
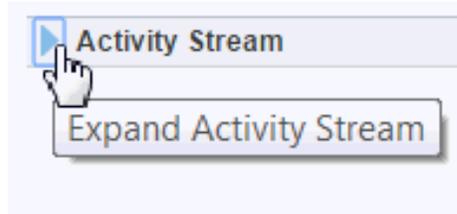
Resetting All of Your User Customizations on a Page in the Home Portal

You can change your view of a page in many ways, including rearranging your view of page content, hiding components, and resizing, as described in Customizing Your View of a Page in the Home Portal.

To reset all of your personal customizations on a page in the Home portal:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page.

   > **Tip:**
   >
   > The way you access the **Personalize Pages** page depends on the page template in use. For example, you may access it through an **Actions** menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **Reset Layout** (Figure 7-7) to open the Reset Layout dialog.

Figure 7-7   Page Actions: Reset Layout
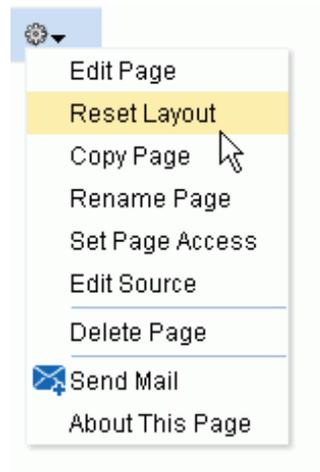
3. To confirm your intent to remove all of your user customizations from the page, click **Reset**.

Rearranging Page Order in the Home Portal

On the **Personalize Pages** page, you can change the order in which pages are listed or arranged in your view the Home portal. This affects the order of the tabs exposed in the Home portal.

To rearrange page order in the Home portal:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page.

> **Tip:**
>
> The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙️▾ menu.

2. Use the icons in the **Reorder** column to rearrange page order (Figure 7-8).

> **Note:**
>
> You can also reorder pages by dragging and dropping the page names

Figure 7-8   Personalize Pages: Reorder

Showing or Hiding Pages in Your View of the Home Portal

By default, the Home portal exposes your personal pages and selected system pages as tabs. You may want to hide some pages, or expose system pages that are hidden by default, such as the **Portal Templates** page.

To show or hide pages in your view of the Home portal:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page.

   > ○ **Tip:**
   >
   > The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙▾ menu.

2. On the **Personalize Pages** page, select or deselect the **Show Page** check box for the pages you want to show or hide (Figure 7-9).

   > ✎ **Note:**
   >
   > If you deselect the **Show Page** check box for the current page, the **Personalize Pages** page closes and the current page is hidden.
   >
   > Within the Home portal, one page must always be shown; therefore, you cannot hide all pages.

Figure 7-9   Personalize Pages: Show Page

8

Creating and Managing Personal Pages

Create, secure, edit, copy, and delete your own personal pages, which are available in the Home portal to you and to other users to whom you grant access.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you need the application-level permission `Pages: Create, Edit, and Delete Pages`. Users with this permission can create and manage their personal pages in the Home portal.

Topics:

- About Personal Pages
- Creating a Personal Page in the Home Portal
- Changing the Layout of a Personal Page
- Changing Display Options for a Personal Page
- Adding or Modifying Parameters for a Personal Page
- Managing Your Personal Pages
- Setting Security for a Personal Page
- Editing a Personal Page
- Editing the Source of a Personal Page
- Copying a Personal Page
- Renaming a Personal Page
- Sending Mail with a Link to a Personal Page
- Viewing Information About a Personal Page
- Deleting a Personal Page

About Personal Pages

> **✎ Note:**
>
> The system administrator may choose to prohibit the creation of personal pages in the Home portal, allowing only the display of business role pages and system pages, over which you have less control.

With appropriate permissions, you can create, secure, edit, copy, and delete your own *personal pages* in the Home portal, and populate them with components and content such as Message Board, Events, Discussions, portlets, and documents.

By default, personal pages can be seen in the Home portal only by the user who created them, but users can also allow other users to see their personal pages (see Setting Security for a Personal Page). While individuals are primarily responsible for managing the content of their personal pages, a system administrator has the authority to administer all personal pages in WebCenter Portal administration, as described in Managing Personal Pages in *Administering Oracle WebCenter Portal*.

Personal pages are functionally similar to *portal pages*, but their purpose is different: personal pages are for an individual user's use in the Home portal, whereas portal pages are created by a portal manager for use by all members of a portal. For more information about the different types of *pages* in WebCenter Portal, see What Are Pages?

Creating a Personal Page in the Home Portal

After setting page creation defaults, you can create a personal page in the Home portal:

- Setting Page Creation Defaults for Personal Pages
- Creating a Personal Page

Setting Page Creation Defaults for Personal Pages

If your system administrator has made the option available, you can set page creation defaults to reduce the number of steps required to create a personal page in the Home portal. That is, you can specify the page style that is selected by default when you open the Create Page dialog. You can also select to bypass the Create Page dialog, which enforces the default page style.

The settings you establish for yourself override any page creation settings set by the system administrator.

To set personal page creation defaults:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page.

    > **Tip:**
    >
    > The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙▾ menu.

2. On the Personalize Pages page, click **Set Page Defaults** to open the Set Page Defaults dialog.

Figure 8-1   Set Page Defaults Dialog
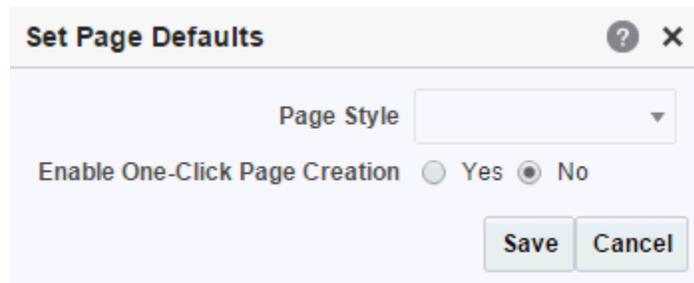
3. To set page creation defaults:

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

    For detailed information about the seeded page styles, click the Help icon. Note, however, that your system administrator may provide additional custom page styles or restrict page styles to a shorter list.

    > **Tip:**
    >
    > Make sure that the page style you select does not contain any content publishing components. Content publishing is not supported in personal pages. Built-in page styles that you can use are Portal, Web, Blank, and Product Information.

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

    - **Yes**—Bypass the Create Page dialog, and create all of your personal pages using the specified **Page Style**. This enforces a common look and feel across your personal pages.

      > **Tip:**
      >
      > When you bypass the Create Page dialog, your result is a page with a generic name. For information about renaming pages, see Renaming a Personal Page.

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

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

Creating a Personal Page

Depending on how your portal navigation is implemented and the page template design in use, there may be several ways to create a personal page in your view on the Home portal.

To create a personal page in the Home portal:

1. In the Home portal (see How do I access the Home portal?), click **Create Page**.

> 💡 **Tip:**
>
> The location of the **Create Page** link depends on the page template in use. For example, in a side navigation template, you may access it through an **Actions** menu. You can also find it on the **Personalize Pages** page.

WebCenter Portal will either:

- Open the Create Page dialog (Figure 8-2).
- Immediately create a new page with a default style, if specified in the Set Page Defaults dialog (see Setting Page Creation Defaults for Personal Pages).

Figure 8-2   Create Page Dialog
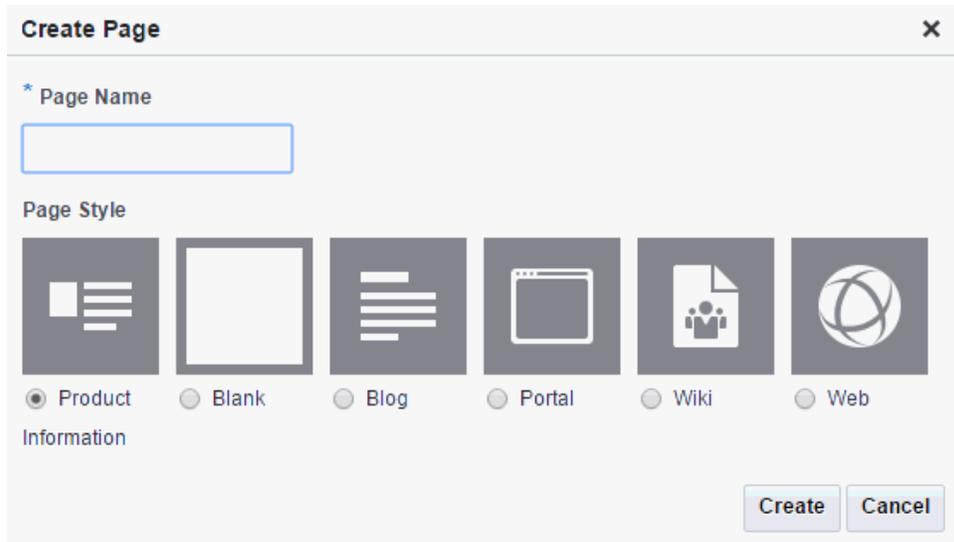
> ✎ **Note:**
>
> Your system administrator can control the options that appear in the Create Page dialog, so your view may differ from that depicted in Figure 8-2. Additionally, the system administrator can set an attribute on a custom page style that determines whether a newly created page that is based on that style opens in page edit mode or page view mode.

> 💡 **Tip:**
>
> Make sure that the page style you select does not contain any content publishing components. Content publishing is not supported in personal pages. Built-in page styles that you can use are Product Information, Blank, Blog, Portal, Wiki, and Web Information.

2. If the Create Page dialog opens, provide a name for the page.

   There are no restrictions on the characters you can use in page names. You cannot give a personal page the same name as an existing page or certain system pages (`Activities`, `Documents`, `Tag Center`, `Analytics`, `WebCenter Portal Impersonation`). However, the names of the following system pages are allowable as personal page names: `Portals`, `Portal Templates`, `Profile`.

   > **Note:**
   >
   > While there are restrictions on naming files (including wiki documents), there are no naming restrictions for page names. Thus, while any of the following characters can be used to name a wiki *page*, the page title will include the character(s) but the associated wiki *document* will replace the illegal character with _.
   >
   > `? # & \ / * " | < > : ^`
   >
   > For example, if you create a wiki page named "`What's In a Name?`", the page will have this title, but the associated wiki document will be named `_What's In a Name__`.

3. Select a page style to define the page structure.

   For detailed information about the seeded page styles, click the Help icon. Note, however, that your system administrator may provide additional custom page styles or restrict page styles to a shorter list.

4. Click **Create**.

   The new page opens in the page editor, where you can add content.

   > **See Also:**
   >
   > For information about editing personal pages in the Home portal, see Editing a Personal Page.

Changing the Layout of a Personal Page

When you create a new page, the first page of the wizard enables you to select a page style for the page. Every page style includes a default layout, which you can modify in the page editor.

> **Note:**
>
> With the exception of the Wiki, Blog, and Web page styles, pages based on the built-in page styles allow you to modify the default layout in the page editor, selecting a new built-in or custom layout.

To change the page layout for a personal page:

1. Open the page in the page editor.

2. Click ⊞ to open the Page Properties dialog.

3. On the **Layout** tab, click the **Layout** menu and select one of the available layouts. The selections show both built-in and custom layouts that are listed on the application-level **Shared Assets** page.

Figure 8-3   Changing Page Layout: Layout Menu
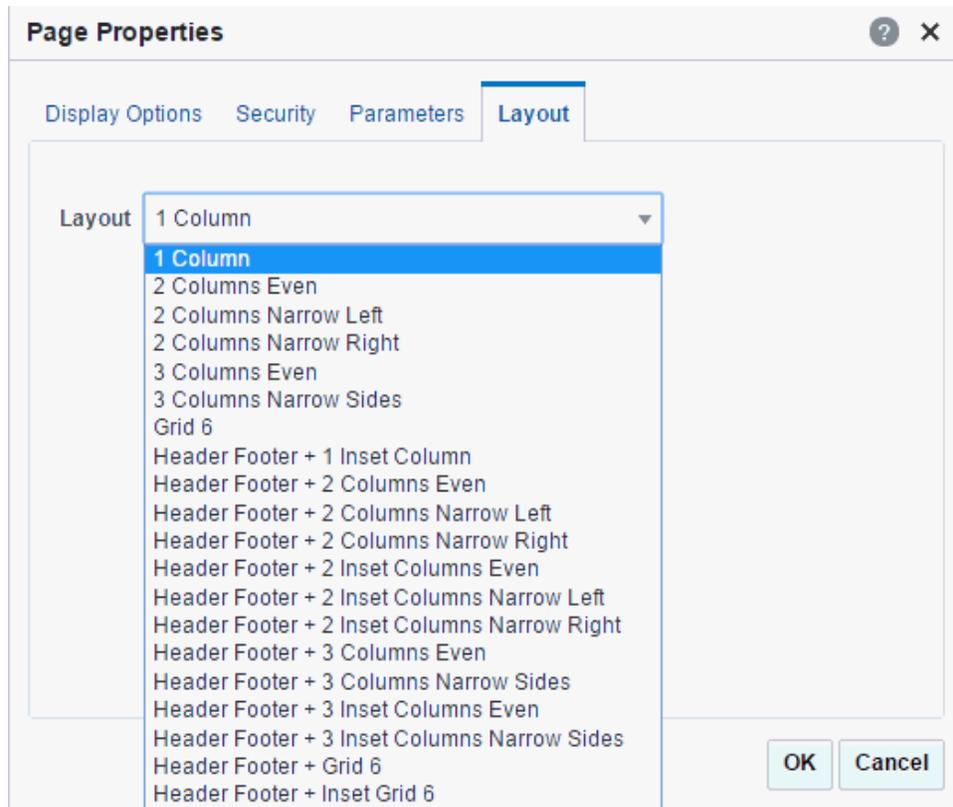
4. Click **OK** to apply the selected layout to the current page.

Changing Display Options for a Personal Page

Page display options provide a means of specifying a page background color and image, and applying additional CSS encoding to the page.

> **Note:**
>
> To access other page parameters, which you can use in wiring pages to page components, see Adding or Modifying Parameters for a Personal Page. To set properties that control page security settings, see Setting Security for a Personal Page.

To change page display options:

1. Open the page in the page editor (see Editing a Personal Page).

2. Next to the page name, click the **Page Properties** icon (Figure 8-4) to open the Page Properties dialog.

Figure 8-4   Page Properties Icon

3. In the Page Properties dialog, click the **Display Options** tab (Figure 8-5).

Figure 8-5   Page Properties: Display Options
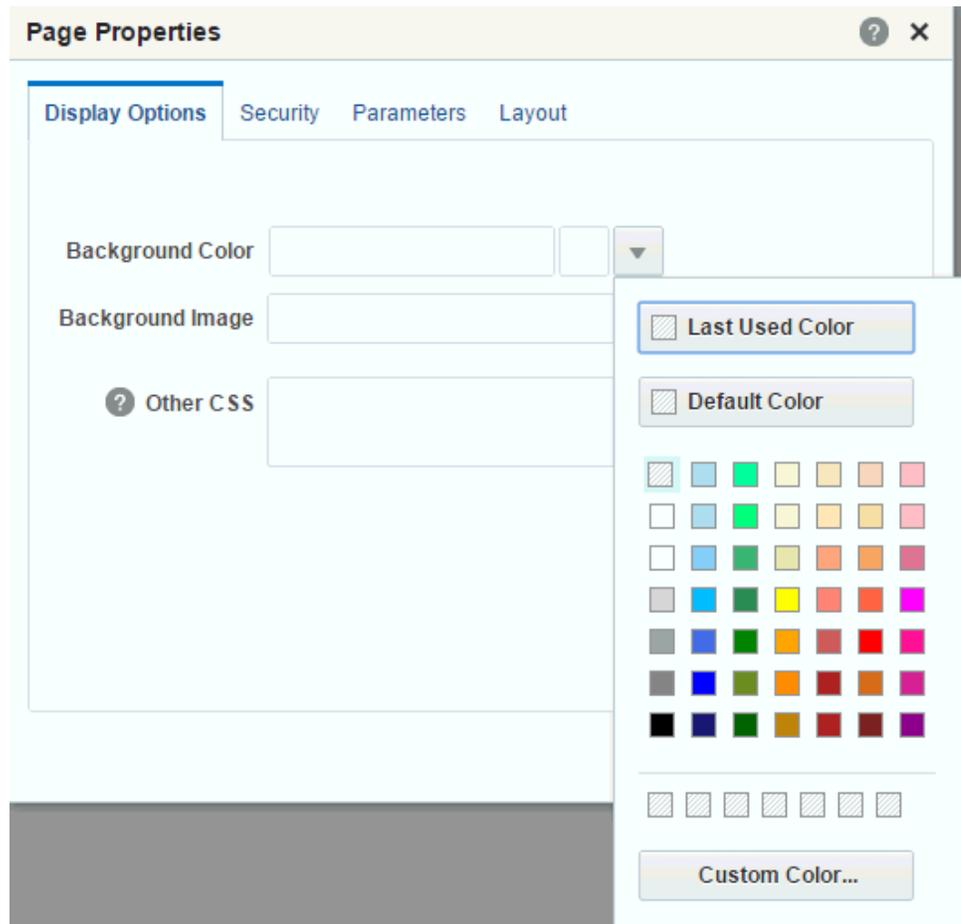
4. To set the page background color, open the color picker next to **Background Color**, and select a background color for the page in one of the following ways:

   • Select a color by clicking it.

   • Enter the color's RGB equivalent in the **Background Color** field.

   > 💡 **Tip:**
   >
   > Enter RGB values in the format `RRGGBB` or `#RRGGBB` or `r,g,b`

- Create a custom color by clicking **Custom Color** in the picker and selecting a color and a saturation level using the selector and the slider provided.

Figure 8-6   Custom Color Picker

Click **OK** to enter the color value in the **Background Color** field.

5. To set a background image for the page, enter in the **Background Image** field a full URL or a URL relative to the application root. For example:

    ```
    http://www.abc.com/image.jpg
    ```

6. In the **Other CSS** field, add any desired CSS encoding that is not covered by the other page properties. Examples:

    ```
    background-position:center;
    background: #F8F8FF url(http://www.google.com/intl/en_ALL/images/logo.gif) no-
    repeat fixed top; font-size: xx-small
    ```

    You must use standard CSS syntax for this value to be valid. For more information about **Other CSS**, see Other CSS Property: Usage and Examples in *Building Portals with Oracle WebCenter Portal*.

7. Click **OK** to save your changes and apply them to the page.

Adding or Modifying Parameters for a Personal Page

Page parameters allow communication between components and the pages that contain them by providing a means of storing values for passing to page components that have been configured to consume them.

For example, imagine a page that contains stock ticker and stock news components. You want the ticker and the news components to both consume the same parameter value so that they both show information for the same company.

> **Note:**
>
> If you change a page parameter value, the new value is immediately saved. You cannot revert back to the prior value. Therefore, take note of parameter values before you change them in case you want to set them back to their original values.

To add or modify page parameters:

1. Open the page in the page editor (see Editing a Personal Page).

2. Click the **Page Properties** icon (Figure 8-7) to open the Page Properties dialog.

Figure 8-7   Page Properties Icon

3. On the **Parameters** tab:

    • Add new parameters by clicking **Add a page parameter** . In the Add a Page Parameter dialog, enter a new parameter **Name**, then click **Add Parameter** to add the parameter to the **Parameters** tab, with a value entry field. Optionally, enter a value for the new parameter.

    • Modify existing parameters as required

...

Figure 8-8   Adding a Page Parameter
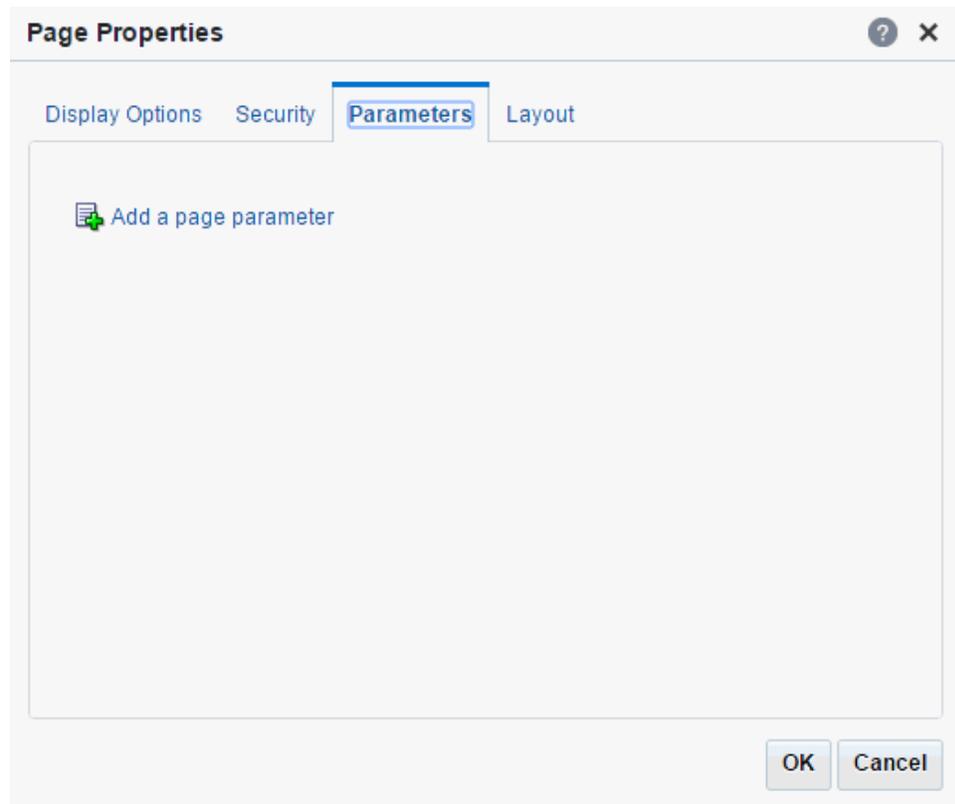
All parameter values provide access to an Expression Language (EL) editor, which you can use to select or specify a variable value instead of a constant value. Click the ▾ icon next to a parameter, then select to open the editor. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Managing Your Personal Pages

To manage a personal page, or a page you have permission to manage:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page (Figure 8-9).

> 💡 **Tip:**
>
> The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙▾ menu.

Figure 8-9 Personalize Pages Page

2. On the **Personalize Pages** page, select a page, then choose any of the actions available to you on the **Actions** menu for the page (Figure 8-10):

Figure 8-10 Personalize Pages: Page Actions Menu
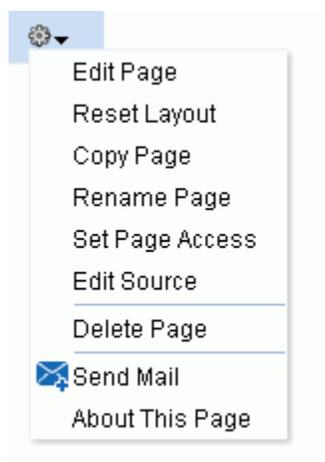
- **Edit Page**. Open a page that you own or have privileges to edit in the page editor. See Editing a Personal Page.

- **Reset Layout**. Remove all of your user customizations from a selected page. This action removes such personal changes as rearrangement, resizing, or collapsing of components in only your view of the page. See Resetting All of Your User Customizations on a Page in the Home Portal.

- **Copy Page**. Make a personal copy of a page. See Copying a Personal Page.

- **Rename Page**. Rename a page that you own or have privileges to manage. See Renaming a Personal Page.

- **Set Page Access**. Add or remove access to a page by user name or role. See Setting Security for a Personal Page.

- **Edit Source**. View and edit page source in HTML. See Editing the Source of a Personal Page

- **Delete Page**. Delete a page that you own or have privileges to manage. See Deleting a Personal Page.

- **Send Mail**. Send a link to a page that you own or have privileges to manage. See Sending Mail with a Link to a Personal Page .

- **About This Page**. View information about a page. See Viewing Information About a Personal Page.

Setting Security for a Personal Page

By default, the personal pages you create in the Home portal are accessible only to you and the system administrator. You can set page security to allow other users to view and work with your personal pages or revoke access.

When you grant access to one of your personal pages to another user, the other user must deliberately show the page in their view of the Home portal. The user must take this step for each session because shared pages are not automatically shown on login.

> ✎ **See Also:**
>
> For information about how to show a hidden page, see Showing or Hiding Pages in Your View of the Home Portal.

You may want to open a personal page to many users, but limit the exposure of a particular page component to a specific user, a user group, or to users who are assigned a specific application role. This is an advanced task, described in Setting Component Access in *Building Portals with Oracle WebCenter Portal*.

You can grant or revoke access to a personal page as described in the following sections:

- Accessing Personal Page Security Using the Page Properties Dialog
- Accessing Personal Page Security Using the Set Page Access Dialog
- Setting Personal Page Security

Accessing Personal Page Security Using the Page Properties Dialog

To access security settings for a personal page using the Page Properties dialog:

1. Open the page in the page editor.

2. Next to the page name, click the **Page Properties** icon.

Figure 8-11   Page Properties Icon

3. In the Page Properties dialog, click the **Security** tab.

Figure 8-12   Personal Page: Security Tab in Page Properties Dialog
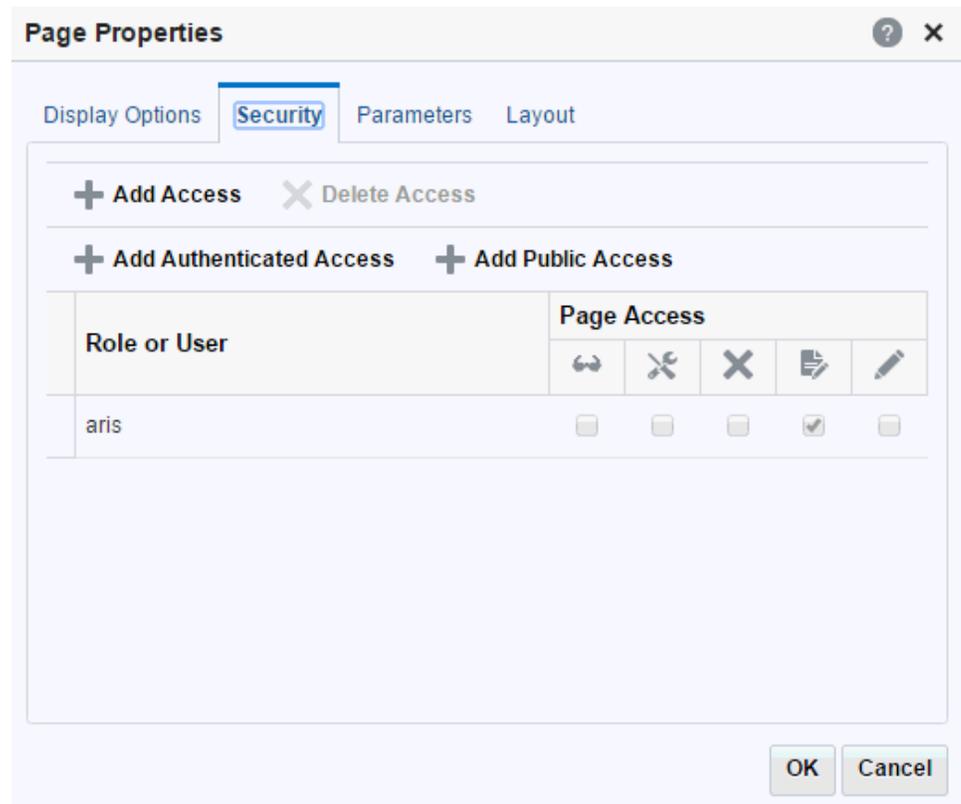
4. Follow the general steps for setting page access in Setting Personal Page Security.

Accessing Personal Page Security Using the Set Page Access Dialog

To access security settings for a personal page using the Set Page Access dialog:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page.

> ### 🔆 Tip:
>
> The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙▾ menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **Set Page Access** to open the Set Page Access dialog (Figure 8-13).

Figure 8-13   Set Page Access Dialog: Personal Page
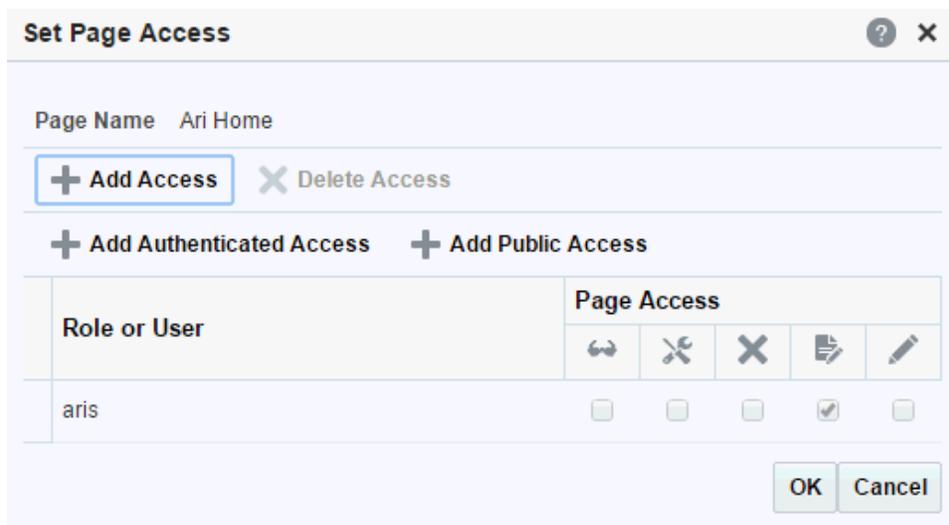
3. Follow the general steps for setting page access in Setting Personal Page Security.

Setting Personal Page Security

To set security on a personal page in either the Page Properties dialog or the Set Page Access dialog:

1. To grant page access permissions to all authenticated users (that is, to users who are logged in to WebCenter Portal), click **Add Authenticated Access**.

   The role `authenticated-role` is added under **Role or User** with default **View** access to the page.

   Figure 8-14   Authenticated Role Access
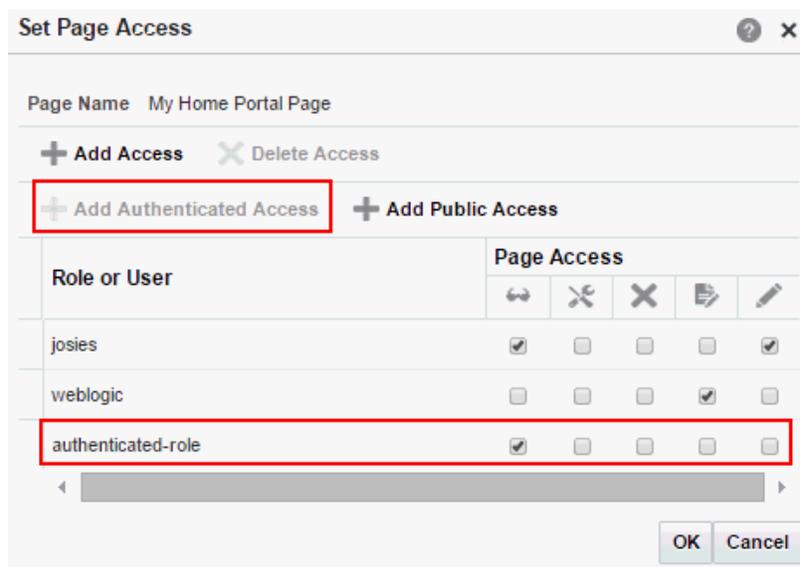
2. To grant page access permissions to all public users (that is, users who have not logged in to WebCenter Portal as well as those who have) click **Add Public Access**.

The role `anonymous-role` is added under **Role or User** with default **View** access to the page.

Figure 8-15   Anonymous Role Access
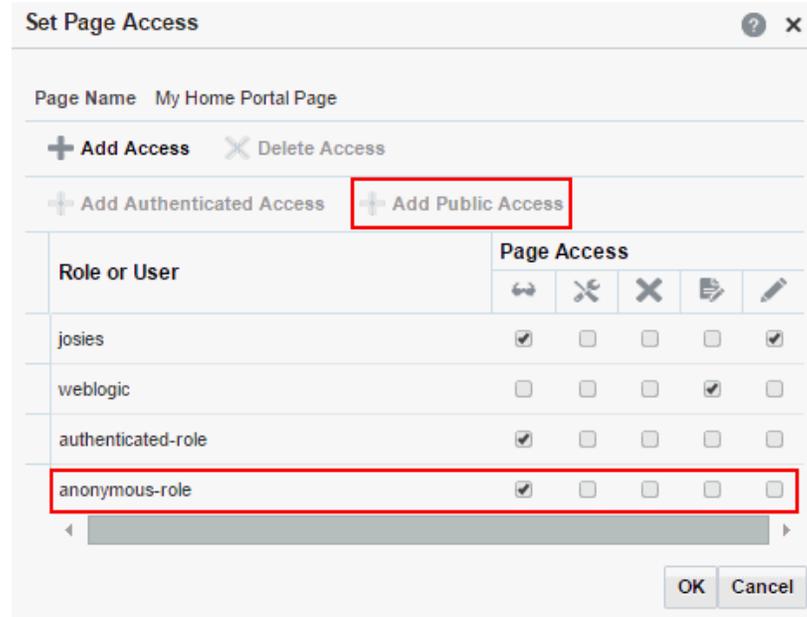
3. To grant page access permissions to selected users and roles, click **Add Access** to open the Add Access dialog.

Figure 8-16   Add Access Dialog
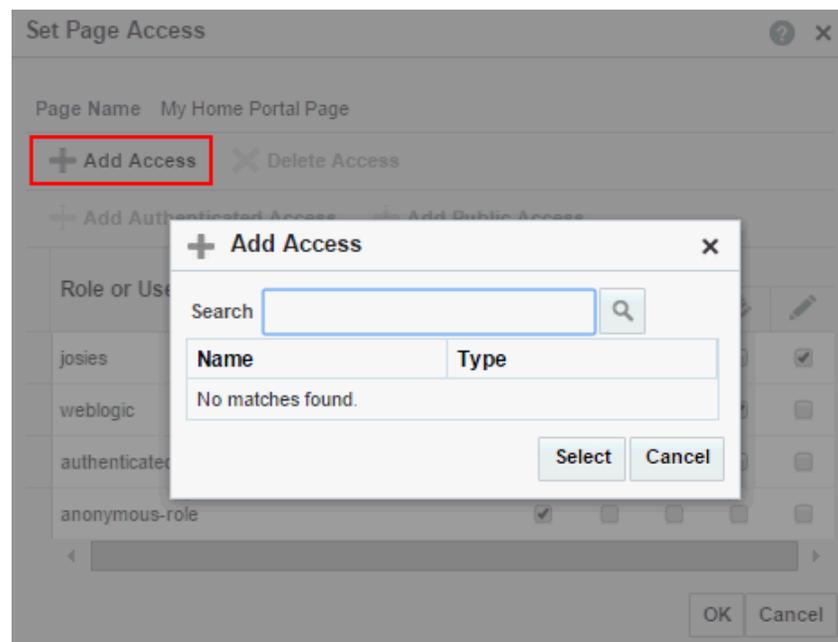
4. Identify the users who can access this page. Choose from all available users, groups, and application roles. Use the Search feature to search your identity store:

    a. In the **Search** field, enter two or more characters and click the **Search** icon.

    For tips on searching the identity store, see Searching for a User or Group in the Identity Store in *Building Portals with Oracle WebCenter Portal*.

    > **Tip:**
    >
    > This search is not case sensitive.

    Users, groups, and roles matching your search criteria appear in the **Add Access** dialog.

    b. Select one or more names from the list.

    Press Ctrl+click to select multiple users.

    c. Click **Select**.

    The selected users and groups appear in the Set Page Access dialog. By default, users have the `View Page` permission on the page. Set other permissions appropriately.

5. To modify the permissions assigned to a current user or role, select one or more check boxes to grant page privileges:

Table 8-1   Page Access Privileges in the Set Page Access Dialog

Page Access	Role or User Permissions
View Page	Access the page for viewing, but cannot perform any other actions on the page. Other permissions do not implicitly include this privilege
Edit Page	Edit the page using the page editor. This includes adding, rearranging, and deleting content; renaming the page; and changing page properties. This permission additionally requires the **View Page** permission.
Delete Page	Delete the page. This permission additionally requires the **View Page** permission.
Perform All Page Actions	Perform all actions on the page.
Personalize Page	Adjust a user's own view of a page. This includes rearranging page content, collapsing and restoring page content, and removing page content. This permission additionally requires the **View Page** permission.

> **Tip:**
>
> By default, all authenticated users and user roles that you add are granted page view access. The other access privileges must be explicitly granted.

6. To revoke access to the page, select the role or user, and click **Delete Access**.

7. Click **OK**.

Editing a Personal Page

When you edit a personal page, you can add or remove content, set properties on content and on the page itself, and perform additional customizations that affect the view of everyone who has access to the page.

To edit a personal page:

1. In the Home portal, open the page in the page editor.

> **✎ Note:**
>
> Depending on how the Home portal is designed, you can enter page edit mode from a page **Actions** menu or an **Actions** menu next to a page on the **Personalize Pages** page. Or, the page template used for the page may provide an **Edit Page** link.

2. Edit the page as desired. Some tasks are exclusive to personal pages, while others are no different than editing a page in a portal. For steps to edit a personal page, see:

   • Changing Display Options for a Personal Page

   • Showing or Hiding Pages in Your View of the Home Portal

   • Rearranging Page Order in the Home Portal

   • Customizing Your View of a Page in the Home Portal

   • Resetting All of Your User Customizations on a Page in the Home Portal

   • Editing a Portal Page in *Building Portals with Oracle WebCenter Portal*

3. Click the **Save** icon to save your changes.

Editing the Source of a Personal Page

You can edit the source of a personal page without opening the page in the page editor.

To edit the source of a personal page:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page.

> **💡 Tip:**
>
> The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙▾ menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **Edit Source** to open the Edit Source dialog (Figure 8-17).

Figure 8-17   Personal Page: Edit Source
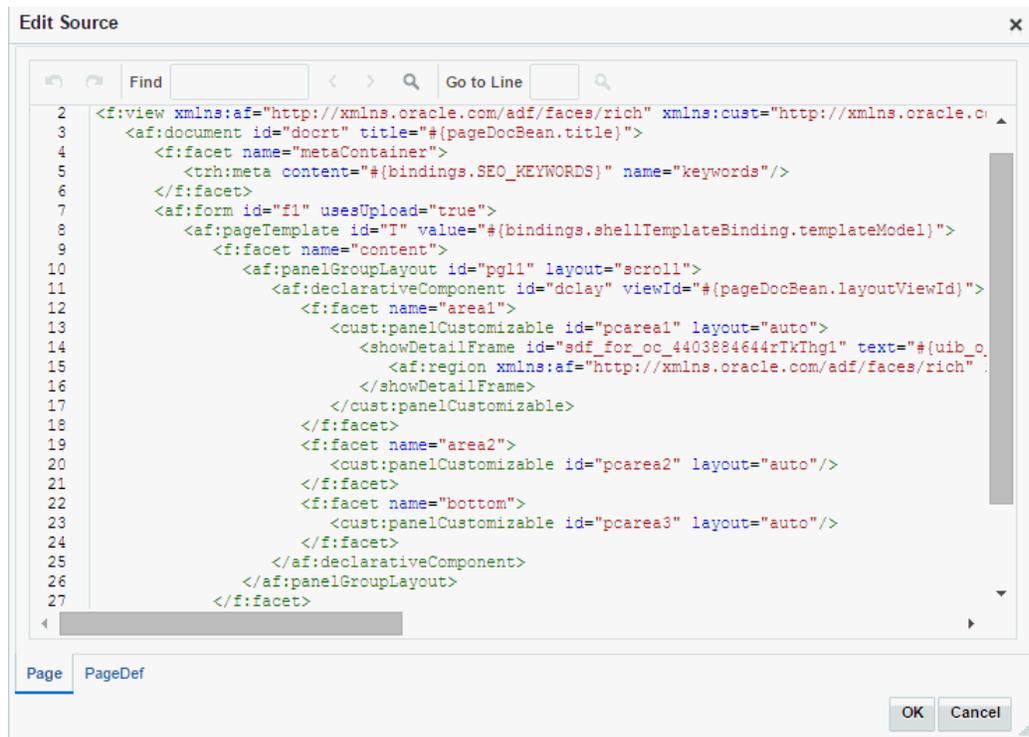
3. Edit the page source, as desired.

4. Click **OK**.

Copying a Personal Page

When you copy a page, all content from the original page is also copied. The copy opens in the page editor so that you can start immediately making adjustments to the copy.

Note that a copy does *not* also include the original page's access settings. You must set access on the copy as a new page (see Setting Security for a Personal Page).

To copy a personal page:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page.

> **Tip:**
>
> The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙▾ menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **Copy Page** to open the Copy Page dialog.

3. Enter a name for the page copy in the **Page Name** field, and click **OK**.

The copied page opens in the page editor.

4. Edit the copy as desired than click the **Save** icon to exit the page editor.

Renaming a Personal Page

When you rename a page, any pretty URLs that use the old name will be broken. Also note that system pages, such as the **Announcements**, **Lists**, and **Events** pages, cannot be renamed.

To copy a personal page, or a page you have permission to manage:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page.

> ### Tip:
>
> The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙▾ menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **Rename Page** to open the Rename Page dialog.

3. Enter a new name for the page, and click the **Save** icon.

Sending Mail with a Link to a Personal Page

If you own or have manage permissions on a page in the Home portal, you can send other users a link to the page.

To send mail to other users populated with a link to a personal page:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page.

> ### Tip:
>
> The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙▾ menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **Send Mail** to open your mail application compose window, showing a URL link to the page.

Viewing Information About a Personal Page

To view information about a personal page:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page.

> **Tip:**
>
> The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙▾ menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **About This Page** to open the Page Information dialog, which shows Name, Created By, Date Created, Last Modified, and Direct URL.

Deleting a Personal Page

To delete a personal page:

1. In the Home portal (see How do I access the Home portal?), open the **Personalize Pages** page.

> **Tip:**
>
> The way you access this page depends on the page template in use. For example, you may access it through an **Actions** ⚙▾ menu.

2. On the **Personalize Pages** page, click the **Actions** icon for the page, and choose **Delete Page** to display the Delete Page dialog.

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

9
Exploring Portals

Learn more about portals and how to perform the tasks available to any knowledge worker in an existing portal.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you need the application-level permissions granted by default to the application `Authenticated-User` role.

Topics:

- About Portals
- Interacting with Portals Before Logging In (Public User)
- Viewing and Accessing Available Portals
- Sending Mail to Portal Members or Managers
- Viewing Information About a Portal
- Publishing the Link to a Portal
- Searching for a Portal
- Joining a Portal
- Searching in a Portal
- Working with Pages in a Portal
- Changing Your Role in a Portal
- Cancelling Your Portal Membership

About Portals

A portal provides a dedicated and readily accessible area for relevant tools, pages, and content and supports the inclusion of specified members, each of whom have defined roles associated with permissions in the portal. As you explore, you will learn more about the portals available to you, their purpose, and how to manage your role in a portal. Your experience in a particular portal depends on the purpose of the portal and your membership role.

Many features and tools to facilitate teamwork are built into the portal framework, instantly allowing portal members to share documents, discuss issues, schedule meetings, exchange messages, create lists, and much more.

Interacting with Portals Before Logging In (Public User)

Public portals are available to anyone with Internet access, without logging in to WebCenter Portal, allowing a portal to be shared with non-members and people outside of the WebCenter Portal community.

Public users who are not registered WebCenter Portal users can access public portals in two ways:

- Directly, using the portal URL provided to them.
- From the WebCenter Portal Welcome page, if their installation is configured to display this page, exposing a link to public portals (Figure 9-1).

Figure 9-1   Public Portals Link on Welcome Page
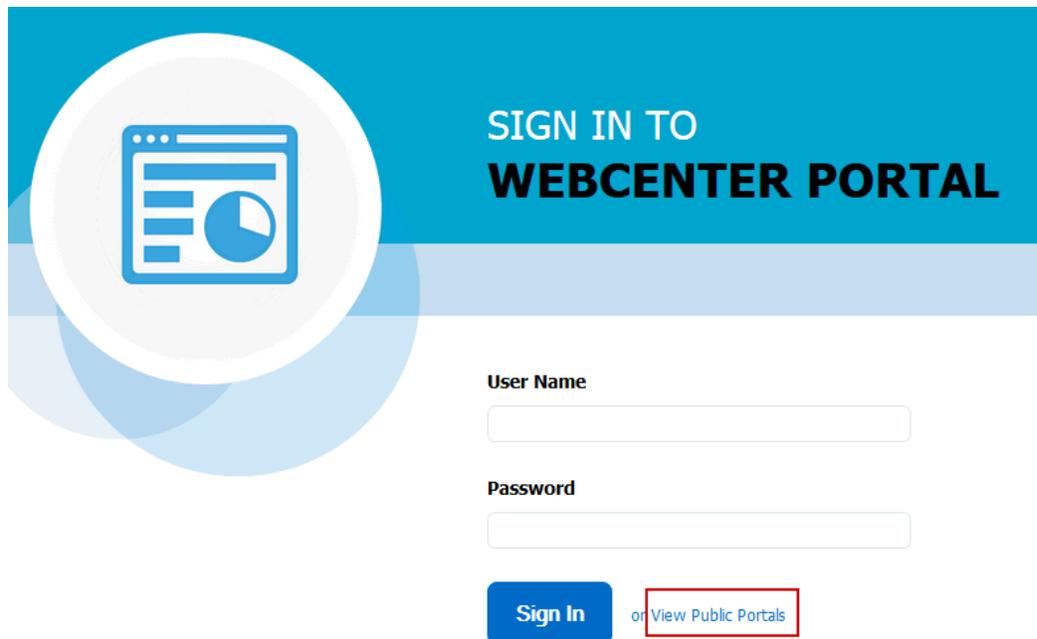
When a portal is made public, public users can view pages, lists, events, links and notes. To view announcements, discussions, and documents, the portal manager must explicitly grant these permissions. The public permissions granted by the portal manager override the public permissions set by the system administrator at the application level.

Viewing and Accessing Available Portals

You can participate in multiple portals and manage your portal memberships in the *portal browser*. By default, the portal browser is the first page you see when you log in to WebCenter Portal (Figure 9-2). Your system administrator may change the initial landing page to be the Home portal, a specific portal, or a specific page.

Figure 9-2   Portal Browser
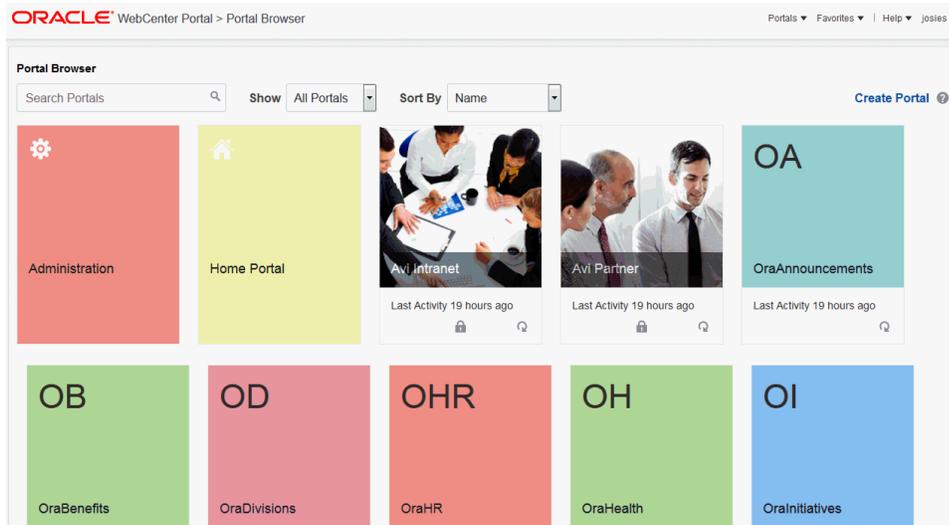
To work with the portals available to you:

1. If the portal browser is not displayed, open it in any of the following ways:

    •   From the **Portals** menu (Figure 9-3), select **Portal Browser**.

    Figure 9-3   Portals Menu
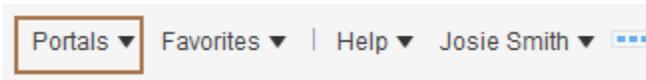
    •   In the Home portal (see How do I access the Home portal?), click the **Portals** tab.

    Figure 9-4   Home Portal: Portals Tab
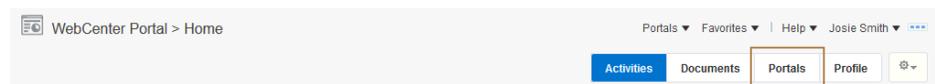
    In the portal editor, click the **Back to All Portals** icon (Figure 9-5)

    Figure 9-5   Portal Editor: Back to Portals Icon
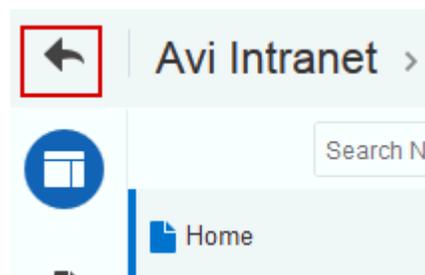
2. Optionally, select from the **Show** list at the top of the portal browser:

   • **All Portals** (Figure 9-6) to show all portals available to you, both public and private. Portals defined as *hidden* when created are not shown.

   Figure 9-6   Showing All Portals
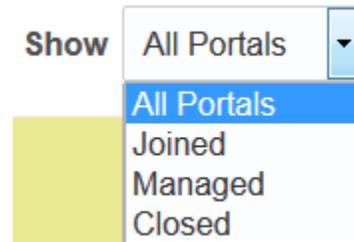
   • **Joined** to display portals of which you are a member.

   • **Managed** to display portals for which you have portal manager privileges.

   • **Closed** to display portals available to you that have been closed by the portal manager. When **Closed** is selected, the Home Portal and Administration tiles do not display in the portal browser. The content of a closed portal remains accessible and searchable to those who still want to reference it and portal members can continue working in the portal either by selecting **Closed** as described here, or by direct URL (`http://host:port/webcenter/portal/portalName`).

3. To find one or more specific portals, enter a full or partial search term in the keyword search, then press Enter (or click 🔍) to show all portals for which a match is found in the **Title**, **Acronym**, **Description**, or **Keywords** (specified when the portal was created or on the **General** page in the administration settings for the portal).

   To display all portals, delete the search string, then press Enter (or click 🔍) to refresh the portal browser with all portals.

   > **Note:**
   >
   > The Home portal and Administration pages are not included in search results.

4. To go to the Home page of a portal, click the portal tile.

   By default, a portal is shown in the portal browser as a color tile, overlaid with an acronym and portal name. In the portal administration settings, you can change the display of a portal in the portal browser to its logo.

   See Changing the Portal Logo

   The Security icon (🔒) indicates that the portal is secured and some action, like edit or change membership, and may not be available to you.

5. To display a menu of actions available on the portal, click 🜋 to explore the actions available to you, depending on your permissions in the portal.

For example, to view a portal and its pages, you must be a portal manager or a portal member with the portal-level permission `Basic Services: View Pages and Content` (standard permissions) or `Pages: View Pages` (advanced permissions).

Figure 9-7   Portal Actions Menu for Non-Member
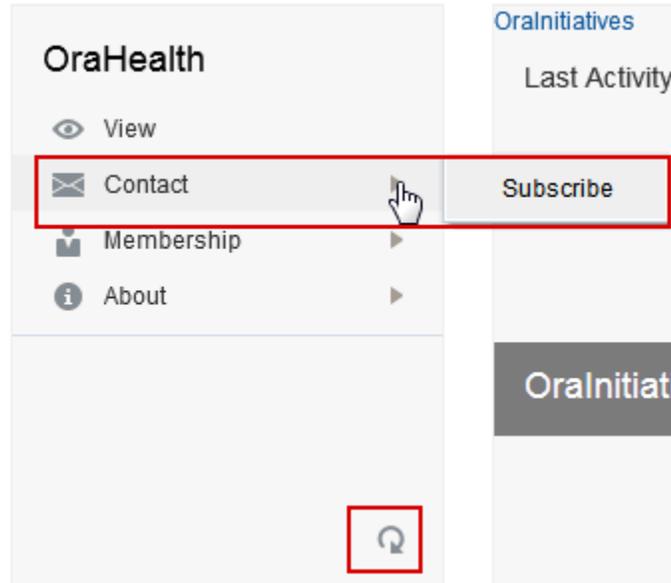
Figure 9-8   Portal Actions Menu for Portal Member with View-Only Permissions
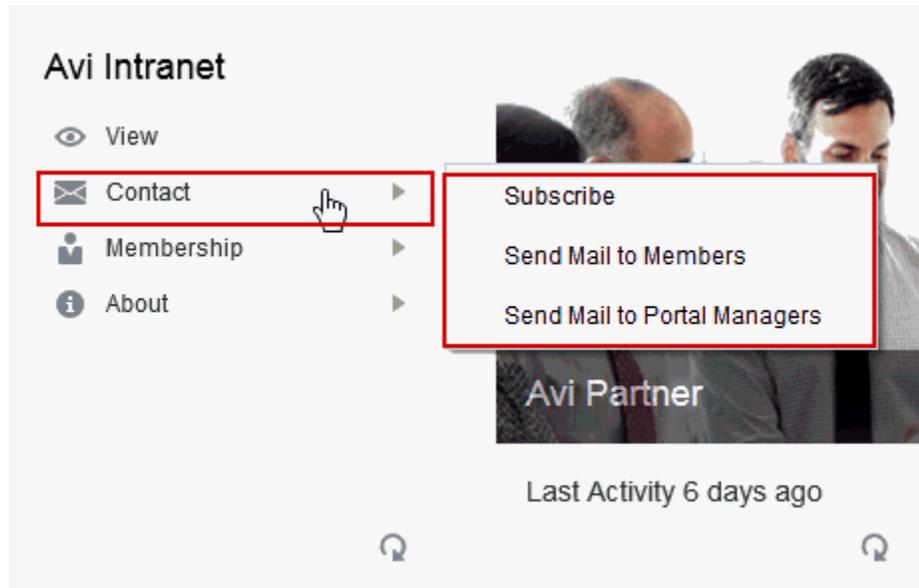
Figure 9-9   Portal Actions Menu for Portal Manager or Member
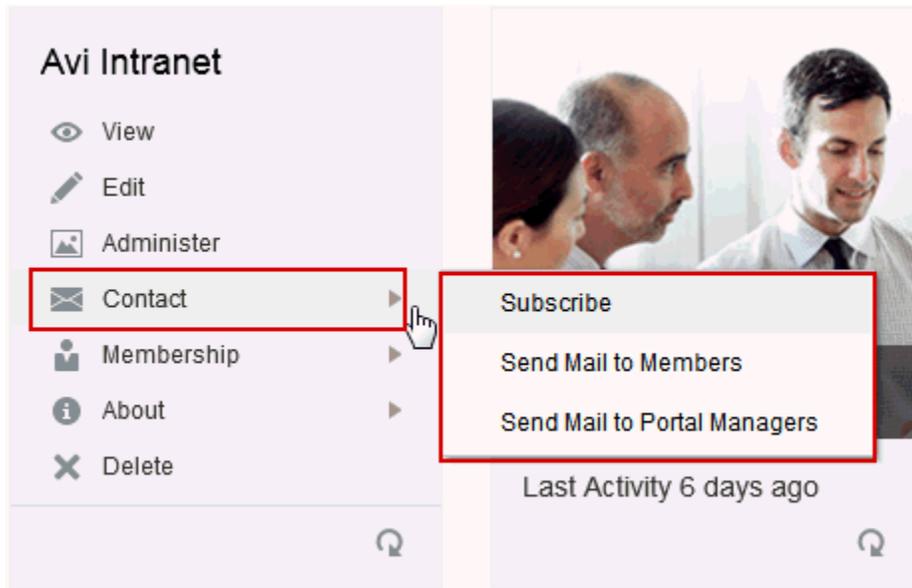
> **Note:**
>
> Portal administration selections (**Administer** and **Delete**) are shown only if you are the portal manager or have `Manage Configuration` permission in the portal.

Select any action that is available to you, depending on your permissions in the portal:

* **View** to open the home page of the portal in the browser, as it appears to end users.

* **Edit** to open the home page of the portal in the portal editor, available if you have editing permissions in the portal.

    See Editing a Portal in *Building Portals with Oracle WebCenter Portal*.

* **Administration** to open the portal administration settings pages, available only if you are the portal manager or have `Manage Configuration` permission in the portal.

    See Administering a Portal in *Building Portals with Oracle WebCenter Portal*.

* **Contact** menu:

    – **Subscribe** to open the Subscribe dialog, where you can select notification messages that you want to receive whenever the listed actions occur within the scope of the portal.

        See Setting Portal-Level Subscriptions.

    – **Send Mail to Members** and **Send Mail to Portal Managers** to open a pre-addressed message composer. The Members option opens a mail message that is addressed to everyone who is a member of the portal.

The Portal Managers option opens a mail message that is addressed to everyone assigned the role of portal manager in the portal. .

See Sending Mail to Portal Members or Managers.

- **Membership** menu:
  - **Join** to join a portal of which you are not a member.

    See Joining a Portal.

  - **Change Role** to change your role in the portal.

    See Changing Your Role in a Portal.

  - **Cancel Membership** to cancel your membership in the portal.

    See Cancelling Your Portal Membership.

- **About** menu:
  - **Portal** to view information about the portal.

    See Viewing Information About a Portal.

  - **Share Link** to share the portal URL with others.

    See Publishing the Link to a Portal.

- **Delete** to delete the portal, available only if you are the portal manager or have `Manage Configuration` permission in the portal.

Sending Mail to Portal Members or Managers

> **Note:**
>
> The **Send Mail** menu actions are available only if the profiles of one or more portal members or managers specify a mail address, and you are a portal member.

You can send mail to the members or the managers of a portal using the default mail distribution list for the portal. Advanced users can customize the mail distribution lists for a portal, as described in Configuring the Mail Distribution List for a Portal in *Building Portals with Oracle WebCenter Portal*.

You can send mail to portal members or managers in either of the following ways:

- In the portal browser (see Viewing and Accessing Available Portals), locate the portal to which the members or managers belong, click to display the portal actions, and select **Contact**, then **Send Mail to Members** or **Send Mail to Portal Managers** (Figure 9-10).

Figure 9-10   Portal Actions Menu for Portal Manager or Member
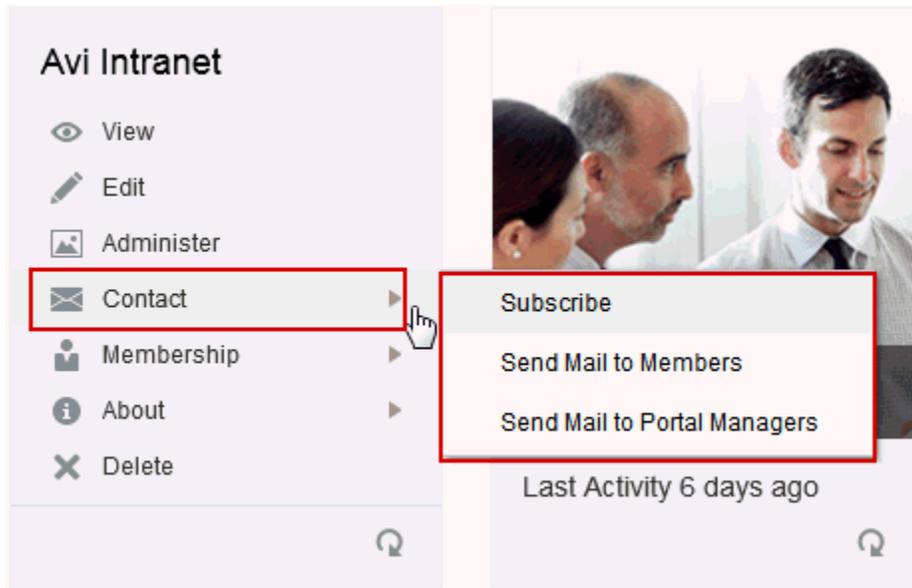
- When viewing a portal, click the **Actions** menu, and select **Contact**, then **Send Mail to Members** or **Send Mail to Portal Managers**.

> ✎ **Note:**
>
> The location of the **Actions** menu is dependent on the page template in use. For example, it may be an icon in the menu bar in a top navigation template.

Figure 9-11   Portal Actions Menu: Viewing Portal
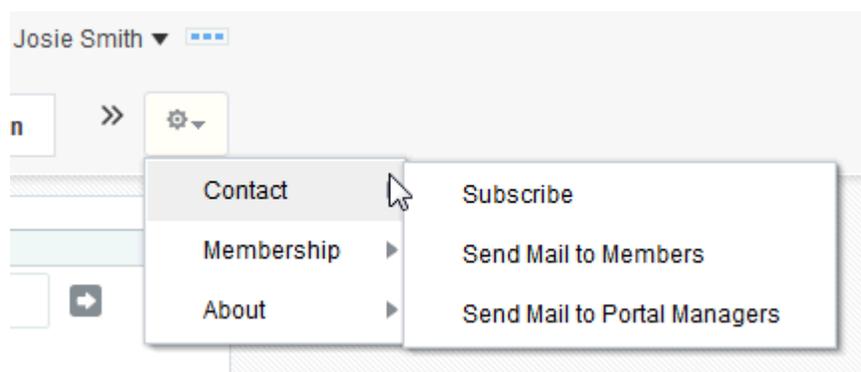
Your mail application opens, where you can compose and send mail to all members or managers of the portal.

Viewing Information About a Portal

To view information about a portal:

1. Open the About Portal dialog in any of the following ways:

   • In the portal browser (see Viewing and Accessing Available Portals), locate
     the portal for which you want to view information, click ⟳ to display the portal
     actions, and select **About**, then **Portal** .

   **Figure 9-12   Portal Actions Menu for Portal Member with View-Only
   Permissions**
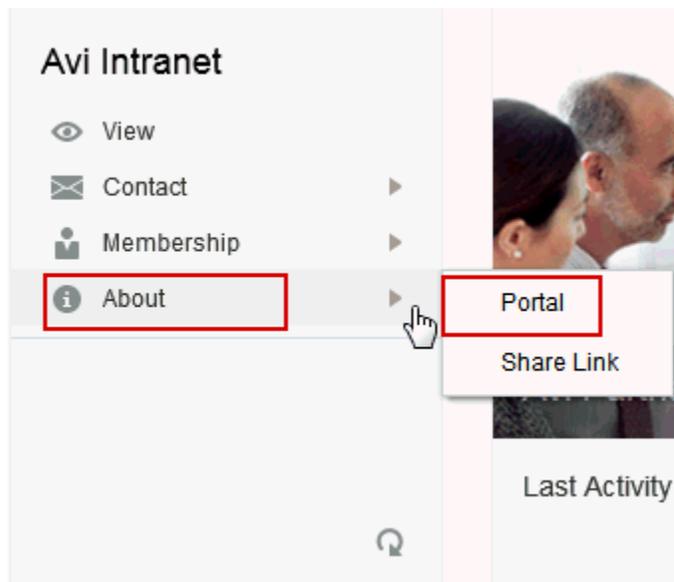
   • When viewing a portal, click the **Actions** menu, and select **About**, then
     Portal.

   > ✎ **Note:**
   >
   > The location of the **Actions** menu is dependent on the page
   > template in use. For example, it may be an icon in the menu bar in a
   > top navigation template.

   Figure 9-13   Portal Actions Menu: Viewing Portal
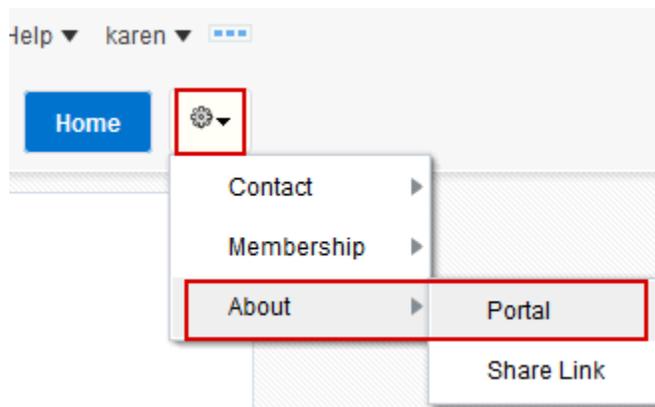
2. Explore the information in the About Portal dialog:

Figure 9-14   About Portal Dialog

- **Name**: Internal name of the portal displayed in the portal URL.
- **Display Name**: The name specified when the portal was created. This name displays at the top of the portal and other places where portals are available for selection, such as the portal browser.
- **Internal ID**: ID of the portal, which other applications may use to reference this portal.
- **Description**: A description of the portal, specified when creating the portal or in the portal administration settings.
- **Created By**: User name of the portal creator.
- **Date Created**: Date and time that the portal was created.
- **Direct URL**: URL that provides direct access to the portal.

Publishing the Link to a Portal

If you want to share a portal with others, you can publish a link to the portal that will appear in activity streams of other users. With appropriate permissions, users can directly access a portal by clicking the link that specifies the portal display name.

To publish the direct link to a portal:

1. Open the Share Link dialog in any of the following ways:

- In the portal browser (see Viewing and Accessing Available Portals), locate the portal for which you want to publish the link, click ⟳ to display the portal actions, and select **About**, then **Share Link**.

Figure 9-15   Portal Actions Menu for Portal Members With View-Only Permissions
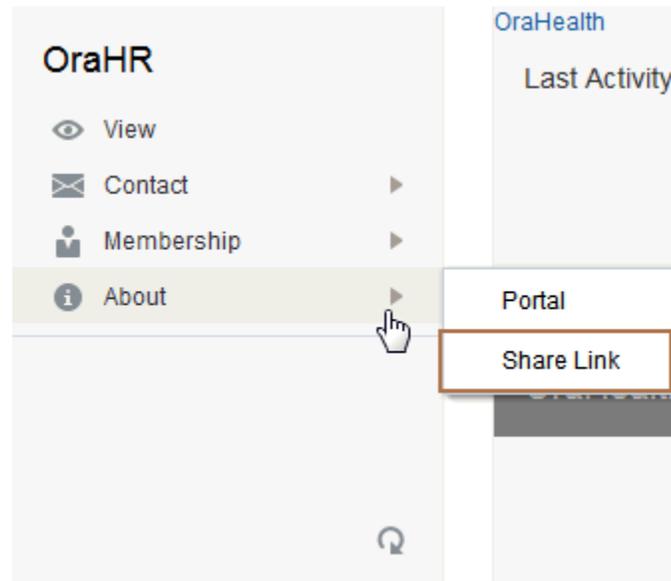
- When viewing a portal, click the **Actions** menu, and select **About**, then **Share Link**.

> **✎ Note:**
>
> The location of the **Actions** menu is dependent on the page template in use. For example, it may be an icon in the menu bar in a top navigation template.

Figure 9-16   Portal Actions Menu: Viewing Portal
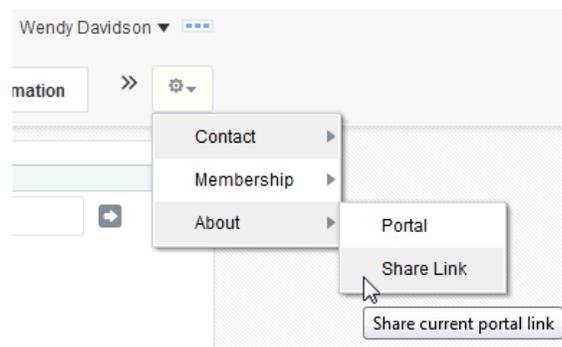
2. Optionally, enter a comment to appear with the link.

Figure 9-17   Share Dialog for a Portal
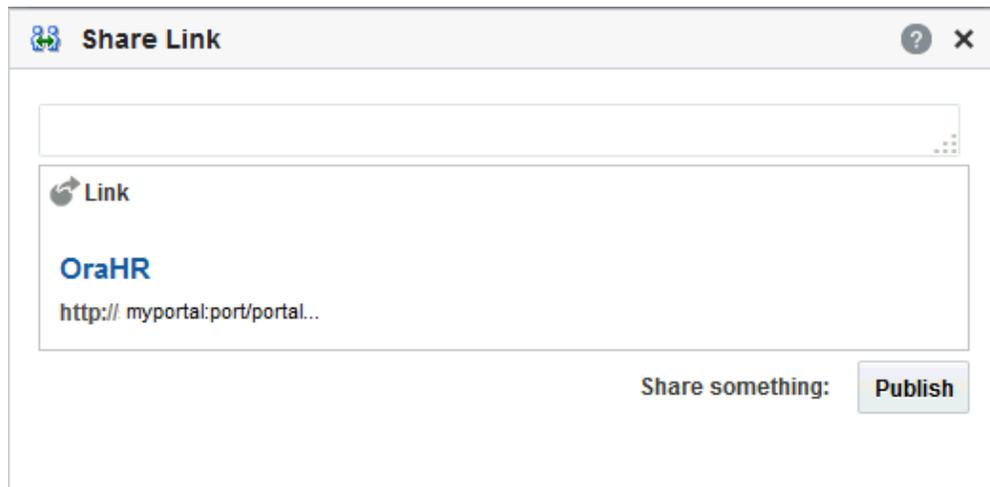
3. In the **Share with** list, select who you want to share the link with:

    *   **Everyone** to share the link with all members of the current portal in their activity streams. This is useful to notify members of updates to the portal.

    *   **Portals** to open the Select a Portal dialog, where you can select a portal to share the link in the activity streams of all members of the selected portal. This is useful for sharing information with members of other portals who may be interested in your portal.

4. Click **Publish**.

Searching for a Portal

To search for a portal by a string in the acronym, title, description, or keywords:

1. In the portal browser (see Viewing and Accessing Available Portals), enter a full or partial search term in the Search field.

    > **Note:**
    >
    > If the acronym for a portal has changed, it will no longer display in the search results if you search by acronym.

2. Press Enter or click the magnifier icon (Figure 9-18).

    Figure 9-18   Search Everything Field
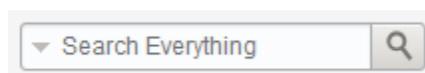
    The **Portals** page displays portals where the search string is found in the portal **Title**, **Description**, or **Keywords** (specified when the portal was created or on the **Overview** page in the administration settings for the portal).

3. To display all portals, delete the search string, then press Enter or click the magnifier icon to refresh the portal browser with all portals.

Joining a Portal

To become a member of a portal, you may be registered with WebCenter Portal, or you may be a public user. If a portal allows self-service membership, you can request membership to the portal. Or, you may receive an invitation to join a portal.

This section includes the following topics:

- Joining a Portal (Registered WebCenter Portal User)
- Joining a Portal (Unregistered WebCenter Portal User)

Joining a Portal (Registered WebCenter Portal User)

If a portal is configured to allow self-service membership, as described in Managing Self-Service Membership for a Portal in *Building Portals with Oracle WebCenter Portal*, you can request membership to the portal. Or, you may receive an invitation to join a portal.

Some membership requests require approval from the portal manager so you may not gain access immediately. If WebCenter Portal is configured to use SOA, you will receive a worklist notification (if you are using Oracle BPM Worklist) or email when your membership is approved.

To join a portal:

1. In the portal browser (see Viewing and Accessing Available Portals), locate the portal for which you want to view information, click ⟳ to display the portal actions.

2. Select **Membership** and then select **Join** (Figure 9-19).

Figure 9-19   About Portal Dialog (for non-member)
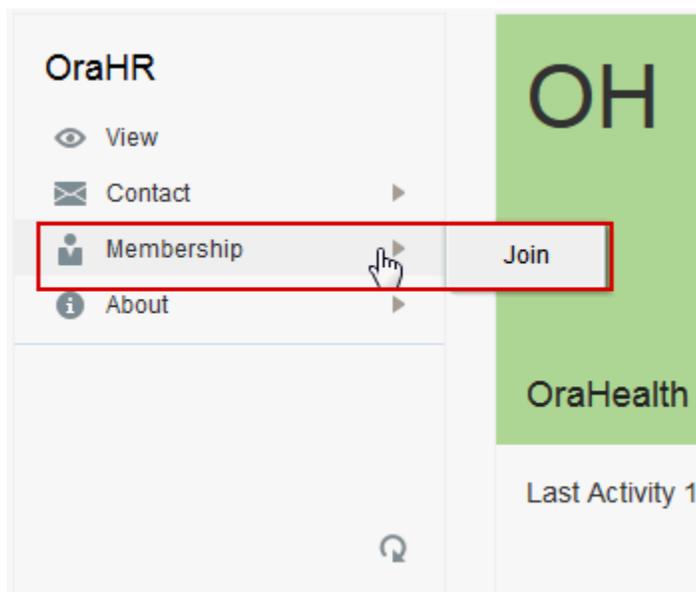
> **Note:**
>
> **Join** is shown only if the portal allows self-service membership, as described in Managing Self-Service Membership for a Portal in *Building Portals with Oracle WebCenter Portal*. If **Join Portal** is not shown, contact the portal manager directly to request membership.

A portal membership request page similar to Figure 9-20 opens, showing the default Request Membership page. Because the portal manager may customize this page, the page and roles you see may be different to the example shown here.

Figure 9-20   Requesting Portal Membership

3. Select the type of **Role** you want to play in this portal.

> **Note:**
>
> The only out-of-the-box portal role is that of `Portal Manager`, but a subset of this role or other custom roles names may display, depending on what roles the portal manager has defined for the portal.

4. (Optional) In the **Purpose** field, enter an explanation of why you need access to the portal with the role you have requested.

5. Click **Request Membership**.

   You may see a confirmation message, depending on whether or not the selected role requires the approval of the portal manager.

6. Click **OK**.

7. On the **Portals** page, click the Refresh icon to confirm your new membership status.

> **Note:**
>
> If membership requests require approval, you do not gain access immediately. Check back later or monitor your worklist (if you are using Oracle BPM Worklist) or email—you will receive notification as soon as your membership is approved.
>
> For more information about working with worklist items, see About the Process Workspace Tasks Page in *Managing and Monitoring Processes with Oracle Business Process Management*.

Joining a Portal (Unregistered WebCenter Portal User)

If you are not a registered WebCenter Portal user, you can still view public portals, but you cannot join a portal unless you receive a mail message from the portal manager inviting you to join a portal. If you want to join a portal, you must become a registered WebCenter Portal user.

Some membership requests require approval from the portal manager so you may not gain access immediately. If WebCenter Portal is configured with SOA, you will receive a worklist notification (if you are using Oracle BPM Worklist) or email when your membership is approved.

For more information about working with worklist items, see About the Process Workspace Tasks Page in *Managing and Monitoring Processes with Oracle Business Process Management*.

1. In the mail message you receive inviting you to join a portal, click the **Register Yourself** link included in the invitation mail to open the Self-Registration page, similar to Figure 9-21. Because the portal manager may customize this page, the page you see may be different to the example shown here.

> **✏ Note:**
>
> The Self-Registration page displays only if the portal allows self-service membership, as described in Managing Self-Service Membership for a Portal in *Building Portals with Oracle WebCenter Portal*.

Figure 9-21   Registering with WebCenter Portal
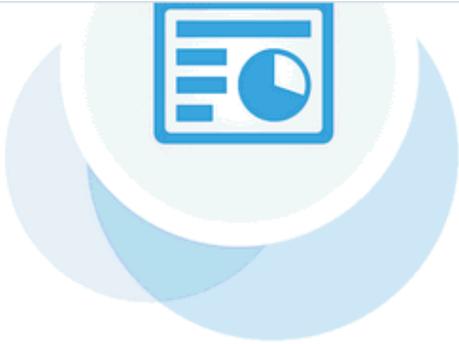
2. Choose a suitable **User Name**. The user name restrictions depend on the underlying identity store that is configured with WebCenter Portal.

   Click **Check User Name Available** to determine whether a WebCenter Portal user is registered with that name. Click **OK** to dismiss the confirmation message and, if necessary, enter a different name.

3. Enter a suitable **Password**, and then **Re-enter Password** for verification. The password restrictions depend on the underlying identity store that is configured with WebCenter Portal.

4. Enter your **First Name** and **Last Name**, and an **Email Address**.

5. Click **Register**.

After your User Name and Password are registered with WebCenter Portal, the portal to which you were invited opens.

Searching in a Portal

WebCenter Portal can be configured with Oracle Secure Enterprise Search with facet support, which includes the **Search** field at the top of the application for global (application-wide) searches. For more information, see Searching for Information with Oracle Secure Enterprise Search .

Working with Pages in a Portal

As a portal member, you will most likely be given access to pages in the portal. The portal manager can grant you permissions to view, create, edit, and rename pages in the portal. Other portal members can grant you permissions to access the pages that they own. Pages that you create are for your own use only, unless you specifically share them with other users.

You can work with pages in a portal as described in the following sections:

- Viewing a Page in a Portal
- Creating, Editing, and Managing a Page in a Portal

Viewing a Page in a Portal

In a portal, members have access to system pages and portal pages. The content on a portal page is typically targeted to a particular audience or objective.

The way that you access the pages of a portal depends on the page template that is defined for the portal and the controls that the portal manager has made available. In all configurations, however, you can view a page using a *pretty URL*.

You can view a page in a portal in the following ways:

- Click the page name in the portal navigation.
- Enter the following URL in your browser:

    ```
    http://host:port/webcenter/portal/portalName/pageName
    ```

Creating, Editing, and Managing a Page in a Portal

Creating, editing, and managing pages in a portal are advanced tasks, described in Working with Portal Pages in *Building Portals with Oracle WebCenter Portal*.

Changing Your Role in a Portal

If you are unable to perform all the actions that you would like in your portal, you can request a change to your membership role or add another role to your current role in the portal. For example, you might want to participate in an interesting discussion thread or raise a new issue, but in your current role you are only allowed to view ongoing discussions.

If WebCenter Portal is configured with SOA, you will receive a worklist notification (if you are using Oracle BPM Worklist) when your new role is approved.

Role change requests may or may not require approval, depending on how the portal manager has defined membership changes for a particular role.

For more information, see Managing Self-Service Membership for a Portal in *Building Portals with Oracle WebCenter Portal*.

To change your portal role:

> **✎ Note:**
>
> The **Change Role** option is not available if the portal is not set up for self-service membership (or **Do Not Allow Self-Service Membership or Self-Service Membership Change** is selected in the Membership Options dialog).

1. Open the Change Membership dialog in either of the following ways:

   • In the portal browser (see Viewing and Accessing Available Portals), locate the portal in which you want to change your membership role, click 🔄 to display the portal actions, and select **Membership**, then **Change Role** (Figure 9-22).

Figure 9-22   Portal Actions Menu for Portal Members With View-Only Permissions
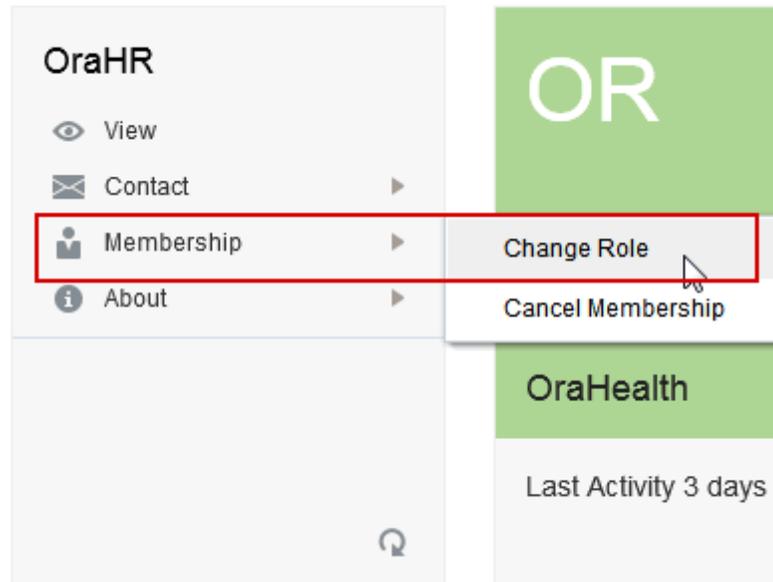
- When viewing a portal, click the **Actions** menu, and select **Membership**, then **Change Role**.

> **Note:**
>
> The location of the **Actions** menu is dependent on the page template in use. For example, it may be an icon in the menu bar in a top navigation template.

Figure 9-23   Portal Actions Menu: Viewing Portal
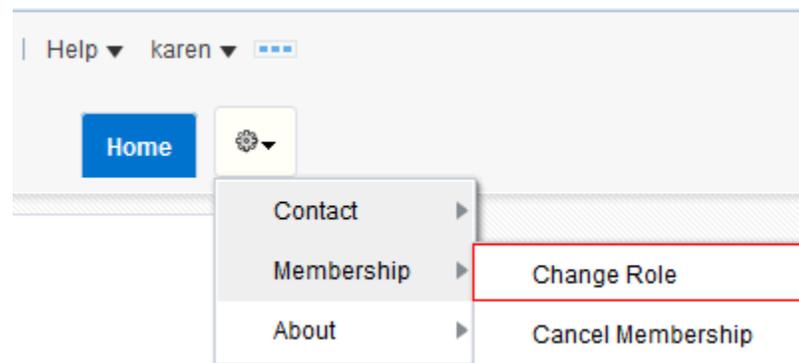
2. In the Change Membership dialog, select your preferred roles from the **Current Role** list.

   The Change Membership dialog shows the roles that are available in the portal, with those to which you are currently assigned selected.

> **✎ Note:**
>
> The roles available in the Change Membership dialog are configured by the portal manager.
>
> - The **Current Role** list is available only if self-service membership changes are allowed.
>
> - In the **Current Role** list, some roles may be disabled. The only out-of-the-box portal role is that of `Portal Manager`, but other custom roles may display. If you wish to select a role that is not available to you, contact the portal manager directly to request a member role change.

If you wish to cancel your membership in the portal, click **Cancel Membership**.

Figure 9-24   Change Membership Dialog
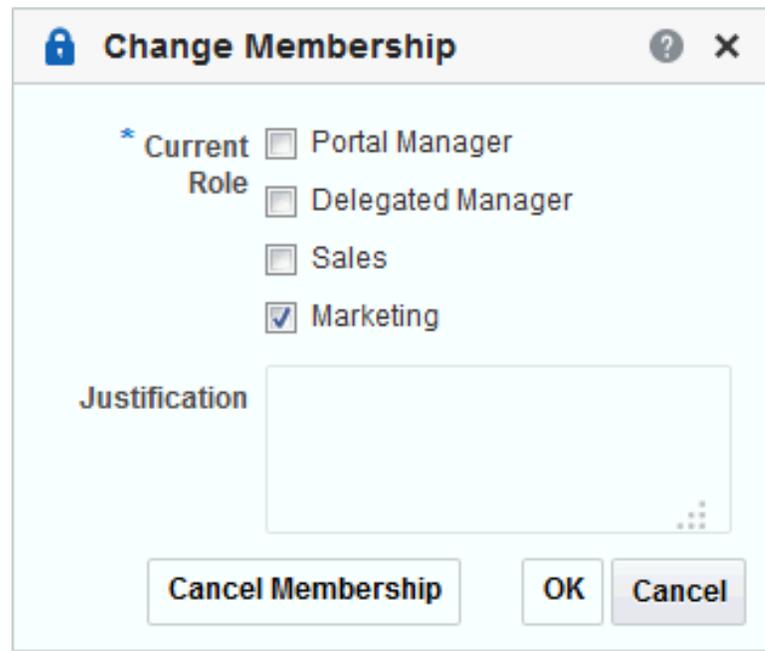
3. Click **OK**.

   A confirmation message displays whether or not the selected role change requires approval.

4. Click **OK** to acknowledge the confirmation message.

5. On the **Portals** page, click the **Refresh** icon to confirm your membership status has changed for the portal.

> **Note:**
>
> Your new role is not effective immediately when membership change requests require approval. Check back later or monitor your worklist (if you are using Oracle BPM Worklist); your new role will be effective as soon as the portal manager approves it.
>
> For more information about working with worklist items, see About the Process Workspace Tasks Page in *Managing and Monitoring Processes with Oracle Business Process Management*.

Cancelling Your Portal Membership

When you no longer want or need membership in a portal, you can cancel your membership.

Some cancellation requests require approval from the portal manager so you may not be removed from the portal immediately. If WebCenter Portal is configured with SOA, you will receive a worklist notification (if you are using Oracle BPM Worklist or email when your membership is removed.)

For more information about working with worklist items, see About the Process Workspace Tasks Page in *Managing and Monitoring Processes with Oracle Business Process Management*.

After you have successfully cancelled your membership in a portal, it will no longer be shown on the **Portals** page when you select **Joined** from the **Show** menu.

To cancel your membership in a portal:

1. Open the Cancel Membership dialog in either of the following ways:

    - In the portal browser (see Viewing and Accessing Available Portals), locate

        the portal in which you want to change your membership role, click ↺ to display the portal actions, and select **Membership**, then **Cancel Membership** (Figure 9-25).

Figure 9-25   Portal Actions Menu for Portal Members Without Manage Permissions
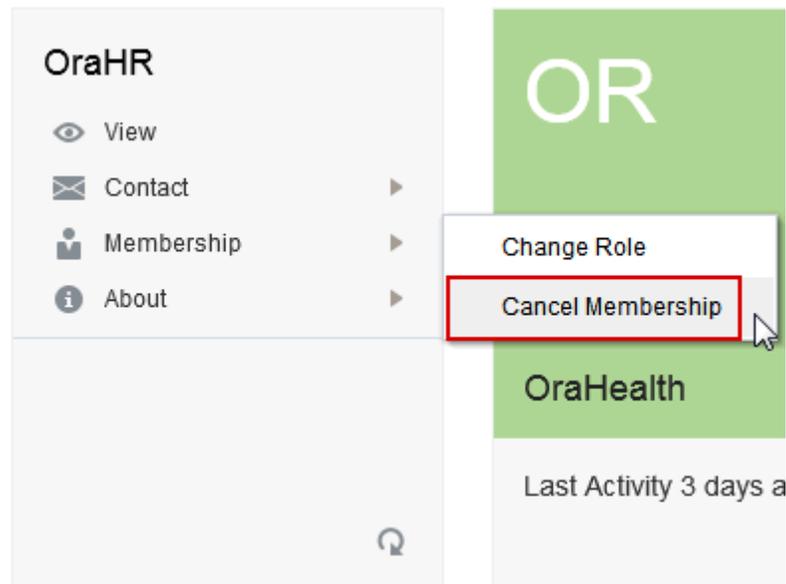
- When viewing a portal, click the **Actions** menu, and select **Membership**, then **Cancel Membership**.

> ✎ **Note:**
>
> The location of the **Actions** menu is dependent on the page template in use. For example, it may be an icon in the menu bar in a top navigation template.

Figure 9-26   Portal Actions Menu: Viewing Portal
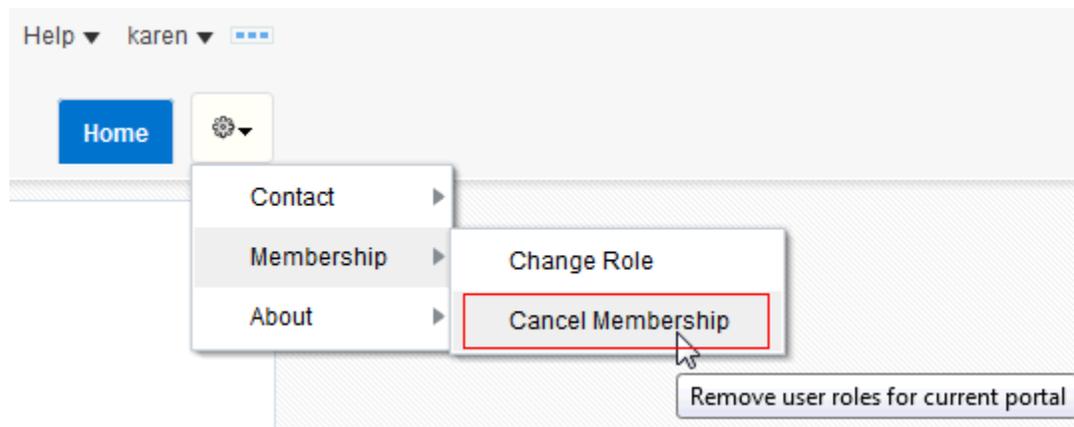
2. Click **OK** to acknowledge the confirmation message.

3. In the portal browser (see Viewing and Accessing Available Portals), select **Joined** from the **Show** menu, then click the **Refresh** icon to confirm that the portal no longer displays.

9-24

> **✎ Note:**
>
> If a cancellation request requires approval, you are not removed from the portal immediately. Check back later or monitor your worklist (if you are using Oracle BPM Worklist); you will receive notification when your unsubscribe request is approved or rejected by the portal manager.

Part III

Connecting and Collaborating with Other Users

This part of *Using Portals in Oracle WebCenter Portal* provides information about social features in your portal. It describes how to set up and manage your personal contacts, how to have online conversations and see who is currently available, and how to use features for posting your opinion and discussing your ideas with others.

- Managing Your Contacts

- Using Instant Messaging and Presence Viewer

- Sending and Viewing Mail

- Working with Feedback and the Message Board

- Liking, Commenting On, and Sharing Items

- Viewing and Participating in Discussions

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10

Managing Your Contacts

Use the Connections feature of the People Connections service to establish a social network comprised of the coworkers you collaborate with most, your contacts, and your work friends and associates.

> ✏️ **Permissions:**
>
> To perform the tasks in this chapter, you need the application-level permission `People Connections: Connect with People`. To work with connections lists, you also need the application-level permission `People Connections: Update People Connections Data`.

Topics:

- About Connections
- Setting Connections Preferences
- Viewing Another User's Profile
- Viewing Connections
- Adding Contacts
- Removing Contacts
- Creating and Managing Groups of Contacts

About Connections

You can use Connections to collect your business friends and contacts into a social network, manage your connections, and view the connections of others. Using People Connections preferences, you can grant different levels of access to those who are and are not your connections. For example, you can give access to views of your profile, message board, activity stream, and feedback to just your connections, leaving the people who are not your connections without access. For your profile, you can limit view privileges to just your connections or enable your connections to view certain sections of your profile, while hiding those sections from users who are not your connections. For your message board and feedback, you can give everyone view access, but limit post access to just your connections or to a limited set of your connections through a connections list. When you connect with other users, you give them access to your People Connections views and gain access to theirs.

> **Note:**
>
> People Connections encompasses Connections, Profile, Activity Stream, Message Board, and Feedback. For more information, see:
>
> • Managing Your Profile
>
> • Tracking Portal Activities
>
> • Working with Feedback and the Message Board
>
> For information about setting your Connections preferences, see Setting Connections Preferences.

Before you begin to build your social network, your system administrator can set global application defaults that affect what all users may see and do with their own and other users' connections. For more information, see Configuring People Connections for WebCenter Portal in *Administering Oracle WebCenter Portal*.

WebCenter Portal provides the following Connections views that can be added to a portal page:

• **Connections** for viewing and managing your connections, creating connections lists, and sending and responding to invitations to connect (Figure 10-1)

Figure 10-1   Connections View
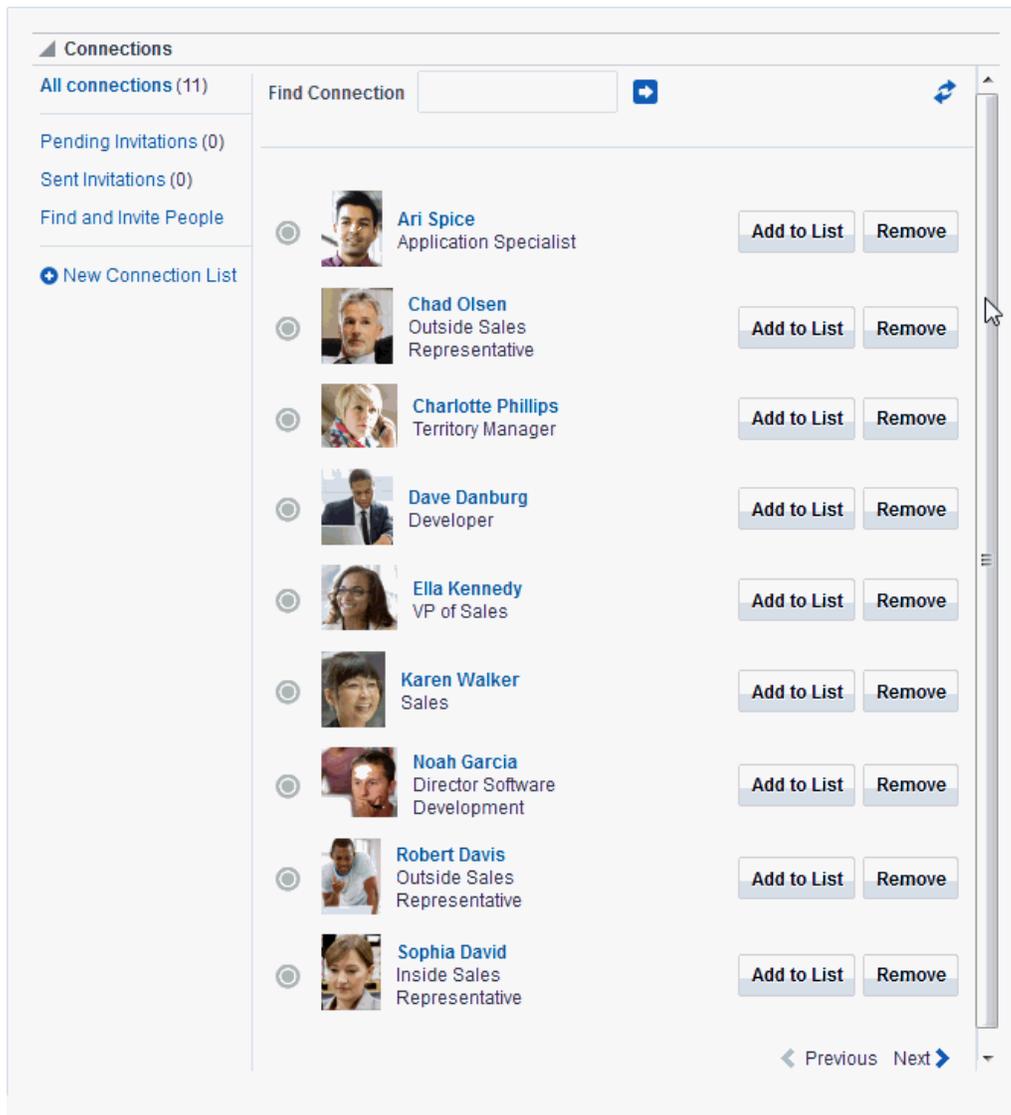
- **Connections - Card** for photos, status messages, and instant contact options (Figure 10-2)

Figure 10-2   Connections - Card View
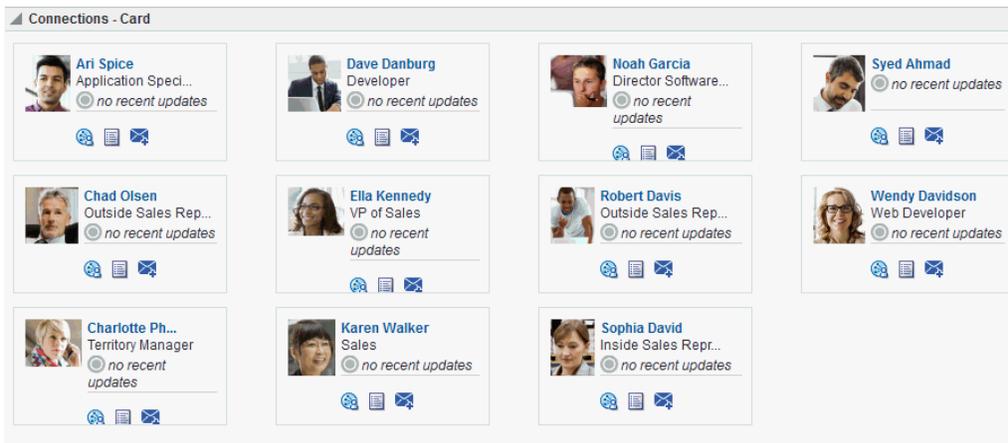
- **Connections - Detailed View** for photos and quick access to your connections and to features for inviting new, managing existing, and organizing lists of your connections (Figure 10-3). This is the same view you see when you click the **Connections** tab on the **Profile** page.

Figure 10-3   Connections - Detailed View
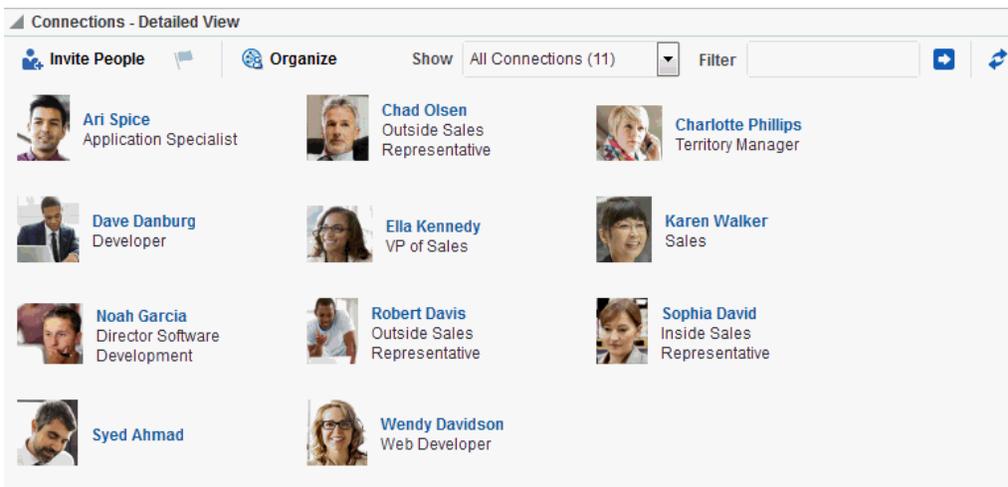
- **Connections - Quick View** for photos and quick access to your connections (Figure 10-4). This is the same view you see on the right side of the main **Profile** page.

Figure 10-4   Connections - Quick View
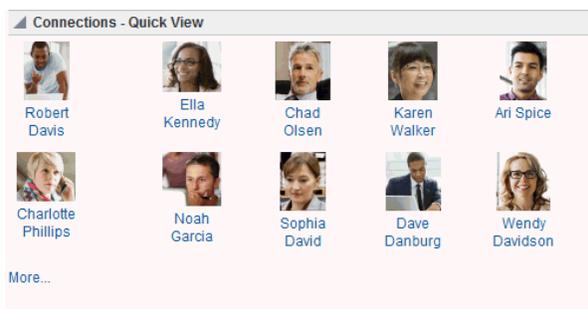
For information about using Connections features, see Viewing Connections, Adding Contacts, Removing Contacts, and Creating and Managing Groups of Contacts.

Setting Connections Preferences

Use Connections preferences to specify who can view information about the people you have connected with and whether to accept invitations to be others' connections automatically.

To set Connections preferences:

1. From your user menu in the menu bar, select **Preferences** .

2. On the **People** page, click the **Connections** tab.

Figure 10-5   Connections Preferences
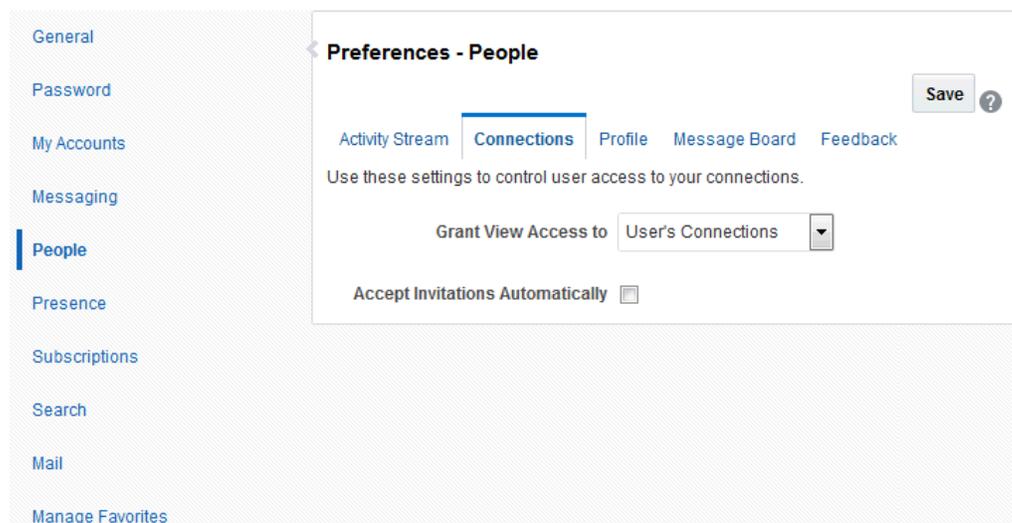
3. From the **Grant View Access to** list, select the users who can view your list of connections:

   • **Everyone**—All users, including users who are not logged in, can see information about your connections.

   • **Authenticated Users**—Only users who are logged in can view your connections.

   • **User's Connections**—Only you and your connections can view your connections.

   • **User Only**—Only you can view your connections.

   > ✎ **Note:**
   >
   > If the **Grant View Access to** list is disabled in your view contact your system administrator.

4. To automatically accept invitations to connect with another user, select **Accept Invitations Automatically**.

   Deselect this check box to leave yourself the option of accepting, refusing, or ignoring an invitation to connect with another user.

5. Click **Save**.

Viewing Another User's Profile

You access other users' profiles the same way you access your profile. For information, see Viewing a Profile.

Viewing Connections

You can view your connections in any Connections view, including on the **Connections** tab of your Profile page, which you can navigate to by clicking your user name wherever it appears in the application.

This section describes how to access the Connections page and view or search through your connections. It includes the following topics:

- Viewing Your Connections
- Searching Through Your Connections

Viewing Your Connections

To view your connections:

1. In the Home portal (see How do I access the Home portal?), open your profile page, for example, by clicking on your user name.

   You can also use the following URL to navigate to a Profile page:

   ```
   http://host:port/webcenter/portal/profile/userName
   ```

   > **Tip:**
   >
   > For *userName*:
   >
   > - When *userName* matches the current user or is not specified, this URL navigates to your view of the Profile page.
   >
   > - When *userName* is not the current user's, it navigates to the specified user's view of the Profile page.

2. On the Profile page, click the **Connections** tab (Figure 10-6).

Figure 10-6   Connections Tab on Profile Page
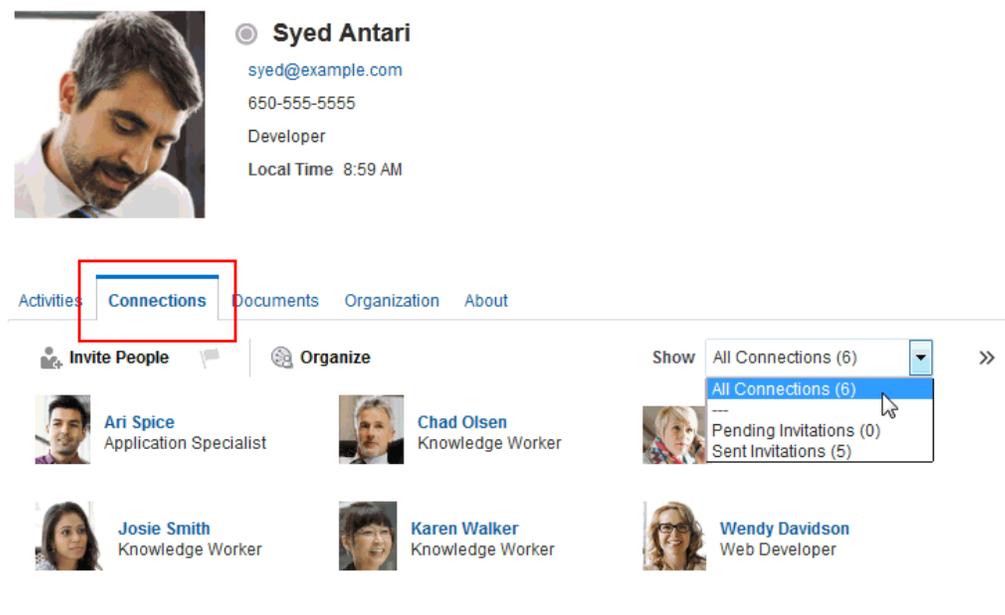
Searching Through Your Connections

The Connections search feature provides an efficient way to locate a particular connection in an otherwise long list of connections.

To search through your connections:

1. Go to the **Connections** page (as described in Viewing Your Connections.)

2. In the **Filter** field, type the text you want to search for in your connections, and click [ ] next to the **Filter** field.

> 💡 **Tip:**
>
> You can search for part or all of a name, email, title, or department.

To exit the search, click [ ] next to the **Filter** field.

Adding Contacts

This section includes the following topics:

*   Inviting Others to Connect
*   Viewing Invitations to Connect
*   Responding to Invitations to Be a Connection

Inviting Others to Connect

Connecting to another user potentially provides view access to that user's personal Profile and Activity Stream, and view and post access to the user's Message Board. The level of access you have to a connection is determined by the People Connections defaults set by your system administrator, the individual user's People Connections preference settings, and properties set on the Connections view.

> ✏ **See Also:**
>
> For information about Connections preferences, see Setting Connections Preferences.

You can issue invitations from the Connections - Detailed View or from the **Connections** tab on your Profile page. This section describes the **Connections** tab method.

To invite another user to connect:

1. Go to the **Connections** tab on your Profile page (as described in Viewing Your Connections).

2. On the **Connections** tab, click the **Invite People** link to open the Invite People dialog (Figure 10-7).

Figure 10-7   Invite People Dialog
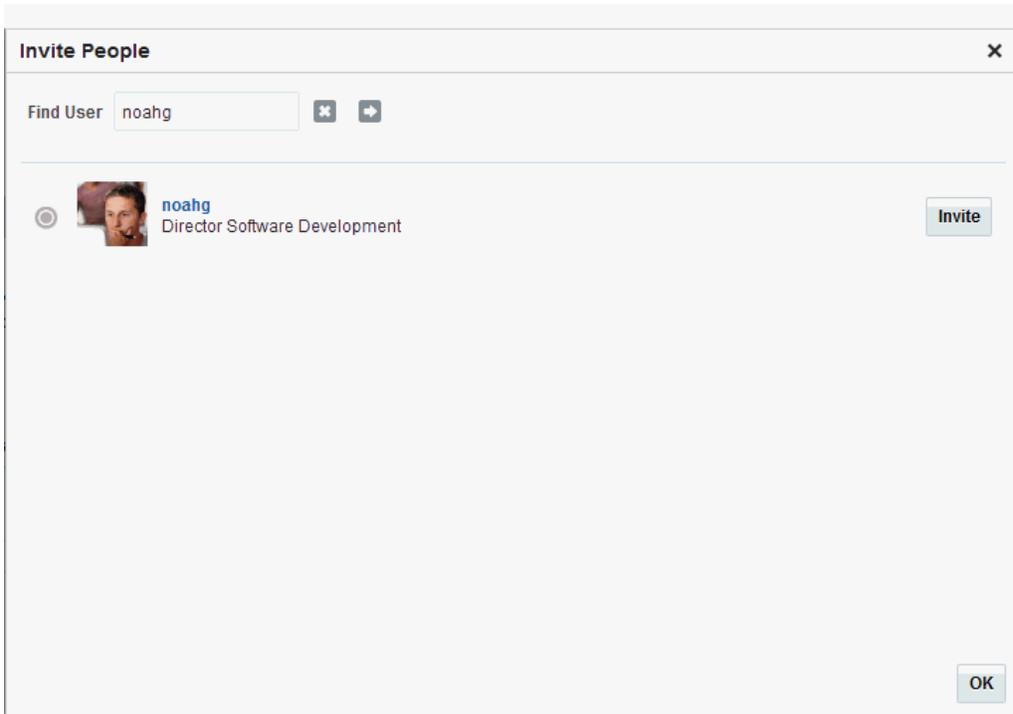
3. In the **Find User** field, type the user name of the person you want to invite to be your connection, then click ![arrow icon].

4. Click the **Invite** link next to the user to open the Invitation Message dialog (Figure 10-8).

Figure 10-8 Invitation Message Dialog
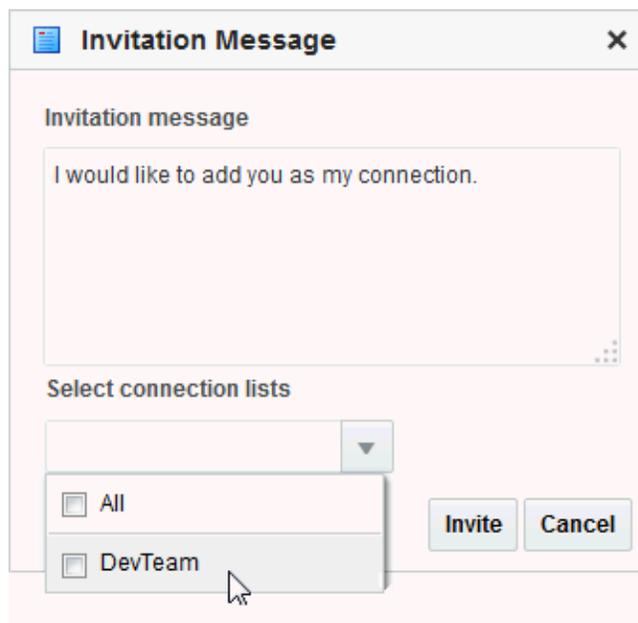
5. Use the default message, or type a new one.

6. Optionally, from the **Select connection lists** list, select one or more connections lists to which to add the user once the invitation is accepted.

7. Click **Invite**.

   If the person you have invited set preferences to automatically accept all invitations, you are connected immediately. Otherwise, the invitation becomes available in the recipient's view of the **Connections** tab of the recipient's Profile page or in the Connections - Detailed View.

Viewing Invitations to Connect

You can view the invitations you have sent and received in the Connections - Detailed View and on the **Connections** tab of your Profile page. This section describes the **Connections** tab method. It includes the following topics:

- Viewing Invitations You Have Sent
- Viewing Invitations You Have Received

Viewing Invitations You Have Sent

To view invitations you have sent:

1. Go to the **Connections** tab (as described in Viewing Your Connections.

2. From the **Show** menu, select **Sent Invitations**.

The **Connections** page refreshes, now showing a list of the pending invitations to connect that you have sent (Figure 10-9).

Figure 10-9   Sent Invitations View
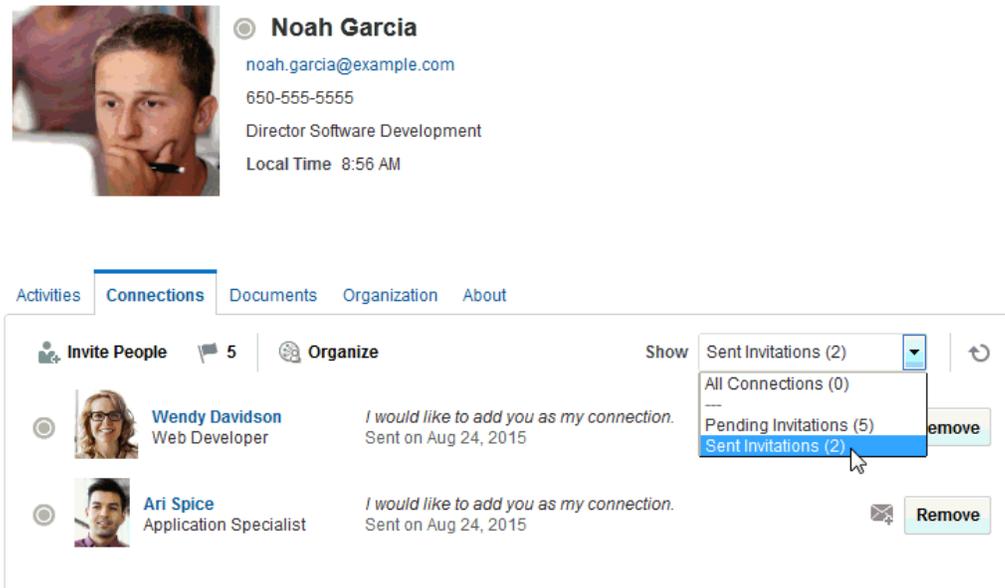
> **Note:**
>
> In the **Show** menu, the number next to **Sent Invitations** represents the number of pending invitations you have sent.

Viewing Invitations You Have Received

To view invitations you have received:

1. Go to the **Connections** tab (as described in Viewing Your Connections.

2. From the **Show** menu, select **Pending Invitations**.

> **Tip:**
>
> Alternatively, click ⚑.

The **Connections** page refreshes, now showing a list of the pending invitations to connect that you have received (Figure 10-10).

Figure 10-10   Pending Invitations View
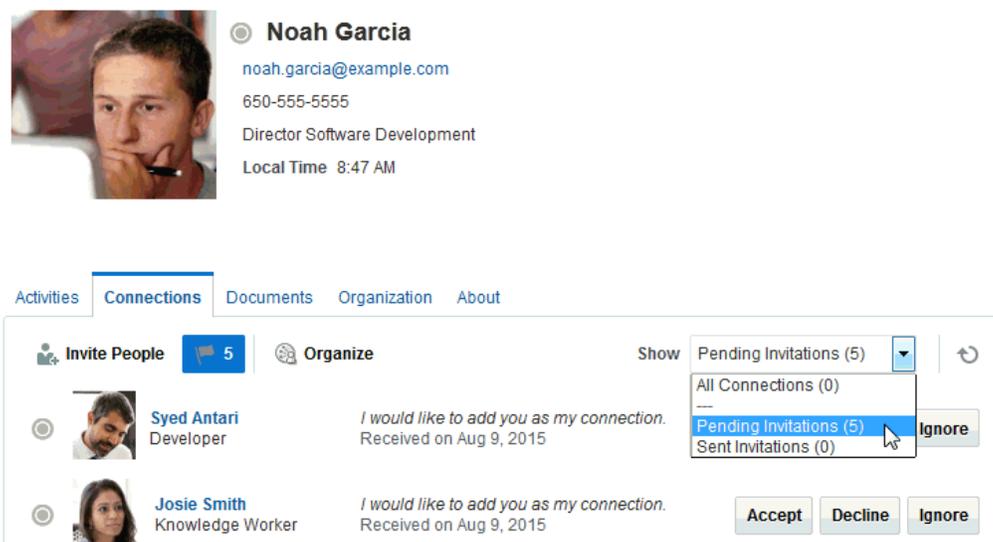
> ### 💡 Tip:
>
> In the **Show** menu, the number next to **Pending Invitations** represents the number of pending invitations you have received.

Responding to Invitations to Be a Connection

Connections provides two methods for responding to an invitation to connect:

- You can set your Connections preferences to accept such invitations automatically. For information, see Setting Connections Preferences.

- You can manually accept, decline, or ignore such invitations through the Connections - Detailed View or on the **Connections** tab of your Profile page.

This section describes the manual method of responding to invitations to connect from the **Connections** tab.

To respond to invitations to connect:

1. Go to the **Connections** tab (as described in Viewing Your Connections.

2. From the **Show** menu, select **Pending Invitations** to display a list of your pending invitations.

> ### 💡 Tip:
>
> Alternatively, click 🚩.

3. Next to a given invitation, click your desired response (Figure 10-11).

Figure 10-11   Pending Invitations View Showing Accept, Decline, and Ignore Buttons
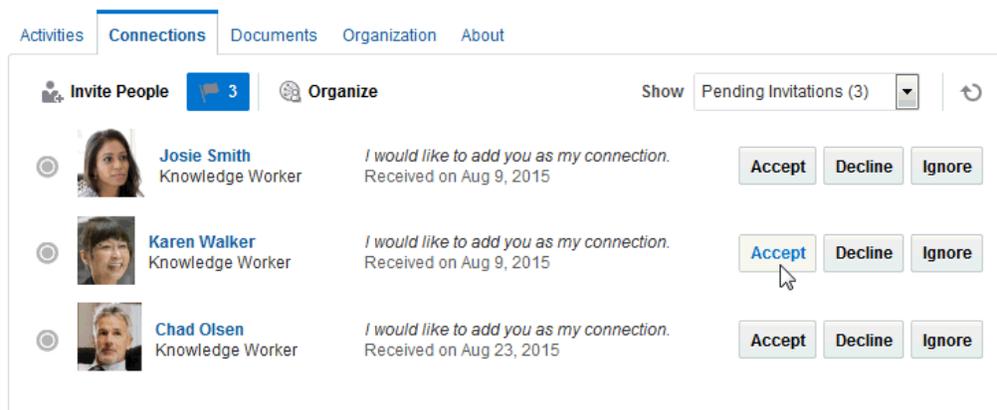
Choose from:

- **Accept**—Make the connection.

- **Decline**—Refuse the connection, with notification. When you decline an invitation to connect, the issuer becomes aware of this by watching his sent invitations.

- **Ignore**—Remove the connection, without responding. When you ignore an invitation to connect, the issuer does not become aware of this by watching his sent invitations.

Once you respond to an invitation, it is removed from the list of received invitations. The users whose invitations you accept appear in your view of the **Connections** tab.

4. Optionally, return to your default view of the **Connections** tab by selecting **All Connections** from the **Show** menu.

Removing Contacts

Included in the process of managing your connections is the occasional necessity of removing connections: they may leave your group or the company, or there may no longer be a compelling reason to stay connected.

Controls for removing a connection are available through the **Connections** tab of your Profile page and the Connections viewer and Connections - Detailed View. This section describes the **Connections** tab method.

To remove one of your connections:

1. Go to the **Connections** tab (as described in Viewing Your Connections.

2. Click **Organize** to open the Organize Connections and Lists dialog.

3. Click the **Remove** button next to the connection to remove (Figure 10-12).

Figure 10-12   Remove Connection
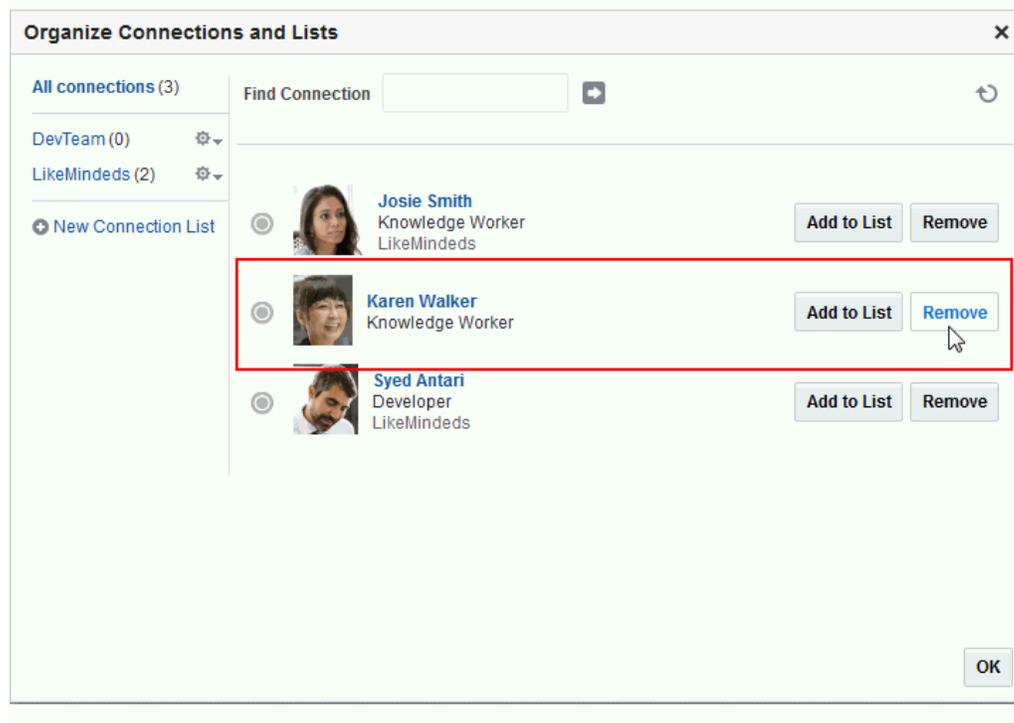
4. In the confirmation dialog, click **Yes** to remove the selected connection.

5. Click **OK** to close the Organize Connections and Lists dialog.

Creating and Managing Groups of Contacts

Connections provides a means of grouping your connections into lists for managing the display of your connections and your connections activities. For example:

- You can select a list and view just its members on the **Connections** tab or in the Connections viewer or Connections - Detailed View.

- You can configure Activity Stream preferences to show activities only from specified connections lists (for more information, see Setting Activity Stream Preferences).

This section describes how to create and manage lists of connections. It includes the following topics:

- Creating a Connections List

- Adding a Connection to a List

- Removing a Connection from a List

- Deleting a Connections List

Creating a Connections List

You can create a connections list using the Connections viewer and Connections - Detailed View, and you can create one on the **Connections** tab of your Profile page. This section describes the **Connections** tab method.

To create a list of connections:

1. Go to the **Connections** tab on your Profile page (as described in Viewing Your Connections).

2. Click **Organize** to open the Organize Connections and Lists dialog.

3. Click **New Connection List** (Figure 10-13) to open the **Create List** dialog.

Figure 10-13   New Connection List
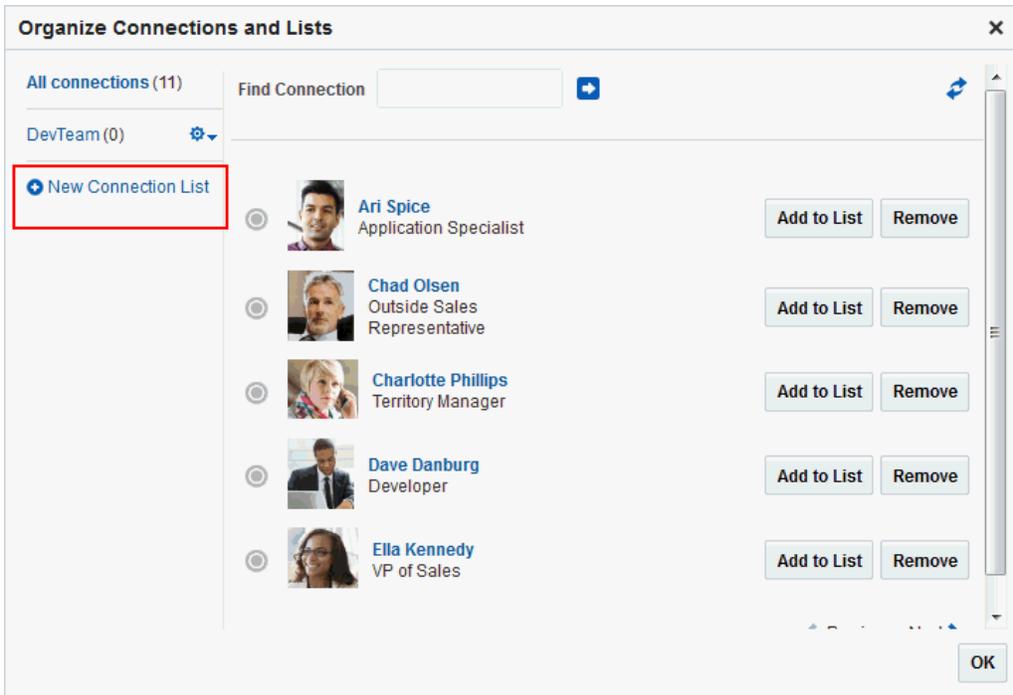
4. Enter a name for your list of connections, and click **Save and Close** to create the list and open it in the Organize Connections and Lists dialog.

> **Tip:**
>
> To return to a view of all your connections, click **All connections**.

> **See Also:**
>
> For information about adding connections to a list, see Adding a Connection to a List.

Adding a Connection to a List

You can add connections to a Connections list from the **Connections** tab of your Profile page, the Connections viewer, and Connections - Detailed View. This section describes the **Connections** tab method.

To add a connection to a Connections list:

1. Go to the **Connections** tab (as described in Viewing Your Connections.

2. Click **Organize** to open the Organize Connections and Lists dialog.

3. Click **Add to List** (Figure 10-14) next to the user.

Figure 10-14   Add to List
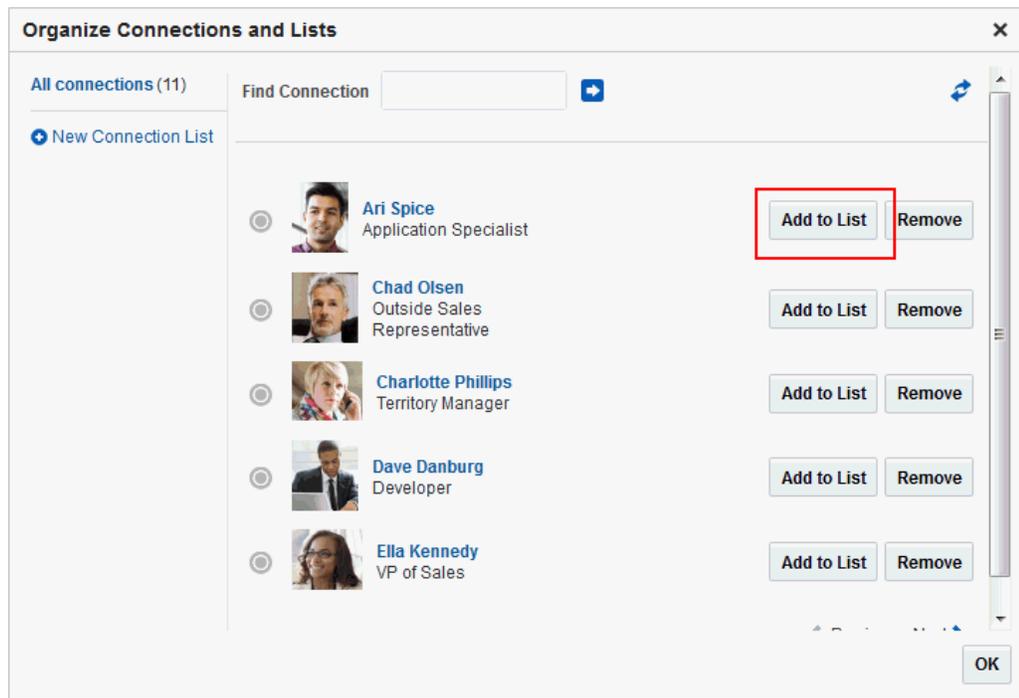
4. In the Add to List dialog (Figure 10-15), select one or more lists, then click **Save and Close**.

Figure 10-15   Add to List Dialog
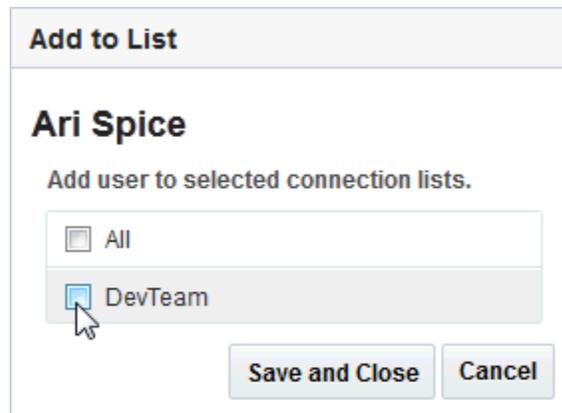
> **Tip:**
>
> Click **All** to add the selected user to all of your Connections lists.

5. Repeat steps 3 and 4 until you are done.

6. Click **OK** to close the Organize Connections and Lists dialog.

Removing a Connection from a List

To remove a connection from a list:

1. Go to the **Connections** tab (as described in Viewing Your Connections.

2. Click **Organize** to open the Organize Connections and Lists dialog.

3. Select the list from which to remove a connection (Figure 10-16) to display the connections list.

Figure 10-16   Organize Connections and Lists Dialog with California Office List Selected
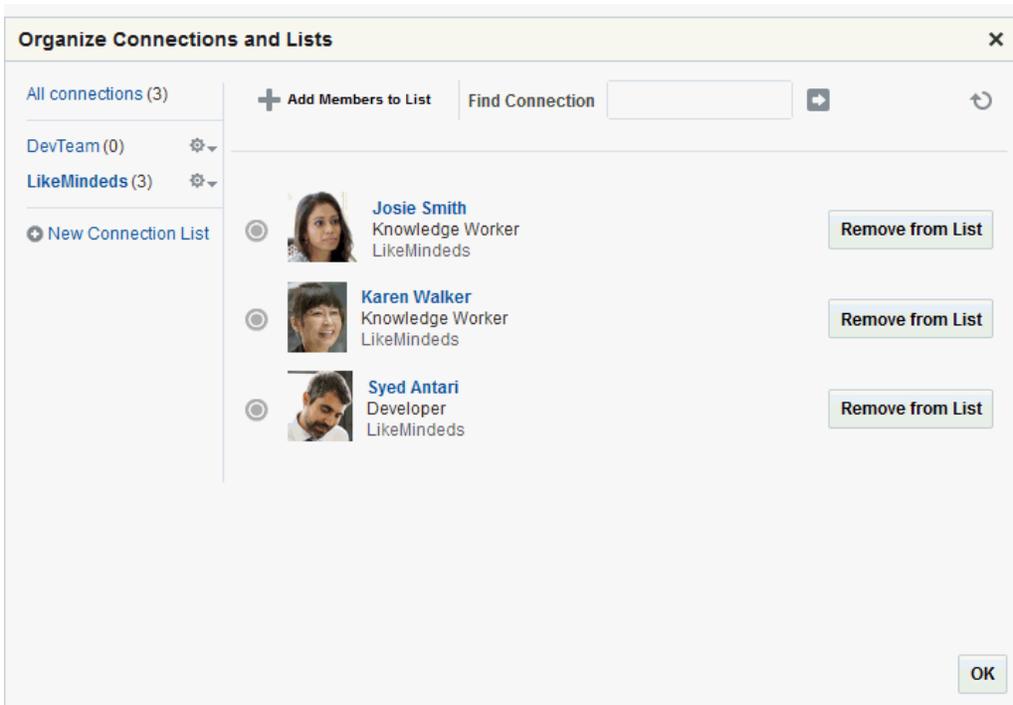
4. Click **Remove from List** next to the user to open the Remove from List dialog (Figure 10-17).

Figure 10-17   Remove from List Dialog
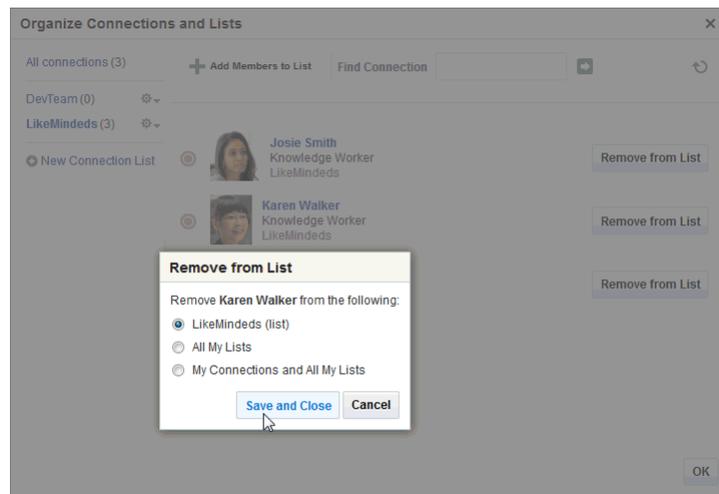
5. Select to remove the selected user from the current list or from all lists of which the user is a member, or select **My Connections and All My Lists** to remove the selected user from all lists and remove the user from your connections.

6. Click **Save and Close**.

7. Repeat steps 3 through 5 until you are done.

8. Click **OK** to close the Organize Connections and Lists dialog.

Deleting a Connections List

When you delete a Connections list, you are not deleting the connections you added to the list. You are deleting only the selected grouping, that is, the list itself. The connections that were on the deleted list continue to be your connections.

You can delete a Connections list from the **Connections** tab of your Profile page, the Connections viewer, and Connections - Detailed View. This section describes the **Connections** tab method.

To delete a connections list:

1. Go to the **Connections** tab on your Profile page (as described in Viewing Your Connections).

2. Click **Organize** to open the Organize Connections and Lists dialog.

3. Click the **Actions** icon next to the Connections list you want to delete, and select **Delete List** from the resulting menu (Figure 10-18).

Figure 10-18   Delete List Option on Actions Menu
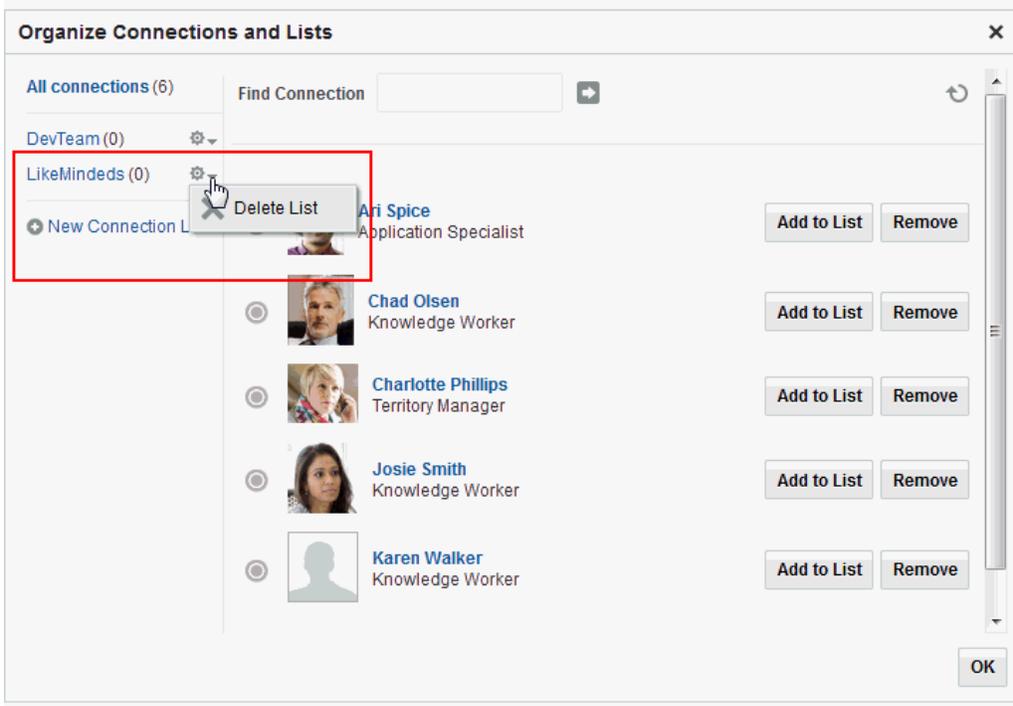
4. In the resulting confirmation dialog, click **Yes** to delete the list.

5. Click **OK** to close the Organize Connections and Lists dialog.

11

Using Instant Messaging and Presence Viewer

Use WebCenter Portal's instant messaging and presence (IMP) features to see the presence status of other authenticated users and interact with them through instant messages and mail. Additionally, if enterprise presence is unavailable, you can connect to a third party network presence service, such as Yahoo! Messenger.

> ✏️ **Permissions:**
>
> This chapter is intended for WebCenter Portal users who want to view, create, and manage instant messaging and presence.
>
> Such users must be granted, minimally, the portal-level permission `View Pages and Content`. They can view the presence of other users only for assets for which they have `view` permission.
>
> Authenticated users require the portal-level permission `Customize Pages`. They must have `view` permission on the asset.

Topics:

- About Instant Messaging and Presence
- Identifying Your Preferred Instant Messaging Provider
- Configuring Network Presence
- Working with IMP Features

About Instant Messaging and Presence

> ✏️ **Note:**
>
> For Instant Messaging and Presence to work in a portal, make sure that:
>
> - The back-end presence server has been installed and configured by the system administrator and the connection between WebCenter Portal and the application is active. For more information, see the Managing Instant Messaging and Presence chapter in *Administering Oracle WebCenter Portal*.
>
> - The external application has been registered by the system administrator. For more information, see the Managing External Applications chapter in *Administering Oracle WebCenter Portal*.

Instant messaging and presence (IMP) lets you observe the presence status of other authenticated users (online, offline, busy, or away) and then interact with them through instant messages and mail. Wherever a user is indicated, for example as the author of a document in the document library, you can see an icon (Figure 11-1) depicting the presence state of that user.

Figure 11-1   Presence Icon for Online Users

If you hover your mouse over the **Presence** icon, a tooltip displays the current status message for that user, if available. If the user has not provided a status message, or the message cannot be retrieved, then the tooltip displays the presence state of the user (online, offline, busy, or away).

> **Note:**
>
> There is no idle status. In the case of extended user inactivity, the status still displays as online.

Additionally, you can click the **Presence** icon to invoke a list of options:

•   When viewing the Presence icon for your self, you can see the following options: View Profile, Send Mail, and Change Credentials (Figure 11-2)

Figure 11-2   Presence Icon Context Menu For the Current User
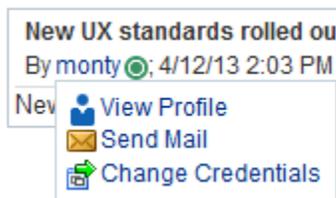
•   When viewing the Presence icon for another user, you can see the following options: Send Instant Message, View Profile, and Send Mail (Figure 11-3)

Figure 11-3   Presence Icon Context Menu For Another User
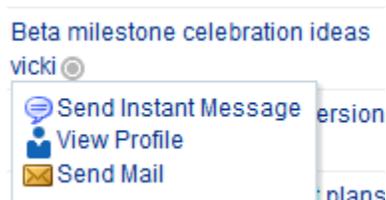
From the list you can:

- View the user's profile. For more information, see Viewing the Status of Other Users.

- Send mail to the user. For more information, see Sending a Mail Message from the Presence Icon Menu.

- Change credentials (appears in the logged in user's context only), where users can update their external application login information. For more information, see Providing Login Information for External Applications.

- Send an instant message to the user (appears in the list for another user only). For more information, see Sending an Instant Message from the Presence Icon Menu.

> **Note:**
>
> The options that display in the list depend on what services are available to WebCenter Portal, how those services are configured, and which services are supported by the back-end presence server. For more information, see the Managing Instant Messaging and Presence chapter in *Administering Oracle WebCenter Portal.*

Identifying Your Preferred Instant Messaging Provider

Instant messaging and presence requires a back-end presence server. WebCenter Portal is certified with Microsoft Office Communications Server (OCS) 2007 R2, and Microsoft Lync. When presence is not available (for example, if your enterprise uses a Jabber/XMPP presence server or has federated presence servers with users distributed across identity management systems), you can connect to a public network presence service.

Out-of-the-box, WebCenter Portal supports Yahoo! Messenger on network presence. However, the network presence model can be extended to include other providers, such as ICQ. To do so, you must build a presence network agent (PNA) that understands how to process each user's presence from a certain URL.

For more information, see Managing Instant Messaging and Presence in *Administering Oracle WebCenter Portal*.

To enable network presence:

1. From your user menu in the menu bar, select **Preferences**.

2. On the **Presence** page, enter the IM address for the presence status and a display name.

Figure 11-4   Preferences - Presence Page
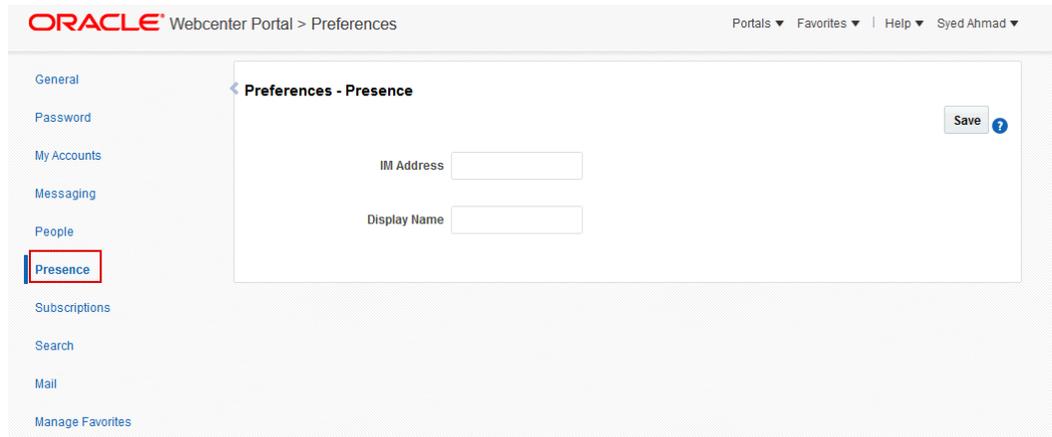
> **Note:**
>
> PNAs run on the IM address. The IMP service consults all registered PNAs to see if one can support this IM address. If so, then it delegates to the respective agent. If you register a new PNA where you identify every user presence with the domain `mydomain.com`, then your PNA handles the presence for user IM addresses like `XYZ@mydomain.com`.

3. Click **Save**.

> **Note:**
>
> If you change your IM address, you must log out of WebCenter Portal and then log in again to view your presence status.

Presence tags for that user shows their network presence, either online (Figure 11-5) or offline (Figure 11-6).

Figure 11-5   Yahoo Presence Icon - Online

Figure 11-6   Yahoo Presence Icon - Offline

Configuring Network Presence

To set your presence to Yahoo! Messenger:

1. From your user menu in the menu bar, select **Preferences**.

2. On the **Presence** page, enter your Yahoo! Messenger ID in the **IM Address** field and a display name for yourself.

Figure 11-7   Preferences - Presence Page
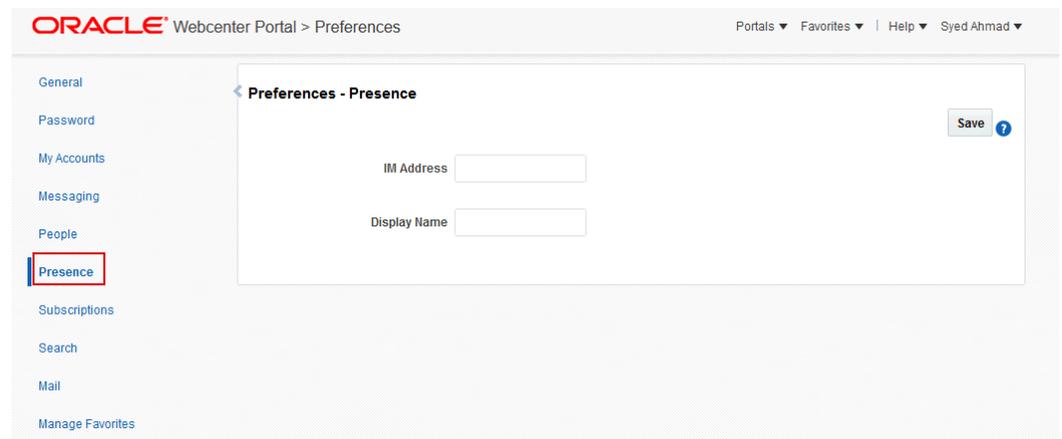
3. Click **Save** to save your change and exit Preferences.

   To revert to your enterprise presence, when you are back on your network, remove this information from Preferences - Presence.

> **Note:**
>
> To send instant messages to an online user on Yahoo! Messenger, you also must have Yahoo! Messenger installed.

Working with IMP Features

Many WebCenter Portal features include a presence capability that enables you to make contact with other users from within the context of what you want to contact them about. For example, if you see a post in a discussion topic and want to send an instant message to the author of that post, you can do so directly from the discussion topic.

This section includes the following topics:

- Viewing the Status of Other Users
- Sending a Mail Message from the Presence Icon Menu
- Sending an Instant Message from the Presence Icon Menu

Viewing the Status of Other Users

Wherever a feature includes a **Presence** icon (Figure 11-1), you can start an instant chat or send a mail to the user associated with the icon.

The way you communicate with another user depends upon their availability. For example, if the user is online, then you could send an instant message to make immediate contact. However, if the user is offline or busy, then sending a mail message is probably a better option.

Additionally, users can provide further information about their status by providing status messages. If such a status message exists for a user, hovering over the **Presence** icon displays that message as a tooltip. The status message enables you to make an even more informed decision about how to make contact. If there is no status message for the user, then the presence state is displayed in the tooltip instead (online, offline, busy, or away).

To view the current presence status or status message of a user:

- Hover the mouse over the **Presence** icon next to the user's name.

> **Note:**
>
> The presence state of the user is held in a cache with a default expiration time of 60 seconds. As a result, the **Presence** icon may not reflect the actual status of the user if the status has changed between the initial retrieval and the cache expiry time.

Table 11-1 describes the presence state each **Presence** icon indicates.

Table 11-1   Presence Icon Presence States

Presence Icon	State
🟢	User is online.
🔴	User is online, but busy. Please do not disturb.
🕐	User is still connected but away from the computer.

Table 11-1   (Cont.) Presence Icon Presence States

Presence Icon	State
	User is offline.

Sending a Mail Message from the Presence Icon Menu

Wherever you see a **Presence** icon, you can send a mail message to its associated user.

To send a mail message:

1. Locate a **Presence** icon (Figure 11-1) for the person you want to contact.

   For example, you can find **Presence** icons associated with documents and discussion topics—any view that has been configured to support IMP.

2. Click the **Presence** icon associated with the user you want to contact. The available options appear, as shown in Figure 11-8.

   Figure 11-8   Presence Icon For Another User

3. From the list, select **Send Mail**.

   You might be presented with a login window. If so, then enter your user name and password for your mail application. If your preferences are set up to deliver your login credentials automatically, you can start your message right away. For more information about login credentials and preferences, see Setting Your Personal Preferences.

4. Compose your message and click **Send**.

Sending an Instant Message from the Presence Icon Menu

Wherever you see a **Presence** icon, you can send an instant message to its associated user.

Before you can send an instant message, you must install the appropriate chat client (and only that client) on your local computer. The client must be configured to connect to the back-end presence server. To use Microsoft Office Communications Server (OCS) 2007 R2, or Microsoft Lync 2010, install the Microsoft Communicator.

Contact your system administrator if you are not sure which client to install or how to connect to the presence server.

To send an instant message:

1. Locate a **Presence** icon (Figure 11-1) for the person you want to contact.

    For example, you can find **Presence** icons associated with documents and discussion topics—any place that has been configured to support IMP.

2. Click the **Presence** icon associated with the user you want to contact. The available options appear, as shown in Figure 11-9.

    Figure 11-9   Presence Icon Options For Another User
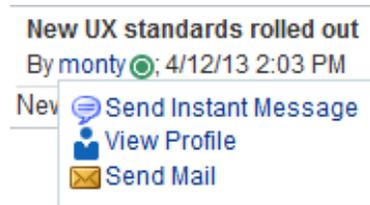
3. From the list, select **Send Instant Message**.

    WebCenter Portal invokes your instant messaging client, and starts a chat session with the selected user.

12

Sending and Viewing Mail

Send and view mail from a portal using WebCenter Portal's Mail service or your local mail client.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you must be granted at least the portal-level permission `View Pages and Content` to view mail. You can view mail only for assets for which they have `view` permission.
>
> Authenticated users require the portal-level permission `Customize Pages`, and must have `view` permission on the resource.

> **✎ Note:**
>
> Some of the tasks discussed in this chapter are not available if mail is not configured. Portal managers can add the Mail viewer to a portal, as described in Adding Mail to a Portal in *Building Portals with Oracle WebCenter Portal*.

Topics:

- About the Send Mail Feature
- About Mail in WebCenter Portal
- Selecting Your Preferred Mail Connection
- Working with Mail

About the Send Mail Feature

Throughout WebCenter Portal, you can click the **Send Mail** icon (Figure 12-1) to mail directly from another feature, such as announcements (Figure 12-2). You need to have the required permissions to work with the other features in order to use the Send Mail feature from the feature.

Figure 12-1   Send Mail Icon

For example, Figure 12-2 shows an announcement topic with the **Send Mail** icon.

Figure 12-2   Send Mail Icon in an Announcement
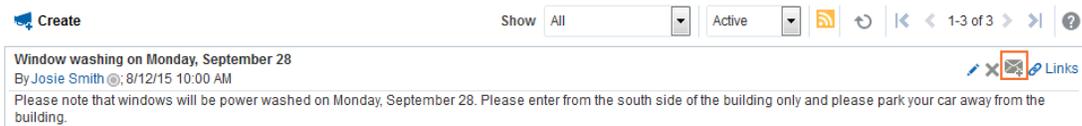
Click the **Send Mail** icon to open a mail compose window prepopulated with information including the announcement topic title, author, date created, topic text, and links to the announcement and the portal. You can edit and add to the mail, as necessary.

> **✎ Note:**
>
> To use WebCenter Portal's Send Mail (not your local mail client), you must change the mail preference (see Selecting Your Preferred Mail Connection). If you are using your local mail client, you are required to log in to mail if you are not logged in (see Logging in to Mail). Log out and then log back in to WebCenter Portal after you change your preferences.

Figure 12-3   WebCenter Portal Mail Compose Window From an Announcement
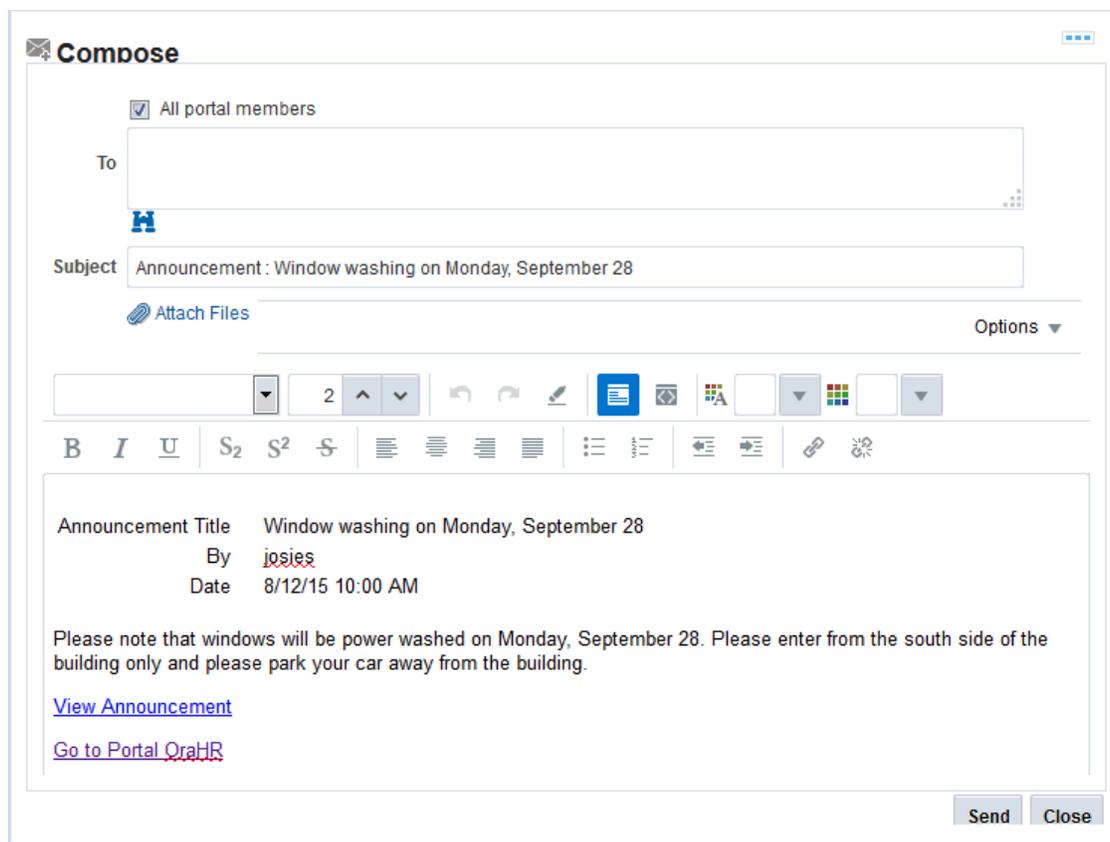
The way the mail window is prepopulated depends on the asset sending it. For example, from a wiki, **Send Mail** opens a mail window prepopulated with the name of the wiki, the size, who created it and when, who modified it and when, and a URL link to the wiki.

Mail, is by default, addressed to all members of the portal. Portal managers can configure the distribution list.

> ○ **Tip:**
>
> With the Microsoft Outlook local mail client, you must configure Outlook to support comma-delimited mail addresses.

Configuring the Send Mail Feature

The Send Mail feature does not require the mail service to be configured. That is, even if mail has not been configured in WebCenter Portal, the Send Mail feature is available using WebCenter Portal's Mail service.

Your system administrator determines the mail client that the Send Mail feature uses: either **WebCenter Portal's Mail Service** or a **Local Mail Client**. The default value is **Local Mail Client**. If your system administrator enabled users to override this mail client setting, then you can select a different mail client on the **Preferences - Mail** page (Figure 12-4).

Figure 12-4   Preferences - Mail Page
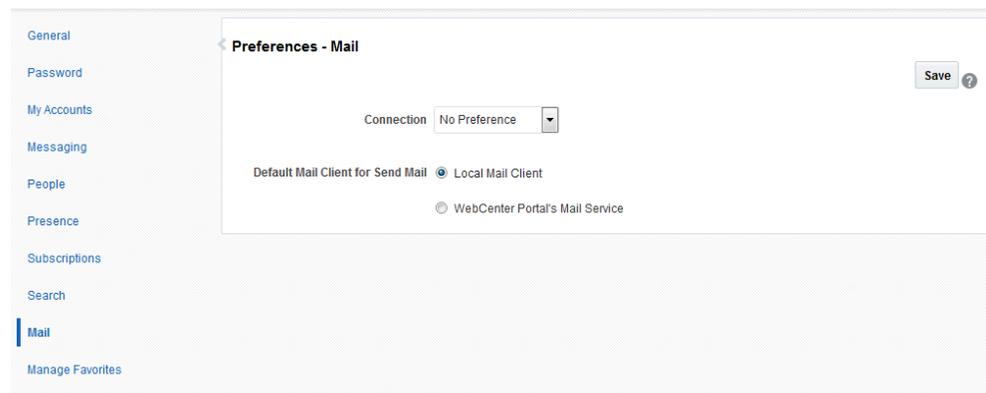
See Selecting Your Preferred Mail Connection for more information about setting mail preferences.

About Mail in WebCenter Portal

WebCenter Portal conveniently exposes familiar mail functionality. Mail is managed on the same mail server that provides your regular business mail, and the mail messages exposed are the same messages you would see in your mail inbox. Many of the same actions are also supported. For example, you can send messages with attachments,

forward messages, and so on. The mail feature does not replace your company mail, but rather enhances it by making it accessible within WebCenter Portal.

WebCenter Portal's Mail service enables users to perform simple mail functions, such as view, read, create and create with attachments, reply, forward, and delete. All mail is stored in your inbox and can be accessed from there through a link.

WebCenter Portal fetches mail from the inbox folder only. It does not support fetching mail from other folders or moving messages. It supports any mail server based on IMAP4 and SMTP protocol. WebCenter Portal provides access to multiple mail connections. You can use a different mail connection by selecting it in WebCenter Portal's Preferences settings. For more information, see Selecting Your Preferred Mail Connection.

The Mail viewer exposes features from your mail server (Figure 12-5).

Figure 12-5   Mail in WebCenter Portal
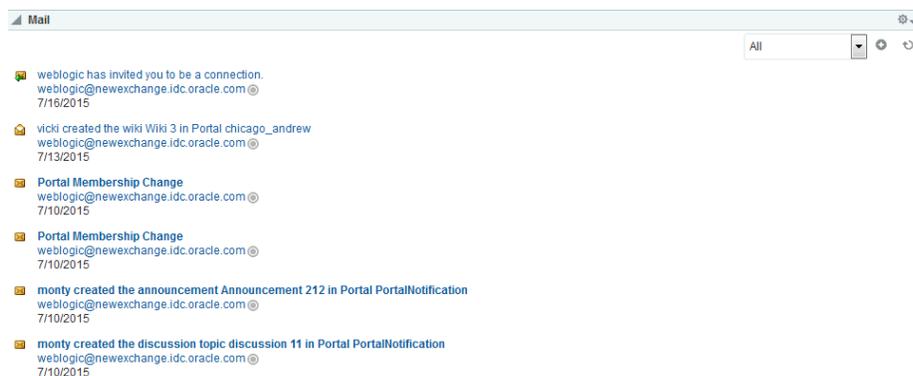
The Mail viewer presents the following:

- A menu for specifying which messages to display

- A **Compose** icon for starting the process of creating a new message

- A **Refresh** icon for updating new messages

Note that the mail viewer does not render embedded images. If an email contains inline images, they are shown as attachments, and not within the message body.

A default distribution list containing all the portal members is created upon portal creation. The portal manager can also select a different distribution list. As members are added to or deleted from the portal, the mailing list is updated automatically.

You can mail other users or any user recognized by the back-end mail server by adding their mail addresses in the To field.

Mail is integrated with WebCenter Portal's instant messaging and presence to provide additional options for contacting others. Each listed mail message in the viewer includes the sender's user name and status icon, which you can click to open a menu with options for starting a chat session or sending a new mail.

> **Note:**
>
> If instant messaging and presence is not configured in WebCenter Portal, the status icons are grayed out. For more information, see Using Instant Messaging and Presence Viewer.

Selecting Your Preferred Mail Connection

When WebCenter Portal provides access to multiple mail connections, it also provides a way for you to choose which connection to use.

> **Note:**
>
> You can choose your preferred mail connection only if your system administrator enabled users to override this mail client setting.

To choose your preferred mail connection:

1. From your user menu in the menu bar, select **Preferences**.

2. On the **Mail** page, from the **Connection** drop-down list, select the mail connection you want to use for accessing your mail through WebCenter Portal.

   The options available in this list depend on the connections your system administrator makes available to WebCenter Portal. The **No Preference** option uses your system-level active mail connection.

Figure 12-6   Preferences - Mail Page
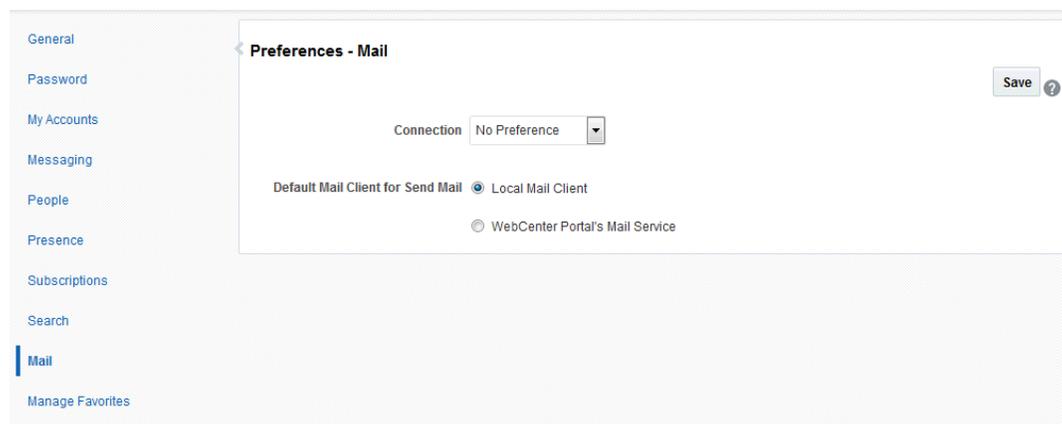
3. Under **Default mail client for Send Mail action**, select an option to identify the mail application to open when the `SendMail` command is invoked.

   Choose one of the following options:

   - **Local mail client**—Select to specify that the local mail client you normally use, such as Microsoft Outlook, should open a compose message window when the `SendMail` command is invoked.

- • **WebCenter Portal's Mail Service**—Select to specify to open WebCenter Portal's Mail service compose message window when the `SendMail` command is invoked.

4. Click **OK** to save your changes and exit Preferences.

5. Log out of WebCenter Portal.

6. Log in to WebCenter Portal.

   If you previously saved your credentials for this mail connection to the WebCenter Portal credential store, then you are logged in to the new mail connection automatically.

   If you have not previously saved your credentials, log in to this mail connection using Preferences (see Providing Login Information for External Applications) or using the login link where you see mail (see Logging in to Mail).

Working with Mail

WebCenter Portal's mail feature exposes your company's mail features within the context of your portal. You can view, respond to, and manage your personal mail.

This section provides information about how to use mail in WebCenter Portal. It includes the following topics:

- • Logging in to Mail
- • Personalizing Your View of Mail
- • Opening Mail Messages
- • Downloading Mail Attachments
- • Composing and Sending Mail Messages
- • Sending Mail with Attachments
- • Removing Attachments from the Add Attachment Window
- • Replying To and Forwarding Mail
- • Refreshing Mail
- • Deleting Mail

Logging in to Mail

If you are using your local mail client, before you can access your mail in a portal, you must provide your mail login credentials. The first time you access mail, it displays the message depicted in Figure 12-7.

Figure 12-7   Mail Login Message

To log in to mail:

1. Click the **Login to Mail** link (Figure 12-7) to open an External Application Login dialog (Figure 12-8).

Figure 12-8   External Application Login Dialog

> **Note:**
>
> The External Application Login dialog may include additional fields and information, depending on the requirements of the mail service that provides it. For more information about external applications and storing your login credentials in WebCenter Portal, see Providing Login Information for External Applications.

2. Enter your user name and password and any other login credentials that your mail application requires.

   Required fields are marked with an asterisk (*).

3. Optionally, deselect or keep selected the **Remember My Login Information** to store your credentials.

   The next time you log in to WebCenter Portal, your mail credentials are retrieved from storage and you are logged in.

4. Click **OK**, and mail displays from your inbox.

Personalizing Your View of Mail

You can personalize your view of the mail by filtering the number of displayed messages. For example, you can choose to display only the messages that were

delivered **Today**, **Since Yesterday**, **This Week**, or **This Month**. Additionally, you can choose to display **All** messages in your inbox.

> **Note:**
>
> By default, the 50 most recent mail messages from your mail server inbox folder are displayed.

Personalizations affect only your view of mail. No other user's view is changed because of your selection.

To personalize your view of mail:

1. In the Mail viewer, click the drop-down list (Figure 12-9).

Figure 12-9   Mail Personalization Menu
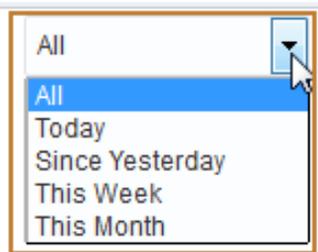
2. Select a display option from the available options:

    *   **All**—to show all messages
    *   **Today**—to show all messages received today
    *   **Since Yesterday**—to show all messages received yesterday and today
    *   **This Week**—to show all messages received in this calendar week
    *   **This Month**—to show all messages received in this calendar month

    The mail view refreshes, displaying only those messages that match your selection.

Opening Mail Messages

The messages that display in your mail are the same messages that display in your regular mail application inbox. You open them in the same way too. Note that the mail viewer does not render embedded images. If an email contains inline images, they are shown as attachments, and not within the message body.

To open a mail message:

1. Click the link to the message you want to open.

2. After reading the message, click **Cancel** to close the message.

> **Note:**
>
> HTML reports, tables, inline images (copy paste), and fonts viewed in a mail message may not render correctly. The Mail service requires HTML data to be well-formed to display as expected in a mail message.
>
> The mail should show everything that your browser supports. However, some tags, like `<script>`, are encoded and disabled from execution.

Downloading Mail Attachments

Note that the mail viewer does not render embedded images. If an email contains inline images, they are shown as attachments, and not within the message body. Attachments display in mail messages as links (Figure 12-10).

Figure 12-10   Mail Attachment
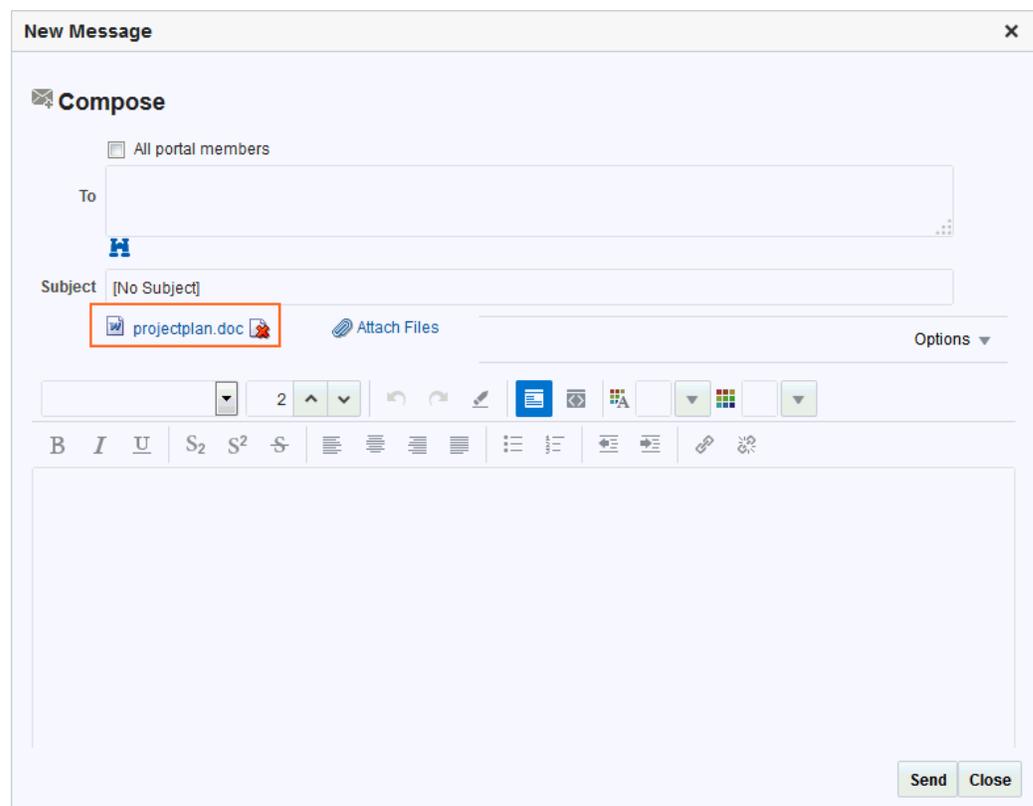
Accessing files associated with attachments is the same as accessing a file from any browser window.

To view an attachment, click the link. Clicking an attachment link opens a download dialog that gives you the option of viewing the file in its native application or saving the file to a locally. This is browser behavior, so the behavior depends on the browser you use.

Composing and Sending Mail Messages

Whether you are composing and sending messages through WebCenter Portal's Mail or using your local mail client, it is the same as doing so in your regular mail application.

To compose and send a mail message:

1. Click the **Compose** icon (Figure 12-11).

    Figure 12-11   Compose Icon in Mail

2. In the **Compose** window (Figure 12-12), do one or both of the following:.

    *   Select **All portal members** to send mail to the entire distribution list containing all the users who are members of the portal

    *   Enter recipients in the **To** field. Separate multiple addresses with a comma (,)

Figure 12-12   Compose Window
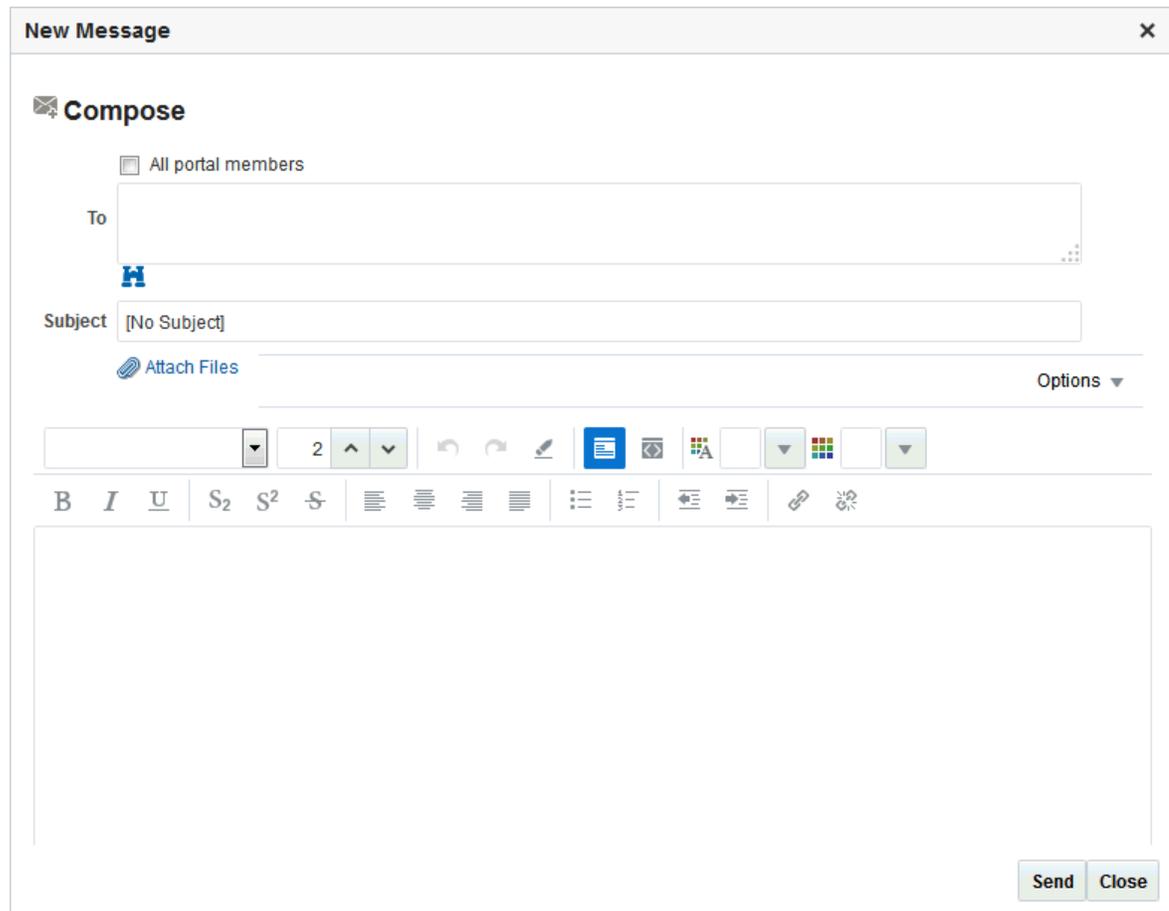
3. Optionally, click the **Options** drop-down list (Figure 12-13):

    • Select **Show CC field**, **Show BCC field**, **Show Reply-to field** to include these fields in the message.

       The Reply-to field is prepopulated with the user composing the mail (Figure 12-13), but it can be changed to any address.

    • Deselect **Use rich text editor** to compose the message in plain text, instead of the rich text editor. The Use rich text editor option is selected by default.

    The selected options persist until they are changed.

Figure 12-13   Options in the Mail Compose Window
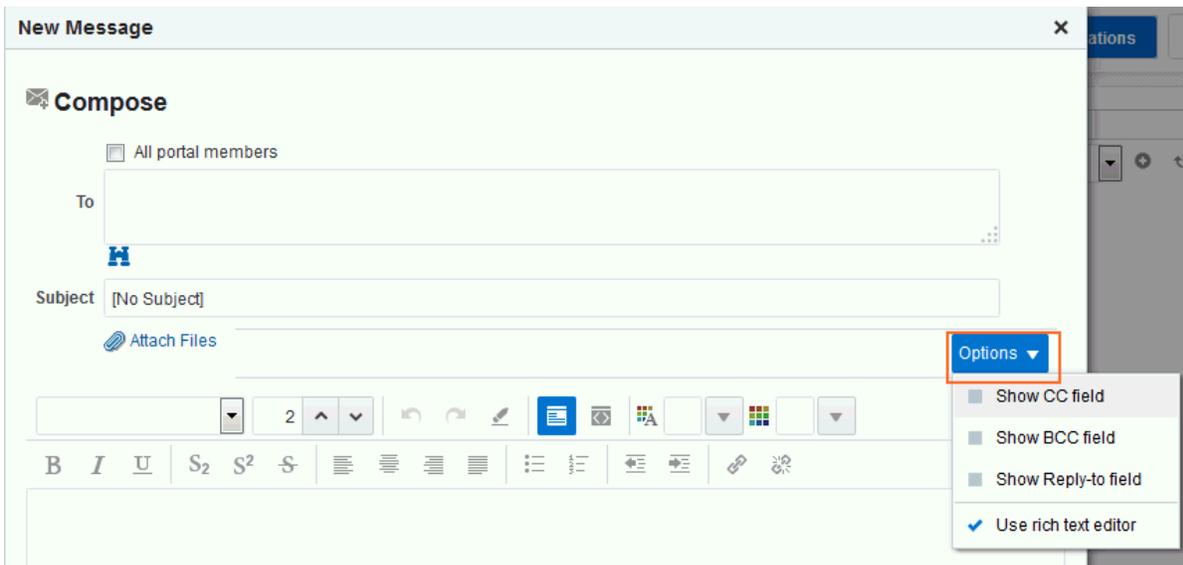
4. Optionally, click the **Find User** icon to find mail addresses (Figure 12-14).

   The Compose window is directly connected to your mail server, so you can use the Find User icon to find mail addresses and contacts.

Figure 12-14   Find User Icon in a Compose Window

The Select User window opens. Enter a search term and click the Search icon.

> **Tip:**
>
> For tips on searching with the **Find User** icon, see Searching for a User or Group in the Identity Store in *Building Portals with Oracle WebCenter Portal*.

5. In the **Subject** field, enter a subject for your message.

   Enter up to 255 characters.

6. Compose your message in the message body.

7. Click **Send**.

Sending Mail with Attachments

Just like your regular mail, you can send messages with attachments.

To send a mail with attachments:

1. Create a mail message as described in Composing and Sending Mail Messages.

2. In the **Compose** window, click the **Attach Files** link (Figure 12-15).

Figure 12-15   Attach Files Link
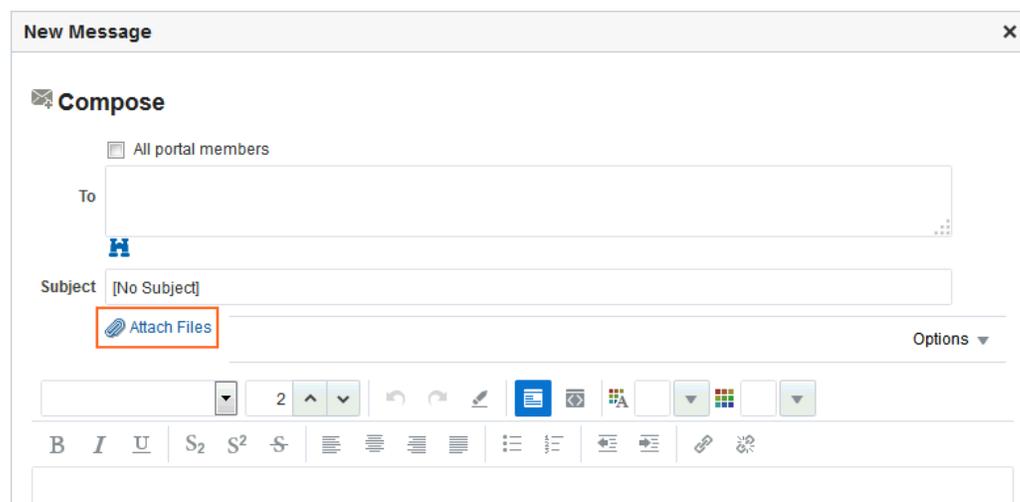
The **Add Attachment** window opens.

3. Click **Browse** to locate and choose an attachment.

4. Click **Attach** to attach the selected file.

   The file size must be greater than zero bytes but less than 2 MB. Zero-byte files do not get attached.

> **Note:**
>
> It is recommended that you avoid attaching large files, as this causes the server to slow down or not respond. If you attach large files (greater than 2MB), then because of how the HTTP protocol handles attachments, the system reports an error only after reading all of the 2MB characters.

5. Repeat steps 3 and 4 to add additional attachments.

   Attachments are listed under the **Attachments** heading in the **Add Attachment** window (Figure 12-16).

Figure 12-16   Attachments in the Add Attachment Window

A **Remove Attachment** icon appears next to each attachment (Figure 12-16). Click this to remove a selected attachment from the window.

6. Click the **Back to Compose** link to go back to the Compose window.

7. Click **Send**.

Removing Attachments from the Add Attachment Window

You can remove attachments from the **Add Attachment** window and from the **Compose** window:

•

• To remove mail attachments from the **Add Attachment** window, click the **Remove Attachment** icon next to the attachment you want to remove (Figure 12-17).

Figure 12-17   Remove Attachment Icon in the Add Attachment Window

For information about accessing the **Add Attachment** window, see Sending Mail with Attachments.

• To remove mail attachments from the **Compose** window, click the **Remove Attachment** icon next to the attachment you want to remove (Figure 12-18).

Figure 12-18   Remove Attachment Icon in the Compose Window
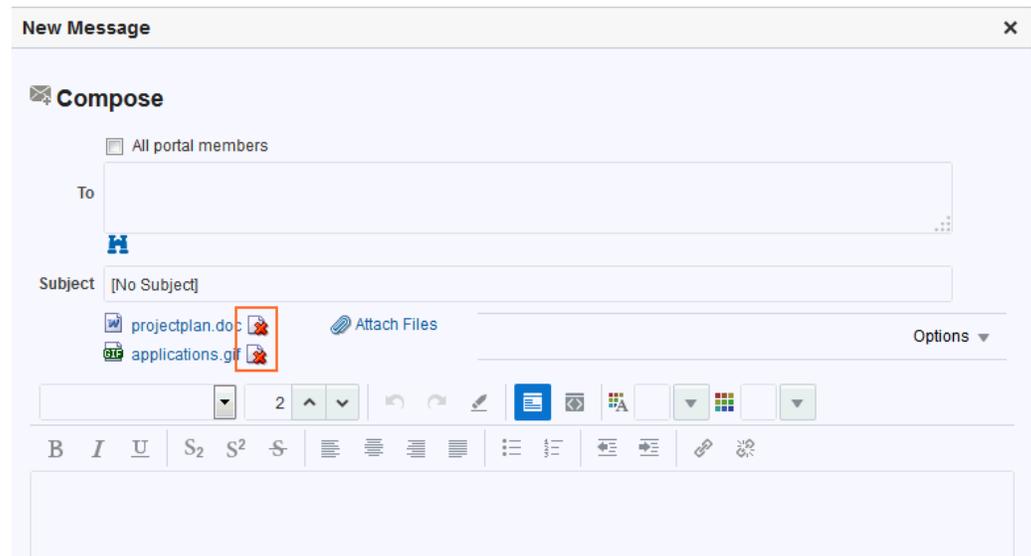
For information about accessing the **Compose** window, see Composing and Sending Mail Messages.

Replying To and Forwarding Mail

When you reply to or forward a mail message, the mail content is sent as an attached HTML file instead of being displayed in the mail message window. Replying to and forwarding mail is as straightforward as in your regular mail application.

To reply to or forward a mail message:

1. Click the link to the message you want to reply to or forward.

2. Select one from the following options:

    • Click **Reply** to reply to the sender.

    • Click **Reply All** to reply to all recipients (including users who received a blind copy).

    • Click **Forward** to send the message on to a third party.

    Notice that the original mail is an HTML attachment.

3. In the resulting **Compose** window, select **All Portal Members** to send mail to the entire distribution list or enter recipients in the **To** field as you require.

    Separate multiple entries with a comma (,).

    Click the **Options** drop-down list to add Cc, Bcc, or Reply-to fields or to remove the rich text editor and use plain text.

    The **Compose** window is directly connected to your mail server, so you can use the **Find User** icon to find mail addresses and contacts. Click the **Find User** icon and, in the resulting dialog, enter a search term for a user. For tips on searching for a user in the identity store, see Searching for a User or Group in the Identity Store in *Building Portals with Oracle WebCenter Portal*.

4. Optionally, revise the subject in the **Subject** field.

5. In the mail's message area, enter your reply or any forwarding message before or after the original message.

6. Optionally, add attachments as described in Sending Mail with Attachments.

7. Click **Send**.

   The message is sent, and the original message reappears.

8. Click **Cancel** at the bottom of the original message to close the window.

Refreshing Mail

You must refresh to check for new mail messages. Because the refresh operation triggers an event to the server to check for new mail, it may take a while to get new messages. Therefore, you may have to refresh a couple of times or so to display new mail.

- To refresh mail, click the **Refresh** icon (Figure 12-19).

> **Note:**
>
> Do not click the Reload or Refresh button in your browser. Click the **Refresh** icon to update your view.

Figure 12-19   Refresh Mail Icon
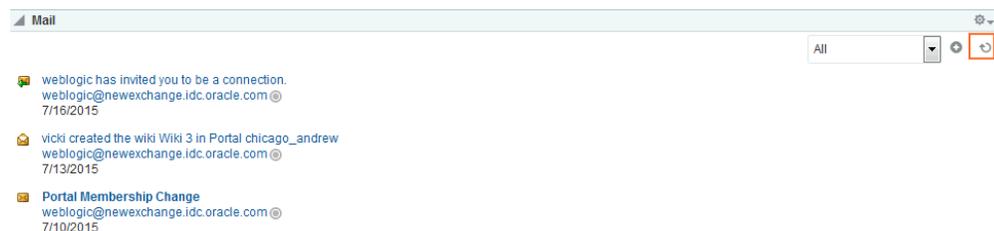
Deleting Mail

You can easily remove a message from your inbox.

To delete a mail message:

1. Open the message you want to delete (see Opening Mail Messages)

2. Click **Delete** at the top of the message (Figure 12-20).

Figure 12-20   Delete Icon in a Message Window
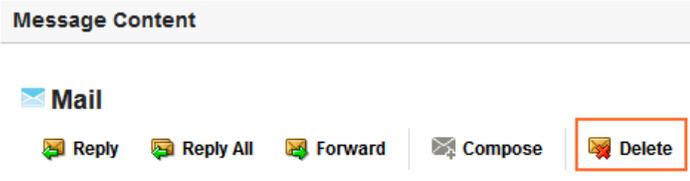
3. Click the **Refresh** icon in the Mail view to remove the message from the list (see Refreshing Mail).

13

Working with Feedback and the Message Board

Post, view, and manage feedback and messages to and from your connections using the Feedback viewers and Message Board.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you need the application-level permission `People Connections: Update People Connections Data`.

Topics:

- About Feedback
- Setting Feedback Preferences
- Viewing Feedback
- Posting Feedback
- Deleting Feedback
- About Messages
- Setting Message Board Preferences
- Viewing Messages
- Posting Messages
- Editing Messages
- Deleting Messages
- Enabling Other Users to Post Feedback and Messages for You

About Feedback

You can use Feedback to view, post, and manage feedback between you and other users. To view your feedback, you must add a Feedback viewer to one of your personal pages (a page you created) in the Home portal. To receive feedback from other users, you must give other users access to that personal page and set your feedback preferences to allow those users to view and/or post feedback for you. To view or post feedback for another user, you must be granted access to that user's personal page and access to view and/or post feedback for the user through that user's preferences.

For information about adding a Feedback viewer to a personal page and providing access to other users, see Enabling Other Users to Post Feedback and Messages for You.

> **Note:**
>
> - Before you access your view of Feedback or your Feedback preferences, your system administrator can set global application defaults that affect what all users may see and do with their own and other users' feedback. For more information, see Configuring Feedback in *Administering Oracle WebCenter Portal*.
>
> - In addition to being available in Feedback viewers, Feedback posts are streamed to the Activity Stream (unless your system administrator has configured the Activity Stream not to show feedback activity).
>
> - You can elect to hide Feedback activity in *your* view of the Activity Stream through your personal Activity Stream preferences. For more information, see Setting Activity Stream Preferences.
>
> - If feedback posts are streamed to the Activity Stream, be aware that even those feedback posts you mark *private* (so that it is shown only to you and the poster in *your* Feedback viewer) will still show up in the Activity Stream of your connections and the poster's connections.

WebCenter Portal provides the following Feedback views:

- **Feedback** for viewing, posting, and managing Feedback (Figure 13-1)

Figure 13-1   Feedback
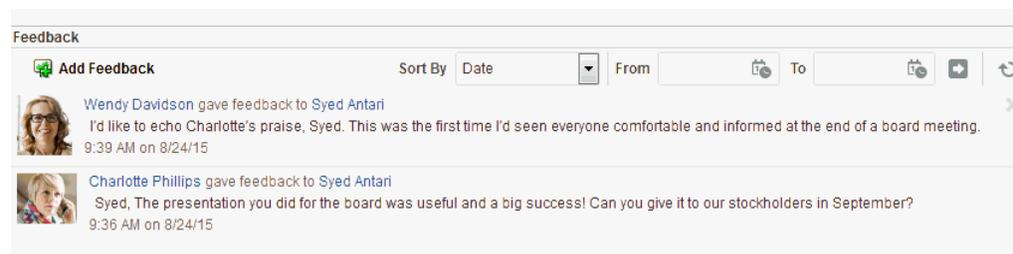
- **Feedback - Quick View** for viewing and posting Feedback (Figure 13-2)

Figure 13-2   Feedback - Quick View
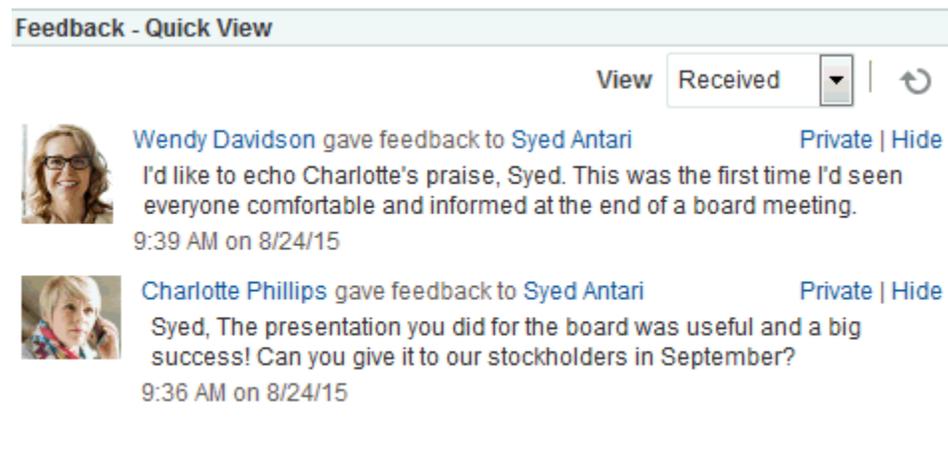
Setting Feedback Preferences

Use Feedback preferences to specify who can view the Feedback you have given and received and who can post Feedback in your Feedback views.

To set Feedback Preferences:

1. From your user menu in the menu bar, select **Preferences**).

2. On the **People** page, click the **Feedback** tab.

Figure 13-3   Preferences - People Page: Feedback Tab
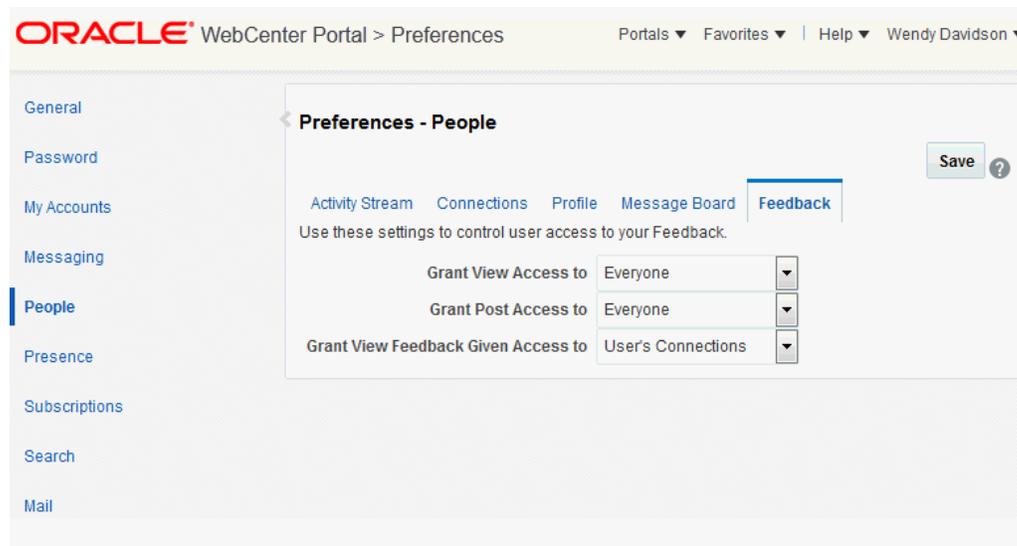
3. Set your preferences for Feedback:

Table 13-1   Feedback Preference Options

Option	Description
Grant View Access to	Select who can view Feedback given to you. • **Everyone**—All users, including users who are not logged in, can view the Feedback you have given. • **Authenticated Users**—Only users who are logged in can view the Feedback you have given. • **User's Connections**—Only you and your Connections can view the Feedback you have given. • **User Only**—Only you and the user for whom you have provided Feedback can view the Feedback you have given.
Grant Post Access to	Select who can provide Feedback to you. • **Everyone**—All users, including users who are not logged in, can post Feedback messages to you. • **Authenticated Users**—Only users who are logged in can post Feedback messages to you. • **User's Connections**—Only you and your Connections can post Feedback messages to you. • **User Only**—No one can post Feedback messages to you.
Grant View Feedback Given Access to	Select who can view Feedback you have received. • **Everyone**—All users, including users who are not logged in, can view Feedback you have received. • **Authenticated Users**—Only users who are logged in can view Feedback you have received. • **User's Connections**—Only you and your Connections can view Feedback you have received. • **User Only**—No one can view Feedback you have received.

4. Click **Save**.

Viewing Feedback

This section provides information about accessing the Feedback you have posted or received and hiding and unhiding posted Feedback. It includes the following sections:

- Viewing Feedback You Have Posted or Received
- Sorting and Filtering Feedback Posts
- Hiding Feedback in Your Own View
- Showing Hidden Feedback
- Marking Feedback Received as Private

Viewing Feedback You Have Posted or Received

A **View** menu on Feedback viewers provides a means of accessing the Feedback you have posted for others and the Feedback you have received from others.

To view Feedback you have posted or received:

1. In the Home portal (see How do I access the Home portal?), go to the Feedback viewer.

2. Select an option from the **View** menu (Figure 13-4):

Chapter 13
Viewing Feedback

- **Given**—To view the Feedback you have posted for others
- **Received**—To view the Feedback others have left for you

Figure 13-4   Feedback View Menu
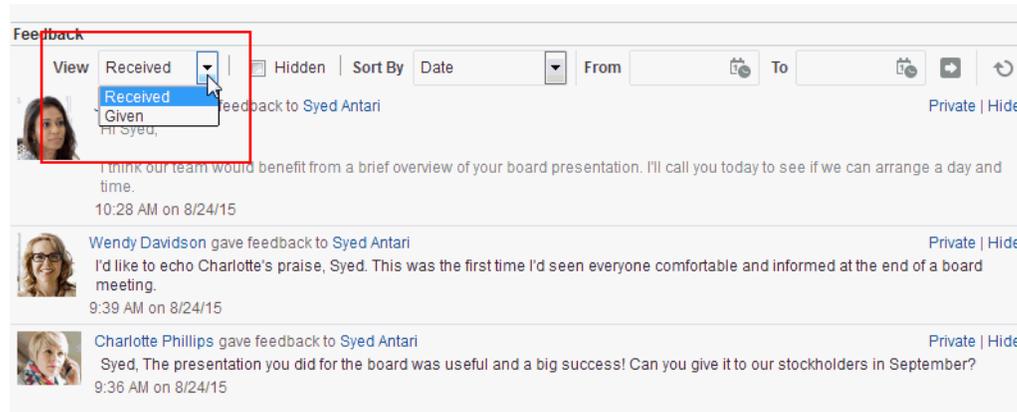
Sorting and Filtering Feedback Posts

The Feedback viewer includes sorting and filtering features for controlling what is shown in your view. Use the sorting feature to sort your Feedback by date or by person—that is, the user name of the person who left the Feedback. Use the filtering feature to display Feedback posted on a particular date or within a given date range.

To sort and filter your Feedback:

1. Go to the Feedback viewer.

2. Select an option from the **Sort By** menu (Figure 13-5):

Figure 13-5   Sort By Menu on Feedback Viewer
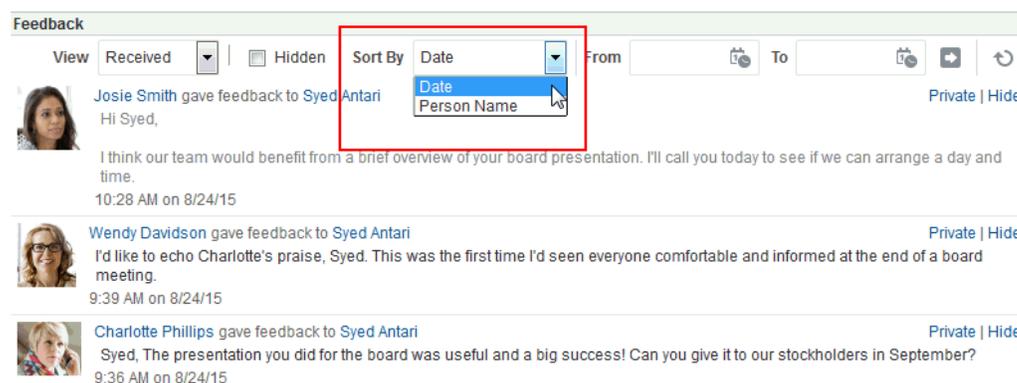
- **Date**—To sort Feedback posts from the most recent to the oldest.
- **Person Name**—To sort Feedback posts by the name of the user who left it for you (**View** is set to **Received**) or by the name of the user you left it for (**View** is set to **Given**).

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13-5

3. To specify a date range, enter a start date in the field that follows **From** and enter an end date in the field that follows **To** (Figure 13-6).

Figure 13-6   Sort By Date Range Fields on Feedback Viewer
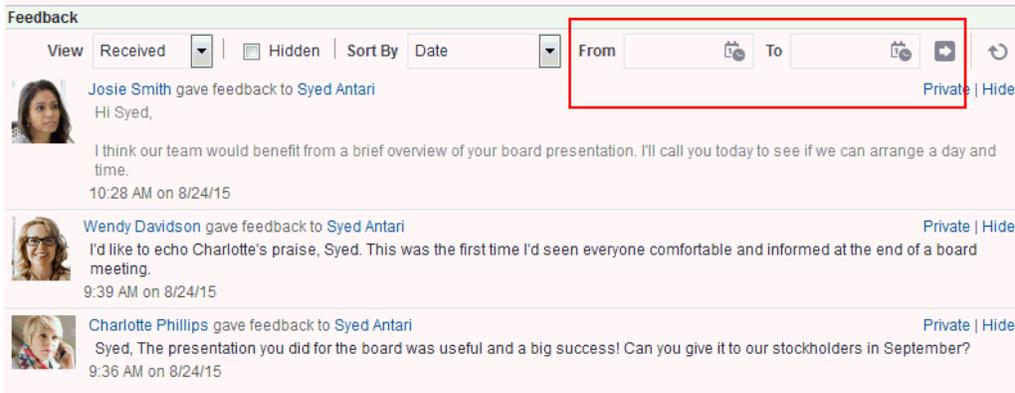
> **Tip:**
>
> You must enter both a start and end date, even when you want to view Feedback posts from a given day. In such a case, enter the same date in both fields.
>
> Instead of entering dates, you can click the **Select Date** icon next to a field to select a date from a calendar.

> **Caution:**
>
> In WebCenter Portal, you cannot use the keyboard to select a date from the calendar that pops up when you click the **Select Date** icon. Instead, manually enter the date into the field.

4. Click the **Search** icon.

All of the Feedback posts (either received or given) that fall within the specified date range appear in the Feedback viewer.

> **Tip:**
>
> To remove the date filtering criteria from your Feedback view, click the **Clear Date** icon.

Hiding Feedback in Your Own View

You can hide any Feedback in your own Feedback view. Hiding provides a means of removing Feedback posts from your own view without actually deleting them. Users to

whom you have given access to your Feedback can still see the posts you have hidden.

> **✏ Notes:**
>
> - For information about undoing this action, see Showing Hidden Feedback.
> - To hide a feedback post from everyone except you and the poster, mark the post as private. See Marking Feedback Received as Private.

To hide Feedback in your own view:

1. In the Home portal (see How do I access the Home portal?), go to the Feedback viewer.

2. Click the **Hide** link next to the Feedback message you want to hide (Figure 13-7).

Figure 13-7   Hide Link on a Feedback Message

Showing Hidden Feedback

Use the **Hidden** check box on the Feedback viewer to show all the Feedback you have hidden. The **Hidden** check box provides a means of showing all hidden Feedback in one operation, making it available to be unhidden or deleted.

To show hidden Feedback posts:

1. In the Home portal (see How do I access the Home portal?), go to the Feedback viewer.

2. Select the **Hidden** check box (Figure 13-8).

Figure 13-8   Hidden Check Box on a Feedback Viewer
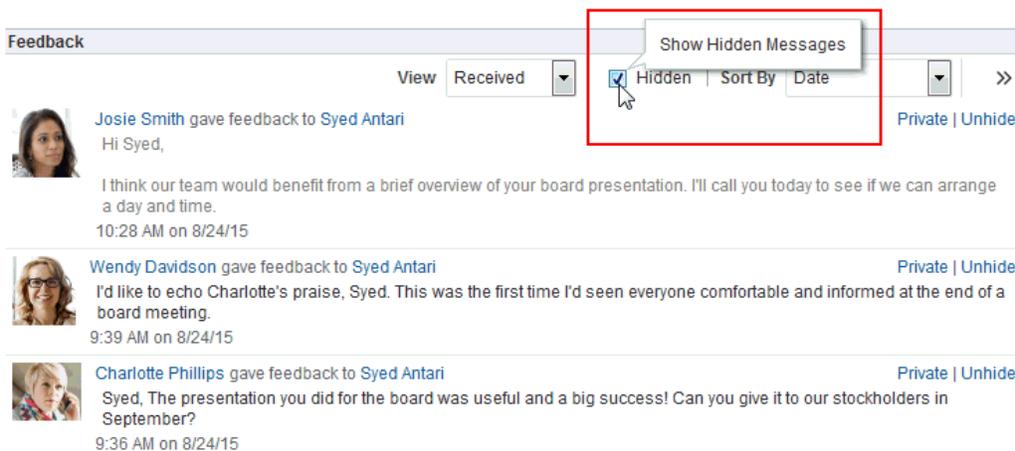
3. All the Feedback posts you have hidden are shown.

4. Click the **Unhide** link to the right of the Feedback you want to show (Figure 13-9).

Figure 13-9   Unhide Link on a Feedback Viewer
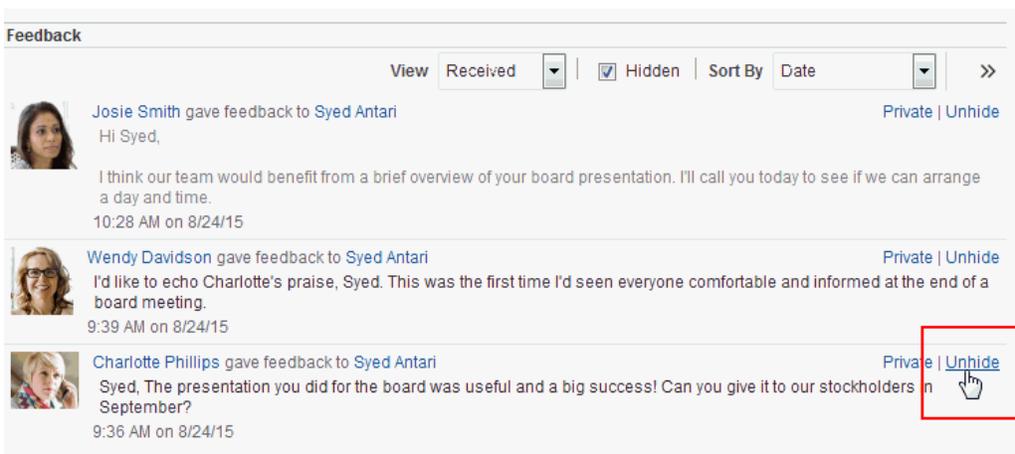
5. To remove hidden Feedback posts from your view, deselect the **Hidden** check box.

Marking Feedback Received as Private

You can mark Feedback you have received as private so that it shows only to you and the poster. To mark a post as private, click the **Private** link next to the post (Figure 13-10).

> **✎ Note:**
>
> - If you do not see portal the **Private** link, your portal manager might have hidden the link.
> - Unless Activity Stream is configured at the application level or the personal level (through Preferences) to omit Feedback activity, your connections and the poster's connections can still see private Feedback in their Activity Streams.
> - For more information, see Setting Activity Stream Preferences.

Figure 13-10   Private Link on a Feedback Message
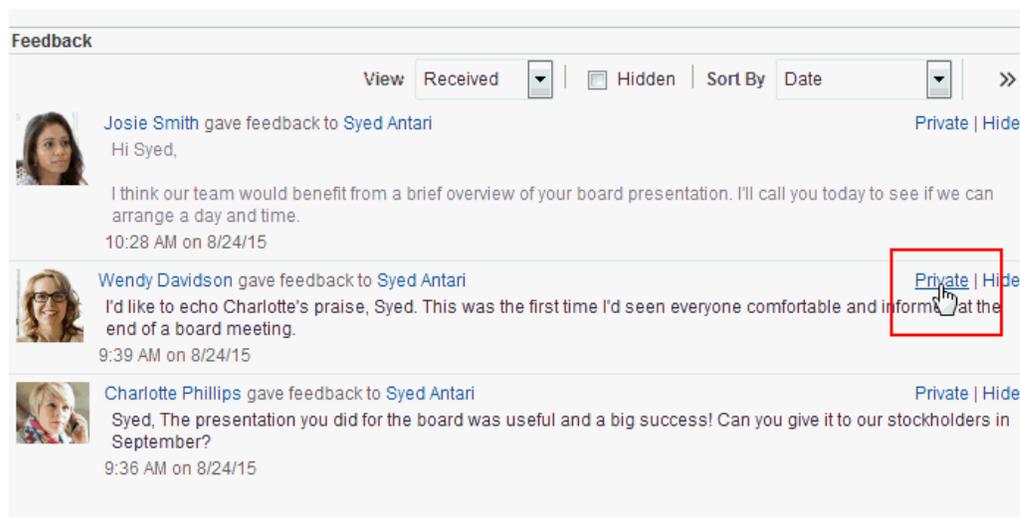
Posting Feedback

Use Feedback to pass along remarks to your connections about their efforts and results. Keep in mind that a wider audience than just your connections may see your Feedback message.

To post a Feedback message:

1. Go to the page the user has set up to receive Feedback.

    > **✎ See Also:**
    >
    > For more information, see Enabling Other Users to Post Feedback and Messages for You.

2. Click **Add Feedback** (Figure 13-11).

Figure 13-11   Add Feedback Button on a Feedback Viewer
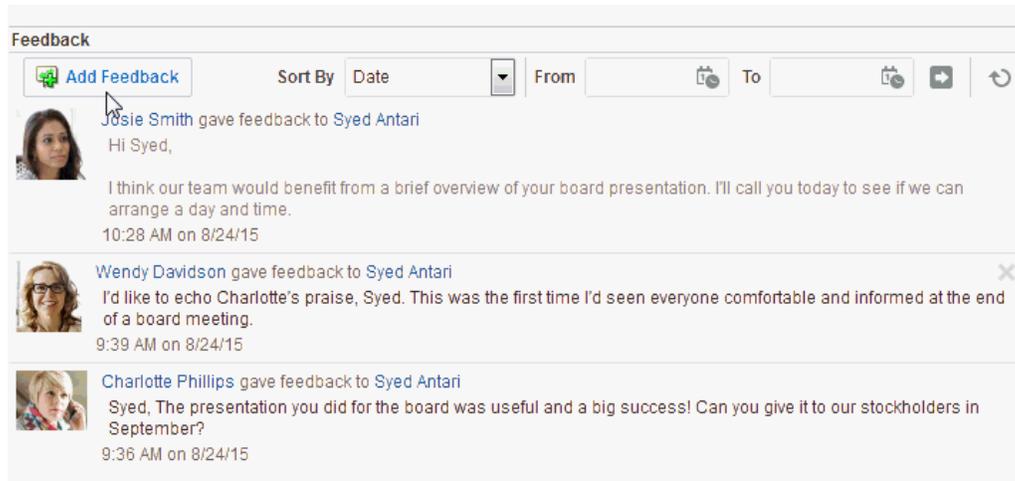
3. In the resulting Add Feedback dialog, enter your Feedback in the text area (Figure 13-12).

> 💡 **Tip:**
>
> The Add Feedback dialog provides an integrated rich text editor that enables you to add styles, links, and other HTML encoding to your Feedback.

Figure 13-12   Add Feedback Dialog with Rich Text Editor
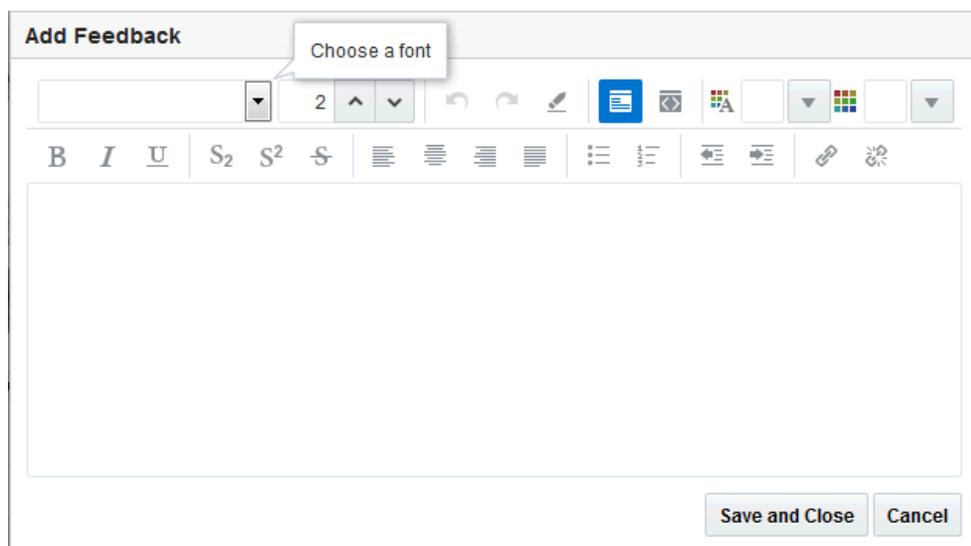
4. When you finish entering text, click **Save and Close**.

   Your Feedback appears in the selected user's Feedback view.

Deleting Feedback

You can delete Feedback you have posted to other users, provided your system administrator has enabled you to do so.

If Activity Stream is configured to show Feedback activity, deleted Feedback posts nonetheless continue to show in the Activity Stream of the recipient and all of your connections.

> ✎ **See Also:**
>
> For information about configuring your personal Activity Stream Preferences, see Setting Activity Stream Preferences.

To delete Feedback you have posted:

1. In the Home portal (see How do I access the Home portal?), go to the Feedback viewer.

2. From the **View** menu, select **Given**.

3. Click the **Delete** icon next to the post you want to delete (Figure 13-13).

Figure 13-13   Delete Icon on a Feedback Message
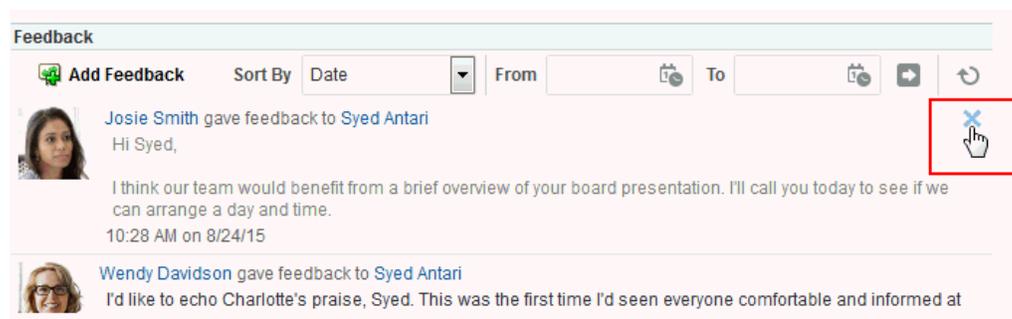
4. Click **Delete** in the resulting confirmation dialog.

   The Feedback is deleted from your view and from the view of the user for whom you left it.

About Messages

On personal pages in the Home portal, Message Board provides a means of viewing and posting messages to and from you and other users. To view your messages, you must add a Message viewer to one of your personal pages (a page you created) in the Home portal. To receive messages from other users, you must provide other users access to that personal page and set your message preferences to allow those users to view and/or post messages for you. To view or post messsages for another user, you must be granted access to that user's personal page and access to view and/or post messages for the user through that user's preferences.

For information about adding a Message Board viewer to a personal page and providing access to other users, see Enabling Other Users to Post Feedback and Messages for You.

In portals other than the Home portal, a Message Board viewer provides a means of viewing and posting messages within the scope of the portal. In a portal, every instance of a Message Board shows the same content: messages left by authorized users who are members of the portal. If you cannot perform actions in a portal Message Board, contact the portal manager.

> **✎ Note:**
>
> - Before you access your view of Message Board or your Message Board preferences, your system administrator can set global application defaults that affect what all users may see and do with their own and other users' messages. For more information, see Configuring Message Board in *Administering Oracle WebCenter Portal*.
>
> - In addition to being available in Message Board viewers, messages are streamed to the Activity Stream (unless your system administrator has configured the Activity Stream not to show Message Board activity).
>
> - You can elect to hide Message Board activity in *your* view of the Activity Stream through your personal Activity Stream preferences. For more information, see Setting Activity Stream Preferences.
>
> - If messages are streamed to the Activity Stream, be aware that even those messages you mark *private* (so that it is shown only to you and the poster in *your* Message Board viewer) will still show up in the Activity Streams of your connections and the poster's connections.

WebCenter Portal provides the following Message Board views:

- **Message Board** for adding, viewing, updating, hiding, deleting, and managing your view of messages, and for marking messages as private and sharing private messages (Figure 13-14)

Figure 13-14   Message Board
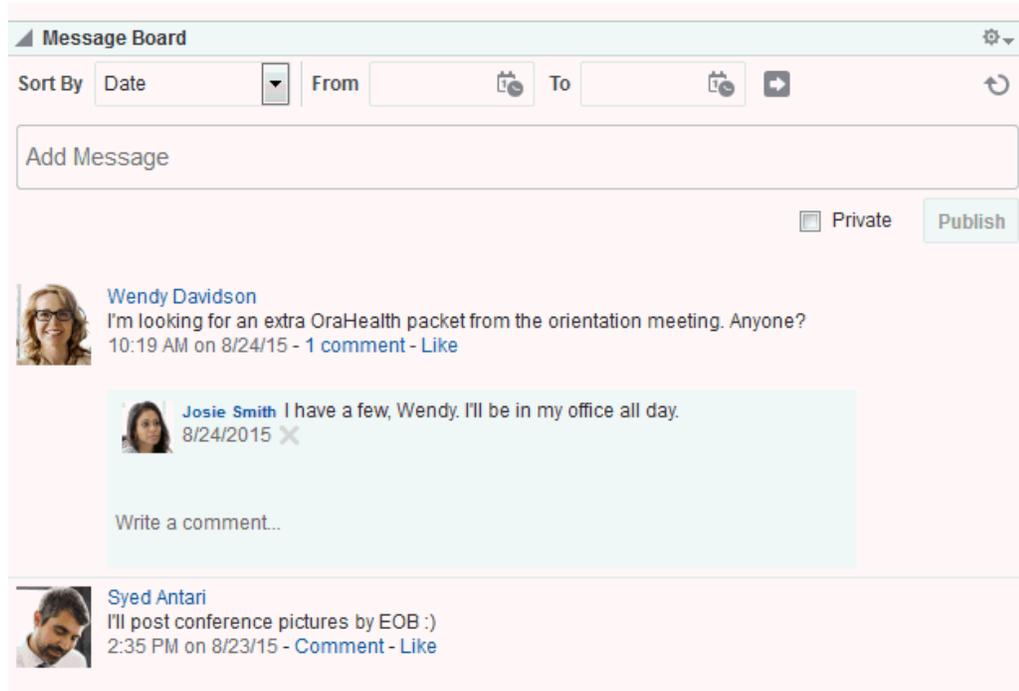
- **Message Board - Quick View** for adding, viewing, updating, hiding, and deleting messages, and for marking messages as private and sharing private messages (Figure 13-15)

Figure 13-15   Message Board - Quick View
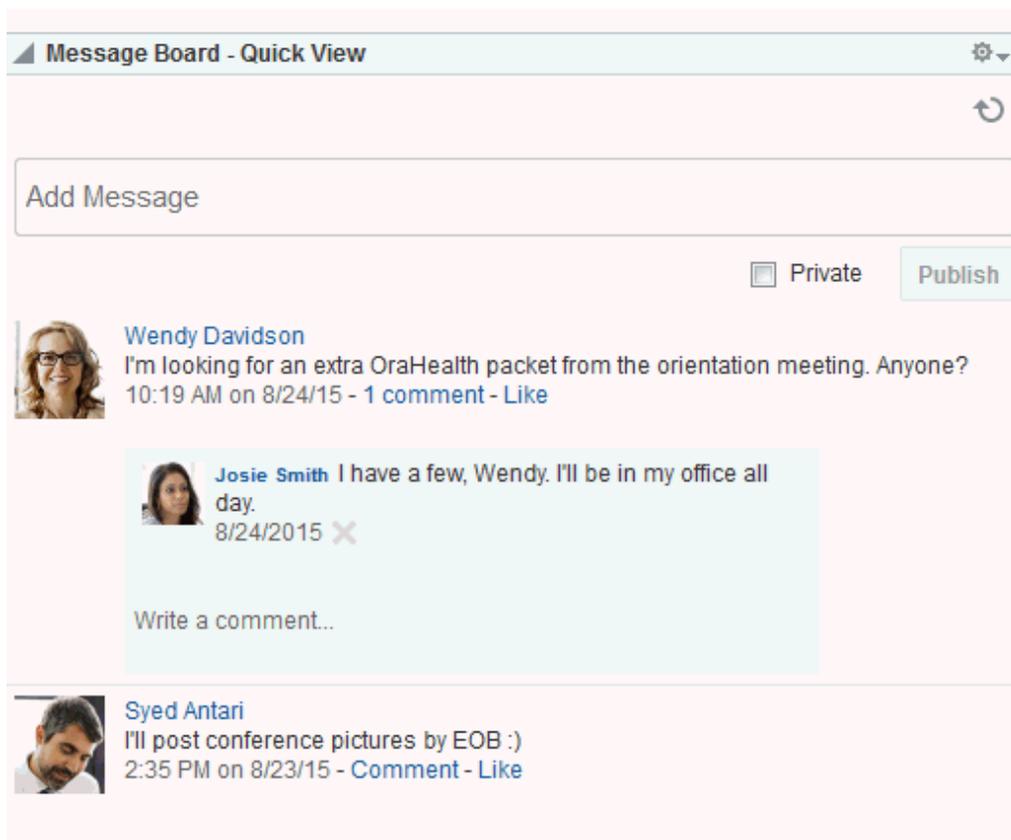
Setting Message Board Preferences

Use Message Board preferences to specify who can view and post to your Message Board.

To set Message Board Preferences:

1. From your user menu in the menu bar, select **Preferences** .

2. On the **People** page, click the **Message Board** tab.

Figure 13-16   Message Board Preferences
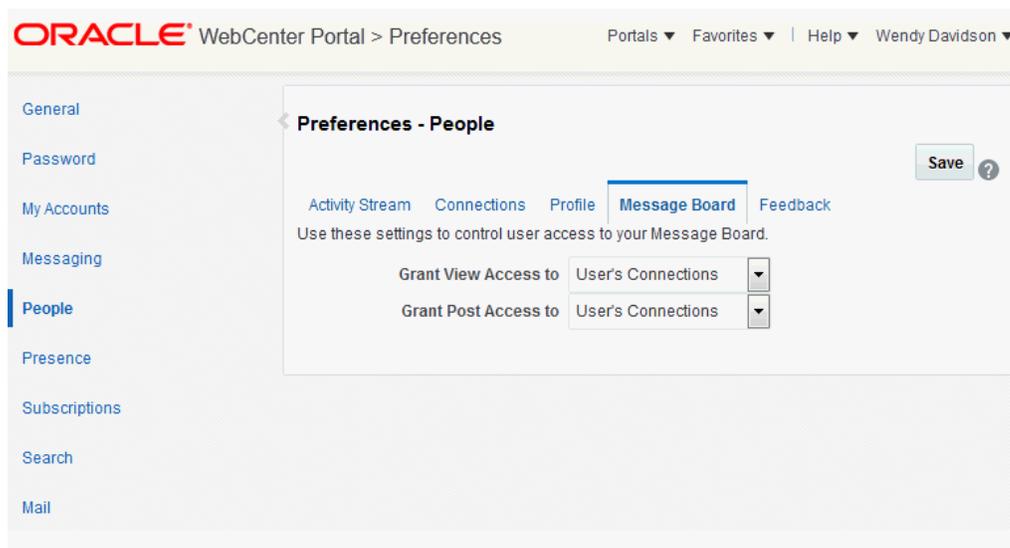
3. Set your preferences for the Message Board:

Table 13-2   Message Board Preference Options

Option	Description
Grant View Access to	Select who can view your Message Board: • **Everyone**—All users, including users who are not logged in, can view your Message Board messages. • **Authenticated Users**—Only users who are logged in can view your Message Board messages. • **User's Connections**—Only you and the users you your Connections can view your Message Board messages. • **User Only**—Only you can view your Message Board messages.
Grant Post Access to	Select who can post messages to your Message Board: • **Everyone**—All users, including users who are not logged in, can post messages to your Message Board. • **Authenticated Users**—Only users who are logged in can post messages to your Message Board. • **User's Connections**—Only you and your Connections can post messages to your Message Board. • **User Only**—Only you can post messages to your Message Board.

4. Click **Save**.

Viewing Messages

Once you and your connections have set up your own Message Boards, you can see your own and, potentially, each other's messages. This section provides information about how to view each other's messages post-set-up. It includes the following topics:

• Viewing Messages Others Have Left for You

• Viewing Messages Others Have Received

• Viewing Messages Sent to a Selected Portal

> **Tip:**
>
> For information about setting up your view of Message Board, see Enabling Other Users to Post Feedback and Messages for You.

Viewing Messages Others Have Left for You

To view Message Board messages other users have left for you, go to the personal page in the Home portal that you have set up to receive Message Board messages (Figure 13-14).

Viewing Messages Others Have Received

To view Message Board messages other users have received (including those you have left for them), go to the page the user has made available to you in your view of the Home portal. You can access this page through the **Personalize Pages** page. For more information, see Opening a Page in the Home Portal.

Viewing Messages Sent to a Selected Portal

Message Boards placed in a portal provide a means of viewing and posting messages within the portal context. All default Message Board views within a given portal display the same content: messages left by authorized users who are members of the portal. All users with access to the portal can see the posted messages.

To see the messages sent to a selected portal, navigate to the Message Board task flow dedicated to the portal.

Sorting and Filtering Message Board Messages

Your full view of the Message Board includes sorting and filtering features for managing your view of your messages. Use the sorting feature to sort your messages by date or by the person who left the message. Use the filtering feature to show messages posted on a particular date or within a given date range.

To sort and filter your Message Board messages:

1. Go to the Message Board viewer.

2. From the **Sort By** menu, select a sorting option (Figure 13-17):

Figure 13-17   Options on Sort By Menu
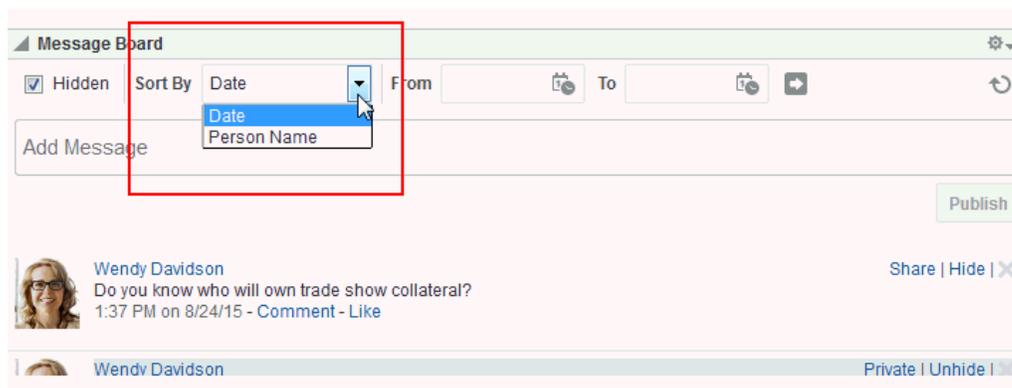
- **Date**—Sort your messages by the date they were posted, from most recent to oldest.
- **Person Name**—Sort your messages by the user name of the person who posted them, from A to Z.

3. To show messages between a particular range of dates, enter the beginning and end of the range respectively in the fields after **From** and **To** (Figure 13-18).

Figure 13-18   Sort By Date Range Options
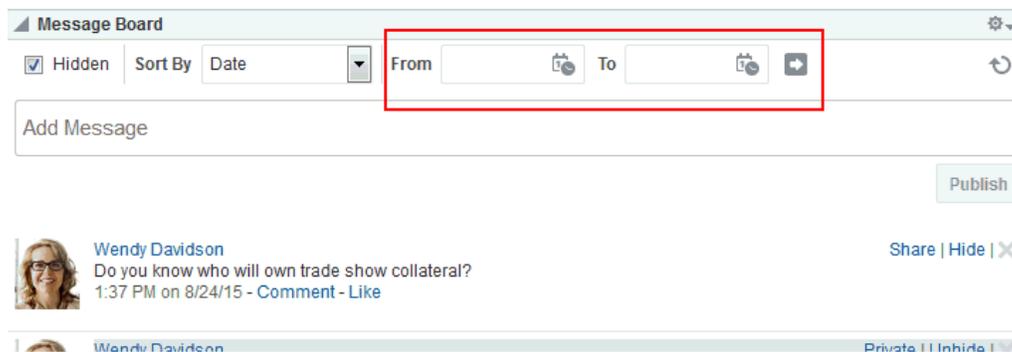
> 💡 **Tip:**
>
> Instead of entering dates, you can click the **Select Date** icon next to a field to select a date from a calendar.

> ⚠️ **Caution:**
>
> In WebCenter Portal, you cannot use the keyboard to select a date from the calendar that pops up when you click the **Select Date** icon. Instead, manually enter the date into the field.

4. Click the button to the right of the fields to apply the filter.

   The Message Board refreshes, showing only those messages that fit your sorting and filtering criteria.

> 💡 **Tip:**
>
> To remove the date filtering criteria from your Message Board view, click the **Clear Date** icon that appears to the right of the date range fields after you filter by date.

Figure 13-19   Clear Date Icon
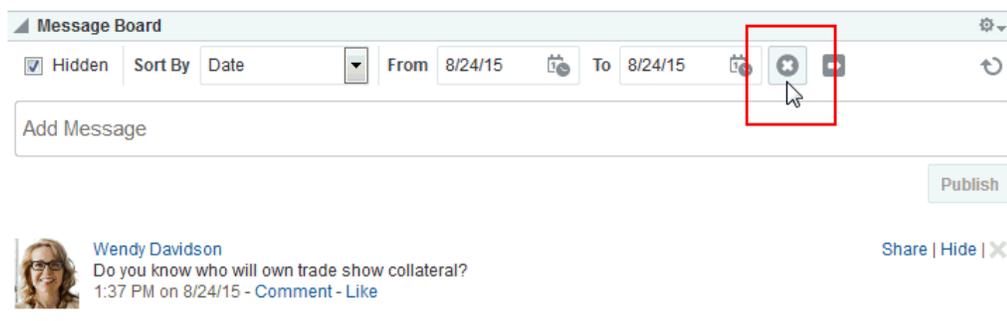
Hiding Messages in Your View of Message Board

You can hide messages in your Message Board in one of two ways: you can hide a specific message or hide public or private messages. Hiding provides a means of removing messages from your own view without actually deleting them. It is a non-permanent way to reduce the visual clutter of your Message Board view.

> ✎ **Note:**
>
> Users granted access to your messages can still see the messages that you have hidden.

To hide a specific message in your view of the Message Board:

1. Go to the message you want to hide in your view of the Message Board.

2. Click the **Hide** link next to the message you want to hide (Figure 13-20).

Figure 13-20   Hide Link on a Message
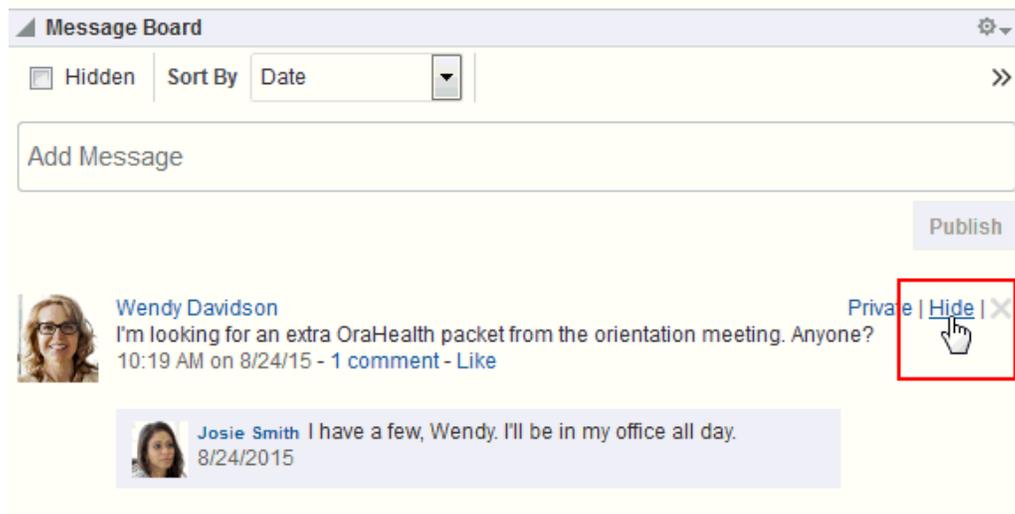
The message is hidden in your view of the Message Board. Other users you have permitted to view your Message Board can see this message when they visit your view.

To hide messages of a particular type (private or public) in your view of the Message Board:

1. In the Home portal (see How do I access the Home portal?), edit the personal page that includes the Message Board.

    > **See Also:**
    >
    > For more information, see Editing a Personal Page.

2. Click the Message Board viewer, and then click the **View Actions** menu and select **Parameters**.

    > **See Also:**
    >
    > For more information about editing component properties, see Setting Properties on a Component in *Building Portals with Oracle WebCenter Portal*. Editing component properties is an advanced task.

3. In the **Parameters** dialog, open the **Message Type** drop-down list and select the type of messages you want to see in your view of the Message Board:

    *   **All** - (default) Shows both public and private messages.

    *   **Public** - Shows only public messages.

    *   **Private** - Shows only private messages.

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

5. Click **Close** to exit page edit mode.

Messages of the selected type appear in your view of the Message Board; all other messages are hidden in your view of the Message Board. Note that other users you have permitted to view your Message Board can still see all messages when they visit your view.

Showing Hidden Messages

Use the **Hidden** check box on the Message Board to show all of the messages you have hidden. The **Hidden** check box provides a means of showing all hidden messages in one operation, making it available to be unhidden or deleted.

To show hidden Message Board messages:

1. In your view of the Message Board, select the **Hidden** check box to show the messages you have hidden (Figure 13-21).

Figure 13-21   Hidden Check Box on a Message Board Viewer
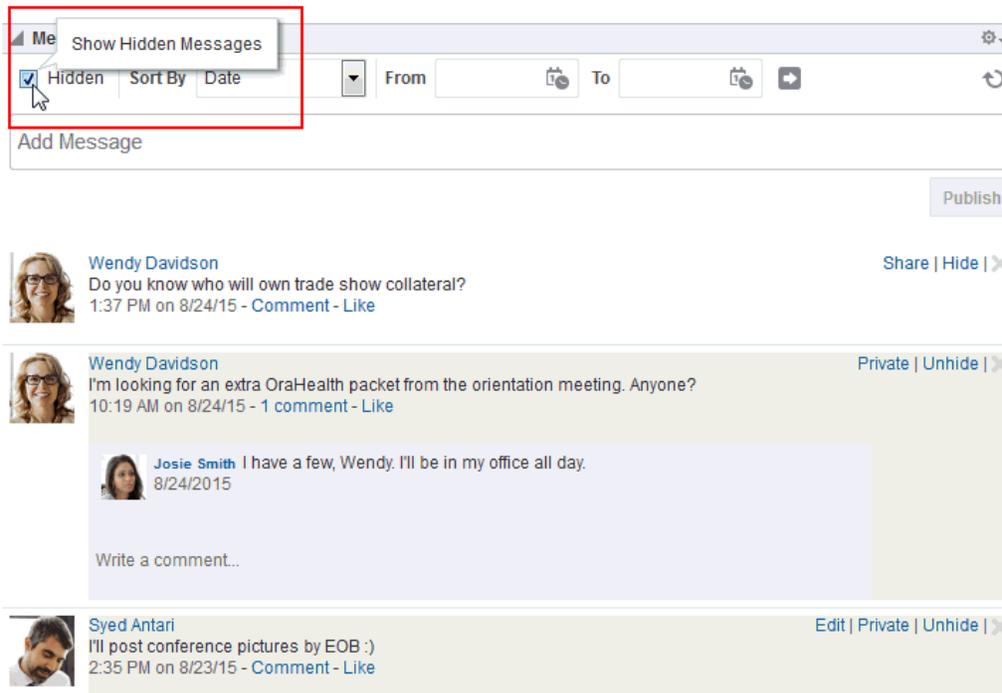
2. Click the **Unhide** link next to the message you want to show (Figure 13-22).

Figure 13-22   Unhide Link on a Message Board Viewer
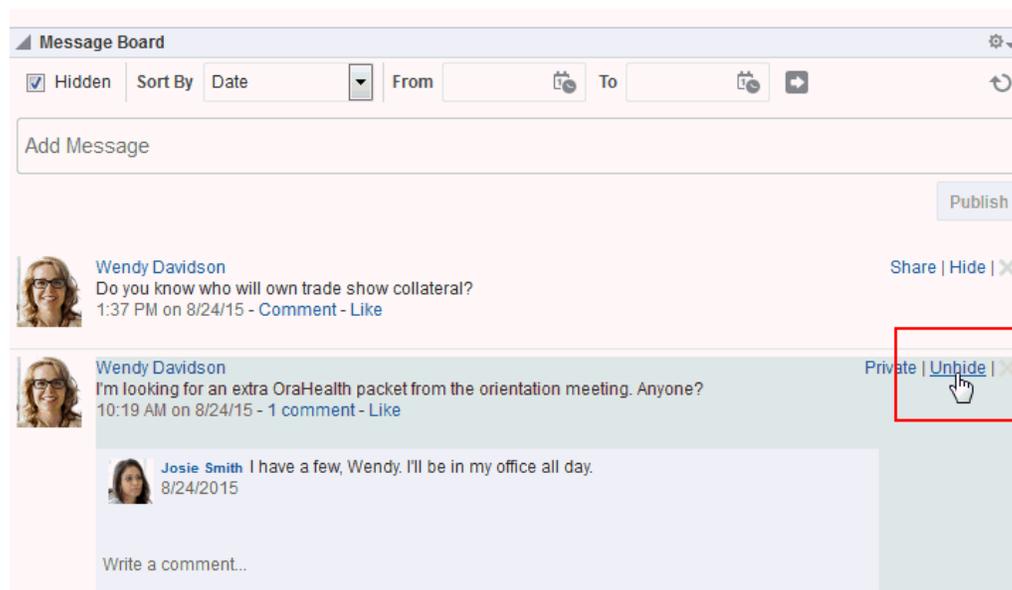
3. Optionally, deselect the **Hidden** check box to hide the messages that are still marked as hidden.

Posting Messages

This section describes the various ways you can post messages and attachments. It includes the following topics:

- Posting a Message Through Message Board
- Posting a Private Message
- Sharing a Private Message

Posting a Message Through Message Board

This section describes how to post a message to all of your connections through Message Board.

> ✎ **See Also:**
>
> For information about Connections, see Managing Your Contacts.

To post a Message Board message:

1. Go to a Message Board view.
2. In the text box, enter a message.
3. Click **Publish** (Figure 13-23).

Figure 13-23   Publish Button on a Message Board View
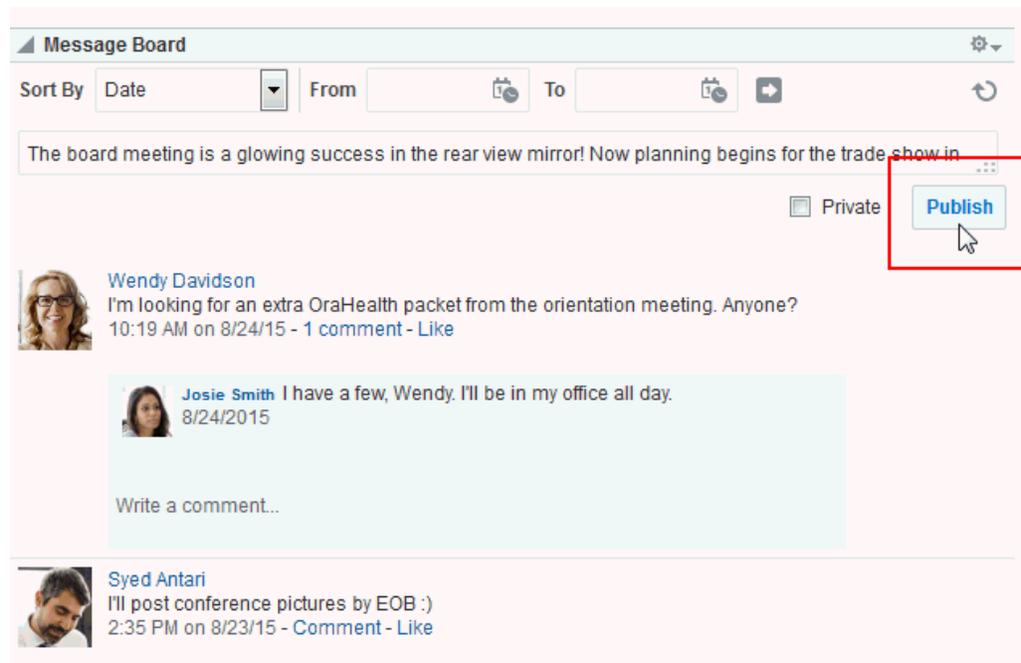
The message appears in all of your connections' views of Message Board and Activity Stream.

Posting a Private Message

Provided you are authorized to do so, you can post a private message to any of your connections. When you mark a message as *private*, only you and the recipient can see the message in your views of Message Board; however, all of your connections and all of the recipient's connections can see private messages in Activity Stream, unless the application is configured to omit Message Board activity from the Activity Stream or you have configured your Activity Stream preferences to do so.

> ✏ **See Also:**
>
> For more information, see Setting Activity Stream Preferences.

To post a private message:

1. Go to your **Profile** page and click **Connections** to bring it forward.

> 💡 **Tip:**
>
> If necessary, set the **Show** menu to **All Connections**.

2. Click the name of the user to whom you want to send a private message. In the Profile popup, click **Add Message** (Figure 13-24).

Figure 13-24   Add Message Link in Profile Popup
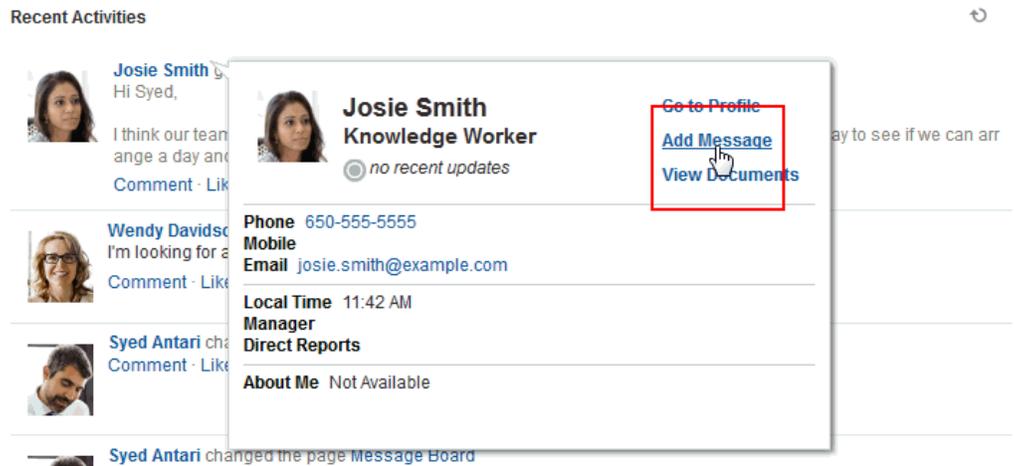
3.   Enter your message in the Add Message dialog (Figure 13-25).

Figure 13-25   Add Message Dialog
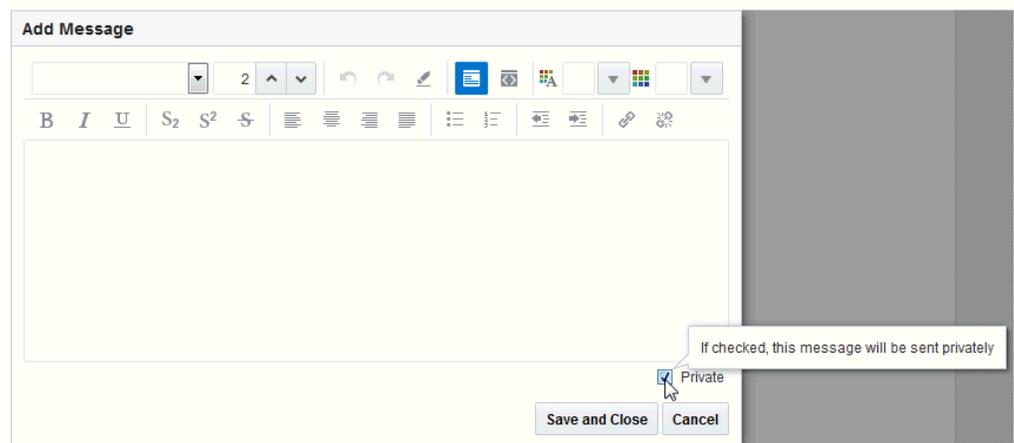
4.   Select the **Private** check box to allow only the recipient to see the message.

5.   Click **Save and Close** when you have finished.

The message appears in the recipient's views of Message Board and Activity Stream.

Sharing a Private Message

When you receive a private message, you can opt to share that message with all users who have access to your Message Board by marking it as *shared*. When someone sends you a message marked *private*, only you and the sender can see it in the Message Board (though all of your connections and the sender's connections can see the message in their Activity Streams, unless the Activity Stream in configured to omit Message Board activity).

When you mark a private message as shared, you open it up to those permitted to see your view of the Message Board.

To mark a message as shared:

1. Go to the message you want to mark as shared in your view of the Message Board.

2. Click the **Share** link next to the relevant message (Figure 13-26).

Figure 13-26   Share Link on a Private Message
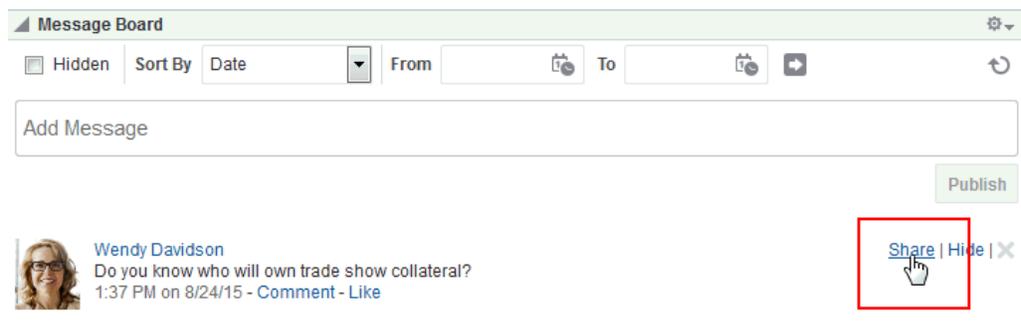
The message can be viewed by everyone who can access your Message Board.

Editing Messages

Your system administrator can configure the Message Board feature to enable users to revise the messages they leave. Provided this permission is in place, you can edit any message you post.

To edit a Message Board message:

1. Go to the message you want to edit.

2. Click the **Edit** link associated with the message (Figure 13-27).

Figure 13-27   Edit Link on a Message
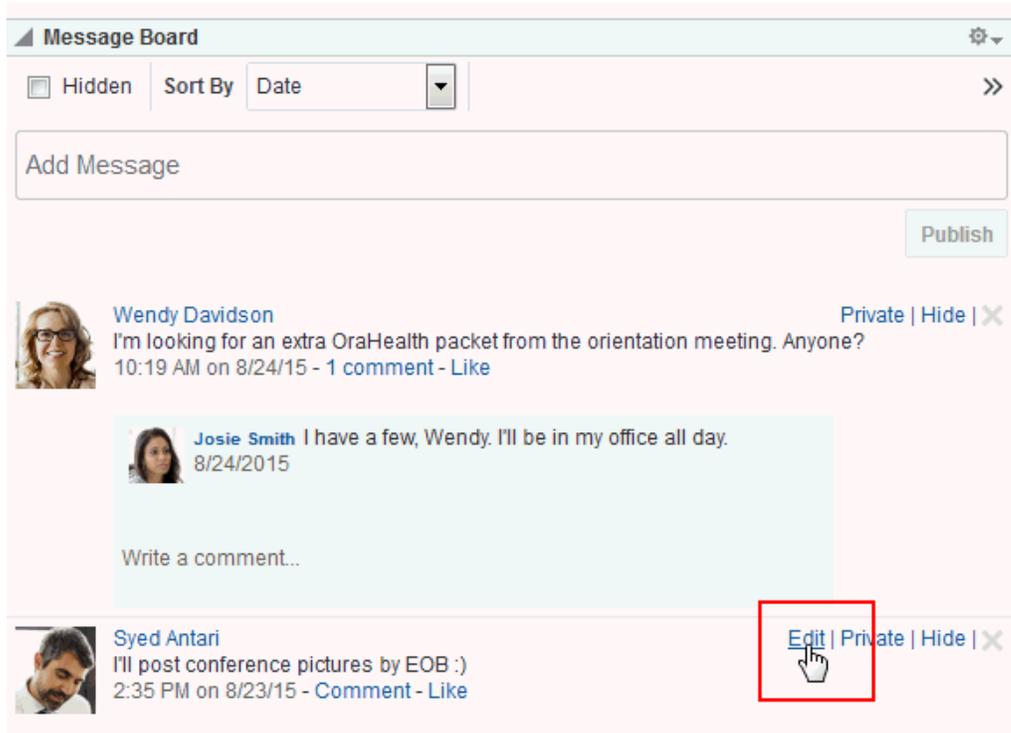
The Edit Message dialog opens with a rich text editor pre-populated with your message text (Figure 13-28).

Figure 13-28   Edit Message Dialog
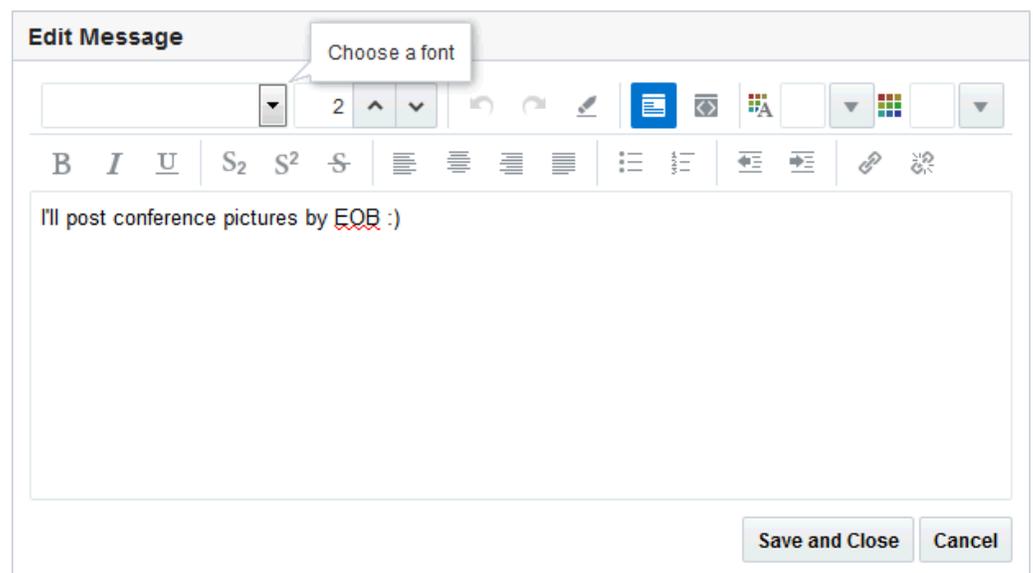
3.   Revise your message, and click **Save and Close**.

Deleting Messages

Your system administrator can configure the Message Board to allow users to delete the messages they send. Provided this permission is in place, you can delete any message you send.

To delete a message you sent:

1. Go to your view of the Message Board, and click the **Delete** icon next to the message you want to delete (Figure 13-29).

   Figure 13-29   Delete Icon on a Message
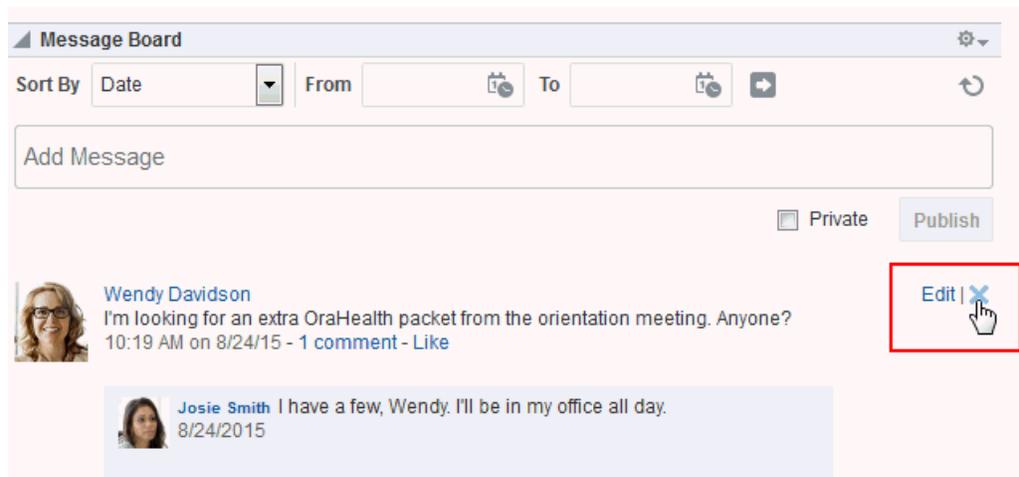
2. In the resulting confirmation dialog, click the **Delete** button.

Enabling Other Users to Post Feedback and Messages for You

To set up your Feedback and Message Board viewers so that users can post feedback and messages specifically for you, you must add a Feedback or Message Board viewer to a personal page in your view of the Home portal and share that page with your connections. Additionally, you must set a parameter on the Feedback or Message Board viewer to identify yourself as the viewer owner. After this is set up, your connections can access this page and post messages and feedback for you. This section steps you through this process.

To enable other users to post feedback and messages for you:

1. In the Home portal (see How do I access the Home portal?), create a new personal page or edit an existing one.

   > ✏ **See Also:**
   >
   > For more information, see Creating a Personal Page in the Home Portal or Editing a Personal Page.

2. Open the resource catalog by clicking **Add Content** in the area you want to add the view to.

3. Use the catalog **Search** field to find the Feedback or Message Board viewer you want to add to the page and drag it to the area you want to add it to or click it to place it automatically.

> **Note:**
>
> • In the resource catalog, the Message Board viewers are stored in the **Social and Communication** folder by default.
>
> • Your system administrator must add the Feedback viewers to a resource catalog to make them available to you.

> **See Also:**
>
> For more information about adding a viewer, see Editing a Portal Page in *Building Portals with Oracle WebCenter Portal*. Editing a personal page is no different than editing a page in a portal, but this is an advanced task.

4. Click the view to show the **View Actions** menu, and select **Parameters**.

> **See Also:**
>
> For more information about editing component properties, see Setting Properties on a Component in *Building Portals with Oracle WebCenter Portal*. Editing component properties is an advanced task.

5. In the Parameters dialog, enter your user name in the required field:
   • For Feedback, enter your user name in the **Resource Id** text box.
   • For Feedback - Quick View, enter your user name in the **User Id** text box.
   • For Message Board and Message Board - Quick View, enter your user name in the **User Name** text box.

> **See Also:**
>
> For more information about other component properties, see Setting Message Board and Feedback Task Flow Properties in *Building Portals with Oracle WebCenter Portal*. Editing component properties is an advanced task.

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

7. Click **Close** to exit page edit mode.

8. Set page access to enable other users to view and personalize the page as described in Setting Security for a Personal Page.

> **Tip:**
>
> When you share one of your personal pages in the Home portal with other users, the shared page appears on their **Personalize Pages** page. Users can use controls on the **Personalize Pages** page to show the page in their own view of the Home portal.

9. Set your preferences to allow users to view and/or post feedback and/or messages for you. For more information, see Setting Feedback Preferences and Setting Message Board Preferences.

    All users who have access to the page see the Feedback or Message Board viewers that you place there, but only the users to whom you have granted access, through preferences, see any content in these viewers.

You might want to send a link to this page to the users to whom you granted access, inviting them to leave you feedback or messages. For more information, see Sending Mail with a Link to a Personal Page .

14

Liking, Commenting On, and Sharing Items

Like, comment on, or share items such as messages, activities, files, and links in a portal.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you need the application-level permission `People Connections: Update People Connections Data`.

Topics:

About Liking Items

You can use liking to show your appreciation of an item and to see at a glance how well it's liked and who has liked it. A counter keeps track of the number of people who like an item and a link is available for viewing who liked it. In a group of items, you can determine the most favored by its number of likes.

You can express liking for Message Board messages, Activity Stream entries—such as files uploaded through the Home Portal Activity Stream, blogs posts, and wiki pages.

> **💡 Tip:**
>
> Whether you or any user can like a message or activity depends on whether your system administrator has enabled liking for these features.

> **✏ Note:**
>
> Liking an activity associated with an item (for example, an activity entry for adding a document) is not the same as liking the item. The like count is calculated separately for the activity and the item.

Liking Items

To like an item, click the **Like** link or icon (star) associated with the item.

Figure 14-1   Like Link in the Activity Stream

The text under the **Like** link or the number to the right of the Like icon (Figure 14-2) indicates the number of users who like the item. Click the text or number to view a list of other users who have "liked" the item.

Figure 14-2   Like Icon Count

To unlike the item, click the **Unlike** link or click the star again.

About Commenting on Items

You can comment on items in WebCenter Portal to add your thoughts, opinions, and questions directly to the item.

You can comment on the following item types:

- Message Board messages

- Activity Stream entries

> **Note:**
>
> - Commenting on an activity associated with a file (for example, an adding-a-document activity entry) is not the same as commenting on the file.
> - Public users viewing a public document cannot comment on the document.

Commenting on Items

To enter a comment:

1. Click the **Comment** link below a streamed item.

   Figure 14-3   Comment Link in the Activity Stream

2. Enter comment text in the input area (Figure 14-4).

Figure 14-4   Write a Comment Text Box

3. Click **Comment**.

To delete a comment:

1. Click the comment **Delete** icon (Figure 14-5).

Figure 14-5   Delete Icon for a Comment in the Activity Stream

2. In the confirmation dialog, click **OK**.

> ✎ **Note:**
>
> You can delete your own comments, or, if you are a portal manager, you can delete comments in the portal you moderate.

About Sharing Items

Sharing gives you on-the-spot distribution of items, status messages, files, and URLs. Sharing is available in a few different forms:

- Share an item you receive in your Activity Stream by posting it to your connections' Activity Streams (for more information, see Reposting Streamed Items).

- Share an item you receive in your Activity Stream through email (for more information, see Emailing Streamed Items).

- Share an item, status message, file, or URL through Publisher (for more information, see Sharing Messages, Files, and URLs).

To share an item directly from your Activity Stream, the item must contain an object. For example, you can share "Jack has updated doc.xml," but you cannot share "Jack and Jill are now connected." You can share anything you post through Publisher because the post itself is an object.

Sharing Streamed Items with a Wider Audience

You can share items that appear in your view of the Activity Stream with a wider audience. For example, when your view of the Activity Stream reports that one of your connections updated a document of great interest to all of your connections, you can share that streamed item with all of your connections.

You can do so by posting the streamed item to all of your connections' Activity Streams or to the Activity Streams of connections who belong to a named portal. You can also share streamed items through email, enabling you to share it with users to whom you are not connected or to make use of mail distribution lists.

> **✎ Note:**
>
> To share an item directly from your Activity Stream, the item must contain an object. For more information, see About Sharing Items.

This section includes the following topics:

- Reposting Streamed Items
- Emailing Streamed Items

Reposting Streamed Items

To repost a streamed item:

1. Go to the item you want to share, click **Share**, then click **This activity**.

Figure 14-6   Share - This Activity Option
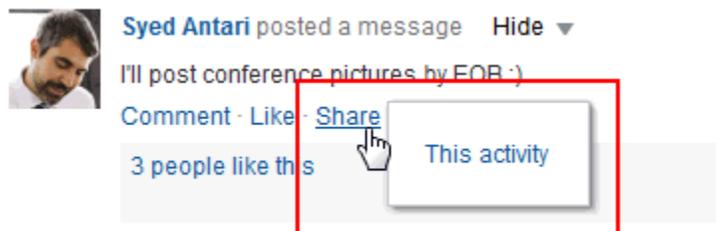
2. In the resulting Share dialog, optionally, enter a message to accompany the shared object.

Figure 14-7   Adding a Message to a Shared Object
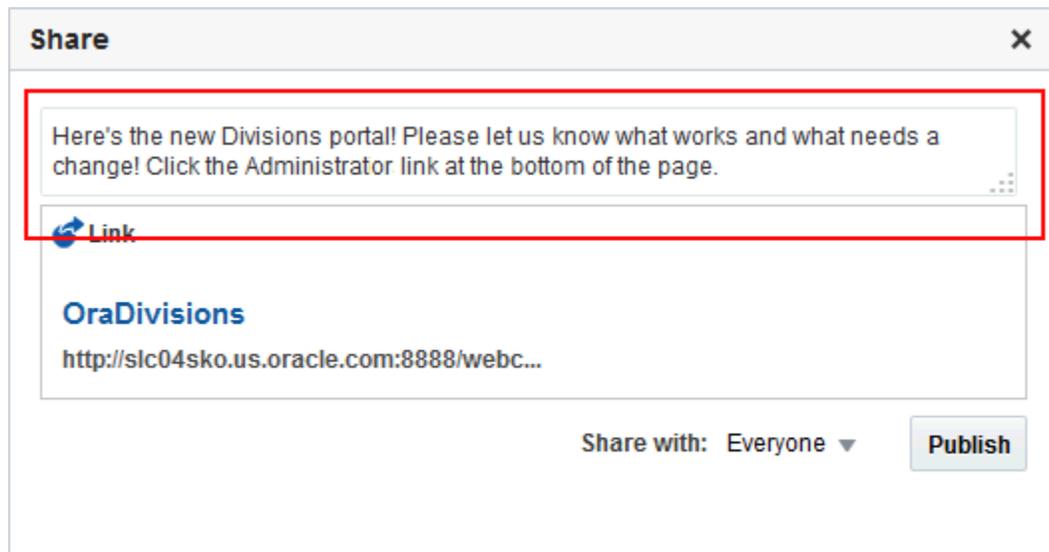
> **Note:**
>
> When you share a message, rather than a file or a link, you cannot enter another message to accompany it.

3. From the **Share with** menu, select the people or portal to share the object with:

Figure 14-8   Share With Menu
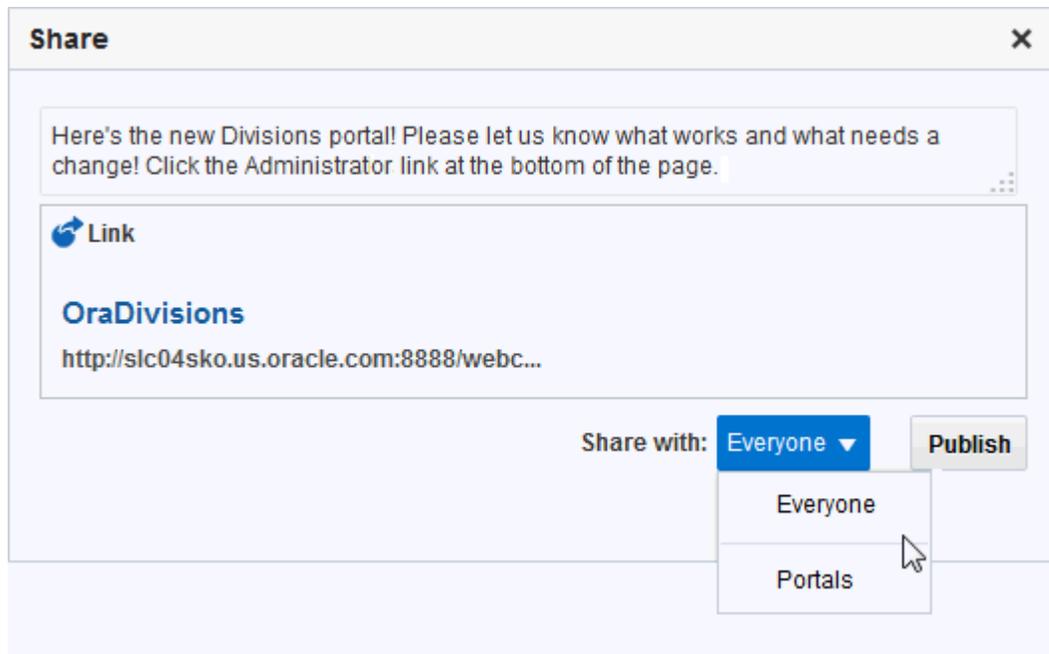
- Select **Everyone** to share the item with all of your connections.
- Select **Portals** to open the Select a Portal dialog, where you can select a portal to share the item on the Home page of the portal.

Figure 14-9   Select a Portal Dialog

From the **Show portals** menu:

– Select **All** to show all the portals you have access to.

– Select **Joined** to show all the portals you joined.

– Select **Moderated** to show all the portals that you manage.

– Select **Public** to show all public portals.

Alternatively, enter the name of a portal in the **Search** field and execute the search. Results appear in the dialog.

Click a portal, then click **OK**.

4. Click **Publish**.

The item is posted to the Activity Streams of the selected recipients or on the Home page of the selected portal.

Emailing Streamed Items

To share a streamed item through email, use the **Send Mail** option. The Send Mail option is available on streamed items that include objects, such as a document. It is otherwise not available.

To share a streamed item through email:

1. Go to the item you want to share, click **Share**, then click **Send Mail**.

Figure 14-10   Share - Send Mail Option
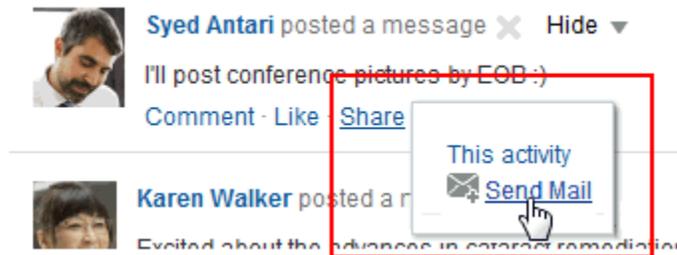
A mail message opens, prepopulated with a link to the selected item.

2. Address, write, and send the message as you would any other email.

Sharing Messages, Files, and URLs

Publisher provides a means of publishing messages, files, and URLs to your connections' Activity Streams or to a portal's Activity Stream.

> **Note:**
>
> A portal's Activity Stream can be displayed in the portal, but portal members can also display the portal's activities in their own Activity Streams.

This section steps you through Publisher features. It includes the following topics:

- About Publisher
- Publishing a Message
- Sharing Files Through Publisher
- Sharing Links Through Publisher
- Deleting a Published Message

> **See Also:**
>
> For information about Activity Stream, see Tracking Portal Activities. For information about Profiles, see Managing Your Profile.

About Publisher

Publisher works in conjunction with Activity Stream, where the messages you enter through Publisher appear. Publisher controls let you select who will see a published message.

Your system administrator can specify that a message published through Publisher is used as a user's Profile status message (Figure 14-11).

Figure 14-11   Published Message Used as Profile Status

Depending on how your system administrator configures Publisher, it can show options for sharing messages, files, and links (Figure 14-12).

Figure 14-12   Publisher
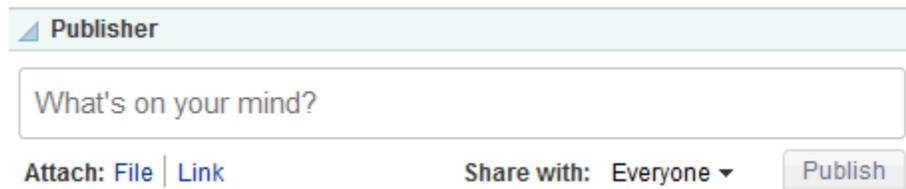
> **Note:**
>
> The **Share with** menu in Publisher appears only in the Home portal, and not in other portals. The **Share with** menu enables you to select whether to share information with your connections or only members of a specified portal where you are also a member. When Publisher is in a portal other than the Home portal, any published information is always shared with members of that portal.

In default WebCenter Portal installations, Publisher is part of the **Activities** page, which is provided in the Home portal for anyone who is logged in.

The default **Activities** page also contains an Activity Stream view where the messages you enter through Publisher are published.

Publisher features can also be embedded in some Profile views.

Publishing a Message

Use Publisher to post a message to the Activity Stream, and, if your system administrator has configured it, to display as your Profile status message.

To publish a message:

1. Go to the **Activities** page in the Home portal (see How do I access the Home portal?) or to another view of Publisher in WebCenter Portal.

   > 💡 **Tip:**
   >
   > The way you access the **Activities** page depends on the page template in use. For example, in a side navigation template, you may access it through an **Activities** link.

2. Click in the Publisher text area, and enter a message.

   Figure 14-13   Publishing a Message
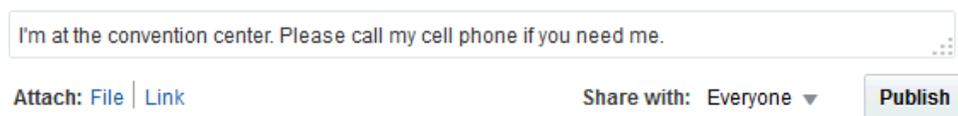
   I'm at the convention center. Please call my cell phone if you need me.

   Attach: File | Link   Share with: Everyone ▼   **Publish**

   > ✎ **Note:**
   >
   > The **Share with** menu in Publisher appears only in the Home portal, not in other portals. This menu enables users to select whether to share information with your connections or only members of a specified portal. When Publisher is in a portal other than the Home portal, the published information is always shared with members of that portal.

3. If you are viewing Publisher from the Home portal, select an option from the **Share with** menu:

   Figure 14-14   Share With Menu
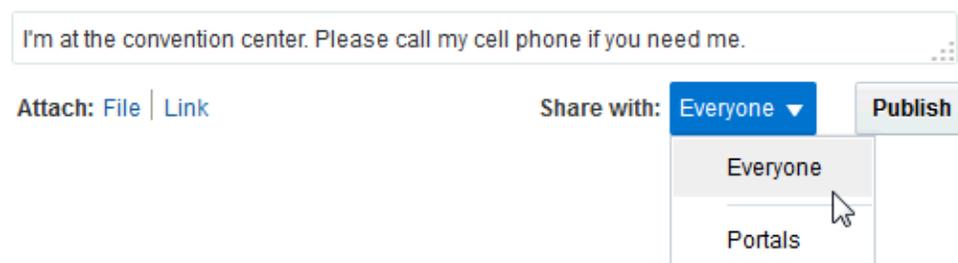
   I'm at the convention center. Please call my cell phone if you need me.

   Attach: File | Link   Share with: Everyone ▼   **Publish**

   Everyone

   Portals

- Select **Everyone** to share the item with all of your connections.

- Select **Portals** to open the Select a Portal dialog (Figure 14-15) and select a portal. The shared file will appear in the selected portal's Activity Stream.

Figure 14-15   Select a Portal Dialog

From the **Show portals** menu:

– Select **All** to show all of the portals to which you have access.

– Select **Joined** to show all of the portals you have explicitly joined.

– Select **Moderated** to show all of the portals for which you are a manager.

– Select **Public** to show all public portals.

Alternatively, enter the name of a portal in the **Search** field and execute the search. Results appear in the dialog.

Click a portal, and click **OK**.

4. Click **Publish**.

> ✎ **Note:**
>
> When you attach a link, the **Publish** button is not enabled by default. You must hover over the **Publish** button to enable it.

Your message appears in your Activity Stream and, as appropriate, your connections' Activity Streams or the portal's Activity Stream.

Sharing Files Through Publisher

Depending on whether you are sharing a personal file or a portal file, the shared file can appear in your connections' Activity Streams or in a portal's Activity Stream. Additionally, sharing a file through Publisher also stores the file in the Public folder of your personal document library.

> **Tip:**
>
> If you prefer to have greater control over where a shared file is stored in your document library, you can upload it to the folder you prefer. Such uploads are also reported in your connection's activity streams, provided your Activity Stream is configured to show them.
>
> For more information, see Setting Activity Stream Preferences.

> **Note:**
>
> • Every folder and file that resides in a connected content repository can be accessed through a direct URL, which you can provide to other users. If they have permissions, they can click the URL link to open the folder or file.
>
>   For information about getting a file or folder link, see Working with Folders and Files.
>
>   The difference with sharing files through Publisher is that the file is also stored in the Public folder of your personal document library. This is useful when the FrameworkFolders folder service is enabled, where folders and files include parent information in their metadata. Because other users do not have access to the parent folder for your personal documents, you cannot share a file from your personal document library (the **Documents** page in the Home portal) by only providing the URL. Instead, you can either copy the file to the Public folder, or share a personal file through Publisher, which stores shared items in the Public folder of your personal document library. Similarly, you can use Publisher to share portal files where users may not have access to the parent folder in the portal.
>
> • Your system administrator can disable the ability to share files through Publisher. If you do not see the **Attach: File** link, contact your system administrator.

To share files through Publisher:

1. Go to the **Activities** page in the Home portal (see How do I access the Home portal?) or to another view of Publisher in WebCenter Portal.

2. Optionally, click in the text area and enter the message you want to accompany the file.

3. Next to **Attach**, click **File** to open the field for attaching a file.

Figure 14-16   Attach File Field
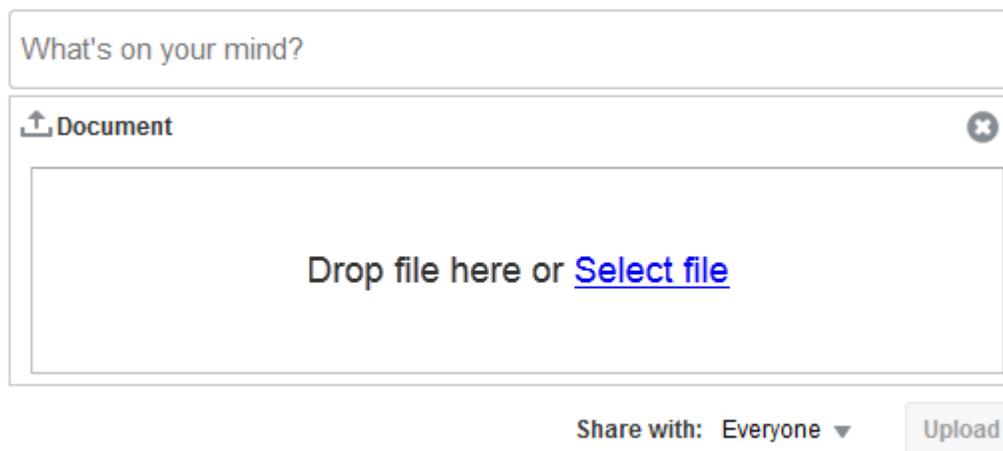
What's on your mind?

⬆ Document   ⊗

Drop file here or Select file

Share with: Everyone ▾   Upload

> **Note:**
>
> The **Share with** menu in Publisher appears only in the Home portal, not in other portals. This menu allows users to select whether to share information with your connections or only members of a specified portal. When Publisher is in a portal other than the Home portal, the published information is always shared with members of that portal.

4. Click **Select files** to navigate to and select the file you want to share.

5. If you are viewing Publisher from the Home portal, select an option from the **Share with** menu.

6. Click **Upload**.

   The file is added to your Activity Stream and, as appropriate, your connections' Activity Streams or the portal's Activity Stream. It is also stored in the Public folder of your personal document library.

> **Note:**
>
> Whether a file or a link to a file is shown depends on how your system administrator configured the Activity Stream.
>
> When you attach a link, the **Publish** button is not enabled by default. You must hover over the **Publish** button to enable it.

Sharing Links Through Publisher

In addition to sharing messages through Publisher, you can share links (URLs).

To share links through Publisher:

1. Go to the **Activities** page in the Home portal (see How do I access the Home portal?) or to another view of Publisher in WebCenter Portal.

2. Optionally, click in the text area and enter the message you want to accompany the link.

3. Next to **Attach**, click **Link** to open field for entering a URL.

   Figure 14-17   Attach Link Field

   > **Note:**
   >
   > The **Share with** menu in Publisher appears only in the Home portal, not in other portals. This menu allows you to select whether to share information with your connections or only members of a selected portal. In a portal other than the Home portal, the published information is always shared with members of that portal.

4. Enter the URL you want to share, and click **Attach**.

5. If you are viewing Publisher from the Home portal, select an option from the **Share with** menu.

6. Click **Publish**.

   The link is added to your Activity Stream and, as appropriate, your connections' Activity Streams or the portal's Activity Stream.

   > **Note:**
   >
   > When you attach a link, the **Publish** button is not enabled by default. You must hover over the **Publish** button to enable it.
   >
   > Whether a file or a link to a file is shown depends on how your system administrator configured the Activity Stream.

Deleting a Published Message

Next to text or links that you post, there is a delete icon (Figure 14-18). Click the delete icon to delete your message.

Figure 14-18   Delete Message

> **Note:**
>
> Messages that include shared files do not display a delete icon. To delete a message with a shared file, go to your Public documents folder (for example, on the **Documents** page, open the **Public** folder) and delete it from there.

15

Viewing and Participating in Discussions

Create and participate in text-based discussions with other members of a portal. Use discussion forums to preserve and revisit discussions.

> **Note:**
>
> Beginning with 12*c* (12.2.1.3.0), Oracle WebCenter Portal has deprecated support for Jive features (announcements and discussions). If you are upgrading from a prior release, these features remain available in your existing installations that are being upgraded.

Topics:

- About Discussions
- Working with Discussions

> **Permissions:**
>
> This chapter is intended for WebCenter Portal users who want to view, create, and manage portal discussion forums and topics. To perform the tasks in this chapter, you need *one* or more of the following portal-level permissions:
>
> - `Create, Edit, and Delete Discussions`
> - `Create and Edit Discussions`
> - `View Discussions`

> **Note:**
>
> Tasks discussed in this chapter are not available if discussions are not enabled and exposed. The portal manager adds and configures discussions, as described in Adding Discussion Forums to a Portal in *Building Portals with Oracle WebCenter Portal*.

About Discussions

You can use the discussions feature to post, respond to, and preserve topical information in discussion forums scoped to portals or to the entire WebCenter Portal

application. Users post topics to a discussion forum, and other users post information relevant to those topics. All of this information is preserved within the forum.

A new portal is assigned a single discussion forum by default; however, portal managers can specify to include multiple discussion forums in a portal. Discussions are scoped to portals. That is, you can create forums and topics only within the context of a portal. You can view and participate in discussions in both portals and the Home portal, depending on your permissions.

Access to discussions is influenced by portal security. Users can access discussions according to the permissions they are granted by their specific user roles within a given portal.

Scoping additionally limits the users who can view and participate in discussions. For example, only members of the *Finance* portal can view discussions that transpire in *Finance* portal forums.

Discussion forums provide configuration settings for specifying which forum content to show. This is of particular use in the Home portal, which exists outside a specific portal scope.

Discussions provides a wide variety of ways for viewing and participating in discussions. These include:

*   **Discussion Forums** provides controls for creating discussion forums (available to the portal manager or members having `Create, Edit, and Delete Discussions` permissions).

    Notice that the **Create Forum** option is not available in the portal member's view in Figure 15-1); creating, replying to, and managing discussion forum topics; and selecting watched forums and watched topics (Figure 15-2).

Figure 15-1   Discussion Forums View Showing Multiple Discussion Forums

Only portal managers can create, edit, and delete discussion forums.

See Creating a Discussion Forum in *Building Portals with Oracle WebCenter Portal*.

> **Note:**
>
> To view and post to different discussion forums, the enabling multiple forums option must be selected for the portal.

For more information about creating and managing forum topics and replies, watching forums and topics, showing and hiding forum information, sending mail from discussion topics, see Working with Discussions.

Click the Forum name link to view the topics in the forum.

Figure 15-2   Discussion Forums - Topics in a Single Discussion Forum

- **Forums** view provides a means of accessing all possible views of a particular portal's discussions: Recent Topics, Popular Topics, Watched Topics, and Watched Forums.

Figure 15-3   Forums View
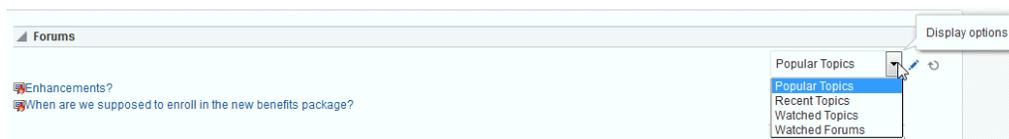
Forums view also provides controls for determining the data to show in addition to the forum or topic title. Click the **Personalize** icon (pencil) in the toolbar to open the Display Settings dialog. For example, when Watched Forums is selected, the Display Settings dialog offers the options **Date** and **Topics**. When Recent Topics is selected on the menu, the Display Settings dialog offers the options **Author**, **Date**, and **Replies** .

Figure 15-4   Display Settings Dialog
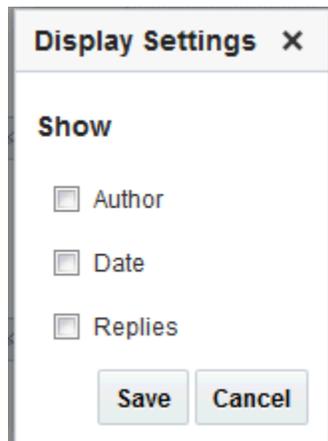
The available display options vary according to the option currently selected on the Forums - Quick View **Display Options** menu.

Figure 15-5   Display Options Menu (Forums - Quick View)
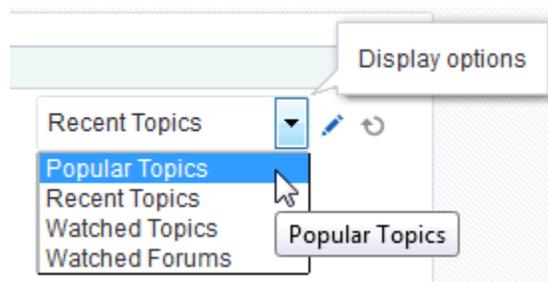
See Showing or Hiding Information in Forums View for more information.

- **Popular Topics** provides a look at the most frequently viewed discussion topics in all the discussion forums in a given portal.

Figure 15-6   Popular Topics

Popular Topics also provides controls for determining the data to show in addition to the topic title. Click the **Personalize** icon to open a panel with controls for selecting the type of additional data to show.

Figure 15-7   Show Panel in Popular Topics

See Showing or Hiding Information in Popular Topics for more information.

- **Recent Topics** provides a look at the most recently accessed discussion topics in all the discussion forums in a given portal.

Figure 15-8   Recent Topics

Access to portal discussion topics is restricted to those portals of which you are a member.

Recent Topics also provides controls for determining the data to show in addition to the topic title. Click the **Personalize** (pencil) icon to open a panel with controls for selecting the type of additional data to show.

Figure 15-9   Show Panel in a Recent Topics

See Showing or Hiding Information in Recent Topics for more information.

- **Watched Forums** provides a means of viewing all discussion forums you have selected to watch from a particular portal or from all portals.

Figure 15-10   Watched Forums

Watched Forums also provides controls for determining the data to show with the topic title. Click the **Personalize** icon to open a panel with controls for specifying the type of additional data to show.

Figure 15-11   Show Panel in Watched Forums

See Showing or Hiding Information in Watched Forums for more information.

- **Watched Topics** provides a cohesive view of all the topics you have selected to watch from a particular portal or from all portals.

Figure 15-12   Watched Topics

Watched Topics also provides controls for determining the data to show with the topic title. Click the **Personalize** icon (pencil) to open a panel with controls for specifying the type of additional data to show.

Figure 15-13   Show Panel in Watched Topics

See Showing or Hiding Information in Watched Topics for more information.

Discussions is tightly integrated with other assets, such as links and mail. For example, mail sent to a portal distribution list can additionally be posted to that portal's default discussion forum. The portal manager must choose **Monitor Incoming Mail** in the portal Tools and Services for Discussions.

See Publishing Portal Mail in a Discussion Forum in *Building Portals with Oracle WebCenter Portal*.

Every discussion topic provides the opportunity to link from the topic to another portal asset, such as a document or an announcement.

See Linking to an Existing Discussion Forum Topic and Adding and Linking to a Discussion Forum Topic for more information.

Working with Discussions

The Discussion Forums feature is rich, providing controls for creating and managing discussion forums (available to the portal manager only) and posting and managing discussion topics and replies. The other views, such as Watched Topics or Watched Forums are useful windows into discussion forum content. They provide different views of the discussion forums and topics available to a particular portal or all portals.

Most of the topics in this section describe tasks you can accomplish through the Discussion Forums page (or console). It is noted when you can use other views to perform the described actions.

> **Note:**
>
> Only portal managers can create discussion forums and edit discussion forums (unless portal members have `Create, Edit, and Delete Discussions` permissions). See Creating a Discussion Forum and Editing the Forum Name and Description in *Building Portals with Oracle WebCenter Portal*.

This section includes the following topics:

- Creating and Managing Forum Topics and Replies
- Watching Forums and Topics
- Showing and Hiding Additional Discussion Forum Information
- Sending Mail from Discussion Topics

Creating and Managing Forum Topics and Replies

The life of a discussion forum takes place in its topics and replies. Users can ask questions, post information, exchange ideas, and otherwise communicate in interesting and useful ways.

> **Note:**
>
> Only portal managers can create, edit, and delete discussion forums. See Creating a Discussion Forum, Editing the Forum Name and Description, and Deleting a Discussion Forum in *Building Portals with Oracle WebCenter Portal*.

This section describes how to work with discussion forum topics and replies. It includes the following topics:

- Posting a New Forum Topic
- Replying to Topic Posts
- Viewing Topic Posts and Replies
- Editing Topics and Replies
- Deleting Topic Posts and Replies
- Selecting the Number of Topics or Forums to Display
- Toggling Between Topic View Modes

Posting a New Forum Topic

When you consider discussion forums hierarchically, the forum is the top container and topics are the next level down. Each posted topic can have subordinate replies, and the replies themselves may have replies (Figure 15-14).

Figure 15-14   A Posted Topic and a Reply to the Topic

To post a topic under a discussion forum:

1. Go to the Discussion Forums console and then navigate to the forum topics page, and click **Create Topic** (Figure 15-15).

Figure 15-15   Create Topic

The Create Topic dialog opens (Figure 15-16).

Figure 15-16   Create Topic Dialog
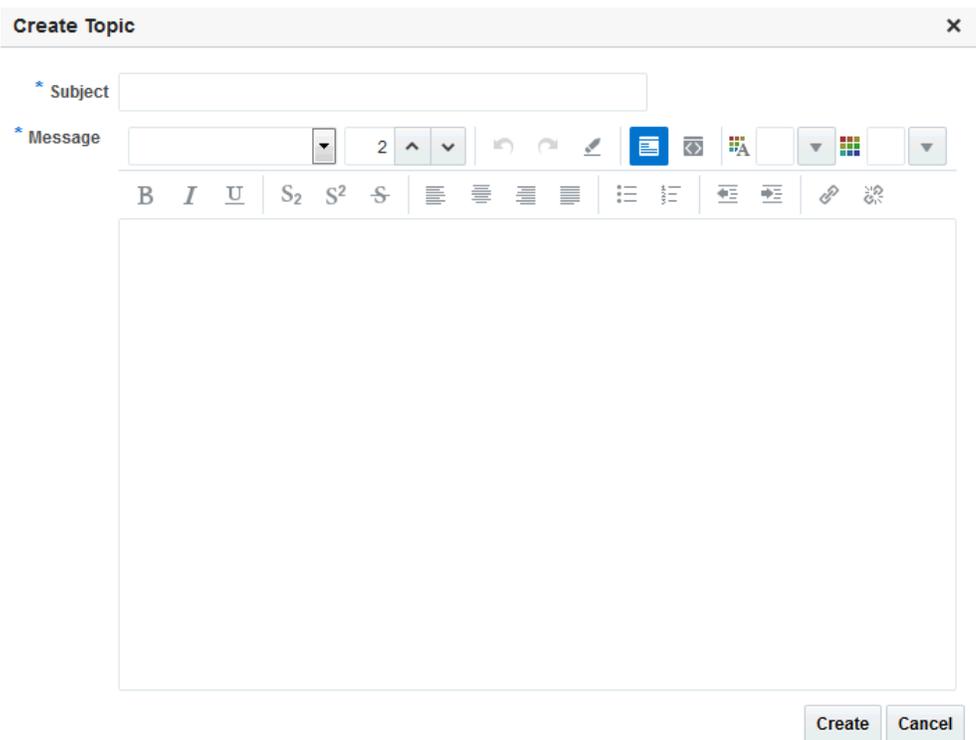
2. In the **Subject** field, enter the subject of the topic.

    You can enter up to 200 characters.

3. In the **Message** field, enter more details about the topic.

    You can enter up to 4000 characters.

4. Click **Create**.

    The newly-posted topic appears under the selected forum in Discussion Forums. Click the topic subject to view the message (Figure 15-17).

Figure 15-17   A New Discussion Forum Topic
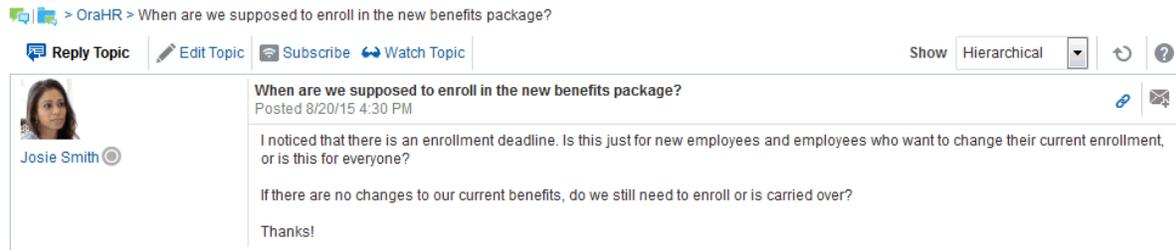
Replying to Topic Posts

To reply to topic posts:

1. Go to the Discussion Forums console and then navigate to the forum topics page, and click the relevant topic link (Figure 15-18).

Figure 15-18   Discussion Forums Topic
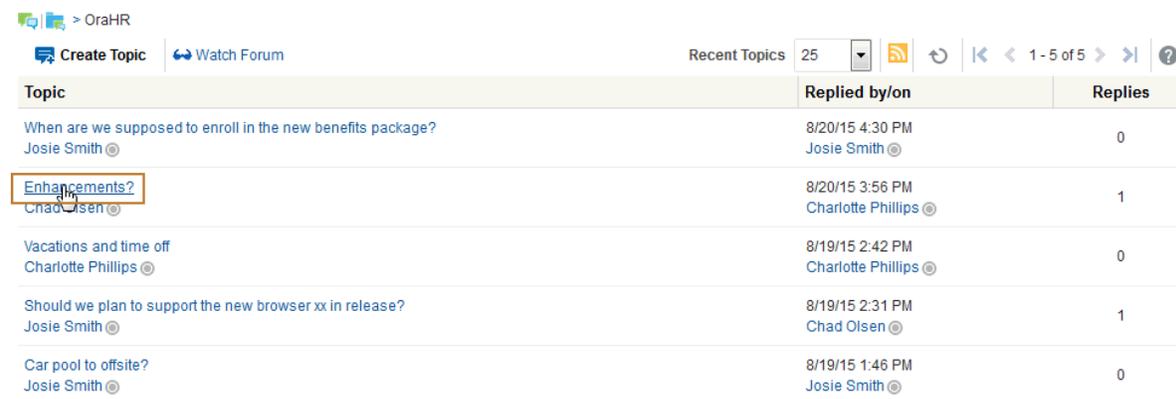
The selected topic opens.

2. Click **Reply Topic** (Figure 15-19).

Figure 15-19   Reply Topic
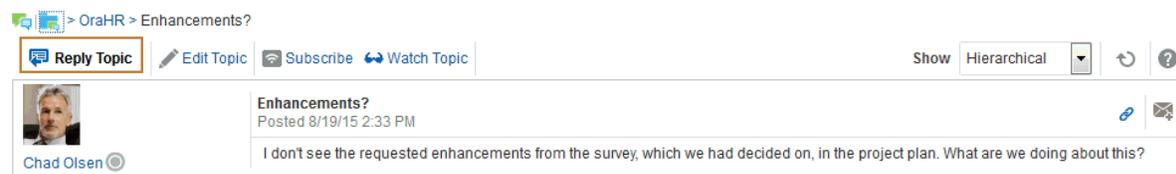
The Reply Topic dialog opens (Figure 15-20).

Figure 15-20   Reply Topic Dialog
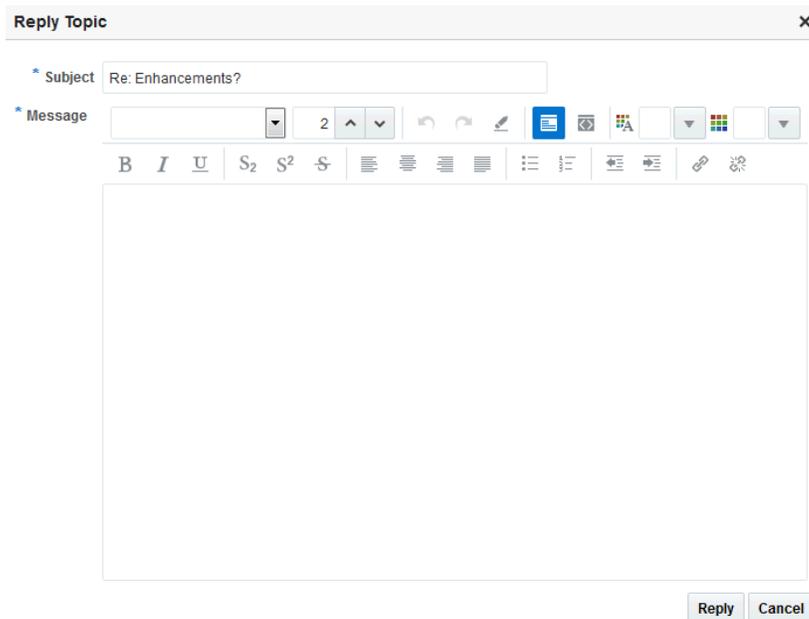
3. In the **Subject** field, either leave the text as is or revise it.

    You can enter up to 200 characters.

4. In the **Message** text box, enter your reply to the topic.

    You can enter up to 4000 characters.

5. Click **Reply**.

    Your reply appears below the main topic post (Figure 15-21).

Figure 15-21   A Topic Post and a Reply
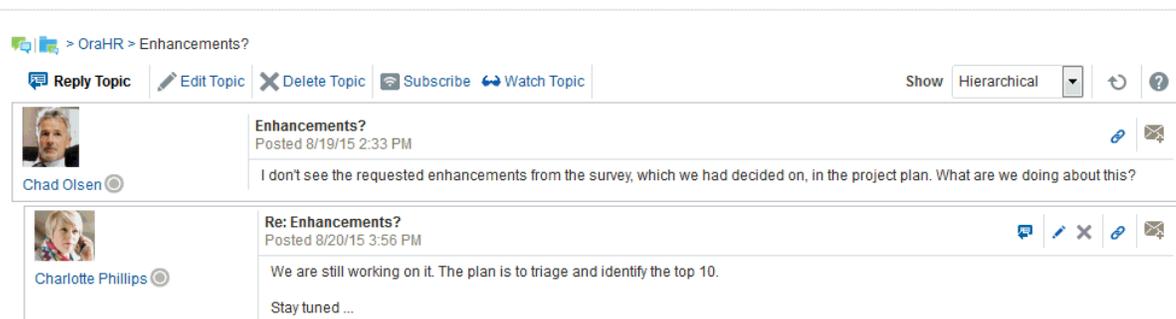
To post a reply to a reply, click the **Reply to message** icon (Figure 15-22) and follow
the steps described in this section.

Figure 15-22   Reply to message Icon
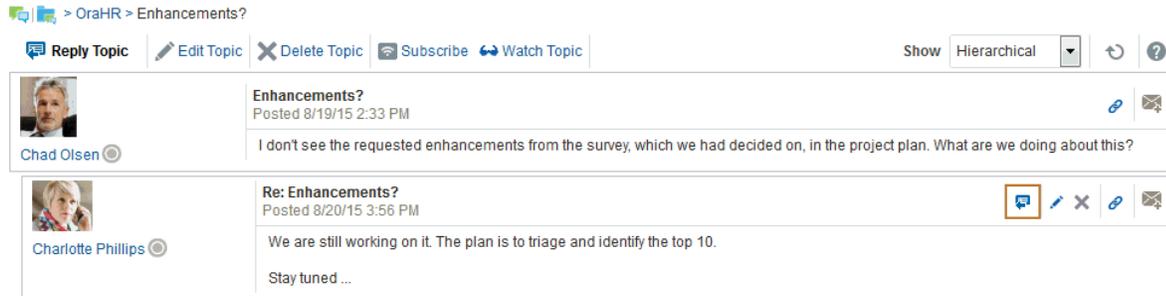
Viewing Topic Posts and Replies

With Discussion Forums, topics and replies to the topic open directly in Discussions Forums. To navigate back up the forum hierarchy, click the locator links that display above the topic reply area.

Figure 15-23   Forum Locator Links
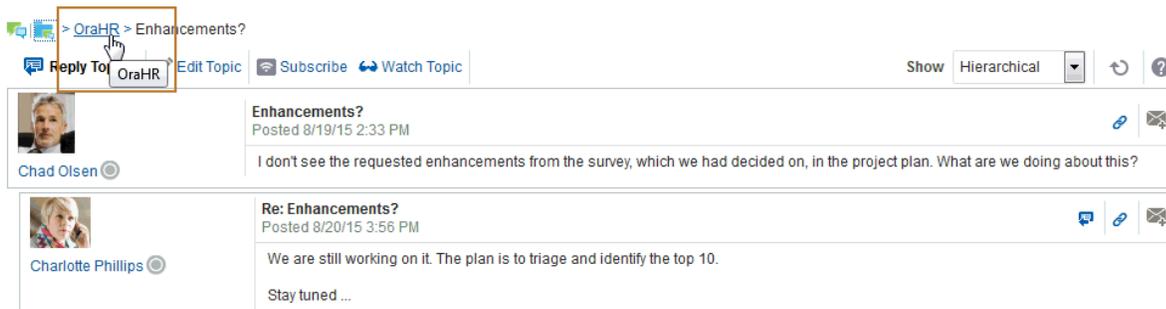
With all the other Discussions views, topics open in a separate window.

For example, in Figure 15-24, the topic and its reply displays in a window after clicking the topic from the Watched Topics view.

Figure 15-24   Viewing a Topic in Discussions - Watched Topics
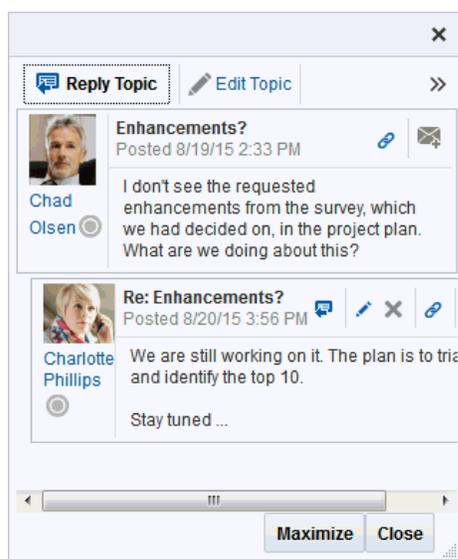
To return to the main view, click **Close**.

Editing Topics and Replies

After you post a topic or a reply, you retain the option of returning to it and revising its content. Only you, as the topic author, and portal managers (or a member with the required permissions to edit discussions) can edit your replies. This section describes how to edit topics and replies.

To edit a topic or a reply:

1. Go the Discussion Forum that displays the topic or reply you want to edit, and click the relevant topic.

   The selected topic opens.

2. To edit a topic or a reply, do the following:

   • To edit the topic, click **Edit Topic** (Figure 15-25).

Figure 15-25   Edit Topic
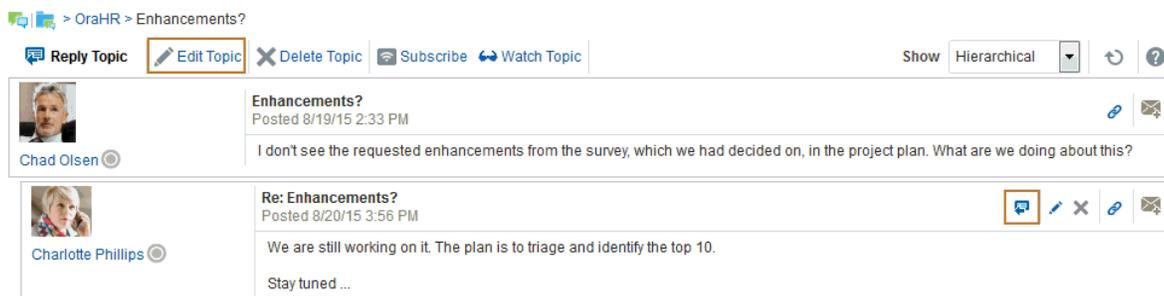
- To edit a reply, click the **Edit message** icon (pencil) associated with the reply (Figure 15-26). Only the user who authored the reply or the portal manager can view the icon.

Figure 15-26   Edit Message Icon
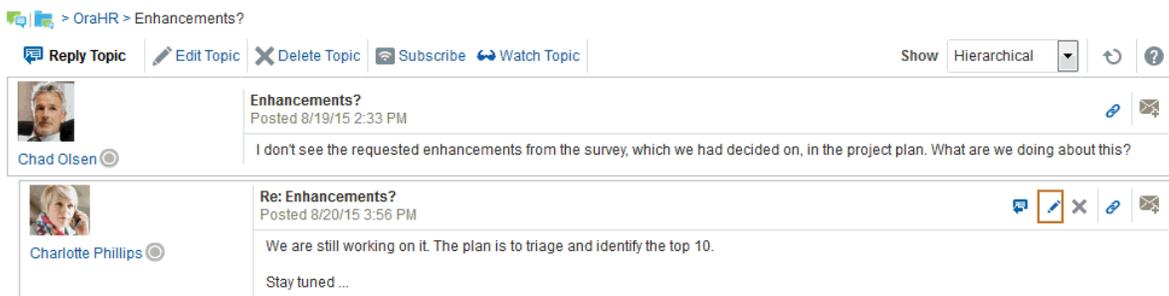
The Edit Topic or Edit Message dialog opens (Figure 15-27).

Figure 15-27   Edit Message Dialog
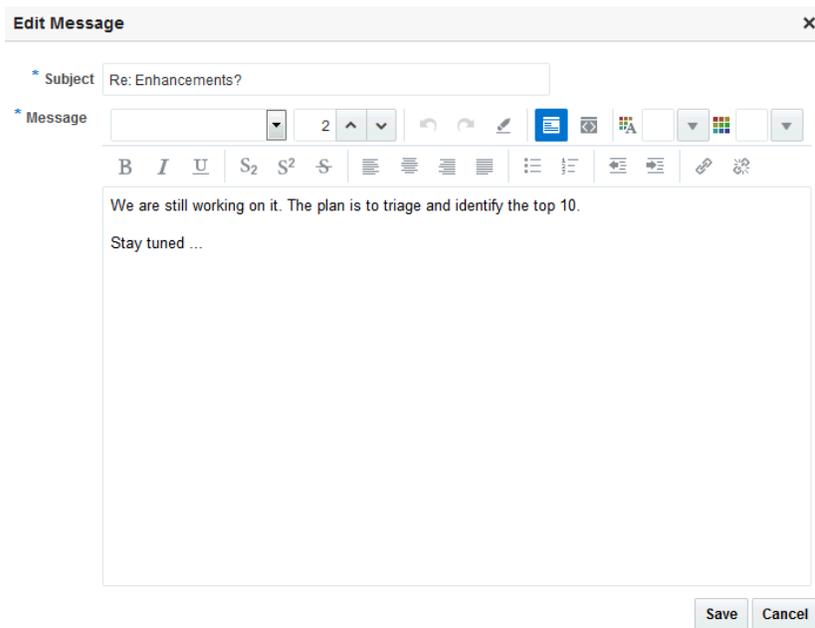
3. Revise the topic (up to 200 characters) or reply (up to 4000 characters).

4. Click **Save**.

    Your changes are posted to the forum.

Deleting Topic Posts and Replies

When you delete a topic, the original topic post and all of its subordinate replies are deleted. When you delete a reply, you can select to delete the original reply as well as all of its subordinate replies or to delete only this message and keep its replies.

The steps to delete topics and replies are similar.

> **✎ Note:**
>
> To delete a topic post or reply, you must be the user who created it or you must have access equivalent to the portal manager (`Create, Edit, and Delete Discussions` permissions). If you do not have the permission to delete, you will not see the option to delete.

To delete a topic or a reply:

1. Go to the Discussion Forum that displays the topic or reply you want to delete, and click the relevant topic (Figure 15-28).

Figure 15-28   Discussion Forum Topic

The selected topic opens.

2. Your next step depends on whether you want to delete a topic or a reply:

   • To delete a topic, click the **Delete Topic** link (Figure 15-29).

Figure 15-29   Delete Topic Link
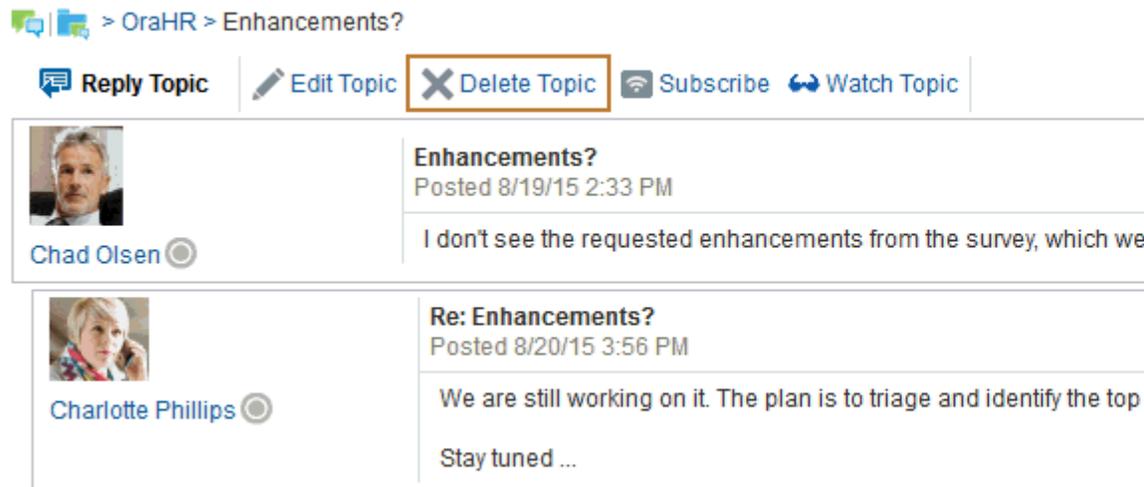
A Delete Topic confirmation dialog opens (Figure 15-30).

Figure 15-30   Delete Confirmation Dialog for Topics
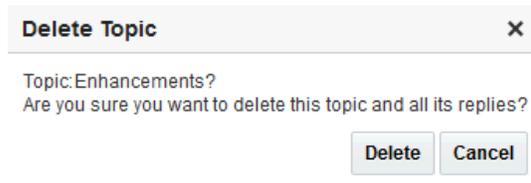
- To delete a reply, click the **Delete message** icon associated with the reply (Figure 15-31).

Figure 15-31   Delete Message Icon
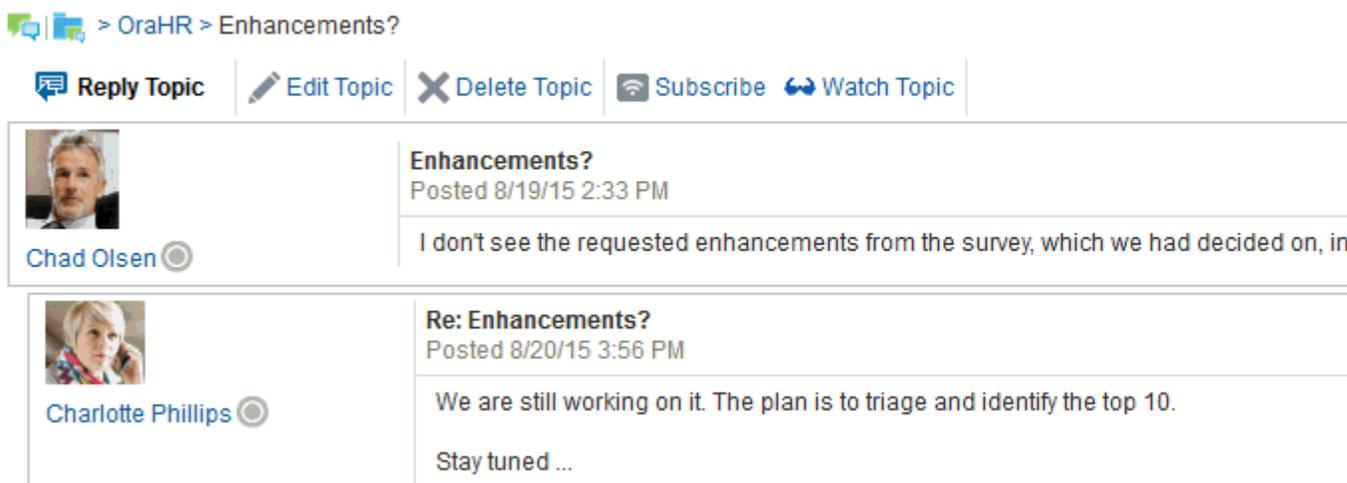
A Delete Message confirmation dialog opens, with the option to select if you want to delete this message and all its replies or delete only this message (Figure 15-32).

Figure 15-32   Delete Confirmation Dialog for Topic Replies
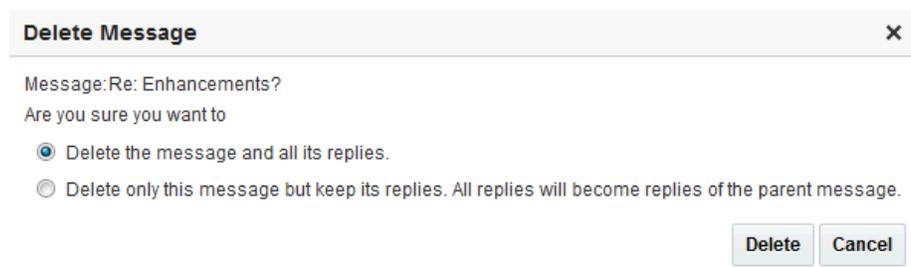
3. Select an option, and then click **Delete** to confirm the deletion.

Selecting the Number of Topics or Forums to Display

You can decide how many topics or forums to display; for example, 10, 25, 50, 75, or 100 (Figure 15-33).

Figure 15-33   Number of Topics to Display
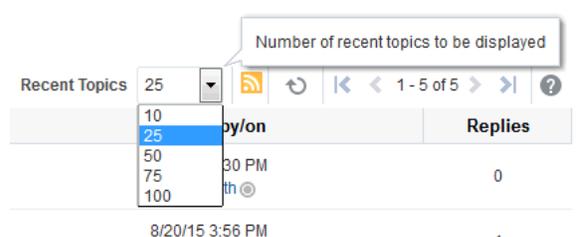
For example, if you choose to display 10 topics, and if there are more than 10 topics available, then you click the **More** link to see the next 10 topics, and so on. (Note that your portal manager may have configured the portal to not show the **More** link or to show a specific number of topics.)

Toggling Between Topic View Modes

You have the option of viewing a topic and all of its replies in a hierarchical (indented) mode or a flat (unindented) mode. The hierarchical mode (Figure 15-34) uses indenting to indicate whether a reply is to the topic or to another reply.

Figure 15-34   Hierarchical View Mode
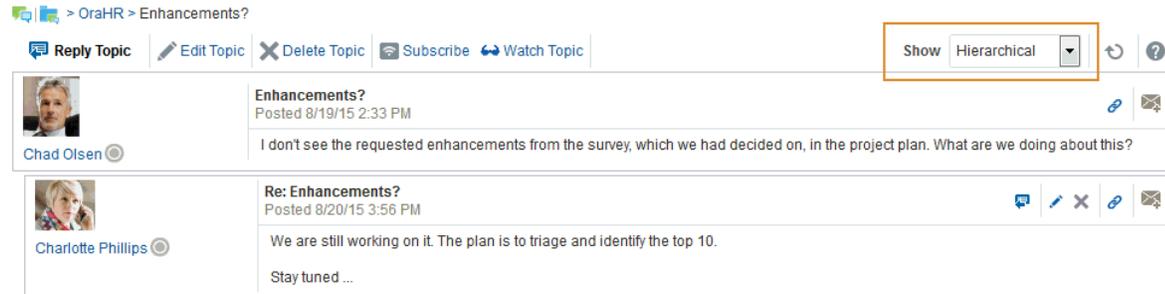
For example, in Figure 15-34 the first entry is the main topic, the second is a reply to the topic, and so on.

The flat mode (Figure 15-35) makes no such distinctions.

Figure 15-35   Flat View Mode
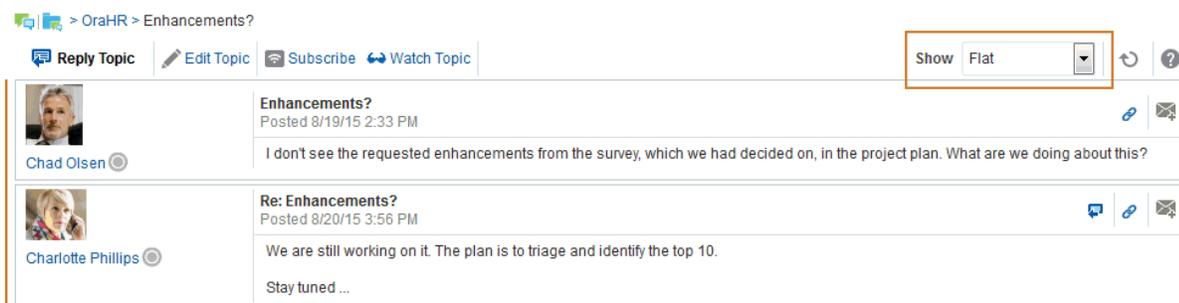
All Discussion views that show topics and replies on the same screen provide Show view mode options.

To toggle between topic view modes:

1. Go to the Discussions view that contains the topic you want to view, and click the topic.

2. From the **Show** drop-down list, select **Flat** or **Hierarchical**.

    The topic view renders according to your selection.

> ✎ **Note:**
>
> (You might have to click **Refresh** or click another page and then return to the page where the Discussions view is to see the changes.)

Watching Forums and Topics

Watching discussion forums and topics provides a convenient means of keeping a close eye on the information most current and relevant to you. The forums and topics you choose to watch are personal, in that your selections appear in your view. No other user is affected by the forums and topics you choose to watch.

When you select to watch a forum or a topic, whenever users add to that forum or topic, in addition to it appearing in the user's watched forums or topics list, you receive a mail notification.

This section includes information about how to add, view, and manage watched topics and forums. It includes the following topics:

- Adding a Discussion Forum or Topic to Your Watch List
- Removing a Discussion Forum or Topic from a Watch List
- Viewing Watched Forums and Topics from the Forums View

Adding a Discussion Forum or Topic to Your Watch List

To add a discussion forum or topic to your watch list:

> **✎ Note:**
>
> Selecting the Watch Forum or Watch Topic option only affects your view.

1. Go to the discussion forum or topic you want to add to your watch list.
2. The next step depends on whether you want to watch a forum or a topic:
   - To watch a forum, click **Watch Forum** at the top of the forum (Figure 15-36).

   Figure 15-36   Watch Forum Link on the Forum
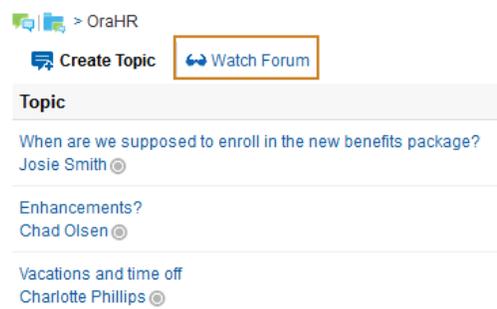
   - To watch a topic, click the topic link, then click **Watch Topic** at the top of the topic (Figure 15-37).

Figure 15-37   Watch Topic Link on the Topic
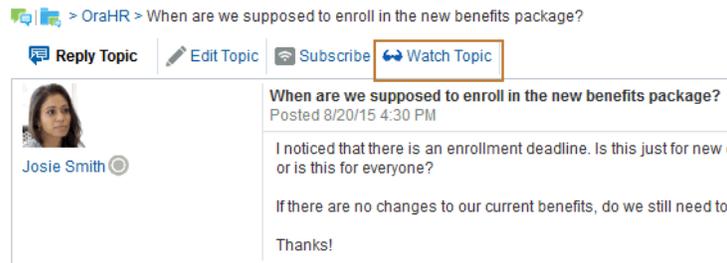
Notice the eyeglass icon that appears next to a watched topic or watched form. Figure 15-39 shows the eyeglass icon next to a watched topic.

The watched forum or topic is listed on all Watched Forums or Watched Topics views, for example, in Watched Forums and Watched Topics (Figure 15-38) views.

> **Note:**
>
> If the Watched Forums or Watched Topic views have not been added to the portal, you will not be able to view the selected forums or topics from these viewers. You can also view watched topics and watched forums from the Forums view (see Viewing Watched Forums and Topics from the Forums View).

Figure 15-38   Watched Forums View

Removing a Discussion Forum or Topic from a Watch List

To remove a discussion forum or a discussion topic from your watch list:

1. Go to the discussion forum or topic you want to remove from your watch list.

2. Click **Remove Watch** on the forum or topic (Figure 15-39).

Figure 15-39   Remove Watch Icon in a Topic
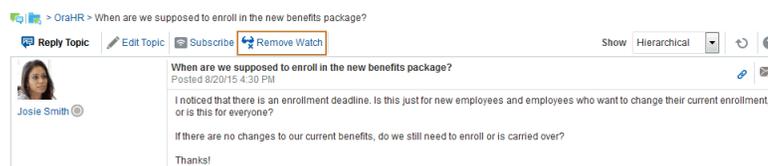
The selected item is removed from your forum or topic watch list upon refresh.

Viewing Watched Forums and Topics from the Forums View

To view a watched forum or topic from the Forums view:

1. From the Forums view, set the panel display option to **Watched Forums** or **Watched Topics** (Figure 15-40).

Figure 15-40   Watched Forums on the Forums - Quick View

2. Click the link to the discussion forum or forum topic you want to view.

The forum or topic opens (Figure 15-41).

Figure 15-41   A Watched Forum Opened from the Quick View
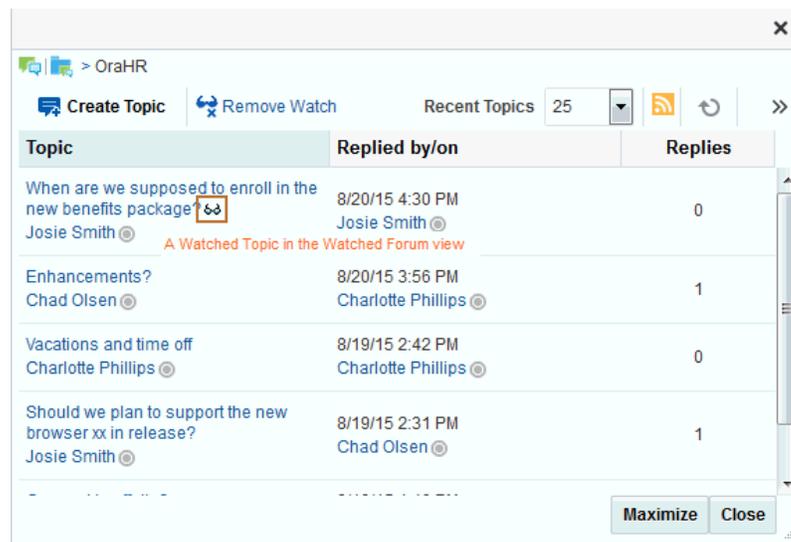
Showing and Hiding Additional Discussion Forum Information

Most discussions views provide personalization settings for determining the amount of information to show in addition to the forum or topic title (the Discussion Forums view does not provide such settings). Additional information can include forum or topic author, creation date, and replies or topics.

How you set these display settings is personal, affecting only your view. How you access these display settings varies slightly from each discussion view.

This section describes how to configure display settings. It includes the following topics:

Showing or Hiding Information in Forums View

To show or hide additional information in Discussions Forums View:

1. Go to the Forums view where you want to select display settings.

2. Click the **Select the data to display** icon (Figure 15-42).

Figure 15-42   Select the data to display Icon in Forums

The Display Settings dialog opens (Figure 15-43).

Figure 15-43   Display Settings Dialog
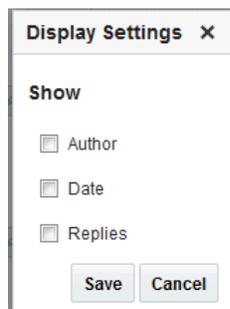
3. Select the data you want to show, or deselect the data check box you want to hide. Select or deselect one or more from:

    - **Author**—The user name of the person who created the forum or topic (for Watched Forums, this option does not appear).

    - **Date**—The date the forum or topic was last updated.

    - **Replies**—The replies associated with the topic (for Watched Forums, this displays Topics).

4. Click **Save** to save your changes and close the dialog.

Showing or Hiding Information in Popular Topics

To show or hide additional information in Popular Topics:

1. Go to the Popular Topics view where you want to show or hide additional information.

2. Click the **Personalize** icon (pencil) in the header (Figure 15-44).

Figure 15-44   Personalize Icon in Popular Topics

The Show panel opens, from where you can select or deselect additional data (Figure 15-45).

Figure 15-45   Show Panel in Popular Topics

3. Select the data you want to show, or deselect the data check box you want to hide. Select or deselect one or more from:

   - **Author**—The user name of the person who posted the topic

   - **Date**—The date the topic was last updated

   - **Replies**—The replies associated with the topic

4. Click **Save** to save your changes and close the panel.

Showing or Hiding Information in Recent Topics

To show or hide additional information in Recent Topics:

1. Go to the Recent Topics view where you want to show or hide additional information.

2. Click the **Personalize** icon (pencil) in the header (Figure 15-47).

Figure 15-46   Personalize Icon in Recent Topics
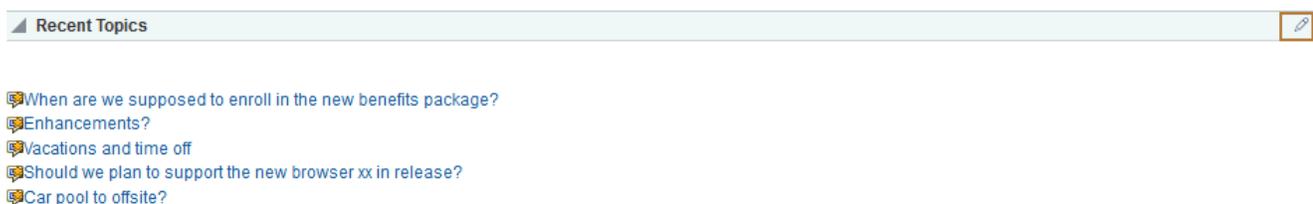
The Show panel opens, from where you can select or deselect additional data (Figure 15-47).

Figure 15-47   Show Panel in Recent Topics

3. Select the data you want to show, or deselect the data check box you want to hide. Select or deselect one or more from:

- **Author**—The user name of the person who posted the topic
- **Date**—The date the topic was last updated
- **Replies**—The replies associated with the topic

4. Click **Save** to save your changes and close the panel.

Showing or Hiding Information in Watched Forums

To show or hide additional information in Watched Forums:

1. Go to the Watched Forums view where you want to show or hide additional information.

2. Click the **Personalize** (pencil) icon in the header (Figure 15-48).

Figure 15-48   Personalize Icon in Watched Forums
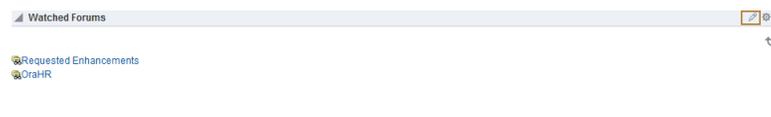
The Show panel opens, from where you can select or deselect additional data (Figure 15-49).

Figure 15-49   Show Panel in Watched Forums

3. Select the data you want to show, or deselect the check box of the data you want to hide. Select or deselect one or more from:

- **Date**—The date the forum was last updated

- **Topics**—The topics associated with the forum

4. Click **Save** to save your changes and close the panel.

Showing or Hiding Information in Watched Topics

To show or hide additional information in Watched Topics:

1. Go to the Watched Topics view where you want to show or hide additional information.

2. Click the **Personalize** icon (pencil) in the header (Figure 15-50).

Figure 15-50   Personalize Icon in Watched Topics

The Show panel opens, from where you can select or deselect additional data (Figure 15-51).

Figure 15-51   Show Panel in Watched Topics

3. Select the data you want to show, or deselect the data check box you want to hide. Select or deselect one or more from:

- **Author**—The user name of the person who posted the topic

- **Date**—The date the topic was last updated

- **Replies**—The replies associated with the topic

4. Click **Save** to save your changes and close the panel.

Sending Mail from Discussion Topics

Each discussion topic in has an associated **Send Mail** icon on its toolbar (Figure 15-52). Click the **Send Mail** icon to initiate a mail message containing the discussion text, location, author, and date it was created. This feature makes it easy for you to communicate interesting discussions to others.

Figure 15-52   Send Mail Icons on Discussion Topics
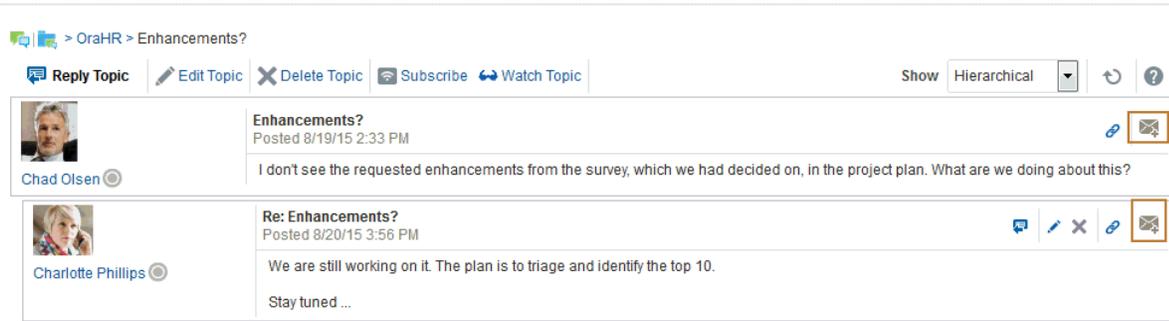
The portal manager determines the mail client to use with the **Send Mail** icon. If a local mail client was specified, then a plain text message opens (if you have not logged into your mail application, you will be prompted to do so). If WebCenter Portal's Mail service was set as the mail client, then the HTML Mail Compose dialog opens. With either mail client, you can add or edit the standard, perpetuated message before sending.

Part IV

Adding Content to a Portal

This part of *Using Portals in Oracle WebCenter Portal* provides information about adding content to a portal, including adding documents, contributing, publishing and presenting content, and collaborating with wikis and blogs.

- Introduction to Adding Content to a Portal
- Contributing and Publishing Content
- Adding and Managing Documents
- Working with Oracle Content and Experience Cloud
- Working with Wikis
- Working with Blogs

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16
Introduction to Adding Content to a Portal

WebCenter Portal provides several different containers in which to display and manage content, enabling end users with appropriate permissions to manipulate and display that content in a variety of ways.

In WebCenter Portal, there are several ways to work with portal content:

- **Content Contribution and Publishing**. Enables users to quickly add image, text, and video content to a portal page. When an Image, Text, or Styled Text component is present on a page, a user who is granted `Edit Page` or `Contribute Page Content` permission can contribute image, text, or video content to the page at runtime.

  > ✏ **Learn More:**
  >
  > For more information about contributing and publishing content, see Contributing and Publishing Content .

- **Sophisticated Content**. Design portal pages and add components to portal pages, such as calendars, activity streams, data visualizations, message boards, tag clouds, and portlets.

  > ✏ **Learn More:**
  >
  > For more information about designing portal pages, see Working with Portal Pages in *Building Portals with Oracle WebCenter Portal*.

- **Content Presenter**. Enables users to precisely customize the selection and presentation of content in a portal. When a Content Presenter task flow is present on a page, a user who is granted `Edit Page` permission can select content from the Oracle WebCenter Content Server (a single item of content, contents under a folder, a list of items, or content query), and then select a template to render the content on a page in a portal. The Content Presenter task flow is available only when the system administrator has completed the prerequisite WebCenter Content Server configuration, but Content Presenter has no dependency on the Documents tool for adding or managing the content it displays.

  > ✏ **Learn More:**
  >
  > For more information about Content Presenter, see Publishing Content Using Content Presenter in *Building Portals with Oracle WebCenter Portal*

- **Content Manager**. Enables users to work with libraries, folders, and files in the connected WebCenter Content Server repository. It offers an easy and intuitive user interface with sophisticated searching capabilities. When Content Manager is available on a page, a user with the appropriate document permissions can work with the WebCenter Content Server files and folders using Content Manager. Content Manager is available only when the system administrator has completed the prerequisite WebCenter Content Server configuration and the portal manager has enabled the Documents tool.

  > **Learn More:**
  >
  > For more information about working with Content Manager, see Adding and Managing Documents.

- **Oracle DOCS Content Manager**. Enables users to access content in Oracle Content and Experience Cloud. For more information, see Working with Oracle Content and Experience Cloud.

- **Wikis**. Enable multiple users to collaborate on content that is relevant, useful, and up-to-date. Wiki pages are available only when the portal manager has enabled the Documents tool.

  > **Learn More:**
  >
  > For more information, see Working with Wikis.

- **Blogs**. Enable users to create and manage personal blogs to record experiences and opinions, and group related blog posts. Blogs are available only when the portal manager has enabled the Documents tool.

  > **Learn More:**
  >
  > For more information, see Working with Blogs.

17

Contributing and Publishing Content

WebCenter Portal provides a quick and easy way to contribute and publish simple content, such as images, formatted text, and embedded videos, to the pages in your portal.

> **See Also:**
>
> For an overview of the different options available in WebCenter Portal for working with portal content and adding content to a portal, see Introduction to Adding Content to a Portal.

> **Permissions:**
>
> To perform the tasks in this chapter, you need to be a member of a role that has been granted the portal-level permission `Contribute Page Content` or has been granted the `Contribute` permission on an individual page.

Topics:

- About Contributing and Publishing Content
- Entering Contribution Mode
- Contributing and Publishing an Image
- Contributing and Publishing Rich Text
- Contributing and Publishing Text with Predefined Formatting
- Contributing and Publishing a Video
- Adding a Hyperlink to an Image
- Adding a Hyperlink to Rich Text
- Contributing and Publishing Content in Different Languages

About Contributing and Publishing Content

You can add text, images, and embedded videos to pages in your portal.

If you have the appropriate permissions, you can enter contribution mode to add the following types of content to your portal:

- If the page includes an Image component, you can place a picture on the page, for example, a logo, banner, photograph, or diagram. For more information, see Contributing and Publishing an Image.

- If the page includes a Styled Text component, you can place a small piece of text on the page, for example, a title, heading, byline, or caption. The style used for the text is determined by the designer of the page and you cannot change it. For more information, see Contributing and Publishing Text with Predefined Formatting.

- If the page includes a Text component, you can place a larger piece of text on the page, for example, the body of a news article; press release; or review, the description of an event, or a list of instructions. You can apply your own formatting and add hyperlinks to the text. For more information, see Contributing and Publishing Rich Text.

  You can also use Text components to place embedded video on a page. For more information, see Contributing and Publishing a Video.

For example, a page could contain an Image component for the page banner, followed by a Styled Text component for a headline, and then another Text component for the main content of the page. Figure 17-1 shows an example of a page created using content publishing.

Figure 17-1   Example Page for Content Publishing
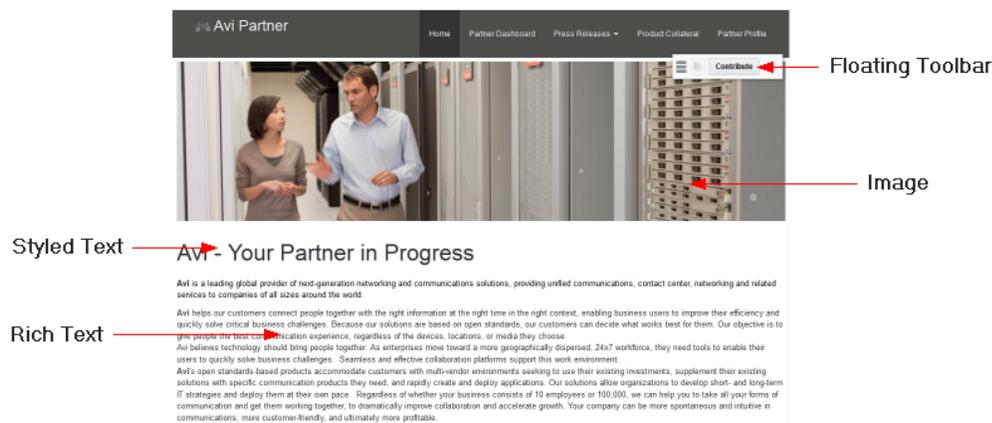
When you edit a Text or Image component, you access the appropriate editing tools for that component. A Text component provides text formatting tools and a text entry area, a Styled Text component provides just a text entry area, and an Image component provides a dialog where you can specify the properties of the image that you want to publish.

When page drafts are enabled in the portal administration settings, you can refine your page contributions before making them available to others who view the portal. When users with `Edit Page` or `Contribute Page Content` permission view the page, they can toggle between viewing the latest updates in the page draft (to preview the changes), or the most recently published page (without the changes). Users without either of these permissions will only ever see the most recently published page. When you are satisfied with the page updates and they are approved, you or another user with the correct permissions can publish the page, thereby making the changes visible to all users. For more information, see Publishing a Portal Page in *Building Portals with Oracle WebCenter Portal*.

For information about publishing content in wikis and blogs, see Working with Wikis and Working with Blogs.

Users with additional permissions can publish more complex content. For more
information, see Publishing Content Using Content Presenter in *Building Portals with
Oracle WebCenter Portal*.

Entering Contribution Mode

If your role enables you to contribute content, you can enter contribution mode while
viewing a page to add images, text, and video to a page.

To enter contribution mode:

1. Go to the page where you will add content.

2. In the floating toolbar, click **Contribute**.

Figure 17-2   The Contribute Button in the Floating Toolbar
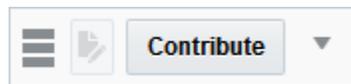
> ✏ **Tips:**
>
> • By default, the floating toolbar appears in the top right of the page,
> just below the toolbar, but you can move it around on the page by
> using the handle on the left of the toolbar to drag it to the preferred
> location.
>
> • If you cannot see the floating toolbar or the **Contribute** option, you
> do not have permission to contribute content.
>
> • The keyboard shortcut to enter and exit contribution mode is Ctrl
> +Shift+C.

3. The components on the page in which you can contribute content are highlighted
with a dashed border.

Figure 17-3   Page with Content Publishing Components in Contribution Mode
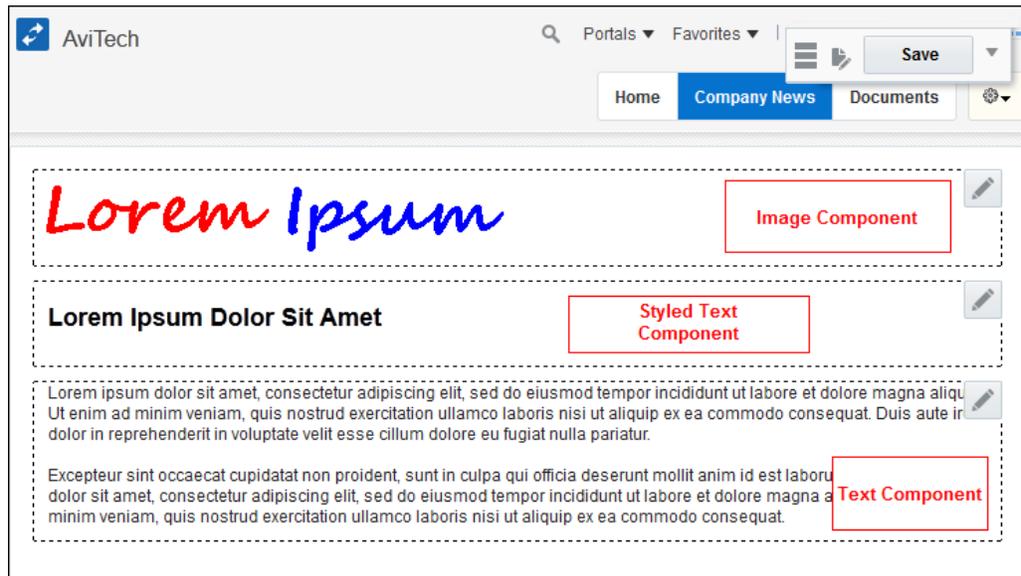
> ### Tip:
>
> If you do not see any components with dashed borders, this means that the current page does not contain any content publishing components. Navigate to a page that does contain content publishing components, or contact the portal manager if you think you should be able to publish content on the current page.

4. Provide your content, as described in one of the following sections:

   • Contributing and Publishing an Image

   • Contributing and Publishing Rich Text

   • Contributing and Publishing Text with Predefined Formatting

   • Contributing and Publishing a Video

5. When you have finished creating your content, click **Save** in the floating toolbar.

   If you change your mind and want to discard your changes, in the floating toolbar, click **Actions** and then choose **Discard Changes**. You can then click **Save** to return to view mode.
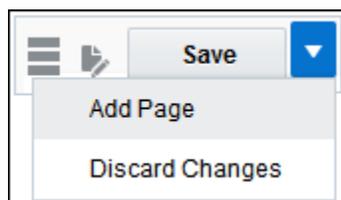
You are returned to view mode.

- If page drafts are enabled, view mode includes two different views of the page and the floating toolbar provides a toggle to switch between them:

  - —a blue icon in the floating toolbar indicates that you are viewing the page draft and this is what the page will look like when the draft is published. Click the icon to view the currently published page.

  - —a dark gray icon in the floating toolbar indicates that you are viewing the currently published page, which does not includes any of the changes you made in contribution mode. Click the icon to view the page draft.
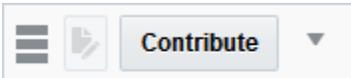
  —a light gray icon in the floating toolbar indicates that there is currently no page draft for the page.

  The changes that you made in contribution are not visible to page viewers until the page draft is published by a portal manager or a user with Publish permissions on the page.

  See Publishing a Portal Page in *Building Portals with Oracle WebCenter Portal*.

- If page drafts are disabled, your changes are immediately visible in view mode to all users.

Contributing and Publishing an Image

If a page includes an Image component, you can add an image to the page by specifying its URL or selecting an image from the Content Server repository.

> ✏️ **Note:**
>
> If you want to use an image from the content repository, that image must already exist in the repository. You cannot upload an image to the repository from the Edit Image dialog.

To contribute and publish an image:

1. Go to the page that contains the Image component in which you want to add the image.

2. Enter contribution mode.

   For more information, see Entering Contribution Mode.

3. Click anywhere in the Image component, or click the **Contribute** icon.

Figure 17-4   The Contribute Icon

4. In the **Image** tab of the Edit Image dialog, from the **Image Location** dropdown list, select:

   • **Web** to specify the location of the image by entering its URL.

      In the **Image URL** field, enter the URL for the image.

Figure 17-5   Image from a URL
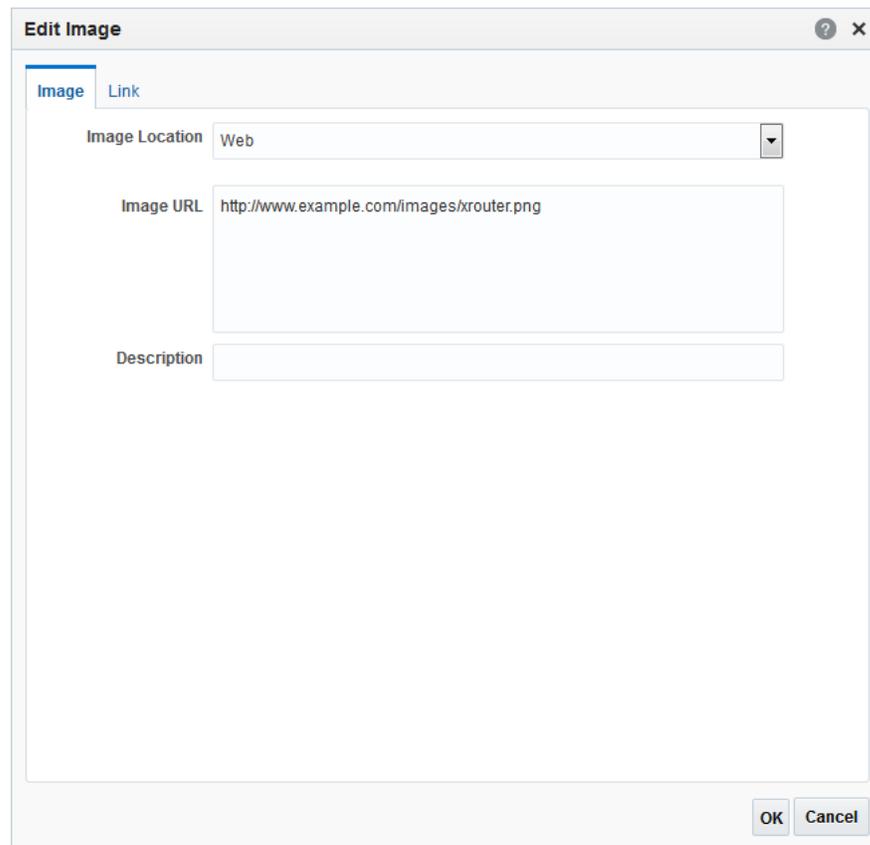
   • **Content Repository** to select an image from the WebCenter Content Server repository.

Figure 17-6   Image from Content Repository
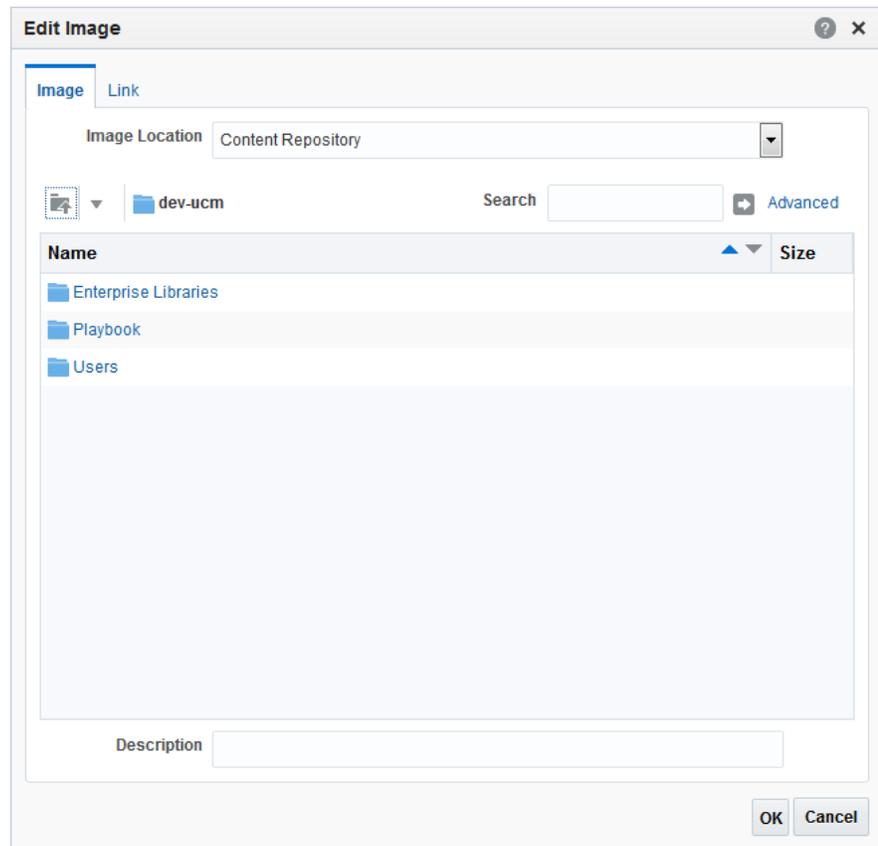
> **Note:**
>
> Select your image carefully. If a specific size has been defined for images in this component, the image will be stretched or shrunk as appropriate to fit. If the size is not specified, the component will use whitespace for padding if the image is too small, or scrollbars if it is too large.

5. In the **Description** field, enter a brief description of the image.

   This description is used as the alternate text for the image and is displayed when a user hovers the mouse cursor over the image. The description is also read by screen readers.

6. Click **OK** to preview the image.

Contributing and Publishing Rich Text

If a page includes a Text component, you can add text to the page and apply your own formatting. For example, you can use a Text component to publish a list of items, an article, or a press release.

To contribute and publish rich text:

1. Go to the page that contains the Text component in which you want to add the text.

2. Enter contribution mode.

   For more information, see Entering Contribution Mode.

3. Click anywhere in the Text component or click the **Contribute** icon (Figure 17-7).

Figure 17-7   The Contribute Icon

4. In the Text component, enter the text that you want to publish on the page.

> ✎ **Tips:**
>
>   • Text components are for detailed pieces of content; if you want to add a brief piece of content, such as a heading, use a Styled Text component.
>
>   • You can paste existing text into the Text component. Any HTML formatting will be retained.

5. Use the formatting tools, shown in Figure 17-8, to change the appearance of the text.

Figure 17-8   A Text Component with Formatting Tools
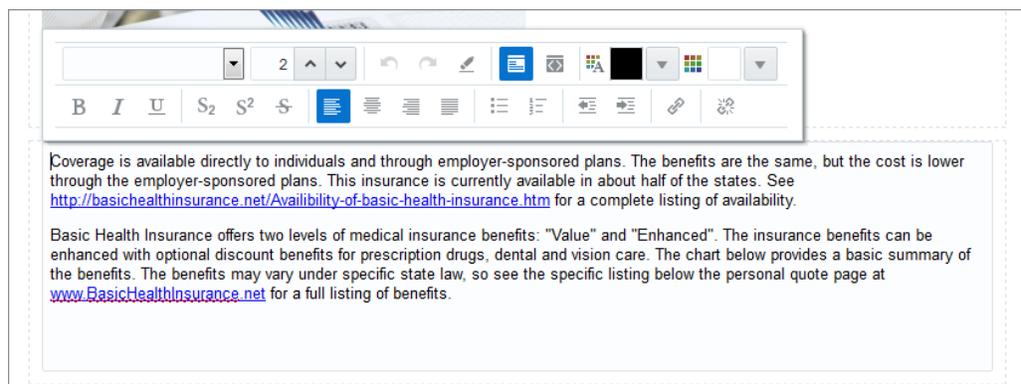
For example, you can:

• Change the font, size, or color of the text

• Apply text effects, such as bold, italic, or strikethrough

• Align or indent text within the component

• Create bulleted or numbered lists

• Add hyperlinks (for more information, see Adding a Hyperlink to Rich Text)

> ✎ **Note:**
>
> By default the text is formatted as defined by the page's skin. If you change the font of your text, for example the font face, size, style, or color, this overrides the settings from the skin.

6. To preview your text, click anywhere outside the Text component.

Contributing and Publishing Text with Predefined Formatting

If a page includes a Styled Text component, you can add a heading, title, or caption. The text in a Styled Text component is formatted according to predetermined settings.

To contribute and publish text with predefined formatting:

1. Go to the page that contains the Styled Text component in which you want to add the text.

2. Enter contribution mode.

   For more information, see Entering Contribution Mode.

3. Click anywhere in the Styled Text component, or click the **Contribute** icon (Figure 17-9).

Figure 17-9   The Contribute Icon

4. In the Styled Text component, enter the text that you want to publish on the page.

> 💡 **Tip:**
>
> Styled Text components are intended for brief items of content, such as headings and captions; if you want to provide more detailed text, use a Text component.

5. To preview your text, click anywhere outside the Styled Text component.

   The text uses the formatting defined for the component.

Contributing and Publishing a Video

To add video to a page, you can use a Text component to enter the code to embed the video.

To contribute and publish a video:

1. Copy the code to embed the video.

   For example:

```
<iframe width="560" height="315" src="https://www.youtube.com/embed/3zdv65Kzw54"
frameborder="0" allowfullscreen></iframe>
```

> **Tip:**
>
> The steps for obtaining this piece of code will depend on the source of your video.

2. Go to the page that includes the Text component in which you want to add the video.

3. Enter contribution mode.

   For more information, see Entering Contribution Mode.

4. Click anywhere in the Text component where you want to add your video, or click the **Contribute** icon (Figure 17-10).

Figure 17-10   The Contribute Icon

5. In the rich text editor, click the **Source Code Editing Mode** icon (Figure 17-11).

Figure 17-11   The Source Code Editing Mode Icon

6. In the text area, paste the code for embedding the video, which you copied earlier (Figure 17-12).

Figure 17-12   Code in Text Component for Embedding Video
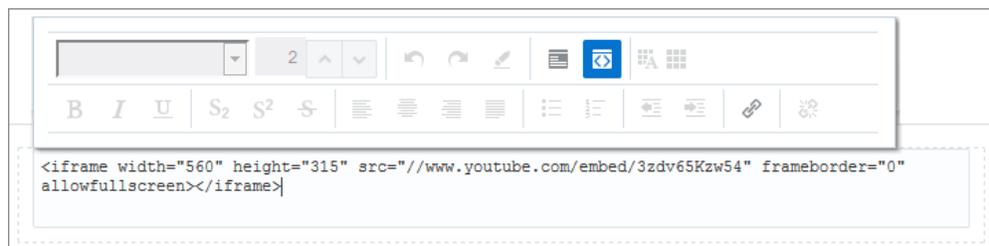
7. To preview the video, click anywhere outside the Text component (Figure 17-13).

Figure 17-13   Embedded Video
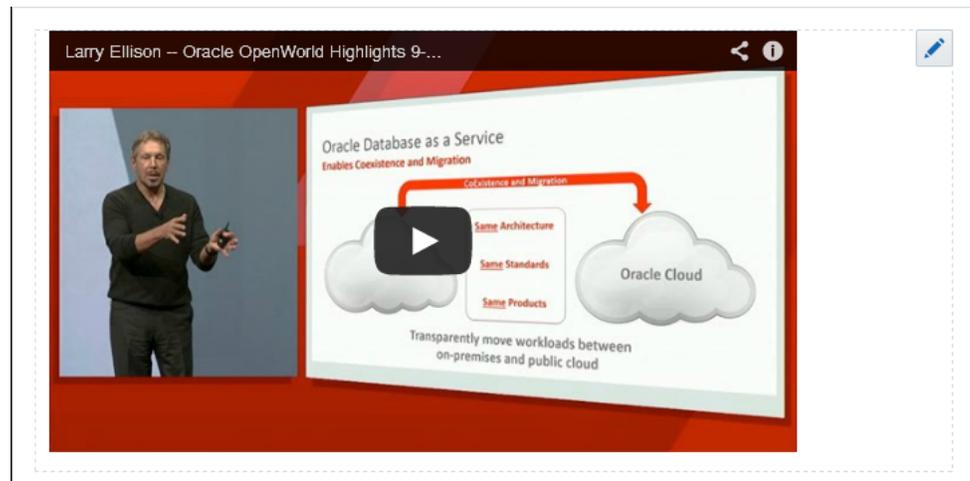
Adding a Hyperlink to an Image

You can add hyperlinks to images to make them clickable.

To add a hyperlink to an image:

1. Go to the page that contains the image to which you want to add the hyperlink and enter contribution mode.

   For more information, see Entering Contribution Mode.

2. Click anywhere in the Image component where you want to add the hyperlink, or click the **Contribute** icon (Figure 17-14).

Figure 17-14   The Contribute Icon

3. In the **Link** tab of the Edit Image dialog, from the **Link Type** list, select:

   • **No Link** if you do not want the image to be clickable.

   • **Page** to identify the link destination as another page within the current portal.

     In the page browser, select the portal page to display when the image is clicked (Figure 17-15).

Figure 17-15   Image Link to a Portal Page
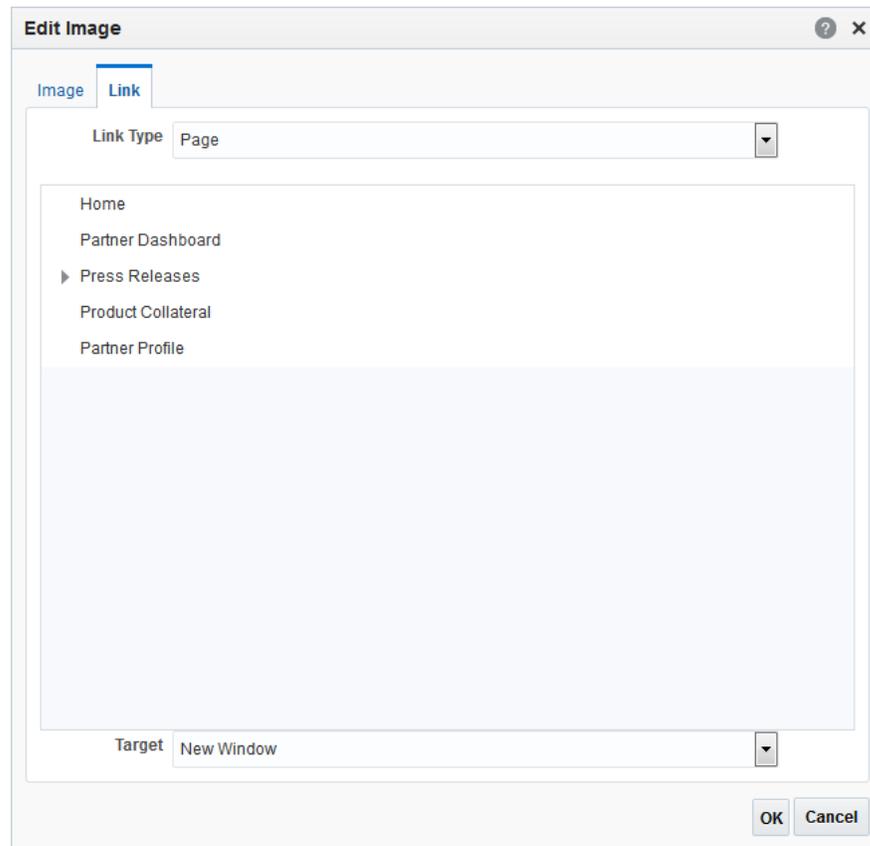
- **External** to identify the link destination as an external URL.

  In the **Destination URL** field, enter the URL of the external page to display when the image is clicked (Figure 17-16).

Figure 17-16   Image Link to an External URL
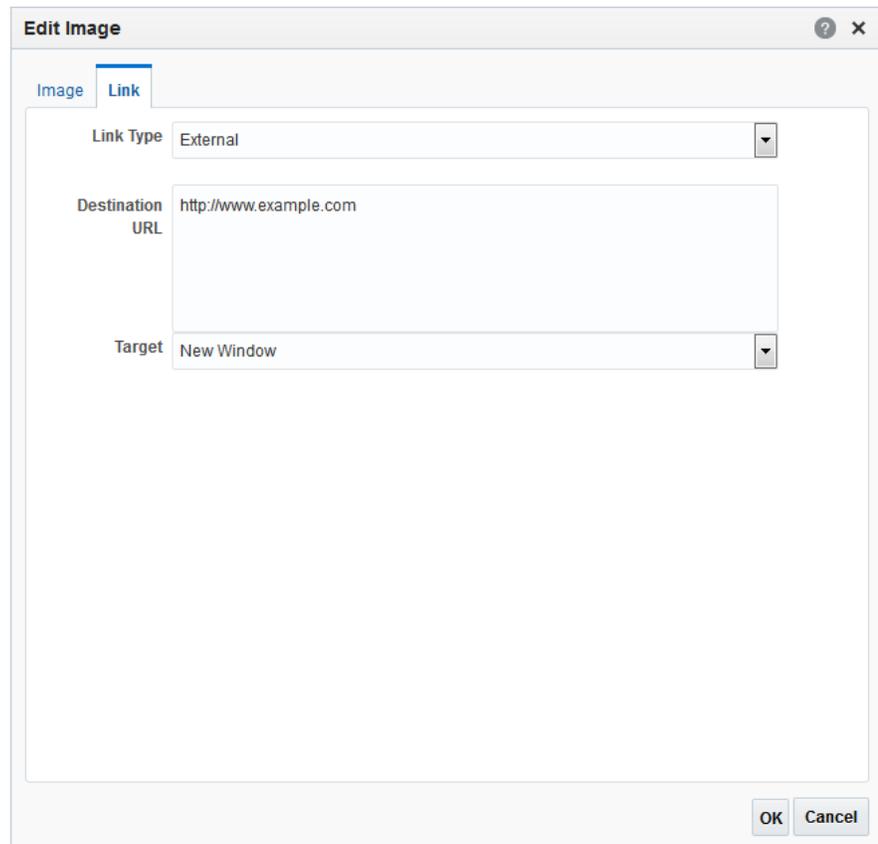
- **Content** to identify the link destination as an item from the Oracle WebCenter Content Server repository.

    In the repository browser, locate and select the content item to display when the image is clicked (Figure 17-17).

Figure 17-17   Image Link to a Content Item
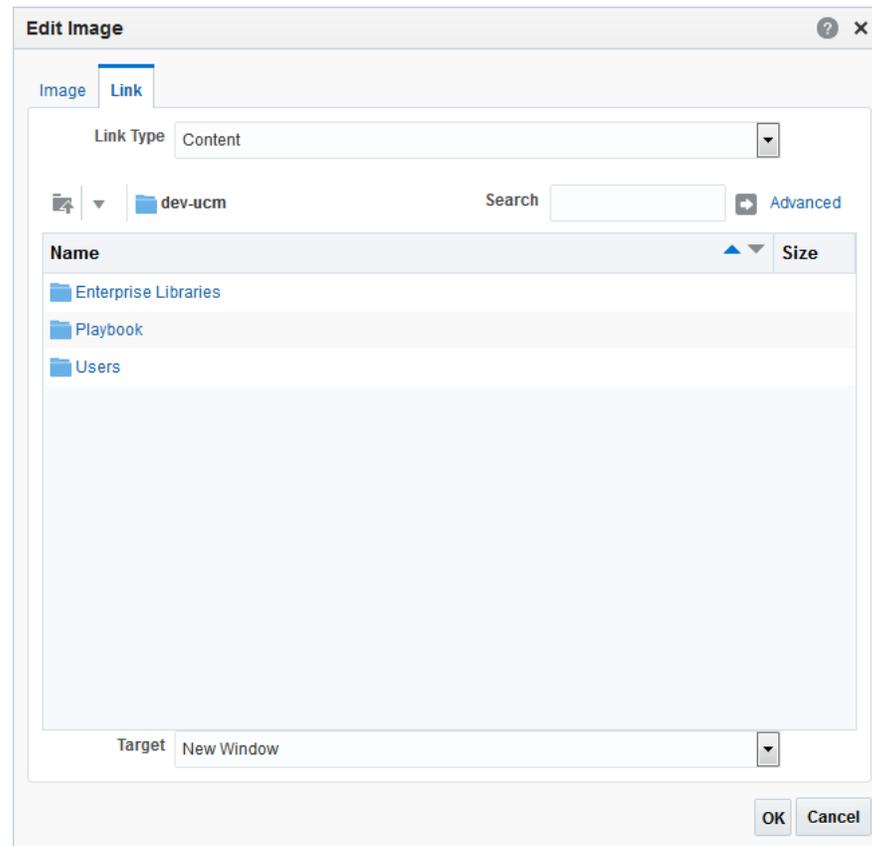
4. From the **Target** dropdown list, select:

   • **Same Window** to display the link destination in the current browser window, navigating away from the current page.

   • **New Window** to display the link destination in a new browser window.

   If you do not specify a target, the browser default behavior is observed, which is usually to open the link in the current browser window.

5. Click **OK** to preview the image.

Adding a Hyperlink to Rich Text

To add a hyperlink to rich text:

1. Go to the page that contains the text to which you want to add the hyperlink and enter contribution mode.

   For more information, see Entering Contribution Mode.

2. Click anywhere in the Text component where you want to add your hyperlink, or click the **Contribute** icon (Figure 17-18).

Figure 17-18   The Contribute Icon

3. In the Text component, place the cursor where you want to add the link and click the **Add Link** icon (Figure 17-19).

> ### Tip:
>
> If the Text component already includes the text that you want to turn into a hyperlink, select the text before clicking **Add Link**.

Figure 17-19   The Add Link Icon

4. In the Add Link dialog, from the **Link Type** dropdown list, select:
   - **Page** to link to another page within the current portal.

     In the page browser, select the portal page to display when the link is clicked.

     Figure 17-20   Link to a Portal Page
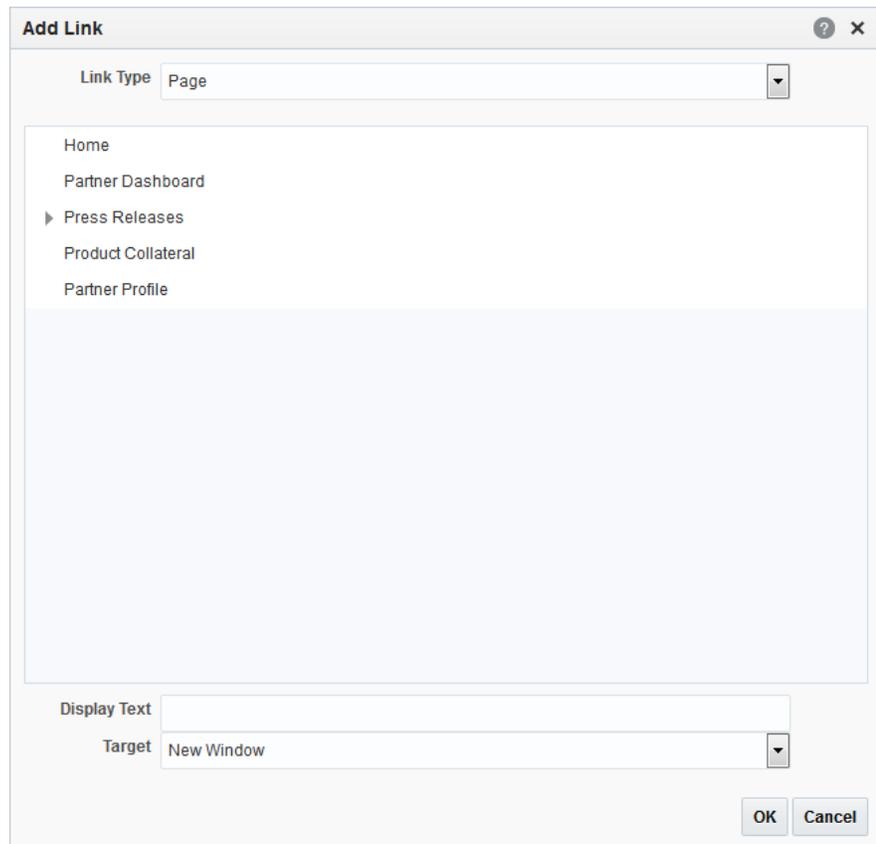
   - **External** to link to an external URL.

     In the **Destination URL** field, enter the URL of the external page to display when the link is clicked.

Figure 17-21   Link to an External URL

- **Content** to link to an item in the Content Server repository.

  In the repository browser, locate and select the content item to display when the link is clicked.

Figure 17-22   Link to a Content Item
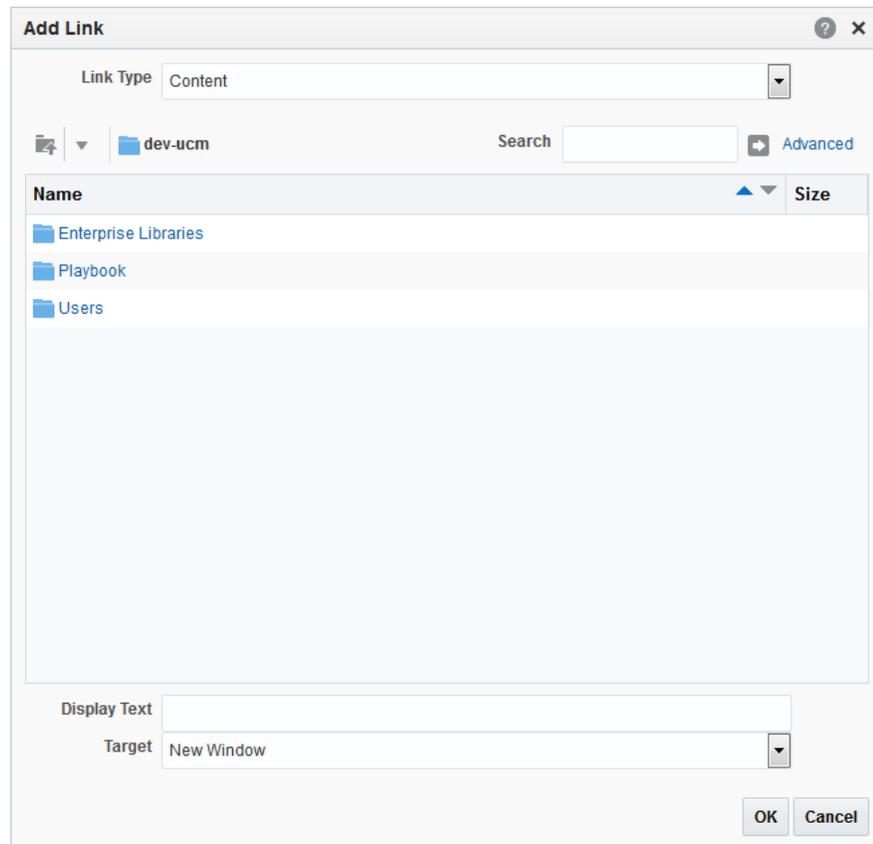
5. In the **Display Text** field, enter the text to use for the hyperlink. If you do not enter a value here, the value is determined from the link destination.

> **Note:**
>
> If you selected text in the Text component, the **Display Text** field is prepopulated with the selected text.

6. From the **Target** dropdown list, select:

    •   **Same Window** to display the link destination in the current browser window, navigating away from the current page.

    •   **New Window** to display the link destination in a new browser window.

    If you do not specify a target, the browser default behavior is observed, which is usually to open the link in the current browser window.

7. Click **OK**.

8. To remove a link, select the hyperlinked text and click the **Remove Link** icon.

Figure 17-23   The Remove Link Icon

9. To preview your text, click anywhere outside the text component.

Contributing and Publishing Content in Different Languages

After first adding content in the portal's default language, you (or other content contributors) can subsequently publish that content in different languages to provide localized content.

> **Note:**
>
> WebCenter Portal does not automatically translate published content; content contributors must provide the translated content, which is then displayed to other users when they view the portal in that language.

To contribute and publish content in different languages:

1. Make sure that your preferred language is set to the one for which you want to add a localized version.

   For more information, see Choosing Your Preferred Display Language.

2. Go to the page that contains the content that you want to localize and enter contribution mode.

   For more information, see Entering Contribution Mode.

3. Overwrite the existing content with the equivalent content in the appropriate language.

   You can provide localized content for the following:

   • Text of a Text or Styled Text component

   • Image location

   • Image description

   • Link destination for images or text

   For more information about the different content contribution and publishing components, see Contributing and Publishing an Image, Contributing and Publishing Rich Text, and Contributing and Publishing Text with Predefined Formatting.

   When the content is published, users whose language matches the one which was used to contribute the localized content will see the localized content; users whose language is set to a different language will see the content which was published for that language. If no localized content was provided for a language, users will see the content provided for the portal's default language.

18
Adding and Managing Documents

Add and manage files and folders and work with document libraries in a portal using Content Manager. Content Manager also supports Hybrid Enterprise Content Management (ECM), which allows you to access your content in the Oracle Document Cloud Service.

> ✎ **See Also:**
>
> For an overview of the different options available in WebCenter Portal for working with portal content and adding content to a portal, see Introduction to Adding Content to a Portal.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter on your personal pages, you need the application-level permission `Pages: Create, Edit, and Delete Pages`. Users with this permission can create and manage their personal pages in the Home portal.
>
> To perform the tasks in this chapter on portal pages, you need the portal-level permissions `Customize Pages and Edit Content` and `Create Documents` (which includes delete permissions on documents that you create), granted by the portal manager. To delete documents that are not your own, you must have `Delete Documents` permission.
>
> To set security on a document in a portal, you must have the `View and Create Documents` permission, granted by the portal manager.
>
> For information about roles and permissions, see Understanding Permissions and Permission Models in a Portal in *Building Portals with Oracle WebCenter Portal*.

Topics:

- About Adding and Managing Documents
- Understanding the Content Manager Interface
- Working with the Results List in Content Manager
- Searching Libraries, Folders, and Documents
- Working with Libraries
- Working with Folders and Files
- Working with Workflow-Enabled Content

- Working with Desktop Integration

About Adding and Managing Documents

Content Manager enables you to upload files to Content Server, the content repository for WebCenter Portal. Files are organized into document libraries and folders. Depending on your permissions, you can open, edit, delete, copy, rename, move, share, search, view, and manage information about files and work with libraries and folders in the connected content repository.

The **Documents** page in a portal or the Home portal exposes the Content Manager view. A portal manager may choose to add one or more instances of Content Manager to a page in your portal to allow you to work with documents. For more information, see Enabling Document Management in *Building Portals with Oracle WebCenter Portal*.

Content Manager supports Hybrid Enterprise Content Management (HECM), which helps portal members to easily and rapidly access enterprise content in Oracle Content and Experience Cloud.

Figure 18-1   Content Manager Task Flow with Cloud Folder
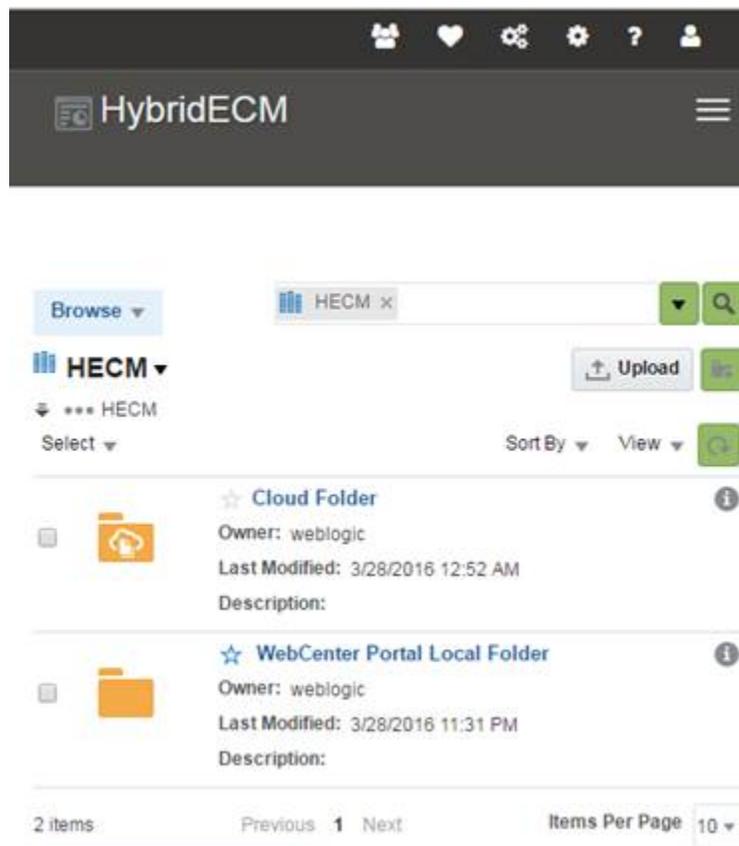
> **Note:**
>
> The permissions on WebCenter Portal are independent from the Oracle Content and Experience Cloud permissions and the WebCenter Portal roles cannot be paired with the Oracle Content and Experience Cloud roles. The following table lists the tasks you can perform with the specified WebCenter Portal document permissions.

Table 18-1   Permissions for Oracle Content and Experience Cloud Tasks

WebCenter Portal Document Permissions	Available Tasks on Oracle Content and Experience Cloud
`Document: View`	• View and download documents • View folders

`Document: View`
 	
`Document: Create and Edit`
	• View, download and upload documents
	• View and create folders
	• Share documents and folders
	• Delete documents and folders
	• Copy and move documents and folders

Understanding the Content Manager Interface

Content Manager offers an easy and intuitive user interface with sophisticated searching capabilities for managing libraries, folders, and documents. Content Manager is organized into two pages: Find Documents and View Documents.

Find Documents

The Find Documents page is the default view of Content Manager on a page. You can personalize this page to display all libraries, documents, or your favorite items. It also provides ways to filter the documents displayed to help you find the required documents more quickly.

For information about the basic concepts like library types, folders, search support, and favorites, see Basic WebCenter Content Concepts in *Using Oracle WebCenter Content*.

Figure 18-2 shows an example of the Find Documents page, highlighting the following areas:

- Access selection area/side bar: Provides a way to browse through libraries, folders, files, and items you have marked as favorites. It includes the following options:

Element	Description
Search	Click to open the Searching Documents page where you can locate and work with the latest revision of all documents to which you have access. In this view, all documents are displayed in a single flat list regardless of the library or folder in which they may be stored.

Element	Description
Browse	Click to open the Libraries page where you can view and work with libraries to which you have access. When browsing within a library, the search box searches only the names of documents within the library or folder you are browsing. To upload documents to a specific library or folder, navigate to the library or folder and then upload the document.
Favorites	Click to open the Favorites page to view the list of items that you previously marked as favorites and to access the associated items. Favorites are listed in the order selected, with the most recent favorite at the top of the list. You can mark documents, folders, libraries, and saved searches as favorites by clicking the star next to the item in a list, or by selecting Favorite from an associated menu. Your favorites are visible only to you.
Clipboard	Click to open the Rendition Clipboard page to list any renditions you have added to the clipboard. A file can have multiple versions in different formats called renditions.
Home	Click to view contents of the enterprise library of the current portal. The portal home page has the same areas as on the Searching Documents page.

- Search box: Provides search and filter options for locating libraries, folders, and documents. Entering text into the search box expands the box to display libraries, folders, or documents whose names are close matches to what you enter. You can use filters to limit search results. Filters applied to the search are listed in the search box. Clearing a filter from the search box removes the filter and broadens the search to a larger context. Filters predefined by a portal manager based on document properties are available by clicking the arrow next to the search box.

- Results list: Displays folders and documents in the main content area based on the filters you use when browsing and searching. You can change how results are sorted and displayed. Selecting one or more documents in the results list displays the results list toolbar that provides a convenient way to do a variety of tasks that vary depending on the permissions you have.

Figure 18-2   Find Documents in Content Manager
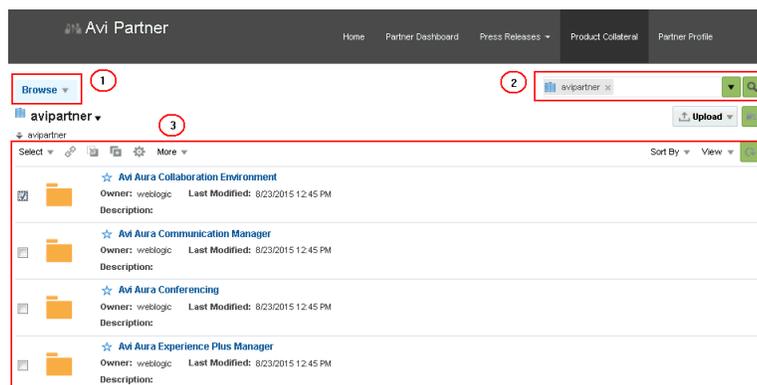
View Documents

The View Documents page displays when you open a document from a results list. The page allows you to view the content and metadata properties of the document, and provides ways to perform tasks such as update the document version, edit

metadata, or download the document. When you open a document, by default its preview displays in the Preview tab.

Figure 18-3 shows an example of the View Documents page, highlighting the following areas:

- Banner: Displays the name of the document. Use it to mark the document as favorite, get links, refresh, and check in the document. The banner contains the **More** menu that provides options for managing the document, as described in Working with Folders and Files.

- Properties section: Enables you to edit document properties, metadata, and security, and preview the document by using the following tabs: Summary, Metadata, Security, and Preview.

- Document view area: Displays the document view or properties depending on the tab selected in the Properties section. When the Preview tab is selected, it displays the document preview and a toolbar for managing the document view such as navigating the pages and zooming in and out.

Figure 18-3   View Documents in Content Manager
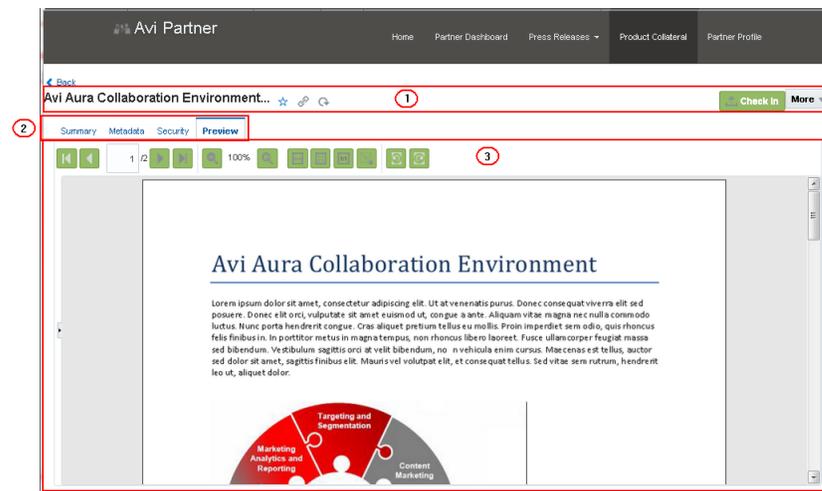
Working with the Results List in Content Manager

Content Manager displays search results as a results list. When searching or browsing in Content Manager, use the View menu to view the results as a list, thumbnails, or table.

To learn more about results lists, refer to the following sections:

- Result Views
- Managing the Results List

Result Views

When searching or browsing in Content Manager, results lists can be viewed as lists, thumbnails, or tables:

- **List** (default): Displays a document thumbnail, document author, release date, and comments (Figure 18-4).

- **Thumbnail**: Displays a document thumbnail. Clicking the information icon opens a window with a subset of the document properties (Figure 18-5).

- **Tabular**: Lists the name, title, author, and release date in a table (Figure 18-6).

Figure 18-4   Content Manager — List View
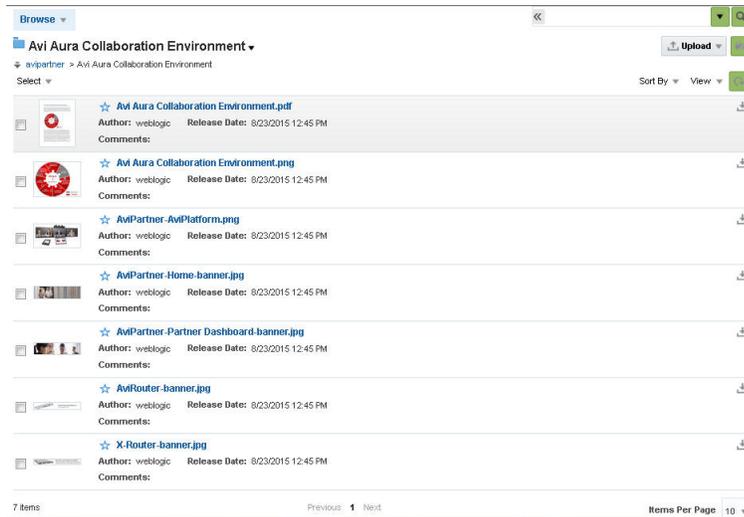
Figure 18-5   Content Manager — Thumbnail View
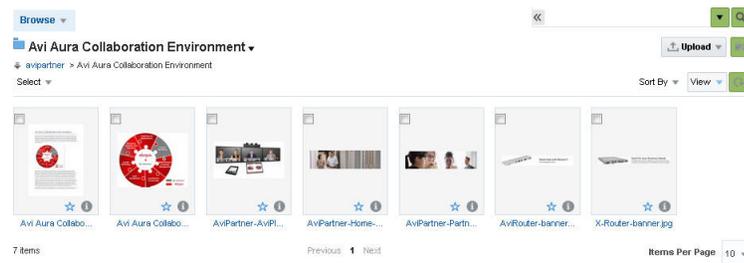
Figure 18-6   Content Manager — Tabular View

Managing the Results List

You can manage the results list by changing the view, sorting and refreshing the results list, and specifying the number of items to display.

Table 18-2 describes how you can manage the results list.

Table 18-2   Managing the Results List

Task	Action	Description	More Information
Changing the result view	**View** menu	Enables you to change how a results list is displayed. You can choose to view the results as a list, thumbnails, or table.	Results View
Refreshing the results list	**Refresh** icon	Enables you to refresh the search results.	Refreshing the Results List
Sorting the results	**Sort By** menu	Enables you to sort the folder and document results lists. Library and favorite results lists cannot be sorted.	Sorting Results
Changing the number of items displayed per page	**Items Per Page** box	Enables you to specify the number of items to display per page in a results list. You can choose to display different number of library items and document items per page.	Changing the Number of Items Displayed per Page

Searching Libraries, Folders, and Documents

Documents uploaded to Content Server can be organized into libraries and folders, or they can be unfiled, stored outside of any library or folder. Each library can have folders and each folder can have subfolders. You can find documents by browsing through libraries and folders, by searching for key words or phrases in the document text and metadata, or a combination of both.

In Content Manager, you use the options on the access selection area to browse through libraries, folders, favorites, or the current portal. For example, you can select **Home** to browse through your current portal or select **Browse** to search the libraries. You use the search box to search based on filters and metadata. As you enter the text in the search box, it expands to provide suggestions based on close matches to what you enter, organized into categories as **Documents**, **Folders**, and **Libraries**. For example, entering `HR` would show documents named `HR Vacation Policy` and `HR Employees`, folders named `HR Forms` and `HR Policies`, and a library named `HR`. Along with text entered into the search box, you can also use predefined filters to better refine your search. For example, you can limit your search by only browsing for documents authored, favorited, followed, or checked out by you. You can also choose to save your searches to quickly execute them again later.

For information about how to search and browse, see Finding Libraries, Folders, and Documents in *Using Oracle WebCenter Content*. Note that some features described

for Oracle WebCenter Content in the referenced documentation might not be available in WebCenter Portal and the UI may vary.

Figure 18-7   Browsing and Searching in Content Manager
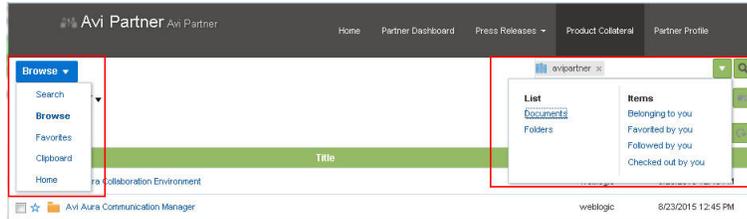
Working with Libraries

Libraries are used to organize and control access to documents, as well as associate the appropriate metadata with documents.

Figure 18-8 shows the Libraries page in Content Manager.Table 18-3 summarizes the various actions you can perform to work with libraries. These actions are available when you select a library in the results list. Certain actions like propagating library metadata or deleting a library are available if you have the permissions listed in Enabling Document Management in *Building Portals with Oracle WebCenter Portal*.

Figure 18-8   Libraries Page in Content Manager
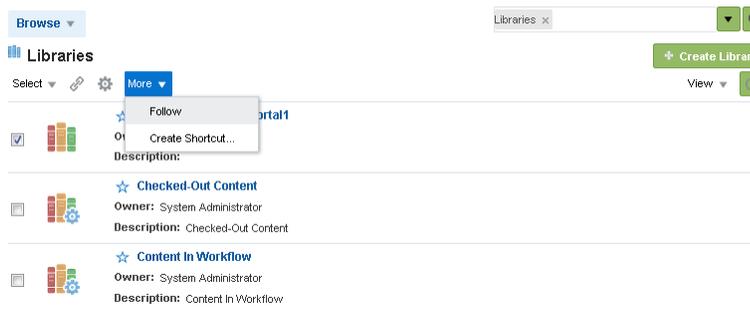
Table 18-3   Library Actions

Task	Action	Description
Getting a link to a library	**Get Link** action on the results toolbar	Displays the link to view the library.
Viewing and editing library properties	**Properties** action on the results toolbar	Displays library properties, such as name, owner, security group, and shortcuts. You can edit various properties if you have the required permissions. For more information, see Viewing and Editing Document Library Properties.

Table 18-3   (Cont.) Library Actions

Task	Action	Description
Following a library	**Follow** action under the **More** menu	Enables you to follow a library and be notified when the library is modified. For information, see Following Document Libraries.
Creating a shortcut to a library	**Create Shortcu**t action under the **More** menu	Creates a shortcut to the library to make navigation easy. For information, see Creating Library Shortcuts.
Propagating library metadata	**Propagate Metadata** action under the **More** menu **Note**: This action is available for enterprise libraries, and not for system libraries, only to portal managers or members with the required permissions.	Enables you to change or add the metadata values associated with the items in the library. For information, see Propagating Library Metadata.
Deleting a library	**Delete** action on the results toolbar **Note**: This is action is available for enterprise libraries, and not for system libraries, only to portal managers or members with the required permissions.	Deletes the selected library. For information, see Deleting Document Libraries.
Creating a library	**Create Library** button This action is not available. Libraries can be created only on Content Server and not in WebCenter Portal.	For information, see Creating an Enterprise Library.

Working with Folders and Files

Using Content Manager, you can create folders, upload files, and manage them as needed.

Figure 18-9 shows the actions available for managing folders and files displayed in a results list in Content Manager. Table 18-4 describes the actions that can be applied to the selected folders or files.

Selecting one or more items in a results list exposes the results toolbar, which provides various actions for managing the selected items. These actions are available directly on the results toolbar or under the **More** menu, unless otherwise specified in the table. Note that the actions available depend on your permissions to the selected items.

> ✎ **Note:**
>
> While performing any action like creating a folder or uploading documents by using Content Manager, if the server goes down and fails over to another server in the cluster, the page will refresh and you will need to perform the operation again.

Figure 18-9   Actions Available for Folders and Files in Content Manager
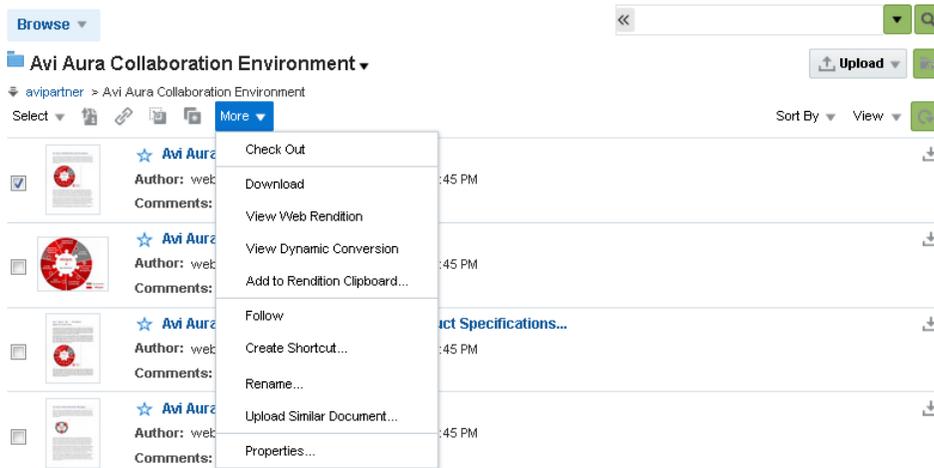
Table 18-4   Actions Available Either for Folders or Files

Task	Action	Applicable to Folder or File	Description	More Information
Opening a document	Click the document name	File	You can open documents of any type to preview file contents or properties in a read-only view. Clicking a document name displays the View Documents page.	Viewing Documents on the Document Page
Viewing alternate renditions of a document	**View Web Rendition**	File	Displays the web rendition of the selected item.	Viewing Alternate Renditions
	View Dynamic Conversion	File	Displays the HTML conversion of the selected item.	Viewing Alternate Renditions
	Add to Rendition Clipboard	File	Prompts you to choose the renditions of the selected item that you want to add to the rendition clipboard. The rendition clipboard stores specific renditions of specific document revisions for quick access. For example, you can save a web-viewable rendition of the first revision of a document as well as a native version of the current revision so that you can quickly compare them.	Use the Renditions Clipboard

Table 18-4   (Cont.) Actions Available Either for Folders or Files

Task	Action	Applicable to Folder or File	Description	More Information
Uploading documents	**Upload**	File	Enables you to upload documents. While uploading a document, you can specify the metadata values of the document. **Note**: While uploading files from within a portal, you *must not* change the security group or account metadata.	Uploading Documents from a Web Browser
	Upload Similar Document	File	Prompts you to upload a similar item. Selecting this action prepopulates the metadata values of the Document Upload dialog with those of the selected document. **Note**: While uploading files from within a portal, you *must not* change the security group or account metadata.	Uploading Documents from a Web Browser
Checking out and downloading documents	**Check out**	File	Checks out the selected item.	Checking Out Documents
	Check out and edit	File	Checks out the selected item and opens the native file for editing.	Checking Out and Editing a Document
	Cancel Check-Out	File	Cancels the checked out status of a file.	
	Download	File	Allows you to save a file from the content repository to your local file system.	Downloading Documents
Working with file versions/ revisions	**Check in New Revision**	File	Enables you to replace a file with a new version that you have saved on your local file system.	Checking In New Revisions from a Web Browser
	View and Manage Revisions	File	Enables you to download or delete a file version.	
Refreshing file content	**Refresh** icon on the View Documents page	File	Displays the latest content of a file.	

Table 18-4   (Cont.) Actions Available Either for Folders or Files

Task	Action	Applicable to Folder or File	Description	More Information
Filing or unfiling a document	**File Document/ Unfile Document**	File	Allows you to file the selected unfiled document in a library or folder, or remove the selected filed document from a library or folder. When you unfile a document, you can no longer locate that document by browsing to its parent library or folder.	
Viewing document properties	**Properties**	File	Opens the View Documents page where you can view and set various document properties such as metadata and security.	Understanding Documents and Document Properties
Setting security on a file	**Security** tab on the View Documents page	File	Enables you to change the access to documents uploaded to a portal using access control lists. **Note:** You can use an access control list on a document only if the security group supports access control lists. If you are uncertain whether the security group you are using supports access control lists, check with your system administrator.	Changing Access to Uploaded Documents
Propagating folder metadata	**Propagate Metadata**	Folder	Enables you to change or add the metadata values associated with the items in a folder.	Propagating Library Metadata
Creating a folder	**Create Folder**	Folder	Creates a folder within the context of a library, inheriting the properties of the parent library. You can create a Local folder or Oracle Content and Experience Cloud folder.	Creating Folders **Note**: To create an Oracle Content and Experience Cloud folder, ensure that your system administrator has configured the Oracle Content and Experience Cloud integration settings, as described in Configuring Content Manager for Oracle Content and Experience Cloud in *Administering Oracle WebCenter Portal*.

Content Manager provides actions that are available for both folders and files when viewing a listing of folders and/or files in the results list. These actions are available directly on the results toolbar or under the **More** menu on the toolbar.

Table 18-5 summarizes the folder and file management actions.

Table 18-5   Common Actions Available for Both Folders and Files

Task	Action	Description	More Information
Following a folder or file	**Follow**	Starts tracking the selected item so you can follow the updates.	Following Items
Creating shortcuts	**Create Shortcut**	Prompts you to create a shortcut to the selected item.	Shortcuts See also, Creating Library Shortcuts
Renaming a folder or file	**Rename**	Prompts you to rename the selected item.	
Linking to a folder or file	**Get link**	Displays links to view the document properties page and to the native file of the latest released revision or optionally the specific revision in the results list. This action is not available if multiple items are selected.	Using Links
Moving a folder or file	**Move**	Prompts you to move the selected items.	
Copying a folder or file	**Copy**	Prompts you to copy the selected items.	
Deleting a folder or file	**Delete**	Prompts you to delete the selected folder or file.	
Adding a folder or file to your favorites	**Favorite** icon	Provides quick access to a folder or file.	Setting Favorites

Working with Workflow-Enabled Content

While a document is being developed, it must typically be reviewed and approved by a number of people. To assist in managing this process, WebCenter Portal provides a built-in workflow capability to move a document through required approvals by assigned approvers before it is released to the system. The workflow notifies approvers through mail messages when they have a file to review and approve.

If you have the permissions to view the contents of a folder that is assigned a workflow, you can view the files while they are in a workflow, showing the pending changes.

For information about working with files in a workflow, see Working with Workflow-Enabled Content in *Building Portals with Oracle WebCenter Portal*.

Working with Desktop Integration

This section includes the following topics:

- About Desktop Integration
- Prerequisites for Desktop Integration

- • Working with Microsoft Office Integration
- • Working with Microsoft File Explorer Integration
- • Working with Email Client Integration
- • Working with Web Browser Search Integration

About Desktop Integration

WebCenter Portal, through Oracle WebCenter Content: Desktop, provides convenient access to the files in your portal directly from the following desktop applications:

- • Microsoft File Explorer
- • Microsoft Office applications (Word, Excel, and PowerPoint)
- • Email clients (Microsoft Outlook and Lotus Notes)
- • Web browsers (Internet Explorer, Mozilla Firefox, and Google Chrome)

Integrating your content repository with your desktop applications improves your ability to work with your portal files. You can easily edit and manage files, and share files with other users directly from your desktop in addition to using WebCenter Portal.

Prerequisites for Desktop Integration

To allow for full integration of desktop applications with WebCenter Portal, your system administrator must complete the steps detailed in Configuring Content Server for Desktop in *Administering Oracle WebCenter Portal*.

Additionally, you must install the latest version of the Desktop client software and set up a connection to your portal's content repository. These tasks may have been performed for you by your system administrator. For more information, see the following topics in *Using Oracle WebCenter Content: Desktop*:

- • Setting Up the Desktop Client Software on Your Computer
- • Working with Content Server Connections

Working with Microsoft Office Integration

This section includes the following topics:

- • About Microsoft Office Integration
- • Opening and Editing a Microsoft Office File from WebCenter Portal
- • Working with Files in Microsoft Office

About Microsoft Office Integration

If you have installed the Desktop client and set up a connection to your portal's content repository, as described in Prerequisites for Desktop Integration, you can interact with the Microsoft Word, Excel, and PowerPoint files in your portal directly in the appropriate Microsoft Office application.

Opening and Editing a Microsoft Office File from WebCenter Portal

When you open a Microsoft Office file from WebCenter Portal, the file is automatically checked out of the Content Server repository.

To make your changes available to other users, you can save and close it in Microsoft Office, or explicitly check the file in using Microsoft Office.

> **Note:**
>
> For all browsers except Internet Explorer, you must install the Java plugin to edit a Microsoft Office file. This plugin is included in Java 6 Update 15 and above.

To open a Microsoft Office file from WebCenter Portal in-place in its corresponding application:

1. On the Documents page or in Content Manager on any portal page, select the document you want to edit.

2. From the **More** menu on the results toolbar, select **Check Out and Edit**.

> **Note:**
>
> If the document is already checked out by another user, the File in Use dialog opens.

3. If prompted, enter the same credentials used to log in to WebCenter Portal to open the file in-place in its corresponding application.

4. When the file opens, it is automatically checked out of the Content Server repository.

5. Make required updates, then save and close the document.

   When you close the document, you will be prompted to check the file back in.

Working with Files in Microsoft Office

When you open a portal file in a Microsoft Office application, you can perform a number of content management tasks, including:

- Checking a document out
- Checking a document in
- Comparing document revisions
- Inserting other files on the server into the current document
- Inserting links to other files on the server into the current document

You can also create new documents and check them in to your content repository.

> **✎ Note:**
>
> Not all these features may be available in all Microsoft Office applications.

The Desktop client provides access to portal document management tasks in Microsoft Office in the following ways:

- A **WebCenter Content** ribbon

Figure 18-10   WebCenter Content Ribbon in Microsoft Word 2007
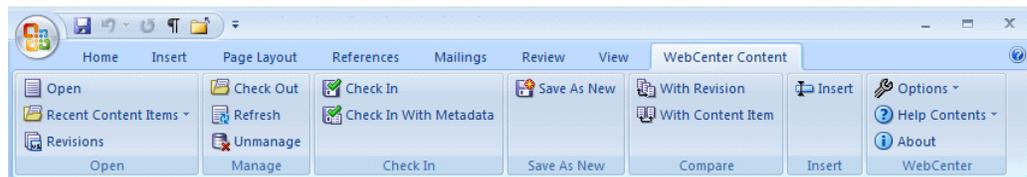
- In versions of Microsoft Office that include a **File** tab, Desktop adds Oracle WebCenter Content options as follows:

  - In Microsoft Office 2010, Desktop adds WebCenter Content Options directly to the **File** tab.

  - In Microsoft Office 2013, Desktop adds Oracle WebCenter Content options to the **Open** and **Save As** pages, as well as to a new **WebCenter Content** page. These pages are available from the **File** tab.

For more information about how you can work with portal documents in Microsoft Office applications, see Microsoft Office Integration in *Using Oracle WebCenter Content: Desktop*.

Working with Microsoft File Explorer Integration

If you have installed the Desktop client, as described in Prerequisites for Desktop Integration, you can manage your portal's documents using a "folders tree" in Microsoft File Explorer.

After you install the Desktop client on your computer, Microsoft File Explorer includes a top-level node called WebCenter Content Servers, through which you can connect your portal repository and work with the documents stored there.

Figure 18-11   A Portal Content Repository Listed in Windows File Explorer
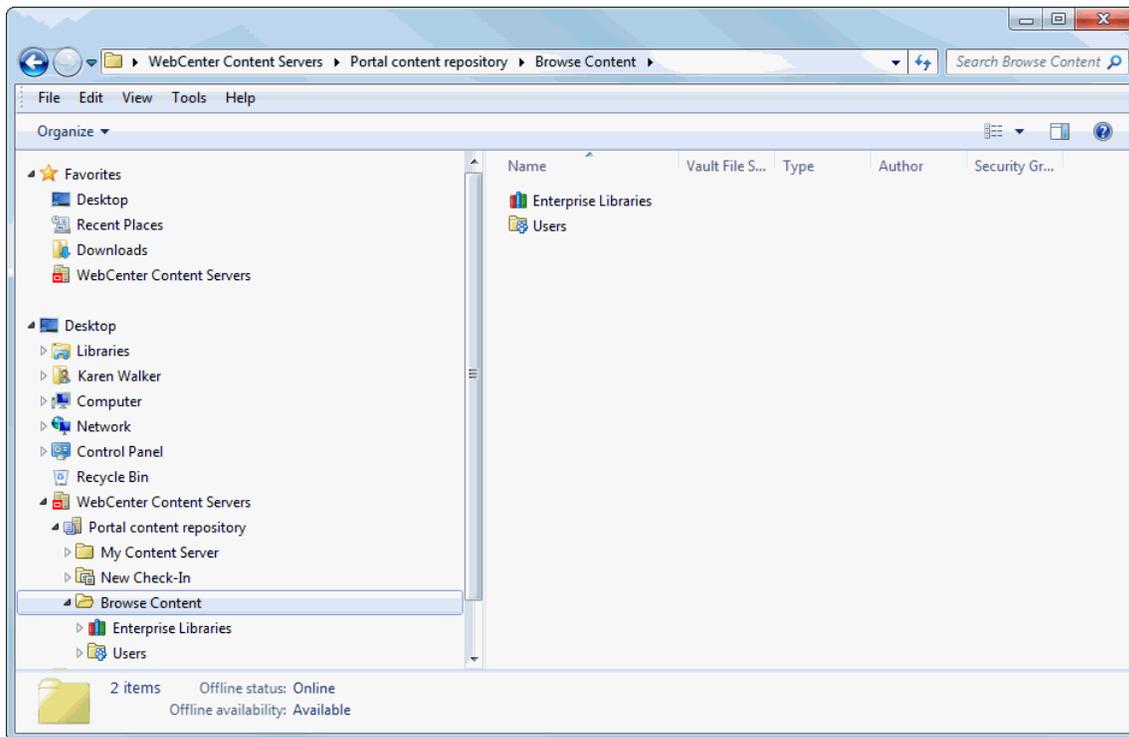
You work with the documents in much the same way you do with other folders and files on your computer. You can copy files, drag and drop files into folders, right-click objects to open context menus, and so on. However, some tasks typically performed on files or folders on your local computer may have a somewhat different effect when performed on files and folders managed by Content Server. For example, copying a new file to a content folder does not put it on your local computer, but rather uploads and saves it on Content Server. In addition, the context menus of files may include items specific to content management, such as **Check In**, **Check Out**, and **Copy Links**.

For more information about how you can work with portal documents in Microsoft File Explorer, see Microsoft File Explorer Integration in *Using Oracle WebCenter Content: Desktop*.

Working with Email Client Integration

You can check in email messages and their attachments to your content repository directly from Microsoft Outlook or Lotus Notes to preserve them and share them with others in your organization. You can also attach content items from the server as well as links to them to your outgoing messages.

Checked-in messages are not intended to be checked out, modified, and checked back in. Messages are checked in to Content Server for the express purpose of preserving them exactly as they were received. You can open a checked-in message from a server to view it in your default email application. You can even make changes if you want, but you cannot check it back in to the server. You can, however, send the message to other people or save a copy on your local computer.

For more information about how you can work with portal documents in your email client, see the following chapters in *Using Oracle WebCenter Content: Desktop*:

- Microsoft Outlook Integration
- Lotus Notes Integration

Working with Web Browser Search Integration

You can search for content in your content repository directly from the search field of the following web browsers:

- Internet Explorer
- Mozilla Firefox
- Google Chrome

Desktop's web browser integration adds a search provider or search engine to your web browser. A search provider or engine in your web browser is for a specific Oracle WebCenter Content Server instance only. You cannot search multiple content servers using a single search provider or engine. You cannot add two search providers or engines for the same Oracle WebCenter Content Server instance.

If you are logged into Content Server, you will see all content items that meet the search criteria and for which you have access privileges on the server. If you are not logged in, then you will see only public content.

For web browser integration to work, it must first be enabled on Content Server by the system administrator.

For more information about searching for portal documents in your web browser, see Web Browser Search Integration in *Using Oracle WebCenter Content: Desktop*.

19
Working with Oracle Content and Experience Cloud

Access and manage files and folders located in Oracle Content and Experience Cloud from a portal.

If Oracle Content and Experience Cloud is integrated with WebCenter Portal, you can access Oracle Content and Experience Cloud documents from a portal. For more information, your system administrator can refer to Integrating with Oracle Content and Experience Cloud in *Administering Oracle WebCenter Portal*.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you need the application-level permission `Pages: Create, Edit Pages`.
>
> For information about roles and permissions, see Understanding Permissions and Permission Models in a Portal in *Building Portals with Oracle WebCenter Portal*.

Topics:

- About Oracle Content and Experience Cloud
- Using Oracle Content and Experience Cloud

About Oracle Content and Experience Cloud

Oracle Content and Experience Cloud is a cloud-based content collaboration solution, built with robust security, application integration. If Oracle Content and Experience Cloud is integrated with WebCenter Portal, you can add, view, and share your documents and also collaborate with others in Oracle Content and Experience Cloud for secure access to content using a cloud interface.

If external non-WebCenter Portal users want to share documents with WebCenter Portal users, they can use Oracle Content and Experience Cloud to allow access to those documents from within a portal in WebCenter Portal.

For example, suppose marketing assets created by design agencies and some partner information need to be shared with WebCenter Portal users. However, the marketing agencies and partners have Oracle Content and Experience Cloud accounts but not WebCenter Portal accounts. If marketing assets and partner documents are shared on Oracle Content and Experience Cloud, WebCenter Portal users can access the documents from a portal that includes the Oracle DOCS Content Manager task flow.

The following figure shows an example of an Oracle Content and Experience Cloud view on a page in WebCenter Portal.

Figure 19-1   Oracle Content and Experience Cloud View in WebCenter Portal
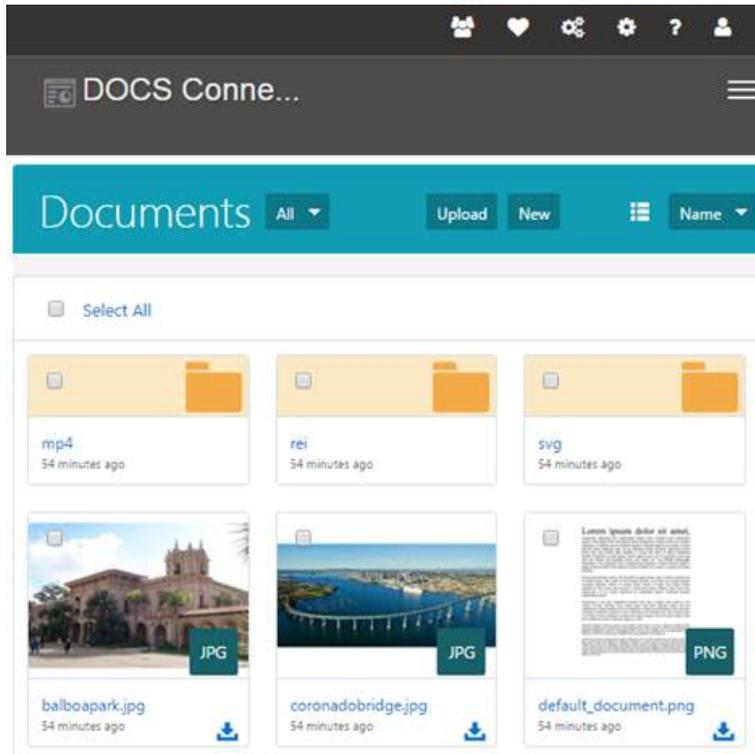
Figure 19-2   Oracle Content and Experience Cloud from WebCenter Portal
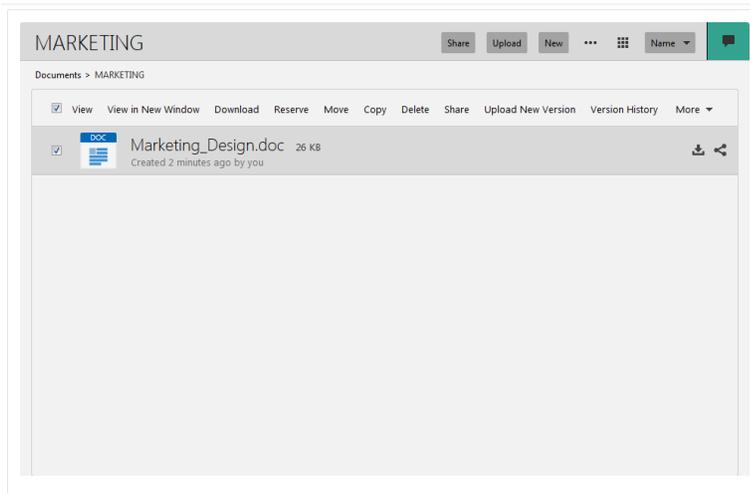
Using Oracle Content and Experience Cloud

You can add, view, and share your documents and also collaborate with others on a cloud server for secure access to content using a cloud interface.

Table 19-1   Oracle Content and Experience Cloud Actions

Task	Action
How do I create a new folder?	Browse to where you want to create a new folder and click **New**.
How do I upload a file?	Click **Upload** to add a file to the current location.
	To add a new version of a file, select the file and click **Upload New Version**.
	For more information, see How do I upload files? in *Using Oracle Content and Experience Cloud*.
How do I view a file?	Click the file name or thumbnail to open the viewer.
	For more information, see How do I view a file or media? in *Using Oracle Content and Experience Cloud*.
How do I copy or move a file or folders?	Select one or more files or folders and choose **Copy** or **Move**.
How do I share content?	You can e-mail a link to a file or folder.
	For more information, see Sharing Your Content and Sites with Others in *Using Oracle Content and Experience Cloud*.
How can I use conversations to collaborate with others?	Click the icon.
	For more information, see How do I start a conversation? in *Using Oracle Content and Experience Cloud.*
How do I reserve a file and show other people that I am using the file?	Select a file and click **Reserve**.
	For more information, see How do I reserve a file? in *Using Oracle Content and Experience Cloud*.
How do I rename a file or folder?	Select the file or folder to rename and click **Rename**.
How do I delete a file or folder?	Select one or more files or folders and click **Delete**.

For more information on how to use Oracle Content and Experience Cloud, see Managing Your Files and Folders in *Using Oracle Content and Experience Cloud*.

20

Working with Wikis

Create, edit, and manage wikis, which multiple users can use to share content that is relevant, useful, and up-to-date.

> **See Also:**
>
> For an overview of the different options available in WebCenter Portal for working with portal content and adding content to a portal, see Introduction to Adding Content to a Portal.

> **Note:**
>
> To perform the tasks in this chapter, you need the following permissions:
>
> - To view or post comments on wiki documents, you need only the `View Documents` permission.
>
> - To view a wiki page, you need the `View Page` permission. This permission is granted to all authenticated users by default. To edit a wiki page, you need to be granted `Edit` permissions on the page.
>
> - To create a personal page using the Wiki page style, you need the application-level permission `Pages: Create`. This permission is granted to all authenticated users by default, allowing them to create and manage their personal pages in the Home portal.
>
> - To use the **New Wiki Document** action and work with wiki documents, you need the portal-level permission `Create Documents` (which includes delete permissions on wiki documents that you create). To delete wiki documents that are not your own, you must have `Delete Documents` permission.

> **Permissions:**
>
> The tasks described in this chapter are available only if the system administrator and portal manager have made wiki functionality available in WebCenter Portal and the current portal, as described in Prerequisites for Enabling Wiki Functionality in *Building Portals with Oracle WebCenter Portal*.

Topics:

- About Wikis
- Creating a Wiki Page

About Wikis

Wikis are web pages that offer in-place editing using HTML or a simple mark-up language called wiki mark-up.

Wikis epitomize the concepts of community and collaboration by allowing all authorized community members to contribute their information to a body of knowledge. Users with sufficient permissions on a wiki can add, revise, or delete content. Wikipedia (`http://www.wikipedia.com`) is a widely-known example of the use of wikis. Users from all over the world collaborate to create and edit Wikipedia pages, resulting in a rich, dynamic knowledge base for everyone's benefit.

In WebCenter Portal, you create a wiki page using Wiki page style, which supports a dedicated wiki page with a default wiki document that offers in-place editing features through the Rich Text Editor (RTE).

A wiki page is exposed in the Content Manager task flow as a folder, just like any other page. The folder contains a default wiki document, with the same name as the page name. The wiki page is automatically added to the portal's navigation.

To create a new wiki page, you must have the following permissions:

- • `Create Pages` or `Create, Edit, Delete Pages`
- • `Create Documents`

In a portal, the newly created wiki page inherits portal permissions (where the `Portal Manager` role and users with `Customize Pages` permissions have `Create, Edit, and Delete` permissions, and users with `View Pages and Content` permissions have only `View` permission).

In the Home portal, a newly created wiki page inherits the same permissions as a public folder; the owner is granted the `Administer`, `Read`, `Write`, and `Delete` permissions, and public users are granted only the `Read` access.

Creating a Wiki

This section describes the ways to create a wiki.

This section includes the following topics:

- • Creating a Wiki Page
- • Creating a Wiki Document Within a Wiki Page
- • Creating a Wiki Document Using the Wikis System Page

Creating a Wiki Page

You can create a dedicated wiki page using the Wiki page style. The wiki page will appear in the portal navigation. When you click the wiki page's name in the navigation, the content of the wiki page gets displayed.

You can create a dedicated wiki page using the Wiki page style as either:

- A personal page in the Home portal, selecting **Wiki** as the page style. See Creating a Personal Page.

- A page in a portal, selecting **Wiki** as the page style. This is an advanced task, described in Creating a Page or Subpage in an Existing Portal in *Building Portals with Oracle WebCenter Portal*.

> 💡 **Tip:**
>
> The **Wiki** page style is available only if the Documents tool is enabled for the portal.

Wikis offer in-place editing features through the Rich Text Editor (RTE), described in Using the Rich Text Editor (RTE).

The initial wiki page, containing a default wiki document with default text, looks similar to Figure 20-1.

Figure 20-1   Default Wiki Document Created Using the Wiki Page Style
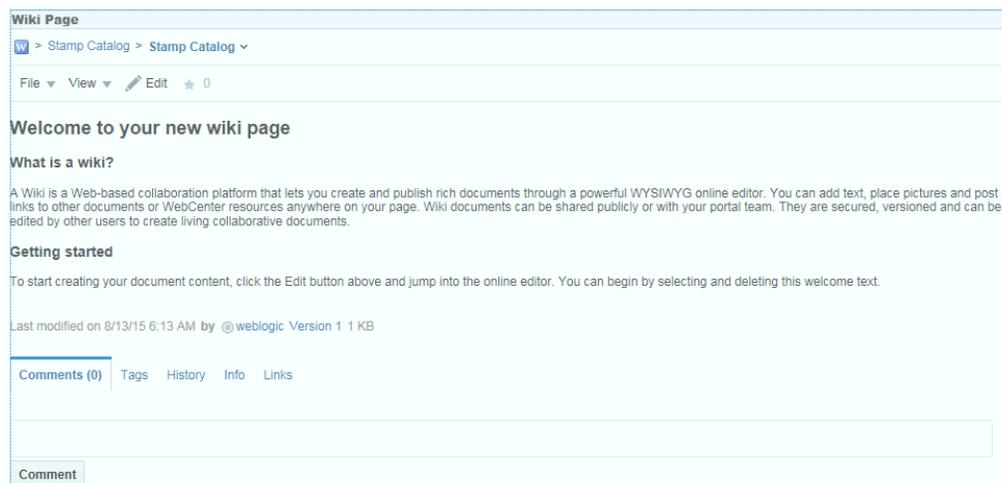
In the wiki document, you can replace the default text with the desired content. For information, see Editing a Wiki.

The breadcrumbs at the top display the path where the wiki document is created in the document hierarchy.

In the Content Manager task flow, you can find the newly created wiki document stored in a separate folder for the wiki page under the root folder, as shown in Figure 20-2. Both the folder and the default wiki document share the same name.

Figure 20-2   Default Wiki Document for a Wiki Page in the Document Hierarchy

Creating a Wiki Document Within a Wiki Page

A page based on the Wiki page style contains a default wiki document. Anyone with appropriate permissions on the wiki page can create additional wiki documents. Additional wiki documents are siblings of the default wiki document, and are all stored in the dedicated folder that is automatically created for the wiki page. A wiki document is not displayed in portal navigation, but is listed only in the document hierarchy.

To create a wiki document within a wiki page:

1.   Navigate to the wiki page and select the **New Wiki Document** action (Figure 20-3).

Figure 20-3   The New Wiki Document Option Available for a Wiki Page
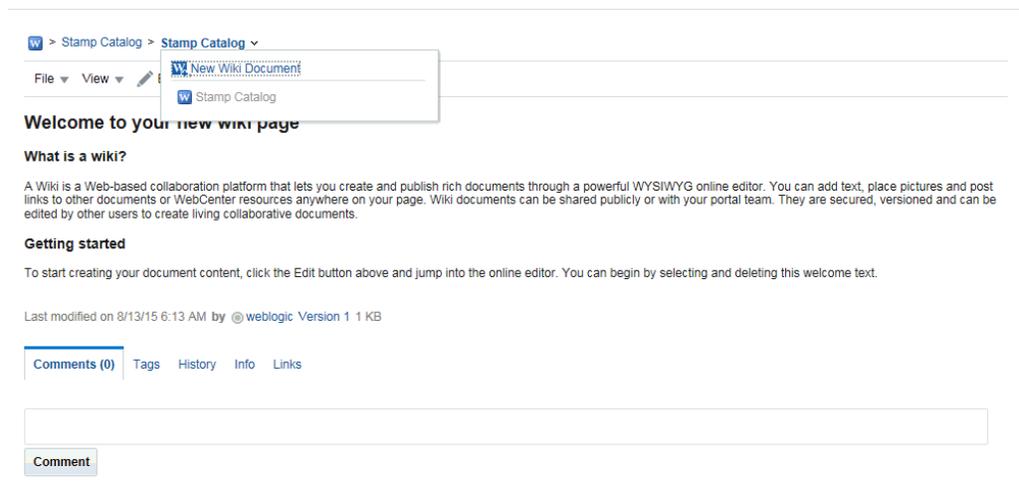
2.   In the Rich Text Editor (RTE), in the **Title** field, enter a name for the new wiki document (for example, `Just Lincoln`).

3.   Add, revise, and preview text, formatting, styling, and links in the **Rich Text**, **HTML**, **Wiki Markup** (if shown), and **Preview** tabbed panes.

> **Note:**
>
> - For information about using the toolbar and features in the **Rich Text** pane, see Using the Rich Text Editor (RTE).
>
> - Apple iPad users cannot make selections from drop-down lists in the RTE. This is a known limitation.
>
> - By default, the **Wiki Markup** tab is hidden in the RTE. Your system administrator can change this setting, as described in Showing and Hiding the Wiki Markup Tab in the Rich Text Editor in *Administering Oracle WebCenter Portal*.
>
> - If you switch from the **Wiki Markup** tab to another tab in the RTE, your content might become garbled. As a workaround, if you go to the **Wiki Markup** tab, click **Save and Close** or **Cancel** rather than switching to another tab in the RTE.

4. Click **Create** to save your changes and exit the editor.

   The new wiki document displays, ready to be edited by other portal members (Figure 20-4).

Figure 20-4   New Wiki Document Associated with a Wiki Page
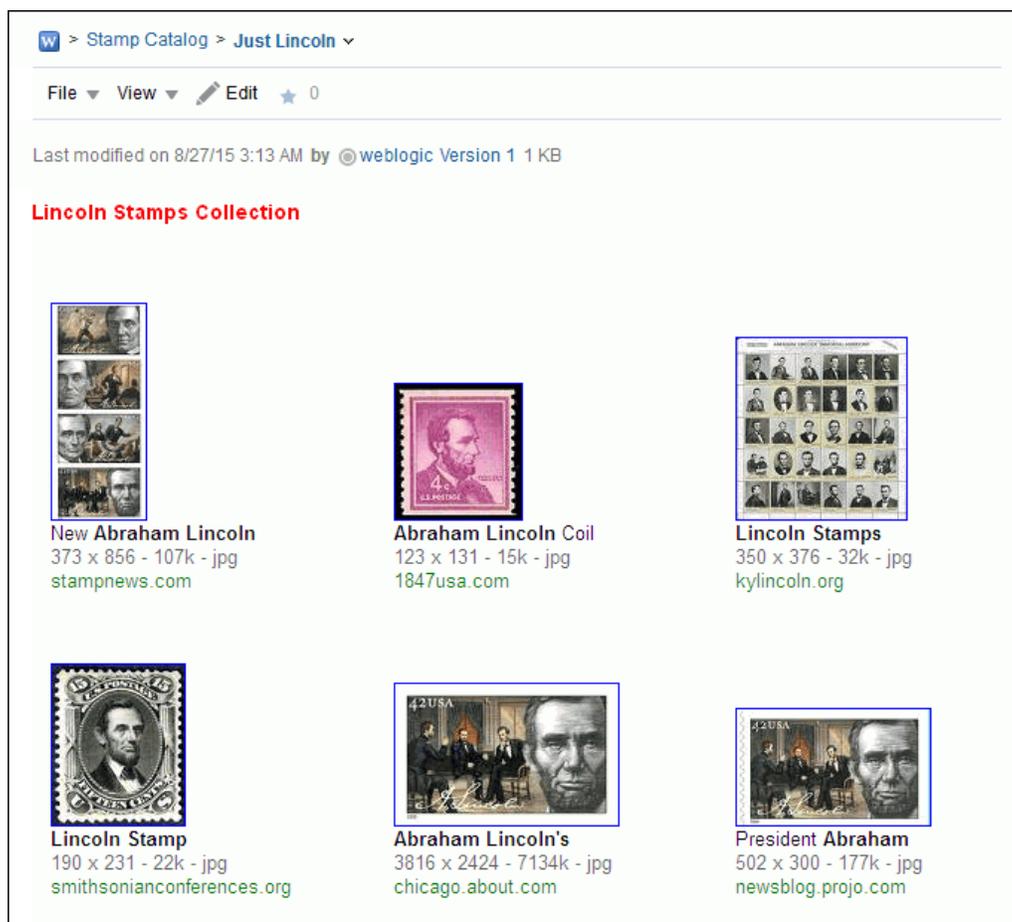
In the Content Manager task flow, the new wiki document (`Lincoln`) is saved as a document under its parent wiki folder (`Stamp Catalog`), along with the wiki document created as the default wiki page document (`Stamp Catalog`), as shown in Figure 20-5.

Figure 20-5   Wiki Document Created Within a Wiki Page
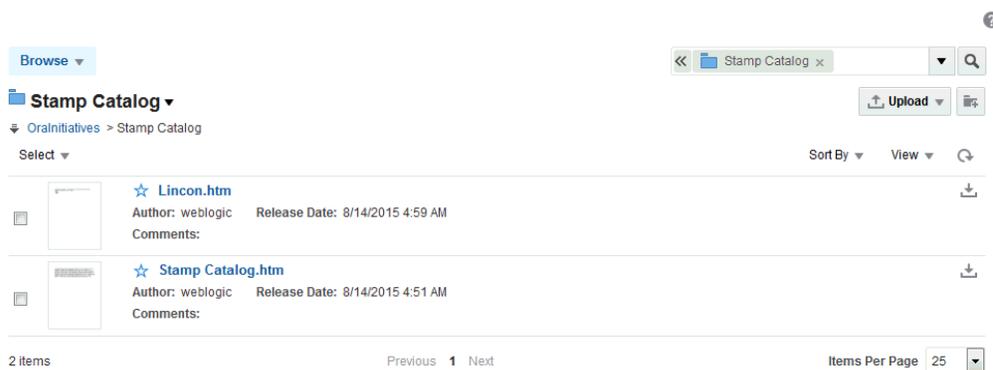
In the wiki page, the drop-down arrow next to the page name in the breadcrumbs displays a menu that includes the wiki documents created within the page (in this example, `Lincoln`) (Figure 20-6).

Figure 20-6   List of Wiki Documents Associated with Wiki Page
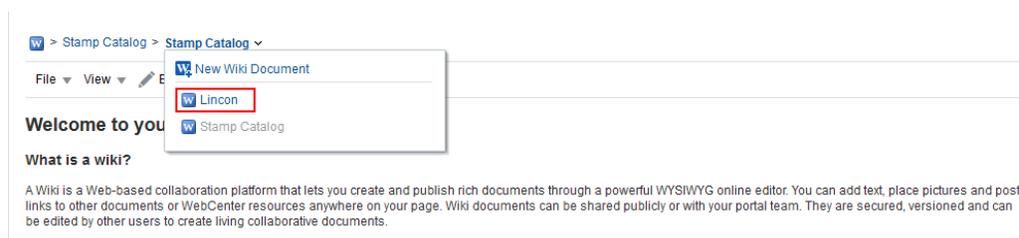
Creating a Wiki Document Using the Wikis System Page

When you create wiki documents within a wiki page, they are listed under the wiki page's folder in the document hierarchy. You can choose to create wiki documents using the Wikis system page so that they are listed directly as a top-level folder in the document hierarchy.

To create a wiki document using the Wikis system page:

1. Ensure the Wikis system page is exposed in your portal navigation. For information, see Adding an Existing Page to the Portal Navigation in *Building Portals with Oracle WebCenter Portal*.

2. On the Wikis system page of your portal, select the **New Wiki Document** action Figure 20-7.

Figure 20-7   The New Wiki Document Option Available on the Wikis System Page

3. Add, revise, and preview text, formatting, styling, and links in the **Rich Text**, **HTML**, **Wiki Markup** (if shown), and **Preview** tabbed panes.

> **✎ Note:**
>
> • For information about using the toolbar and features in the **Rich Text** pane, see Using the Rich Text Editor (RTE).
>
> • Apple iPad users cannot make selections from drop-down lists in the RTE. This is a known limitation.
>
> • By default, the **Wiki Markup** tab is hidden in the RTE. Your system administrator can change this setting, as described in Showing and Hiding the Wiki Markup Tab in the Rich Text Editor in *Administering Oracle WebCenter Portal*.
>
> • If you switch from the **Wiki Markup** tab to another tab in the RTE, your content might become garbled. As a workaround, if you go to the **Wiki Markup** tab, click **Save and Close** or **Cancel** rather than switching to another tab in the RTE.

4. Click **Create** to save your changes and exit the editor.

The new wiki document displays, ready to be edited by other portal members.

On the Wikis system page, the new wiki document (MyStamps) is shown as a top-level folder in the document hierarchy, as shown in .

Figure 20-8   A Wiki Document Listed in the Document Hierarchy on the Wikis System Page
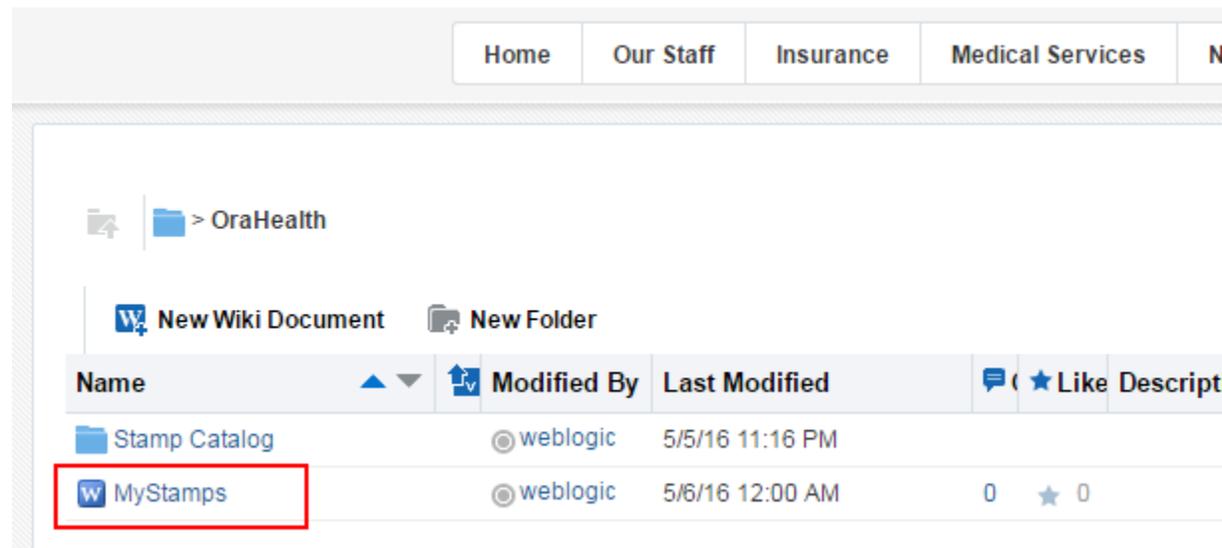
Editing a Wiki

You use the Rich Text Editor (RTE) to add or revise the content of your wiki documents.

> ✏️ **Note:**
>
> The Rich Text Editor (RTE) can edit wiki documents up to 1MB in size. For wiki documents larger than 1MB, the **Edit** action is not active.

When you open a wiki document for editing, WebCenter Portal automatically checks the file out. If another user is already editing a wiki document when you try to open it, you will see a message that the wiki document has already been checked out.

Whenever you save changes to a wiki document, WebCenter Portal automatically checks the file in and creates a new version of the wiki document. This means that the last saved version of a wiki document appears as the current version.

To edit a wiki:

1. Open the wiki document.

   > 💡 **Tip:**
   >
   > To open the default wiki document, navigate to the wiki page.
   >
   > To open another wiki document created within the wiki page, first click the dropdown arrow next to the page name in the breadcrumbs and select the appropriate document.

2. Click the **Edit** action.

Figure 20-9   Editing a Wiki Page

3. In the RTE, add, revise, and preview text, formatting, styling, and links in the **Rich Text**, **HTML**, **Wiki Markup** (if shown), and **Preview** tabbed panes.

> **Note:**
>
> - For information about using the toolbar and features in the **Rich Text** pane, see Using the Rich Text Editor (RTE).
>
> - Apple iPad users cannot make selections from drop-down lists in the RTE. This is a known limitation.
>
> - By default, the **Wiki Markup** tab is hidden in the RTE. Your system administrator can change this setting, as described in Showing and Hiding the Wiki Markup Tab in the Rich Text Editor in *Administering Oracle WebCenter Portal*.
>
> - If you switch from the **Wiki Markup** tab to another tab in the RTE, your content might become garbled. As a workaround, if you go to the **Wiki Markup** tab, click **Save and Close** or **Cancel** rather than switching to another tab in the RTE.

4. Select the **Minor Edit?** check box if you do not want to notify portal members about your changes.

   Leaving this check box deselected updates the Activity Stream and sends notifications after you save your changes.

5. Click **Save** to save your changes and continue editing, or click **Save and Close** to save your changes and exit the editor.

Using the Rich Text Editor (RTE)

The Rich Text Editor (RTE) is a fully-integrated HTML text editor, which you can use to create and edit wiki documents and blog posts.

Figure 20-10 shows create mode, and Figure 20-11 shows edit mode.

Figure 20-10   New Wiki Document in Rich Text Editor
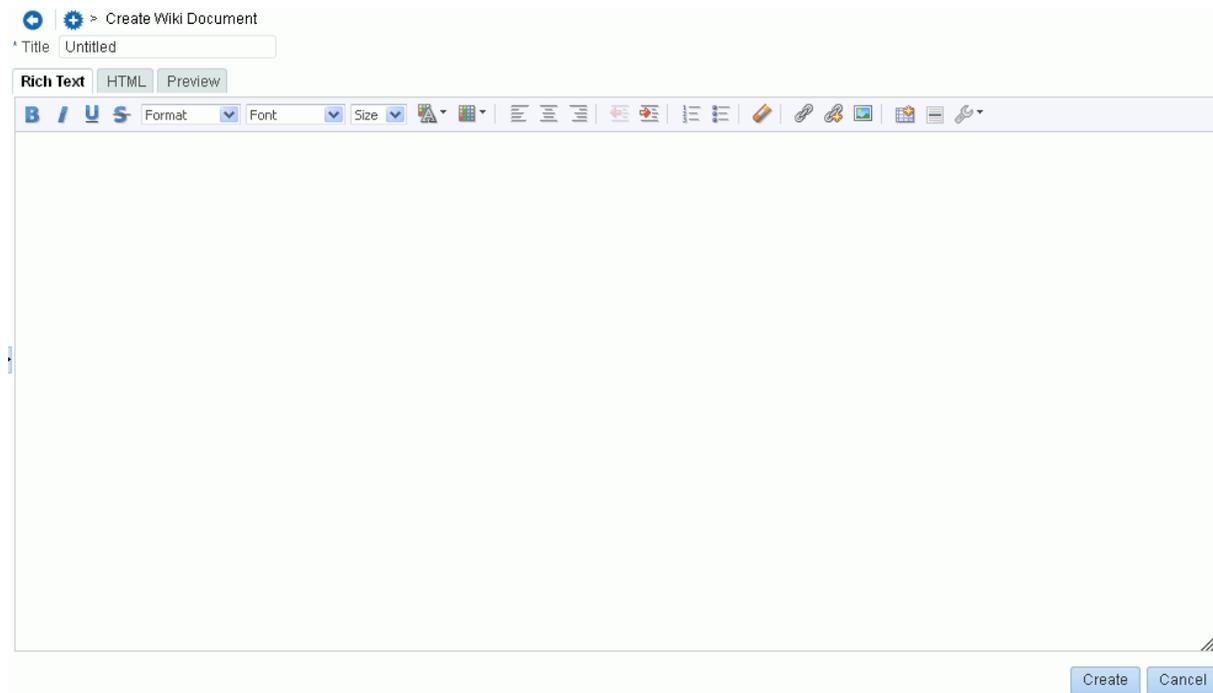
Figure 20-11   Editing Wiki Document in Rich Text Editor
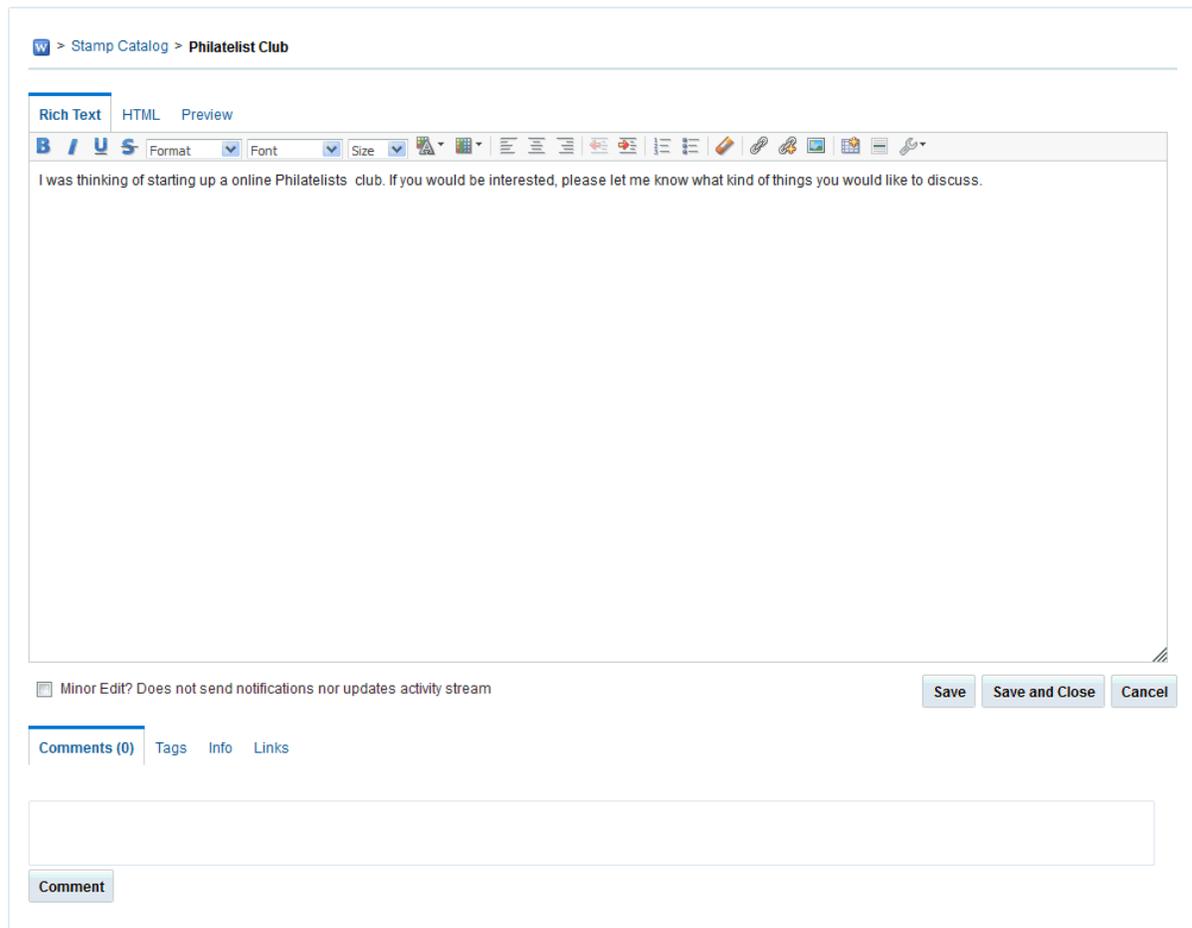
To use the RTE:

1. Open the RTE either by creating a new wiki document (see Creating a Wiki Page) or blog post (see Creating a Blog Post), or editing a wiki (see Editing a Wiki) or blog post.

2. Enter a display name in the **Title** field.

3. Add, revise, and preview text, formatting, styling, and links in the **Rich Text**, **HTML**, **Wiki Markup**, and **Preview** tabbed panes.

> **Note:**
>
> - For information about using the toolbar and features in the **Rich Text** pane, see About the Rich Text Editor Toolbar, Working with Tables in the Rich Text Editor, and Using the Keyboard in the Rich Text Editor.
>
> - Apple iPad users cannot make selections from drop-down lists in the RTE. This is a known limitation.
>
> - By default, the **Wiki Markup** tab is hidden in the RTE. Your system administrator can change this setting, as described in Showing and Hiding the Wiki Markup Tab in the Rich Text Editor in *Administering Oracle WebCenter Portal*.
>
> - If you switch from the **Wiki Markup** tab to another tab in the RTE, your content might become garbled. As a workaround, if you go to the **Wiki Markup** tab, click **Save and Close** or **Cancel** rather than switching to another tab in the RTE.

4. (For wiki documents only) Select the **Minor Edit?** check box if you do not want to notify portal members about your changes.

   Leaving this check box deselected updates the Activity Stream and sends notifications after you save your changes.

5. In the tabbed panes along the bottom of the RTE, you can add comments, tags, or links pertinent to the document or post.

6. Save your changes:

   - To create and save a new wiki document or blog post, click **Create**.

   - To save updates to an existing wiki document or blog post, click **Save**. To save updates and exit the RTE, click **Save and Close**.

About the Rich Text Editor Tabbed Panes

The RTE provides four tabbed panes where you can create and edit your wiki and blog posts.

- **Rich Text**. Create and revise content in a WYSIWYG environment using the icons and controls in the RTE toolbar (see About the Rich Text Editor Toolbar).

  > **Note:**
  >
  > Apple iPad users cannot make selections from drop-down lists in the RTE. This is a known limitation.

- **HTML**. Enter HTML manually. This includes entering source code for HTML not handled by the WYSIWYG icons and controls on the **Rich Text** tab.

  If you exit the **HTML** pane, then come back to it again, any HTML that may have been entered on separate lines will reformat to display on a single line, as is customary for most HTML editors.

> **Note:**
>
> – The RTE ignores the following types of tags when entered in HTML because they are irrelevant or redundant within the RTE context:
>
>   * script tags
>
>   * form elements, such as `input`, `select`, `textarea`, and `form`
>
>   * `frame`/`frameset`
>
>   * document tags, such as `html`, `head`, `body`, `meta`, and `title`
>
>   * unknown tags; for example: `<foo></foo>`
>
> – Changes to the behavior of the default CSS selectors in a wiki or blog is not supported.

* **Preview**. Shows a preview of your wiki document or blog post as it will appear when published.

* **Wiki Markup** (wiki documents only). If shown, use this tab to enter your own wiki markup. For the full set of wiki markup syntax, click **Wiki Markup Help**. Any formatting not provided by Wiki Markup uses HTML.

> **Note:**
>
> – By default, the **Wiki Markup** tab is hidden in the RTE. Your system administrator can change this setting, as described in Showing and Hiding the Wiki Markup Tab in the Rich Text Editor in *Administering Oracle WebCenter Portal*.
>
> – If you switch from the **Wiki Markup** tab to another tab in the RTE, your content might become garbled. As a workaround, if you go to the **Wiki Markup** tab, click **Save and Close** or **Cancel** rather than switching to another tab in the RTE.

About the Rich Text Editor Toolbar

The **Rich Text** tab of the Rich Text Editor includes various icons and controls to create and revise content in a WYSIWYG environment.

Table 20-1 describes the RTE toolbar icons and controls.

To perform an operation assigned to an icon, click the icon once to either immediately perform the action or open a dialog with further configuration options.

Table 20-1   Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

Control	Description
	Bold, **Italic**, **Underline**, and **Strike Through**. Select text, and click the desired font style icon; or click an icon, and enter text. Click the icon again to exit the font style.
	Paragraph Format. Select a format, then enter text; or highlight text, then select a format.
	Font Name. Select a font, then enter text; or highlight text, then select a font.
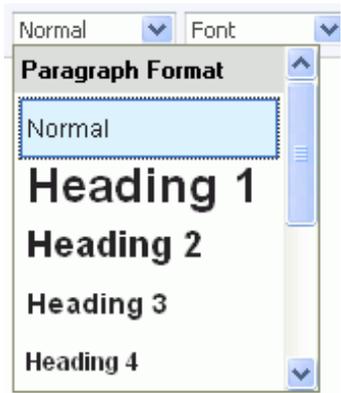
Table 20-1   (Cont.) Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

Control	Description
	Font Size. Select a size, then enter text; or highlight text, then select a size.
	Text Color or **Background Color**. Select text, and click the desired text or background color icon, then select a color. Or, click an icon and select a color, then enter text.
	Left Justify, **Center Justify**, and **Right Justify**. Select text, and click to apply the desired text alignment; or click an icon, and enter text.
	Decrease Indent and **Increase Indent**. Select text, and click the desired indent icon to move text left or right.
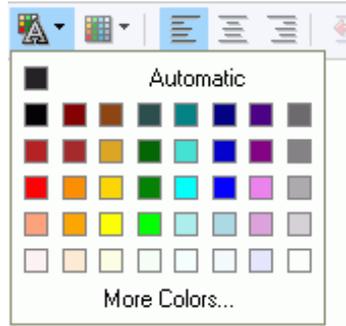
Table 20-1   (Cont.) Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

Control	Description
	Numbered List and **Bulleted List**. Start a new line, click the desired list type icon, and enter text. Or, select lines of text and click an icon. Click the icon again to remove the list formatting. Alternately, end list mode by pressing Enter twice after the last item.
	Remove Format. Select text, and click this icon to remove all font styling, such as font types, sizes, weights, and colors. Lists and indents are not affected.

Table 20-1   (Cont.) Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

Control	Description
	Select Resource. Select text to link to an existing portal resource, then click this icon to open the Select Resource dialog. Select a resource (for example, a document or an announcement in the current portal, or a URL) to be linked from the selected text. Clicking the linked text in the document opens the selected resource in the Document Viewer preview pane.
	New Resource. Select text to link to a new portal resource, then click this icon to open the New Resource dialog. Select a resource to be linked from the selected text, then create the resource (for example, a discussion forum topic or note), specify the external location of the resource (for example, a URL), specify a name for the new resource (for example, a wiki document), or upload the resource from your local file system or a connected network drive (for example, a document).
	Note: If you create a new wiki document in this manner, Oracle WebCenter Portal creates a placeholder for the new wiki document in the current folder. To add content to the new wiki document, you must navigate to it and open it in the RTE.
	Note: For an external URL to be found valid by WebCenter Portal, the system administrator must add it to the list of valid URLs in the `valid-link-url.xml` file. See Adding a List of Valid External URLs in *Administering Oracle WebCenter Portal*. If an external URL is not listed in the file, the following error message appears:
	The URL entered is not available in the list of valid URLs. Contact your system administrator for the list of valid URLs.
	The links created using **Select Resource** and **New Resource** are created as inline links, and are not added to the **Links** tab associated with the details of the linking resource.
	For information about links to resources in WebCenter Portal, see Linking Information.
	Embed Image. Click to open the Embed Image dialog:
	• Click **Select Image** to select an image in the current portal.
	• Click **Upload Image** to upload an image from your local file system or a connected network drive.

Table 20-1   (Cont.) Rich Text Editor Toolbar Icons and Controls on Rich Text Tab

Control	Description
	Table. Click to open the Table Properties dialog. See Working with Tables in the Rich Text Editor.
	Insert Horizontal Line. Click to insert a horizontal line at the current cursor location.
	Tools: • **Maximize/Minimize**. Click to expand the RTE to fill the entire screen, or reduce the RTE to display inside the portal. • **Select All**. Select all content in the body in the text input area. • **Find** or **Replace**. Click to open the Find and Replace dialog, where you can search for a string, or replace a given string with specified text. • **Snippet**. In a blog post, select a portion of text, then click this icon to display that portion as a summary of the blog post on the blog summary page (or digest page), with a **Read More** link to allow users to view the full blog. In a wiki document, this functionality is not available.
	Cut, **Copy**, or **Paste**. Select text, then right-click to display context menu to cut or copy selected text, or paste text in the buffer at the current cursor location. **Note**: If a browser security warning displays, you can either use keyboard commands (see Using the Keyboard in the Rich Text Editor) or configure your browser to grant access to the clipboard. For example, for the FireFox browser, see `http://kb.mozillazine.org/Granting_JavaScript_access_to_the_clipboard`.
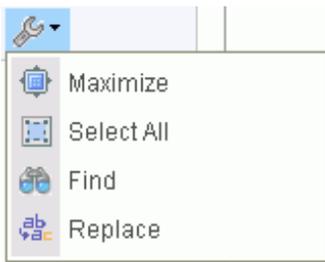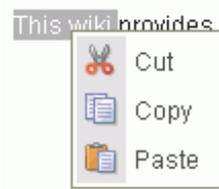
Working with Tables in the Rich Text Editor

You can use the Rich Text Editor to create tables in your wiki documents and blog posts.

To create a table in the RTE, click the **Table** icon in the toolbar (Figure 20-12).

Figure 20-12   Rich Text Editor: Table Icon

The Table Properties dialog window opens (Figure 20-13), where you can set basic properties for the table, as described in Table 20-2.

Figure 20-13   Rich Text Editor: Table Properties Dialog (Basic Properties)

Table 20-2   Rich Text Editor: Basic Table Properties

Property	Description
Rows	(Required) Enter the number of rows in the table.
Columns	(Required) Enter the number of columns in the table.
Width	Enter the width of the table, selecting either pixels or a percent value. Giving the width as a percent value lets you set the proportion of the editing area that the table will occupy.
Height	Enter the height of the table in pixels.

Table 20-2   (Cont.) Rich Text Editor: Basic Table Properties

Property	Description
Headers	Select the table element to format as headers, which applies special formatting to them. You can apply header formatting to First Row, First Column or Both.
Border Size	Enter the width of the table borders.
Alignment	Select the alignment of the table on the page Left, Center, or Right.
Cell padding	Enter the space between the cell border and its contents, in pixels.
Caption	Enter label text to be displayed above the table.
Summary	Enter a summary of the table contents that is available for assistive devices like screen readers. It is good practice to provide tables with meaningful summary text to make them more accessible to users with disabilities.

Click the **Advanced** tab to expose the advanced table properties (Figure 20-14), which you can set as described in Table 20-3.

Figure 20-14   Rich Text Editor: Table Properties Dialog (Advanced Properties)
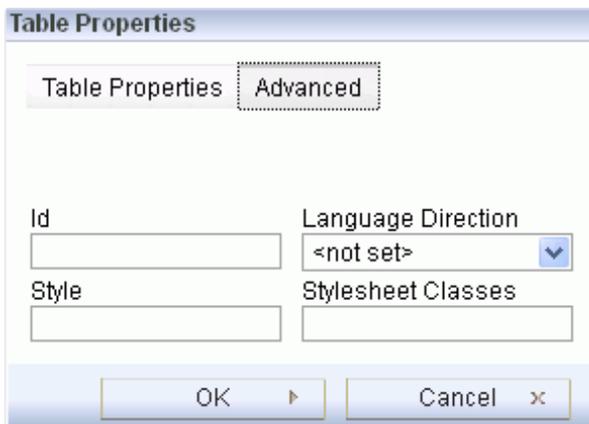
Table 20-3   Rich Text Editor: Advanced Table Properties

Property	Description
Id	Enter a unique identifier for a table element in the document (`id` attribute).
Language Direction	Select the direction of the text in the table: left to right (LTR) or right to left (RTL) (`dir` attribute).

Table 20-3   (Cont.) Rich Text Editor: Advanced Table Properties

Property	Description
Style	Enter the CSS style definitions (`style` attribute). Note that each value must end with a semi-colon and individual properties should be separated with spaces.
Stylesheet Classes	Enter the class of the table element (`class` attribute). If a table element is assigned more than one class, separate class names with spaces.

With a table inserted into your document, you can enter values directly in the cells. Additional editing is available through the context menu. To open the context menu, right-click the table and choose actions as described in Table 20-4.

Table 20-4   Rich Text Editor: Table Context Menu Selections

Action	Description
Paste	Pastes the content on the clipboard at the current cursor location
Cell	See Editing Table Cells in the Rich Text Editor.
Row	See Editing Table Rows in the Rich Text Editor.
Column	See Editing Table Columns in the Rich Text Editor.
Delete Table	Deletes the entire table and its contents.
Table Properties	Opens the Table Properties dialog, where you can modify properties as described in Table 20-2 and Table 20-3, with the exception of the number of rows and columns.

Editing Table Cells in the Rich Text Editor

You can insert, delete, merge cells, or modify cell properties in the Rich Text Editor.

To insert, delete, merge cells, or modify cell properties, right-click a cell (*the current cell*) to display the context menu, then choose **Cell** to expand the submenu of cell actions (Figure 20-15), and choose actions as described in Table 20-5.

To select multiple cells, drag the mouse over the cell, then right-click to open the context menu.

Figure 20-15　Rich Text Editor: Table Cell Actions
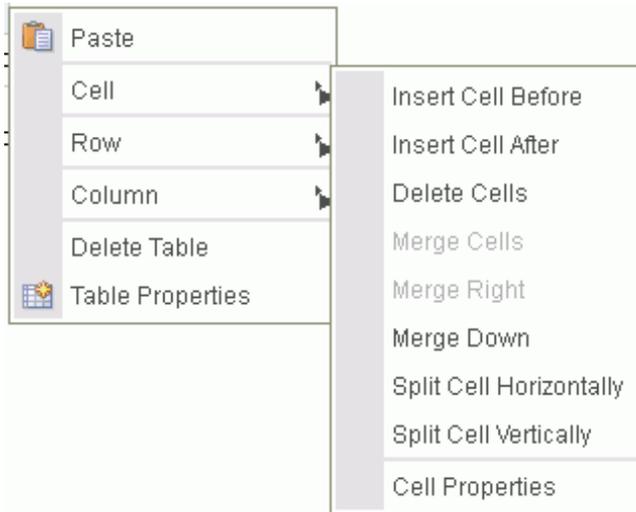
Table 20-5　Rich Text Editor: Table Cell Menu Selections

Action	Description
Insert Cell Before	Inserts a new cell before the current cell(s).
Insert Cell After	Inserts a new cell after the current cell(s).
Delete Cells	Deletes the current cell(s).
Merge Cells	Merges multiple selected cells into one. This option is available only if two or more cells are selected.
Merge Right	Merges the selected cell with a cell on its right. This option is available only if no more than one cell is selected.
Merge Down	Merges the selected cell with a cell located below it. This option is available only if no more than one cell is selected.
Split Cell Horizontally	Splits the selected cell in two, creating a new cell on its right. The content of the cell appears in the original, left cell. This option is available only if no more than one cell is selected.
Split Cell Vertically	Splits the selected cell in two, creating a new cell below it. The content of the cell appears in the original, upper cell. This option is available only if no more than one cell is selected.
Cell Properties	Opens the Cell Properties dialog, where you can configure cell size, type, color, and content alignment, as described in Editing Table Cell Properties in the Rich Text Editor.

Editing Table Cell Properties in the Rich Text Editor

In the Rich Text Editor, table cells can be further customized, creating a unique look and feel.

From the table context menu, select **Cell**, then **Cell Properties** to open the Cell Properties dialog (Figure 20-16) where you can set cell properties for the table, as described in Table 20-6.

Figure 20-16   Rich Text Editor: Table Cell Properties Dialog

Table 20-6   Rich Text Editor: Table Cell Properties

Action	Description
Width	Enter the width of the cell, selecting either pixels or a percent value. Giving the width as a percent value lets you set the proportion of the row that the cell (and the column it is located in) will occupy.
Height	Enter the height of the cell in pixels.
Cell Type	Select the type of the table cell — either a normal data cell or a header cell with special formatting.
Word Wrap	Select whether or not to wrap content in the current cell.
Rows Span	Enter a numeric value to specify the number of rows over which to stretch the cell downward. This value sets the `rowspan` attribute.

Table 20-6   (Cont.) Rich Text Editor: Table Cell Properties

Action	Description
Columns Span	Enter a numeric value to specify the number of columns over which to stretch the cell to the right. This value sets the `colspan` attribute.
Horizontal Alignment	Select the horizontal alignment of table cell contents: Left, Center, or Right.
Vertical Alignment	Select the vertical alignment of table cell contents: Top, Middle, Bottom, or Baseline.
Background Color **Border Color**	Enter the color of the cell background and border using any of the following methods: • Enter an RGB value in `rgb(nn, nn, nn)` format, where `nn` is a numeric value on a scale from 0 to 255 representing the red, green, and blue channel. • Enter a hexadecimal RGB value, in `#nnnnnn` format, where the `nnnnnn` is the three pairs of hex color values representing the red, green, and blue channel. • Click **Choose** to open the Select color dialog where you can select from the color palette.

Editing Table Rows in the Rich Text Editor

In the Rich Text Editor, you can insert or delete table rows.

To insert or delete rows in a table, right-click a row (*the current row*) to display the context menu, then choose **Row** to expand the submenu of row actions (Figure 20-17), and choose actions as described in Table 20-7.

To select multiple rows, drag the mouse over the rows, then right-click to open the context menu.

Figure 20-17   Rich Text Editor: Table Row Actions
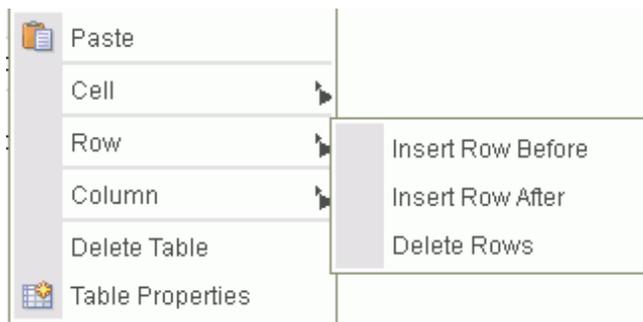
Table 20-7   Rich Text Editor: Table Row Menu Selections

Action	Description
Insert Row Before	Inserts a new row before the current row(s).
Insert Row After	Inserts a new row after the current row(s).
Delete Rows	Deletes the current row(s).

Editing Table Columns in the Rich Text Editor

In the Rich Text Editor, you can insert or delete table columns.

To insert or delete columns in a table, right-click a column (*the current column*) to display the context menu, then choose **Column** to expand the submenu of column actions (Figure 20-18), and choose actions as described in Table 20-8.

To select multiple columns, drag the mouse over the columns, then right-click to open the context menu.

Figure 20-18   Rich Text Editor: Table Column Actions
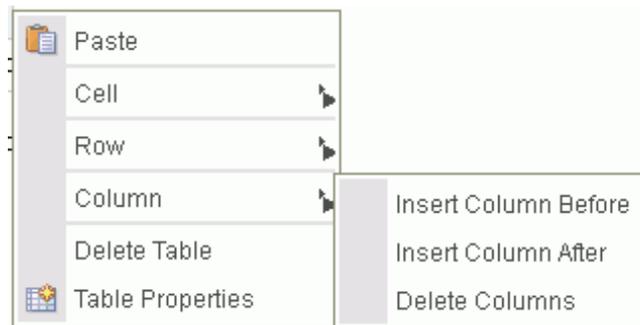
Table 20-8   Rich Text Editor: Table Column Menu Selections

Action	Description
Insert Column Before	Inserts a new column before the current column(s).
Insert Column After	Inserts a new column after the current column(s).
Delete Columns	Deletes the current column(s).

Using the Keyboard in the Rich Text Editor

The Rich Text Editor is compliant with several accessibility standards, including the Web Content Accessibility Guidelines (WCAG), the US Section 508 Amendment to the Rehabilitation Act of 1973 and the IBM Web Accessibility Checklist. To this end, you can use the RTE with the keyboard as well as a screen reader. The currently supported screen reader solution is JAWS.

For more information about accessibility in Oracle WebCenter Portal, see Setting Your Accessibility Options for WebCenter Portal.

Table 20-9 summarizes the keyboard keys and combinations available to you to navigate and edit text in the RTE.

Table 20-9   Rich Text Editor: Keyboard

Keyboard Keys	Description
Alt+F10	Moves to the toolbar.
Tab	In the toolbar, moves to the next button group.
	In a dialog, moves to the next element.
Shift+Tab	In the toolbar, moves to the previous button group.
	In a dialog, moves to the previous element.
Left Arrow/Right Arrow	In the toolbar, moves between buttons within a button group.
	In a dialog, moves within a field.
Enter	In the toolbar, selects the current button or menu item, or expands a drop-down list or menu.
	In a dialog, confirms entry at current cursor location.
Down Arrow/ Up Arrow	Moves between selections in a drop-down list.
Esc	Closes a menu without executing any command. When inside a submenu, closes the submenu and returns focus to the parent context menu. Press Esc again to close it. In a dialog, cancels entries and closes dialog (equivalent to clicking **Cancel** or **Close**).
In the editing area:	
Shift+F10	Opens the context menu of the current element (use down arrow and up arrow to move between selections in the menu, and Enter to select an action).
Alt+F10	Moves to the tab selection in a dialog (use left and right arrow keys to move between tabs, and Enter to move to the fields on a tab).
Ctrl+A	Selects the entire content in the editing area.
Ctrl+B	Changes the formatting of the selected text to bold or remove the bold formatting of the selected text.
Ctrl+C	Copies highlighted selections to the clipboard.
Ctrl+I	Changes the formatting of the selected text to italics or remove the italics from the selected text.
Ctrl+U	Underlines the selected text or remove the underline formatting of the selected text.
Ctrl+V or **Shift+Insert**	Pastes the content on the clipboard at the current cursor location.

Table 20-9   (Cont.) Rich Text Editor: Keyboard

Keyboard Keys	Description
Ctrl+X or **Shift+Delete**	Cuts highlighted selections to the clipboard.
Ctrl+Y	Performs the redo operation.
Ctrl+Z	Performs the undo operation.

Exposing an Existing Wiki Document in the Portal Navigation

If you have created a wiki document within a wiki page, it is not automatically added to the portal navigation.

This section includes the following topics:

- Exposing an Existing Wiki Document as a Wiki Page
- Exposing an Existing Wiki Document Using Content Presenter

Exposing an Existing Wiki Document as a Wiki Page

When you create a wiki page using the Wiki page style, it is listed in the document hierarchy, and is exposed as a separate page in the portal navigation. However, when you create a wiki document using the **New Wiki Document** action, the wiki document is listed only in the document hierarchy. For easy access to such a wiki document, you can publish it to appear as a page in the portal navigation.

To publish an existing wiki document as a page in the portal navigation:

1. In the Content Manager task flow, create a folder with the same name as the existing wiki document at the root level of the portal (see Working with Folders and Files). For example, if the existing wiki document is named `Member Meeting Schedule`, create a folder named `Member Meeting Schedule` (Figure 20-19).

Figure 20-19   Folder Created at the Portal Root Level
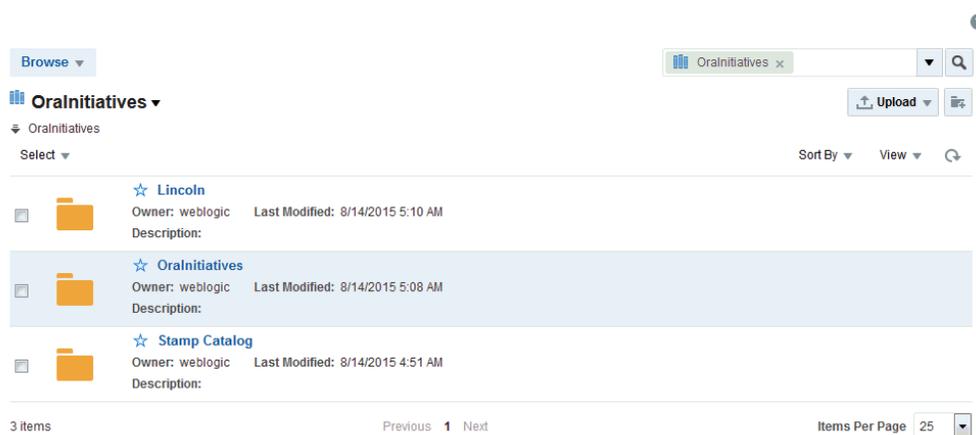
2. Move the existing wiki document into the newly created folder.

> **Note:**
>
> The wiki document must have been originally created using the **New Wiki Document** action, as described in Creating a Wiki Document Within a Wiki Page.

3. Create a new page in the portal, selecting the **Wiki** page style.

4. In the **Title** field, enter the display name of the existing wiki document that you want to expose; for example, `Member Meeting Schedule`.

> **Note:**
>
> While there are restrictions on naming files (including wiki documents), there are no naming restrictions for page names. Thus, while any of the following characters can be used to name a wiki *page*, the page title will include the character(s) but the associated wiki *document* will replace the illegal character with _.
>
> `? # & \ / * " | < > : ^`
>
> For example, if you create a wiki page named `What's In a Name?`, the page will have this title, but the associated wiki document will be named `What's In a Name_`.

5. Click **Create**.

The wiki document is now exposed as a separate page in the navigation area. The location depends on the page template used by your portal. Figure 20-20 shows the `Member Meeting Schedule` wiki document exposed as a page in the navigation area in a portal.

Figure 20-20   A Wiki Document Exposed as a Page
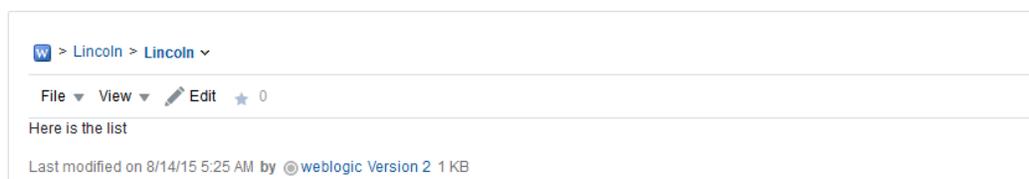
Exposing an Existing Wiki Document Using Content Presenter

Content Presenter enables you to select a wiki document, and render its content in a specific template on a page.

This is an advanced task, covered in Publishing Content Using Content Presenter in *Building Portals with Oracle WebCenter Portal*.

Managing Wiki Documents

Managing a wiki document is like managing any file, as described in Working with Folders and Files.

21

Working with Blogs

Subscribe to blogs, create a blog page, and work with blog posts to record experiences and opinions.

> ✎ **See Also:**
>
> For an overview of the different options available in WebCenter Portal for working with portal content and adding content to a portal, see Introduction to Adding Content to a Portal.

> ✎ **Note:**
>
> The tasks described in this chapter are available only if the system administrator and portal manager have made blog functionality available in WebCenter Portal and the current portal, as described in Prerequisites for Enabling Blog Functionality in *Building Portals with Oracle WebCenter Portal*.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you need the following permissions:
>
> - To create and manage with blog posts: in the Home portal, any authenticated user can add and manage their own blog posts in an existing blog; in other portals, you need the portal-level permission `Create Documents` (which includes delete permissions on blog posts that you create). To delete blog posts that are not your own, you must have `Delete Documents` permission.
>
> - To view or post comments on blog posts, you need only the `View Documents` permission.
>
> - To view a blog page, you need the `View Page` permission. This permission is granted to all authenticated users by default. To edit a blog page, you need to be granted `Edit` permissions on the page.
>
> - To create a personal page using the Blog page style, you need the application-level permission `Pages: Create`. This permission is granted to all authenticated users by default, allowing them to create and manage their personal pages in the Home portal.

Topics:

- About Blogs

- Understanding the Blog Page Style
- Creating a Blog Page
- Working with Blog Posts

About Blogs

Blogs are typically personal records of an individual user's experience and opinions.

The word *blog* is a contraction of the term *Web log*. It was coined to describe the online diaries spawned in the late 1990s.

Blogs provide a useful tool for discussing and/or evangelizing any type of idea, strategy, or point of view. Blogs may be projected out to a select group of people or to a wider audience. Typically, each blog contains various blog posts, with the most recently added blog post displayed at the top. Blogs invite readers to comment on the overall concepts.

In Oracle WebCenter Portal, you can create blogs to group related blogs posts. For example, you can group posts by the same author or related topics. Use the Blog page style to create a dedicated blog page. See Understanding the Blog Page Style and Creating a Blog Page.

Understanding the Blog Page Style

Out-of-the-box, Oracle WebCenter Portal includes several page styles for selection when creating a new page. One of these page styles is the Blog page style, which enables you to create a dedicated blog page.

Figure 21-1   Blog Page Displaying Blog Post
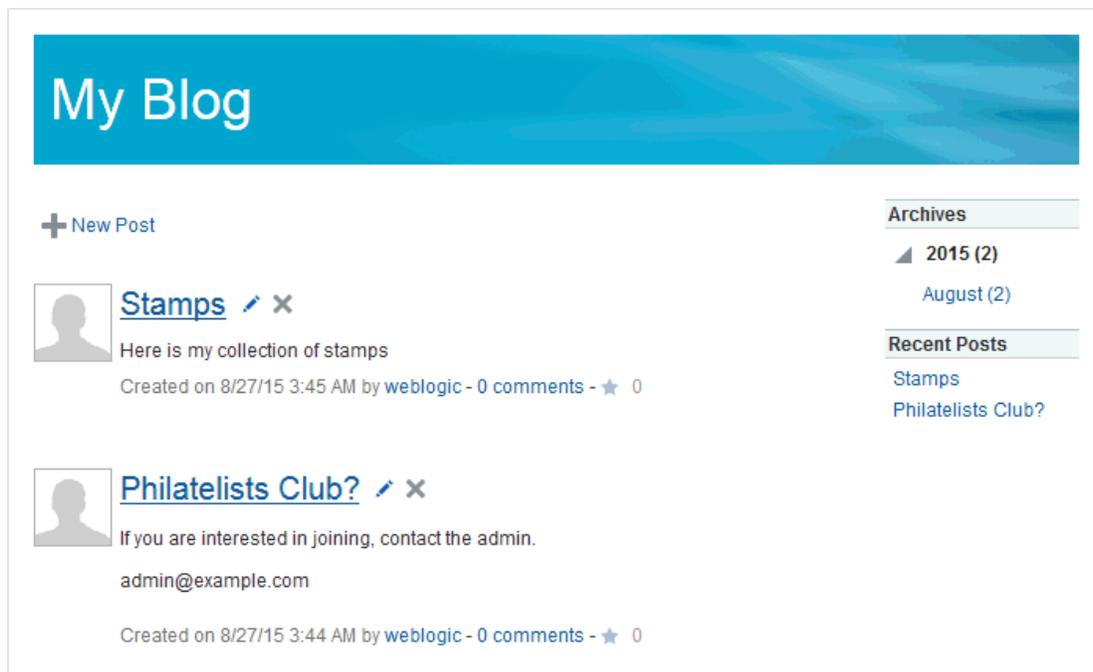
On a blog page, the **Archives** section on the right provides links to blog posts by year and by month, including the current month. Clicking a month displays all blog posts created during that month. Every time you add a blog post, that post is added to the archive for the current month.

A blog page displays various details for each blog post. These include the blog post title, the blog post content, date of creation or modification, name of the user who created or last modified the post, and the number of comments on the blog post.

Authorized users can click the **Edit Post** (pencil) icon to edit a post and also add comments, tags, and links on the corresponding tabs at the bottom of the post. An authenticated user (logged in to WebCenter Portal) with view-only permissions can add comments to a blog post by clicking the **comments** link below the post. Public users can not comment on blog posts.

Clicking a blog post title opens the blog post to occupy the entire the blog page (Figure 21-2), providing controls to manage the blog post.

Figure 21-2   A Blog Post
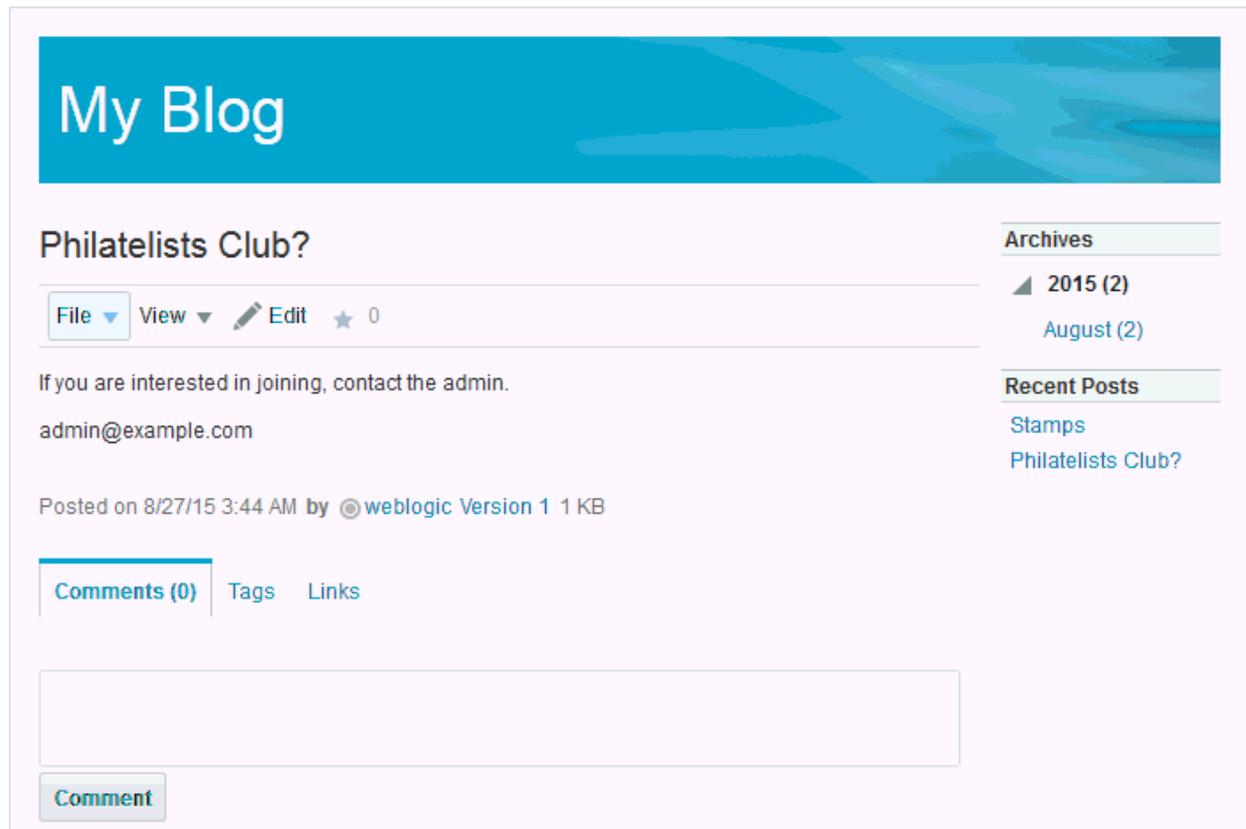
In a portal or the Home portal, blog pages are stored in a separate folder named `Blogs` under the root folder of the portal in the document hierarchy. When you create a new blog page, an empty folder is created for that blog under the `Blogs` folder. All blog posts that you create in that blog are stored in the blog's folder.

Figure 21-3 illustrates the directory structure for the example `MyBlog`, which contains two blog posts. The breadcrumb at the top shows that the blog posts are created in the `MyBlog` folder in the portal.

Figure 21-3   Directory Structure of a Blog
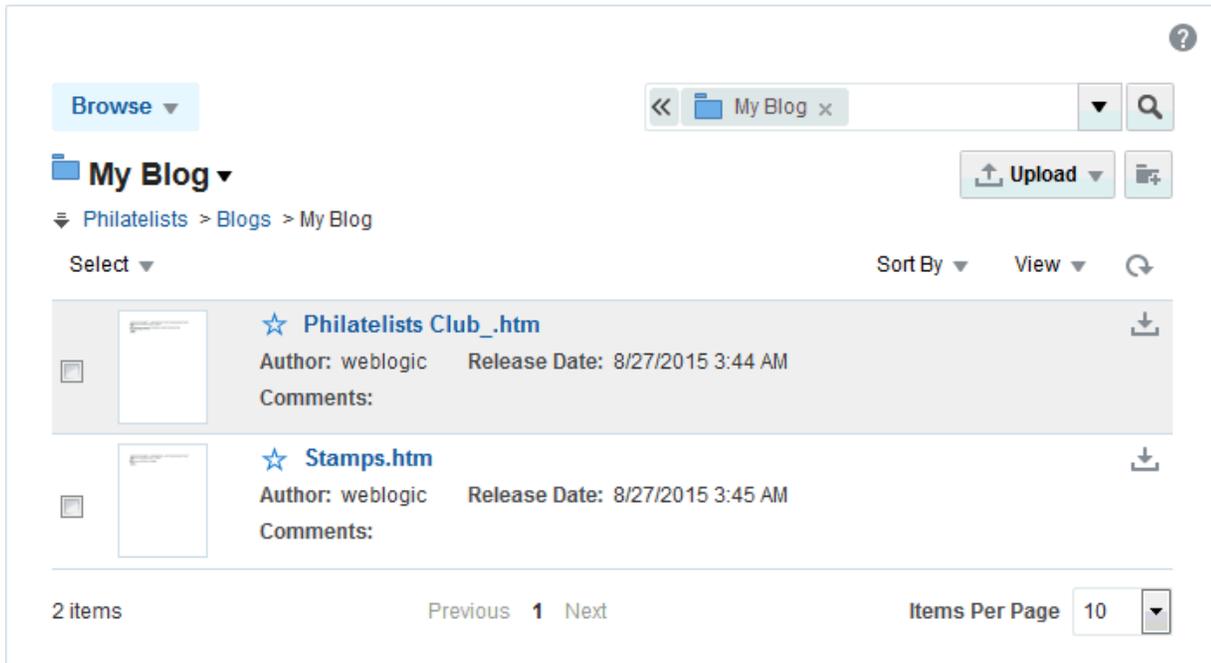
Creating a Blog Page

You can create a blog page to group related blog posts.

You can create a dedicated blog page using the Blog page style as either:

- A personal page in the Home portal, selecting **Blog** as the page style. See Creating a Personal Page.

- A page in a portal, selecting **Blog** as the page style. This is an advanced task, described in Creating a Page or Subpage in an Existing Portal in *Building Portals with Oracle WebCenter Portal*.

The initial blog page you create looks similar to Figure 21-4. For more information, see Understanding the Blog Page Style.

Figure 21-4   A New Blog Created Using the Blog Page Style

Working with Blog Posts

The following sections describe how to add and manage blog posts.

- • About Blog Posts
- • Viewing a Blog Post
- • Creating a Blog Post
- • Editing a Blog Post
- • Deleting a Blog Post

About Blog Posts

For each blog post, you can use the controls to perform tasks such as edit, subscribe to, share, and comment on the post.

Figure 21-5   A Blog Post

When you create a blog post, a file is created in the content repository with the same name as the blog post title. Subsequently, you can change the blog post title when editing the blog post, but keep in mind that this changes only the display title; the name of the file for the blog post remains the original name. Therefore, you cannot later create a new blog post with the same initial title as the original title, as that file name already exists.

You use the Rich Text Editor (RTE) to add the content and style elements to a blog post. The RTE provides features such as the ability to embed images, create new resources on the fly, and add content. For more information, see Using the Rich Text Editor (RTE).

Viewing a Blog Post

You can view a blog post by opening the page in which it resides.

To view a blog post:

1. Open the page containing the blog post (Figure 21-6)

   The way you open the page depends on the page template in use in your portal.

Figure 21-6   Blog Page Displaying Blog Post

2. Click the title of the blog post to open it (Figure 21-7).

Figure 21-7   A Blog Post
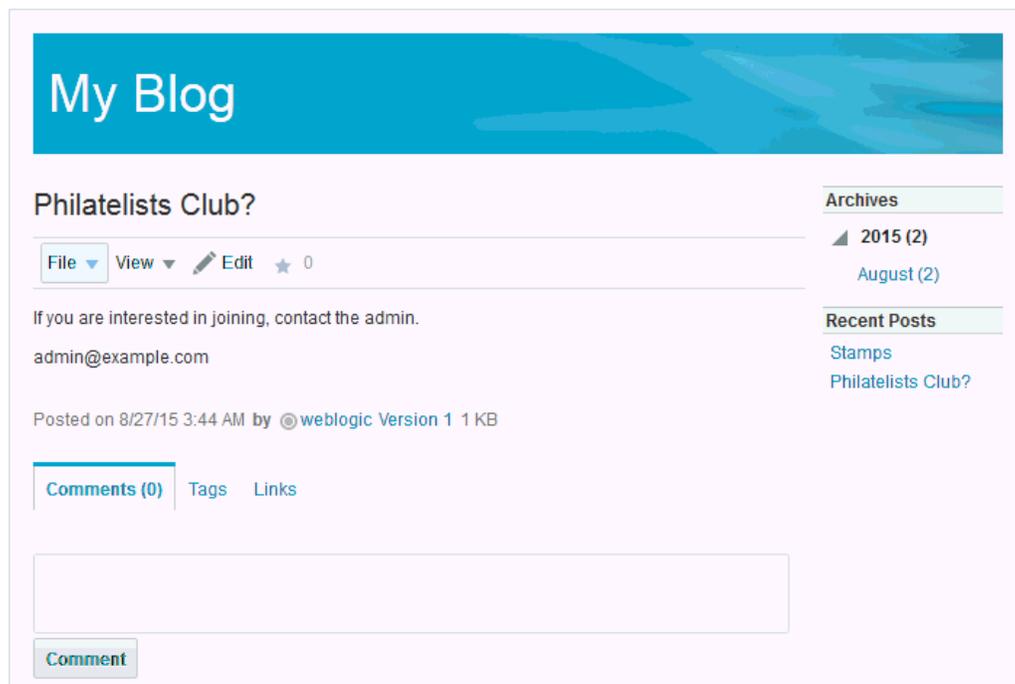
Creating a Blog Post

You can create a blog post on a blog page.

To create a blog post:

1. Navigate to the blog page in which you want to create the blog post.

2. Click **New Post** to open the Rich Text Editor (RTE).

3. In the RTE, in the **Title** field, enter a display name for the blog post (Figure 21-8).

   The title can contain up to 250 characters. Special characters (such as \ / : [ ] * ' " | ?) are allowed.

   > **Note:**
   >
   > The initial title you give a blog post becomes the name of the file that is created in the content repository for the blog post. Subsequently, you can change the blog post title when editing the blog post, but keep in mind that this changes only the display title; the name of the file for the blog post remains the original file name. Therefore, you cannot later create a new blog post with the same initial title as the original title, as that file name already exists. No matter what title you give a blog post, you can always edit the blog post and change the title.

Figure 21-8   Creating a Blog Post
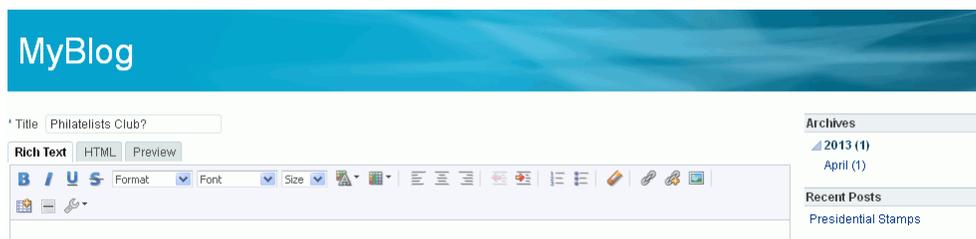
4. Add and preview the text, formatting, and styling in the **Rich Text**, **HTML**, and **Preview** tabbed panes. For information about working with the RTE, see Using the Rich Text Editor (RTE).

5. Choose a mode for publishing the blog post:

    •   **Draft**: Select to mark the blog post as a draft. On a blog page, a draft blog post is marked as "Draft". Only the author of a blog post and portal managers can view draft posts. Users with just view permissions can view only published posts.

    •   **Publish**: Select to publish the blog post. On a blog page, a published post is marked as "Posted".

        By default, a post is published with the current date and time details. If you want the blog post to be published on a future date and time, use the date picker. The blog post will be published automatically on the specified date.

        > **Note:**
        >
        > The Activity Stream shows a blog post that has a publish date, regardless of the publish date. Only draft posts are not listed in the Activity Stream.

6. Click **Create** to save your changes and exit the editor.

    The new blog post appears as the top-most entry in its blog page (Figure 21-3).

Figure 21-9   Blog Page Displaying Blog Post
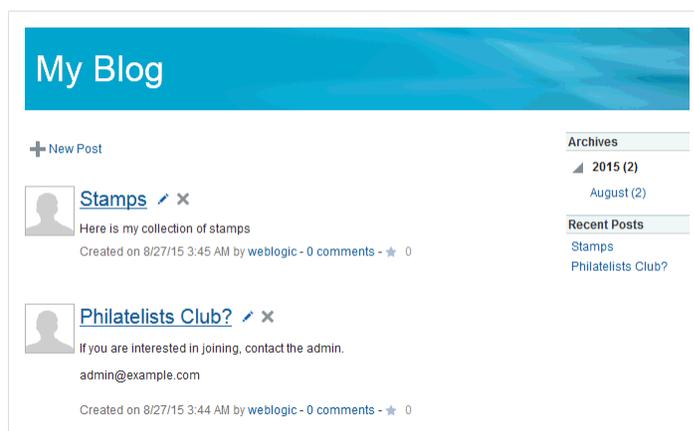
In the content repository, the new blog post is saved as a document under its parent blog folder (`MyBlog`), which in turn, is stored under the `Blogs` folder, as shown in Figure 21-10.

Figure 21-10   Blog and Blog Post in the Document Hierarchy
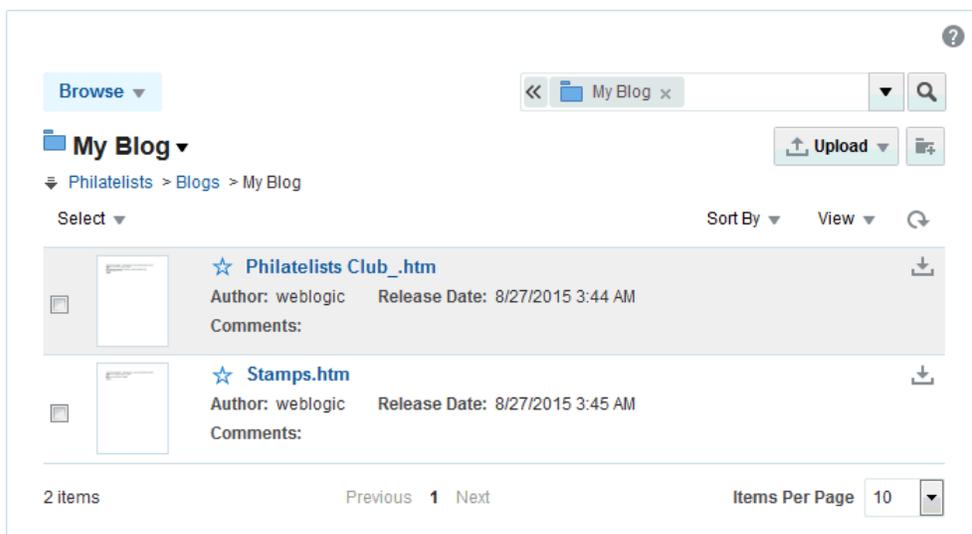
Editing a Blog Post

You use the Rich Text Editor (RTE) to add or revise the content of your blog posts.

When you open a blog post for editing, Oracle WebCenter Portal automatically checks the file out. If another user is already editing a blog post when you try to open it, the Documents tool displays a message that the blog post has already been checked out.

Whenever you save changes to a blog post, WebCenter Portal automatically checks the file in and creates a new version of the blog post. This means that the last saved version of a blog post appears as the current version.

To edit a blog post:

1. Open the blog page that includes the blog post and either:

   - Click the **Edit Post** (pencil) icon for the required blog post.

   - Open the blog post by clicking its title, then click the **Edit** action.

2. In the RTE, add, revise, and preview text, formatting, and styling in the **Rich Text**, **HTML**, and **Preview** tabbed panes. For information about working with the RTE, see Using the Rich Text Editor (RTE).

3. Click **Save** to save your changes and continue editing, or click **Save and Close** to save your changes and exit the editor.

Deleting a Blog Post

If you no longer want a blog post to be available, you can delete it.

To delete a blog post:

Open the blog page that includes the blog post and click the **Delete Post** icon (Figure 21-11) for the required blog post.

Figure 21-11   Deleting a Blog Post

Part V

Staying Informed

This part of *Using Portals in Oracle WebCenter Portal* provides ways to use tracking and notification features to stay on top of the business-relevant activities happening in your organization, work group, and department.

- Getting Notified When Things Change
- Tracking Portal Activities
- Working with Announcements
- Monitoring RSS Feeds

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22

Getting Notified When Things Change

Subscribe to and unsubscribe from portals and application objects, manage your subscriptions, and specify how you are notified when they are changed.

> ✎ **Permissions:**
>
> The tasks described in this chapter are available to any WebCenter Portal user. However, your system administrator can enforce certain application defaults that prevent you from setting subscription and notification preferences for yourself. When application defaults are enforced, you will be unable to perform some of the actions described in this chapter.

Topics:

About Subscriptions and Notifications

Subscriptions and Notifications are available for subscribing to services, portals, and objects in WebCenter Portal and sending notifications of changes to subscribed items through texts and mail. Through subscriptions and notifications, you can track changes that occur to your connections, your portal memberships, content in specific portals, and other application objects that are important to you. Depending on how notifications are configured, you can receive notifications through texts or mail.

Notifications provide a way to trigger notices across different messaging channels. Notices are triggered when the portals and application objects to which you have subscribed change.

Messaging channels can include texts and mail (depending on how your system administrator has configured Notifications). For example, you can receive a mail message when your portal membership changes and a text message when someone responds to a particular discussion topic. Messages contain links that take you to the scene of the change.

You can choose the objects that trigger a notice by subscribing to them. In WebCenter Portal, there are three levels of subscription:

- *Application*, which you can use to receive notices about changes to your portal memberships, Message Board, Connections, and Feedback.

  Such notifications occur only for application-level activities that involve you as the user.

- *Portal*, for changes to a subscribed feature, such as Events, Discussions, Announcements, and Blogs, that occur within the scope of a selected portal
- *Object*, for changes to the application objects you have subscribed to, such as a particular discussion topic

Table 22-1 describes the types of activities that can trigger a notification and indicates the level and location of the associated subscription (for more information, see Subscribing to the Application, to Portals, and to Objects).

> ✎ **Note:**
>
> You must explicitly subscribe to an object to receive subscription-related notifications about it, unless the system administrator has set and enforced company-wide subscription defaults. For more information about object-level subscriptions, see Subscribing to a Discussion Topic.

Table 22-1   Activities that Can Trigger Notifications

Activity	Level	Where to Subscribe
A user sends you an invitation to connect **Note:** Out of the box, the option to send notifications for invitations to connect is enabled and is not end-user configurable.	Application	Preferences (for more information, see Setting Application-Level Subscriptions)
Your portal role changes, for example from `Portal Manager` to another custom role	Application	Preferences
You are added as a member of a portal	Application	Preferences
Your portal membership is removed	Application	Preferences
A user posts a message to your Message Board	Application	Preferences
A user likes your Message Board post (messages explicitly set on a Message Board and not those added from Publisher to the Activity Stream)	Application	Preferences
A user comments on your Message Board post (messages explicitly set on a Message Board and not those added from Publisher to the Activity Stream)	Application	Preferences
A user posts feedback for you	Application	Preferences
An announcement is created	Portal	On the portal, for example, from the **Actions** menu on a portal in Browse portals (for more information, see Setting Portal-Level Subscriptions)
A new event is created	Portal	On the portal
An event is updated	Portal	On the portal
An event is deleted	Portal	On the portal
A new discussion topic is created	Portal	On the portal
A new discussion forum is created	Portal	On the portal
A user replies to a discussion topic	Object	On the topic (for more information, see Subscribing to a Discussion Topic)
A user comments on a discussion topic	Object	On the topic

Table 22-1   (Cont.) Activities that Can Trigger Notifications

Activity	Level	Where to Subscribe
A user deletes a discussion topic	Object	On the topic

You can establish your preferred messaging channels through the **Messaging** page of your Preferences (for more information, see Establishing and Managing Your Messaging Channels and Filters). Additionally, you can use messaging preferences to create filters for the types of notifications you want to receive.

Messaging configuration is available when your system administrator selects a BPEL server as the connection type for outbound notifications. If the system administrator selects a Mail server, the only available messaging channel is mail; consequently, you are neither required nor able to configure your own messaging channels when your system administrator selects a Mail server as the connection type for outbound notifications.

Default settings for application-level subscriptions can be configured by the application administrator. This means that your initial view of application-level Subscription Preferences is determined by these application administrator defaults. Application-level subscriptions appear on the **General Subscriptions** tab of the **Subscriptions** page in your Preferences (Figure 22-1).

Figure 22-1   Preferences - Subscriptions Page
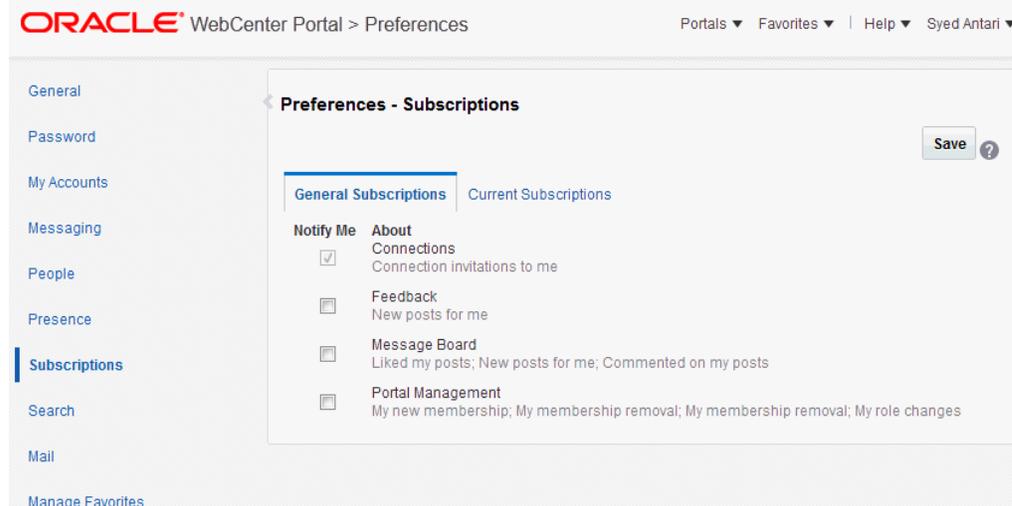
For each option on the **General Subscriptions** tab, the system administrator controls two settings:

- Whether the subscription is enabled for the feature

- Whether users are allowed to change the default setting

These settings determine how and whether general subscription options appear on your view of the tab. Table 22-2 illustrates how administrator-level subscription settings affect the appearance of the **General Subscriptions** tab.

Table 22-2   Effect of Administrator Defaults on Subscriptions Preferences

Subscription Enabled by Default	User Can Change Default	Option in Preferences
True	True	Rendered normally, check box selected
False	True	Rendered normally, check box deselected
True	False	Grayed out, check box selected
False	False	Hidden, check box hidden

You can view and delete all of your subscriptions from one location: the **Current Subscriptions** tab on the **Subscriptions** page in Preferences (Figure 22-2).

Figure 22-2   Preferences - Subscriptions Page: Current Subscriptions Tab
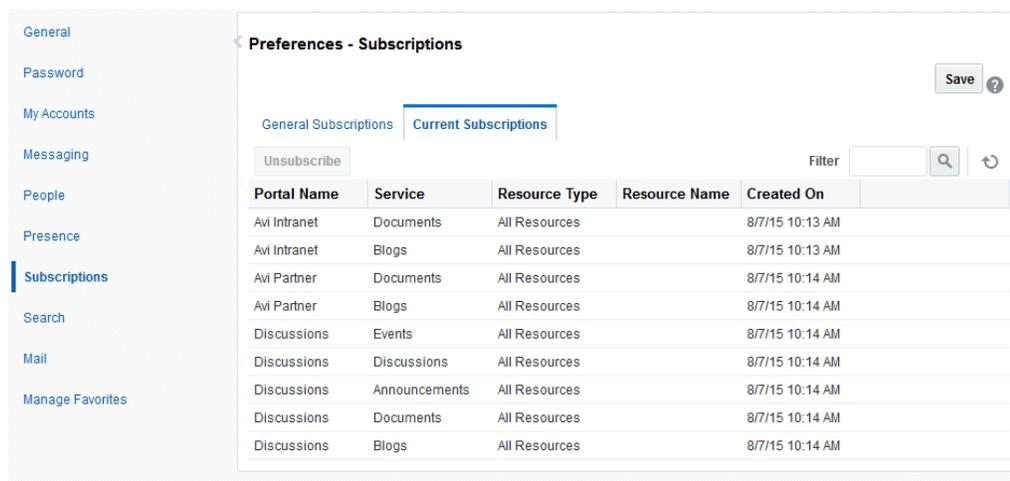
Use the **Subscriptions** page to view and manage all of your application-, portal-, and object-level subscriptions. For more information, see Viewing and Cancelling Your Subscriptions.

WebCenter Portal also provides Notifications viewers that can be added to a portal page. The Notifications viewers duplicate the features provided through Notifications preferences, with the added benefit of flexibility. That is, the Notifications viewers can be placed on any page. Additionally, the Subscription Preferences viewer changes scope according to where it is placed.

Two Notifications viewers are available:

- **Subscription Preferences**, which provides subscription options according to where its is placed:
  - A Subscription Preferences viewer on a Home portal page provides application-level subscription options (Figure 22-3).

Figure 22-3   Subscription Preferences Viewer on a Home Portal Page
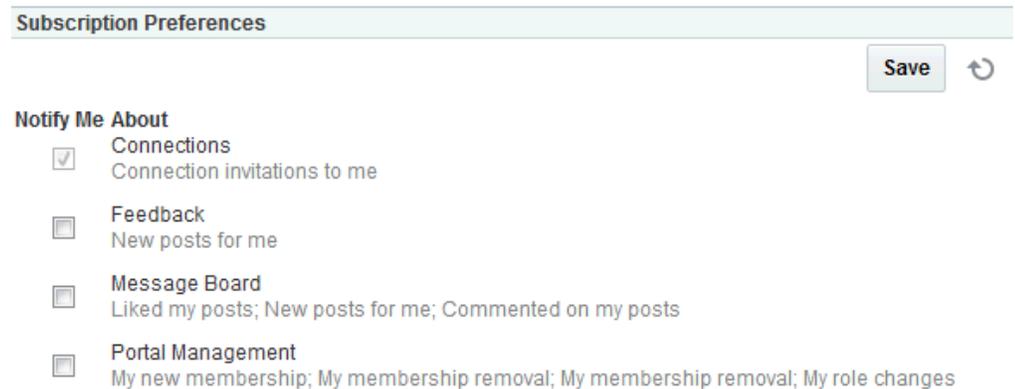
–   A Subscription Preferences viewer on a portal page provides portal-level
    subscription options (Figure 22-4).

Figure 22-4   Subscription Preferences Viewer on a Portal Page
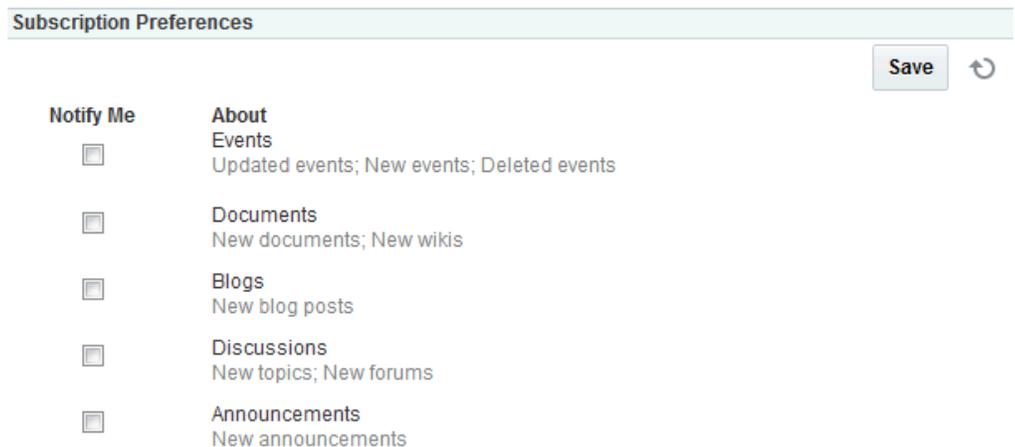
> **See Also:**
>
> For information about controls for:
>
> –   Application-level subscriptions, see Setting Application-Level
>   Subscriptions and Viewing and Cancelling Application-Level
>   Subscriptions.
>
> –   Portal-level subscriptions, see Setting Portal-Level Subscriptions and
>   Viewing and Cancelling Portal- and Object-Level Subscriptions.

•   **Subscription Viewer**, which provides the same controls that are available on the
    Current Subscriptions tab of the **Subscriptions** page in Preferences
    (Figure 22-5).

Figure 22-5   Subscription Viewer

> ✎ **See Also:**
>
> For information about the controls that are available on the **Current Subscriptions** tab, see Viewing and Cancelling Portal- and Object-Level Subscriptions.

Establishing and Managing Your Messaging Channels and Filters

Your mail address is your default messaging channel. With no filters defined, a subscription is sufficient to trigger a mail notification, provided your system administrator has configured shared credentials and mail is the messaging default.

After you have subscribed to an application object, no additional configuration is required to receive a notification through your mail when that object changes.

However, if you want to receive notifications over your phone or from an alternate mail address, you can use Messaging preferences to configure messaging channels and define messaging filters for messages generated from the Oracle User Messaging Service:

- Messaging channels are the channels over which messages, notifications, and alerts are received from the Oracle User Messaging Service. Channels include mail and text. Messages, notifications, and alerts come from the services that are registered with the Oracle User Messaging Service.

- Messaging filters define sorting conditions for messages and specify the channels through which to send the messages that meet the conditions. For example, you can specify that messages from a named *user* should come to you as a text, while messages from a named *service* come to you as an email.

The section includes the following topics:

- Accessing Messaging Configuration Settings
- Establishing a Messaging Channel
- Editing a Messaging Channel
- Deleting a Messaging Channel

- • Creating and Applying Messaging Filters
- • Editing Messaging Filters
- • Deleting Messaging Filters

Accessing Messaging Configuration Settings

To access messaging configuration settings:

1. From your user menu, select **Preferences**.

2. On the **Preferences** page, click **Messaging**.

3. On the **Messaging** page, click **Manage Configuration** to open the User Messaging Preferences login page.

> **✎ Note:**
>
> The **Manage Configuration** button is active only when a BPEL server is configured with WebCenter Portal. If a BPEL server is not present, the button is grayed out, and mail, the default messaging channel, is used for notifications. Because the BPEL server provides notification features, the **Manage Configuration** button may be active even when your system administrator elects to use a mail server instead of a BPEL server for notifications. In environments where more than one BPEL connection is registered, the messaging preferences repository is shared by all. When you set messaging preferences for one BPEL connection, you set them for all.

Figure 22-6   Preferences - Messaging Page (BPEL Server Not Configured)
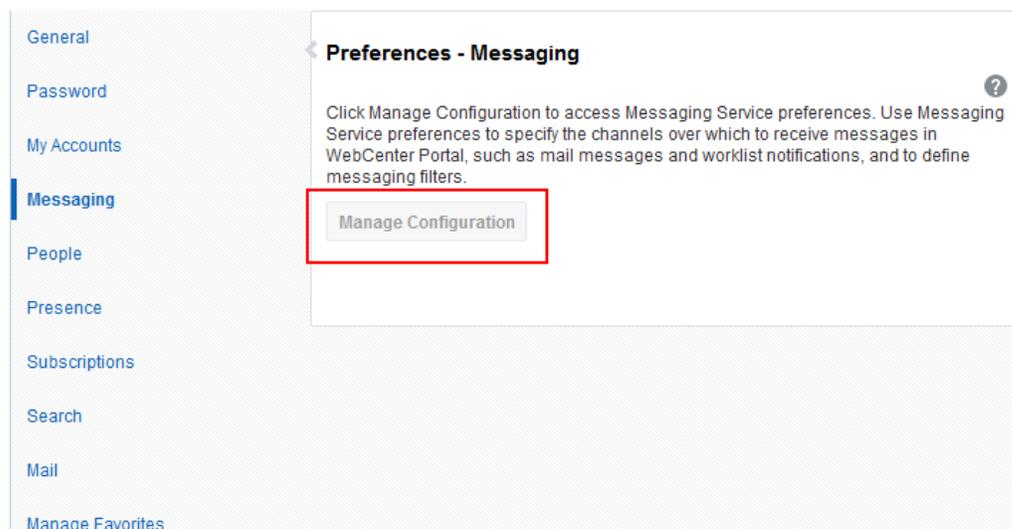
4. Log in to the User Messaging Server to open the Messaging Preferences panel.

- • The **Messaging Channels** tab provides controls for creating and managing messaging channels and a view of all configured messaging channels, such

as EMAIL and SMS. The EMAIL channel is always available. By default, it uses your email address from the LDAP identity store.

- The **Messaging Filters** tab provides a way to outline the conditions under which you are notified and to associate a messaging channel with a defined set of conditions.

For information about messaging configuration, see the following topics:

- Establishing a Messaging Channel
- Editing a Messaging Channel
- Deleting a Messaging Channel
- Creating and Applying Messaging Filters
- Editing Messaging Filters
- Deleting Messaging Filters

Establishing a Messaging Channel

Establishing a messaging channel involves selecting the channel over which a notification is sent and providing the delivery address for that channel.

To establish a messaging channel:

1. Go to the User Messaging Preferences page, as described in Accessing Messaging Configuration Settings.

2. On the the **Messaging Channels** tab, click the **Create** icon to open the Add Channel dialog.

3. In the **Name** field, enter a display name for the channel.

   For example, enter `MyPhone`.

4. From the **Type** list, select the channel over which to send notifications:

   > 💡 **Tip:**
   >
   > The presence of a channel is determined by your system administrator, who deploys them and makes them available.

   - **EMAIL** to specify that notifications are sent to you through your mail
   - **SMS** to specify that notifications are sent as text messages to your phone

5. In the **Address** field, enter an address for the selected type:

   - For EMAIL, enter the address of the mail account to which to send notifications. For example, `my.name@example.com`.
   - For SMS, enter the phone number to which to send notifications in the format `<country_code><area_code><number>`/ For example, `14154444444`.

6. For the **Default** check box:

   - Select to identify one or more channels as the default channel over which to send notifications.

Default channels are the channels over which all notifications that do not meet any of your defined filtering conditions are sent.

- Deselect to prevent selected channels from being used as defaults.

7. Click **OK** to save your changes and exit the dialog.

To complete your configuration, see Creating and Applying Messaging Filters.

Editing a Messaging Channel

To revise messaging channel values:

1. Go to the User Messaging Preferences page as described in Accessing Messaging Configuration Settings.
2. If necessary, click the **Messaging Channels** tab to bring it forward.
3. Select the messaging channel you want to revise, and click the **Edit** icon to open the Modify Channel dialog.
4. Change values as desired.
5. Click **OK** to save your changes and exit the dialog.

Deleting a Messaging Channel

When you delete a messaging channel, any filters that rely on the deleted channel instead use the default. In the absence of a specifically identified default channel, the mail channel is used for sending notifications.

To delete a messaging channel:

1. Go to the User Messaging Preferences page as described in Accessing Messaging Configuration Settings.
2. If necessary, click the **Messaging Channels** tab to bring it forward.
3. Select the messaging channel you want to delete, and click the **Delete** icon.
4. Click **OK** in the Confirmation dialog.

Creating and Applying Messaging Filters

Messaging filters enable you to qualify the types of notifications you want to receive and weed out the notifications of no interest. Filters also provide a means of associating a selected messaging channel with a particular type of notification. For example, using messaging filters, you can specify that all notifications about portal updates go to mail while all notifications about event changes go to your phone, provided your system administrator has configured Notifications to use multiple messaging channels.

Two important things to know about setting up messaging filters:

- Text values in your filtering conditions are case-sensitive. For example, messaging filters differentiate between *Event* and *event*.
- Create separate conditions for multiple terms. For example, for a `Subject` that contains *Ari gave feedback*, create three filtering conditions, one for each term.

To create and apply messaging filters:

1. Go to the User Messaging Preferences page as described in Accessing Messaging Configuration Settings.

2. On the **Messaging Filters** tab, click the **Create** icon to open a filter-creation page.

3. In the **Filter Name** field, enter a display name for the filter.

4. Optionally, enter a filter description in the **Description** field.

5. From the **Matching** list, select from:

   • **All of the following conditions** to require that all of the conditions you specify are met

   • **Any of the following conditions** to require that at least one of the conditions you specify is met

6. From the first **Add Filter Condition** list, select from:

   • **Subject** to base a condition on words appearing in the message subject

   It is likely that the most useful filter condition option is `Subject`. The subjects of notification messages are standardized and can therefore be anticipated. This makes subjects ideal for setting up filtering conditions. See Table 22-4 for a list of standard notification message subjects and examples of filter conditions.

   • **From** to base a condition on the message sender

   All notification messages are sent from the same entity—as configured by your system administrator.

   • **Date** to base a condition on when the message was generated

   `Date` and `Time` options may be useful for ad hoc situations, for example, you want to ensure that any notifications about events delivered on the day of the event are sent right to your phone.

   • **Time** to base a condition on the time the message was generated

   > **Note:**
   >
   > Of all the filter conditions available on the **Add Filter Condition** list, `Subject`, `From`, `Date`, and `Time` are the options that are relevant to and work with the types of messages generated by Notifications. The other options have no effect.

7. From the second **Add Filter Condition** list, select an operator for the condition.

   > **See Also:**
   >
   > See Table 22-3 for an alphabetical list of operators that are relevant to the attributes `Subject`, `From`, `Date`, and `Time`.

8. Click the **Click to add new filter condition** icon.

9. From the **Messaging Option** list, select from:

   • **Send No Messages** to omit notification for the defined filter conditions

- **Send Messages to all Selected Channels** to send notification through all channels selected from the **Add Notification Channel** list
- **Send to the First Available Channel** to send notification through the first open channel of all the selected channels

10. From the **Add Notification Channel** list, select the channel over which to send the notification messages that meet your defined filter conditions, and then click the **Click to add channel to this filter** icon.

    The **Add Notification Channel** list is populated with the channels that are defined on the **Messaging Channels** tab. You can add multiple channels in turn.

11. Click **OK** to save and apply the messaging filter.

> **Tip:**
>
> If your defined filtering conditions do not match an incoming notification, the User Messaging Server will send notifications over all the channels you have identified as default channels.

Table 22-3 provides an alphabetical list of operators that are relevant to the attributes `Subject`, `From`, `Date`, and `Time` and describes the values they require.

Table 22-3   Operators relevant to Subject, From, Date, and Time

Operator	Value[1]	Attributes
Between	In the fields provided: • For Date, enter a start date and end date between which to apply the filter • For Time, select a start time (hours and minutes) and end time between which to apply the filter	Date, Time
Contains	Enter a string that must be included in the message Subject or return address (From) Separate multiple values with commas.	Subject, From
isEqual	Enter the literal value that must be used for the message Subject, Date, Time, or return address (From)	Subject, From, Date, Time
isGreaterThan	Enter the message delivery date beyond which to apply the filter	Date
isGreaterThanOrEqual	Enter the message delivery date on which to start applying the filter	Date
isLessThan	Enter the message delivery date before which to start applying the filter	Date
isLessThanOrEqual	Enter the message delivery date on which to stop applying the filter	Date
isNotEqual	Enter a literal value that must be ignored for the message Subject, Date, Time, or return address (From)	Subject, From, Date, Time
isWeekday	No value is required. This operator applies to messages sent on weekdays.	Date
isWeekend	No value is required. This operator applies to messages sent on weekends.	Date

Table 22-3   (Cont.) Operators relevant to Subject, From, Date, and Time

Operator	Value[1]	Attributes
NotContains	Enter a string that must be excluded from the message Subject or return address (From). Separate multiple values with commas.	Subject, From

[1] String values are case sensitive. Multiple values in strings must be separated by a comma.

Table 22-4 provides a list of standard notification message subjects and examples of condition formulations.

> **Tip:**
>
> Messaging filters are case-sensitive. For example, they differentiate between *Event* and *event*.
>
> You must create a separate condition for each term. For example, when you filter for *Ari gave feedback*, create three conditions—one for each term.

Table 22-4   Standard Notification Message Subjects

Standardized Notification Subject	Example Filter Conditions
userName has invited you to become a connection	• Subject Contains connection • Subject Contains Ari You can set the condition action to route or ignore all messages concerning a named user for any subject that includes a user name.
userName posted message on your message board	• Subject Contains message • Subject Contains board
userName commented on your message board posting	Subject Contains commented
userName likes on your message board posting	Subject Contains likes
userName gave feedback to you	• Subject Contains gave • Subject Contains feedback
Portal Membership Change	Subject isEqual Portal Membership Change
userName created the forum *forumName*	• Subject Contains Monty • Subject Contains created • Subject Contains forum
userName created the event *eventName*	• Subject Contains Java • Subject Contains Summit
userName changed the event *eventName*	• Subject Contains Java • Subject Contains Summit • Subject Contains changed

Table 22-4   (Cont.) Standard Notification Message Subjects

Standardized Notification Subject	Example Filter Conditions
userName deleted the event *eventName*	• `Date isEqual 5/31/10` • `Subject Contains event` • `Subject Contains Java` • `Subject Contains Summit` On the day of the event, all notifications concerning the Java Summit event are routed to a selected channel. You can omit the term *event*, and receive other related notifications.

Editing Messaging Filters

To edit a messaging filter:

1. Go to the User Messaging Preferences page as described in Accessing Messaging Configuration Settings.

2. If necessary, click the **Messaging Filters** tab to bring it forward.

3. Select the filter condition to edit, and click the **Edit** icon.

4. Make your changes.

5. Click **OK** to save and apply your changes.

Deleting Messaging Filters

To delete a messaging filter:

1. Go to the User Messaging Preferences page as described in Accessing Messaging Configuration Settings.

2. If necessary, click the **Messaging Filters** tab to bring it forward.

3. Select the filter condition to delete, and click the **Delete** icon.

4. Click **OK** in the resulting Confirmation dialog.

> ✎ **Note:**
>
> You can remove a filtering condition without deleting the entire filter. Follow the steps in Editing Messaging Filters, and click the **Delete** icon next to the condition to remove.

Subscribing to the Application, to Portals, and to Objects

Where you perform a subscription varies according to the level at which the subscription is applied (either application, portal, or object level) as well as the type of object being subscribed to. For example:

• Application-level subscriptions are made through your personal preferences.

- Portal-level subscriptions are made on the portal's right-click menu on the **Portals** page.

- Object-level subscriptions are made on the object itself.

This section steps you through these subscription scenarios. It includes the following topics:

- [Setting Application-Level Subscriptions](#)

- [Setting Portal-Level Subscriptions](#)

- [Subscribing to a Discussion Topic](#)

Setting Application-Level Subscriptions

You can use subscription preferences to specify whether to receive notifications from People Connections for activities related to Connections, Feedback, and Message Board. Additionally, you can use subscriptions preferences to subscribe to portal management activities, such as changes to any of your portal memberships or roles.

Application-level subscriptions are affected by the defaults set by your system administrator. In your view of Preferences, some subscription options may appear but be unavailable, while others may be hidden completely.

For more information, see About Subscriptions and Notifications.

To set application-level subscriptions:

1. From the user menu, select **Preferences**.

2. On the **Subscriptions** page, click the **General Subscriptions** tab.

Figure 22-7   Preferences - Subscriptions Page: General Subscriptions Tab
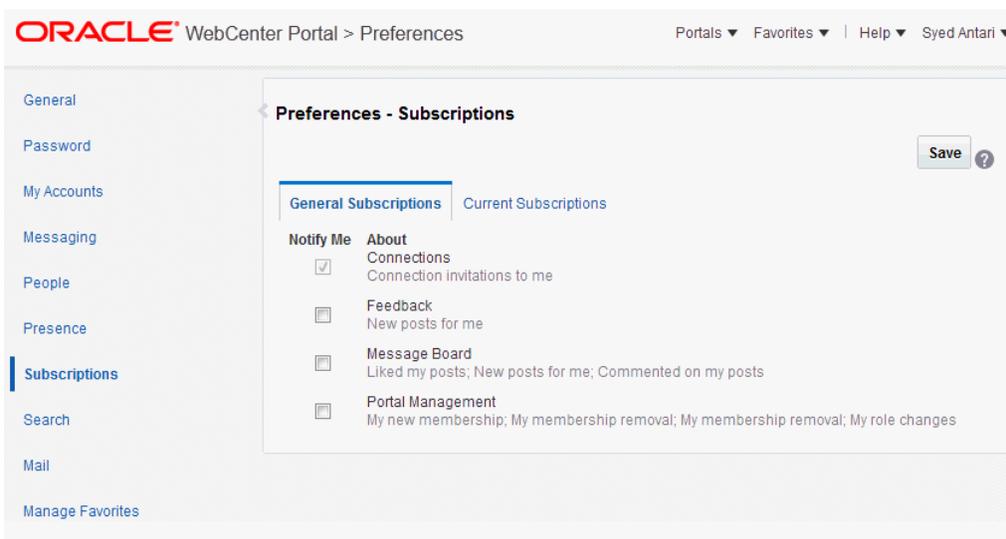
3. Select the actions that should trigger a notification.

> **✎ See Also:**
>
> For more information about messaging channels, see Establishing and Managing Your Messaging Channels and Filters.

Select from:

- **Connections** to receive notification when another user invites you to connect
- **Feedback** to receive notification when other users leave feedback for you
- **Message Board** to receive notification when other users post messages to your Message Board, like your posts, and comment on your posts
- **Portal Management** to receive notification when you are added or removed as a member or your role changes

Deselect actions that should not trigger a notification.

4. Click **Save**.

> **✎ See Also:**
>
> For information about managing application-level subscriptions, see Viewing and Cancelling Application-Level Subscriptions.

Setting Portal-Level Subscriptions

You can use portal-level subscriptions to trigger notification messages whenever any of the following actions occur in the portal:

- An announcement is created
- An event is created, updated, or deleted
- A discussion forum or topic is created

To subscribe to a portal:

1. Open the Subscribe dialog in one of the following ways:
   - In the portal browser (see Viewing and Accessing Available Portals), locate the portal you want to subscribe to, open its flip menu, and select **Contact**, then **Subscribe** (Figure 22-8).

Figure 22-8   Subscribe Options in Portal Actions Menu: Portal Browser
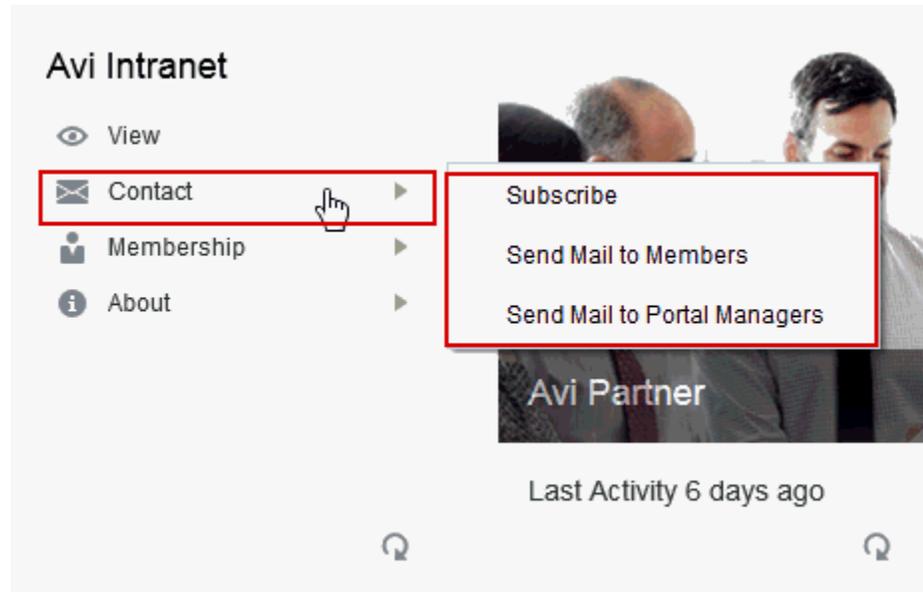
- When viewing a portal, click the **Actions** menu, and select **Contact**, then **Subscribe**.

Figure 22-9   Subscribe Option in Actions Menu: Viewing Portal
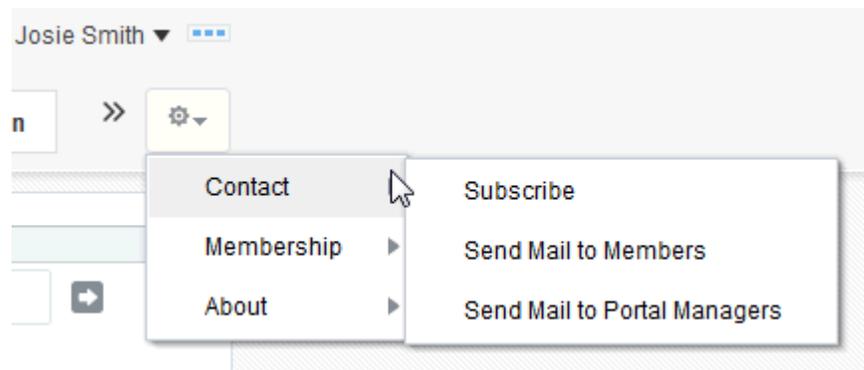
> **Note:**
>
> The location of the **Actions** menu depends on the page template in use.

2. In the Subscribe dialog, select one or more of the following options:

> **Note:**
>
> An option appears in this dialog only when its type is also provided in the portal. For example, if the portal manager has not enabled discussions in the portal, the **Discussions** option does not appear in this dialog.

- **Events**, to receive notice whenever an event is created, updated, or deleted in this portal

- **Documents** and **Blogs**

  > **Note:**
  >
  > In WebCenter Portal 12*c* (12.2.1), a new Documents service task flow has been introduced. Integration between the new task flow and subscriptions and notifications is not in place in this release; consequently, no document-related activities trigger notifications (document-related activities include actions on documents, wikis, and blogs). Integration between the new Documents task flow and subscriptions and notifications will be reintroduced in a subsequent release.

- **Discussions**, to receive notice whenever a discussion topic is created in this portal

  > **See Also:**
  >
  > To see a more detailed level of notifications for a specific discussion topic, such as when the topic is edited, liked, or commented on, subscribe to the topic at the object level. For more information, see Subscribing to a Discussion Topic.

- **Announcements**, to receive notice whenever an announcement is created in this portal

3. Click **Save** to save your settings and exit the dialog.

After you have subscribed to a portal, the subscription is reflected on the **Current Subscriptions** tab on the **Subscriptions** page of Preferences. From that tab you can view all of your portal- and object-level subscriptions. For more information, see Viewing and Cancelling Portal- and Object-Level Subscriptions.

Subscribing to a Discussion Topic

When you subscribe to a discussion topic, you are notified whenever a user, edits, deletes, likes, or comments on the selected discussion topic.

> **✎ See Also:**
>
> For more information, see Establishing and Managing Your Messaging Channels and Filters.

To subscribe to a discussion topic:

1. Go to the discussion topic you want to subscribe to.

2. Click the **Subscribe** link at the top of the topic (Figure 22-10).

Figure 22-10   Subscribe Link on a Discussion Topic
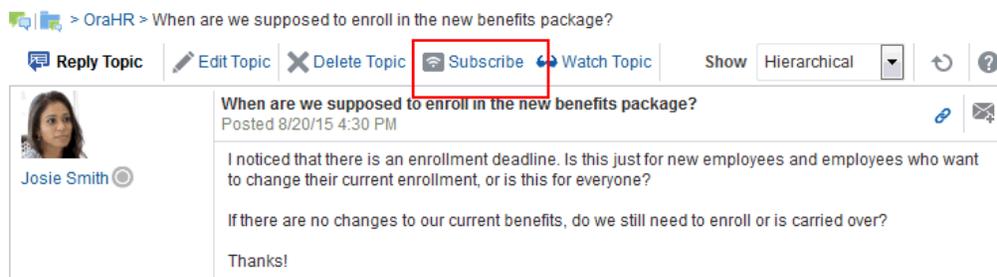
> **✎ See Also:**
>
> For information about unsubscribing, see Viewing and Cancelling Portal- and Object-Level Subscriptions.

Viewing and Cancelling Your Subscriptions

Where you view and cancel your current subscriptions depends on the level of the subscription (application, portal, or object level):

- View, cancel, and make application-level subscriptions on the **General Subscriptions** tab on the **Subscriptions** page in Preferences.

- View and cancel portal- and object-level subscriptions on the **Current Subscriptions** tab on the **Subscriptions** page in Preferences.

> **✎ See Also:**
>
> The settings available on the **Current Subscriptions** tab are also provided through the Subscriptions Viewer. For more information, see About Subscriptions and Notifications.

This section provides information about how to view and cancel your application-level subscriptions and how to view and cancel your portal- and object-level subscriptions. It includes the following topics:

- Viewing and Cancelling Application-Level Subscriptions
- Viewing and Cancelling Portal- and Object-Level Subscriptions

Viewing and Cancelling Application-Level Subscriptions

View and cancel application-level subscriptions through Preferences or through the Subscription Preferences viewer (for more information, see About Subscriptions and Notifications).

To view or cancel application-level subscriptions:

1. From the user menu, select **Preferences** (see Accessing the Preferences Pages).

2. Click **Subscriptions** to open Subscription preferences, and then click the **General Subscriptions** tab (Figure 22-11).

Figure 22-11   Preferences - Subscriptions Page: General Subscriptions Tab
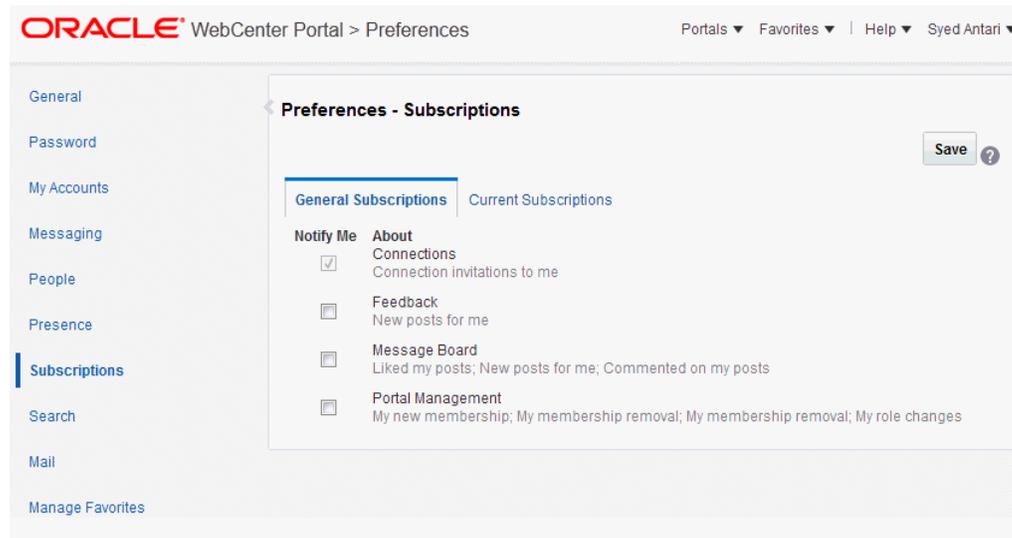
3. View and change your current application-level subscriptions.
4. To cancel a subscription, clear its check box.

Viewing and Cancelling Portal- and Object-Level Subscriptions

Both portal- and object-level subscriptions are listed in Preferences on the **Subscriptions** page. Use the controls on the **Current Subscriptions** tab to adjust your view of these subscriptions and to cancel (or unsubscribe from) a portal- or object-level subscription.

> **Tip:**
>
> Portal- and object-level subscriptions can be cancelled through the same action you took to create the subscription. At the portal- and object-levels, subscription options toggle between subscribed and unsubscribed. Follow the steps outlined in Setting Portal-Level Subscriptions, but select to unsubscribe instead.

> **See Also:**
>
> The settings available on the **Current Subscriptions** tab are also provided in the Subscriptions Viewer. For more information, see About Subscriptions and Notifications.

To view and cancel portal- and object-level subscriptions:

1. From the user menu, select **Preferences**.

2. On the **Subscriptions** page, click the **Current Subscriptions** tab.

Figure 22-12   Preferences - Subscriptions Page: Current Subscriptions Tab

3. Use the **View** menu to control the display order of columns and to hide or show individual columns.

4. To cancel or unsubscribe from a portal- or object-level subscription, select the subscription, and click **Unsubscribe**, then click **Unsubscribe** again in the Unsubscribe Notification Subscription dialog.

5. Click **Save**.

23

Tracking Portal Activities

Activity Stream tracks and reports on activities in WebCenter Portal, enabling you to keep up with what is going on.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you need the application-level permission `People Connections: Update People Connections Data`.

Topics:

- About the Activity Stream
- Setting Activity Stream Preferences
- Working with the Activity Stream

About the Activity Stream

In WebCenter Portal, Activity Stream provides a streaming view of the activities of your connections, actions taken in portals, and business activities. For example, Activity Stream can note when you or a connection posts feedback or creates a discussion forum. Additionally, it streams messages and attachments entered through Publisher.

> ✎ **Note:**
>
> Activity Stream shows file upload activity that occurs through Publisher. Activity Stream does not show file activity that occurs through Content Manager. For example, if you or your connections edit, upload, download, check out, or check in a file through Content Manager, this activity does not appear in the Activity Stream.

Through Activity Stream Preferences, you can select to show connection and portal activities. (However, your system administrator can disable users from overriding application-level settings.)

In addition to streaming messages, your Activity Stream can provide access to file attachments and web links added through Publisher. File attachments are rendered as links, which you can use to access the file.

Users can share a streamed activity and its attachments using a **Share** feature, available on each streamed item.

> **See Also:**
>
> For information about sharing, see Sharing Files and Other Objects Through an Activity Stream Item.

Table 23-1 lists and describes the types of activities that are reported through Activity Stream.

Table 23-1   Activities Tracked by Activity Stream

Tools/Service	Tracked Activities	Scope	Activities Shared or Private
Announcements	• Create announcement • Edit announcement	• portal	• Shared with other portal members
Blogs	• Create blog • Update blog	• portal • Home portal	• Activities on portal blogs are shared with other portal members. • Activities on Home portal blogs are shared with the blogger's connections.
Connections	• Invite to connect • Connection invite accepted	• Home portal	• Shared with invitor and invitee's connections
Discussions	• Create forum • Create topic • Reply to topic	• portal	• Shared with other portal members
Documents	• Upload document through Publisher; document activities performed through Content Manager do not appear in the Activity Stream.	• portal • Home portal	• Uploads to a portal are shared with other portal members. • Uploads to the Home portal are private to user.
Feedback	• Leave feedback • Receive feedback	• Home portal	• Shared with whomever is permitted to view such activities (for more information, see this section and About Feedback.
Lists	• Create a list	• portal	• Shared with other portal members
Message Board	• Leave message • Receive message	• Home portal	• Shared with whomever is permitted to view such activities (for more information, see this section and Setting Message Board Preferences.
Pages	• Create page • Edit page • Add tag • Remove tag	• portal • Home portal	• Activities on portal pages are shared with other portal members. • Activities on Home portal pages are private to user.

Table 23-1   (Cont.) Activities Tracked by Activity Stream

Tools/Service	Tracked Activities	Scope	Activities Shared or Private
Profiles	• Update photo • Update profile • Update personal status	• Home portal	• Shared with whomever is permitted to view such activities (for more information, see this section and Setting Profile Preferences.
Portal Events	• Create an event • Edit an Event	• portal	• Shared with other portal members
Portals Management	• Create portal • Change portal membership • Join portal • Post comment • Like item • Update portal configuration • Enable portal tool or service • Disable portal tool or service • Change custom portal attribute • Change portal role permissions • Change portal role assignment	• portal	• Shared with other portal members
Tagging	• Add tag • Remove tag	• portal • Home portal	• Activities in a portal are shared with all portal members. • Activities in a Home portal are shared with whomever is permitted to view such activities (for more information, see Setting Activity Stream Preferences).

Use Activity Stream Preferences to specify who can view your Activity Stream and the types of activities to show. For more information about Preferences relating to Activity Stream, see Setting Activity Stream Preferences.

Your system administrator can hide or show various controls on Activity Stream viewers and limit the types of activities and the specific portals that are tracked.

WebCenter Portal provides the following Activity Stream viewers:

• **Activity Stream** for viewing application activities and the activities of your connections and for providing access to the attachments added through the **Share** link (Figure 23-1)

Figure 23-1   Activity Stream Viewer
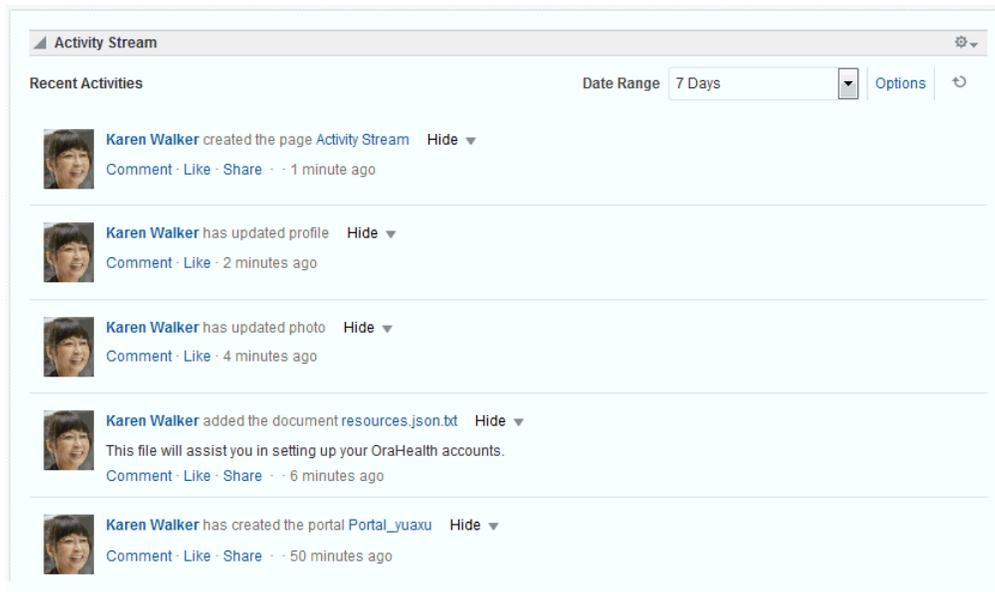
The full view of Activity Stream includes options for liking and commenting on listed activities and for sharing different types of objects, such as images, URLs, documents, and the like. Activity Stream also provides a way to hide the activities and posts of a given user. You can use Activity Stream Options to show the users you have hidden (for more information, see Hiding and Showing the Activities of a Selected User).

The **Activities** page in the Home portal combines an instance of Publisher with the Activity Stream viewer.

> **See Also:**
>
> For information about Publisher, see About Publisher.

- **Activity Stream - Quick View** provides a summary view of application activities and the activities of your connections (Figure 23-2).

Figure 23-2   Activity Stream - Quick View
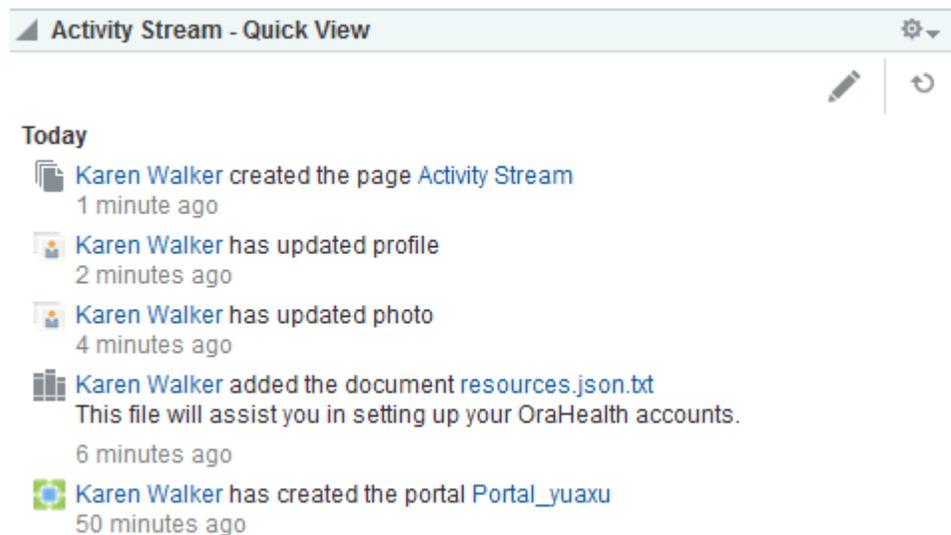
Unlike the full view of Activity Stream, Activity Stream - Quick View does not display **Like**, **Comment**, and **Share** links. The Activity Stream - Quick View also combines similar activities into one entry. For example, if a user posts two messages, you see one entry that says the user "posted messages," but only the most recent message is shown.

When there are more streamed items than the Quick View can show, a **More** link appears at the bottom of the stream. Click **More** to open a full view of the Activity Stream. In the rare case where you have both the full Activity Stream and the Quick View on the same page, clicking **More** changes the focus from the Quick View to the full view, and the Quick View is hidden.

A hierarchy of configuration settings control what you can do with your view of the Activity Stream. Your system administrator sets application-wide values on the WebCenter Portal Administration **Settings** page. You can set your own personal values through People Connections Preferences (for more information, see Setting Activity Stream Preferences). Your system administrator can set values on a given viewer instance, which affects all users' views of the instance (application customization). You can set values on a given viewer instance, which affect only your view of the instance (user customization—for more information, see Working with the Activity Stream).

> **Tip:**
>
> If you adjust a setting through Preferences that does not seem to affect the behavior of a viewer as you expected, it might be because settings on the viewer instance override Preferences settings.

The Activity Stream viewer provides an **Options** link for accessing configuration settings for a given instance (Figure 23-3).

Figure 23-3   Options Link for Activity Stream Options

The Activity Stream - Quick View provides access to its own configuration settings through a pencil icon (**Change the source, filter, and display options**) (Figure 23-4).

Figure 23-4   Pencil Icon and Resulting Configure Dialog
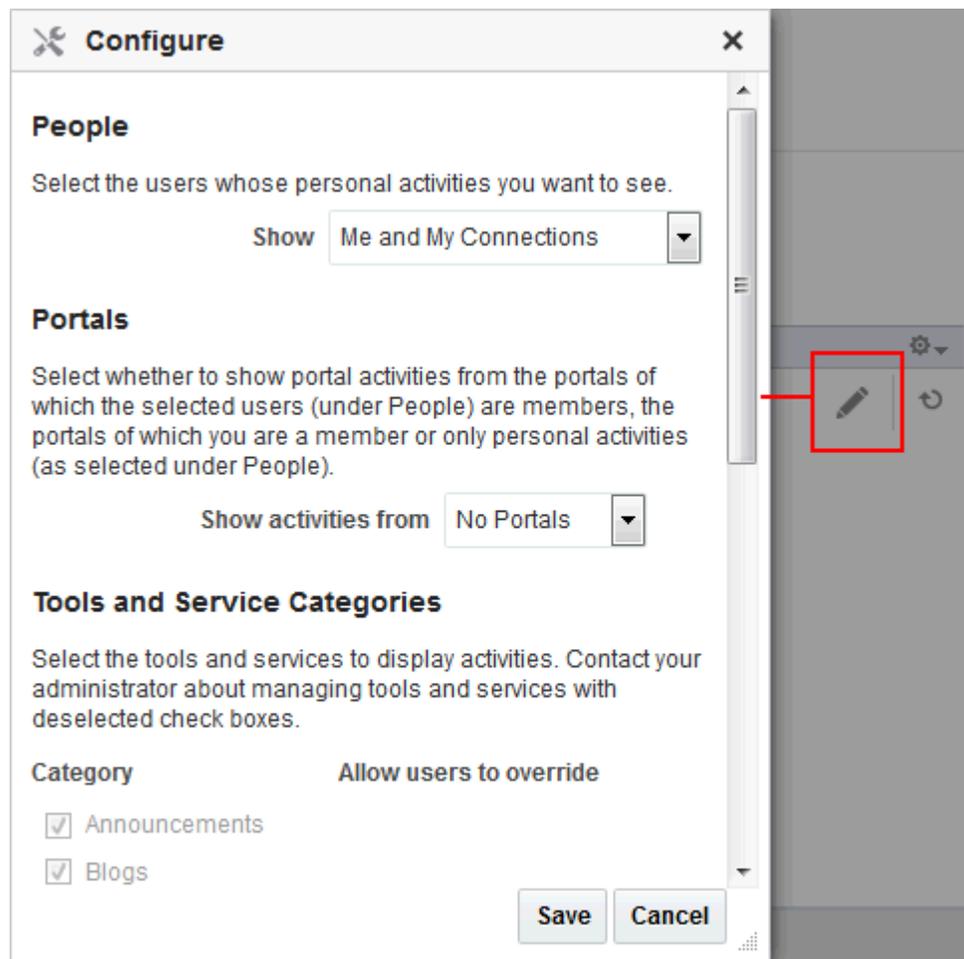
Use these controls to adjust an individual viewer instance with the same kinds of settings that are provided for all of your views of Activity Stream through Activity Stream Preferences (for more information, see Setting Activity Stream Preferences and Working with the Activity Stream).

Setting Activity Stream Preferences

Use Activity Stream Preferences to specify who can view your Activity Stream; the users, categories, and portals for which to track activities; and the activities to show in an Activity Stream view.

> ✎ **See Also:**
>
> For information about the types of activities that Activity Stream tracks, see Table 23-1.

To set Activity Stream preferences:

1. From your user menu in the menu bar, select **Preferences**.

2. On the **People** page, click the **Activity Stream** tab.

Figure 23-5   Preferences - People Page: Activity Stream Tab
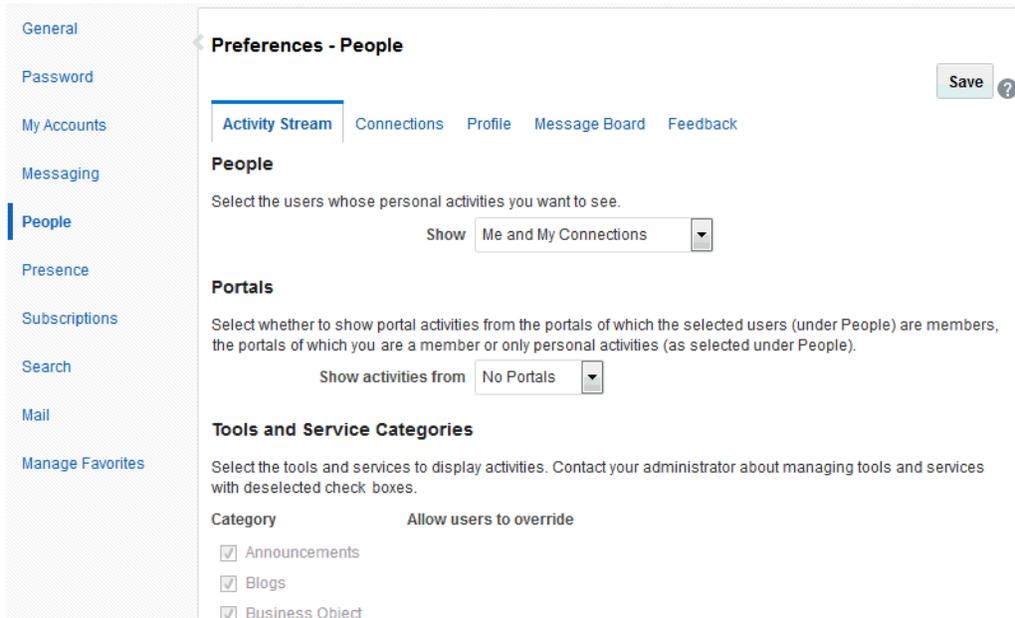
> **Note:**
>
> Despite the presence of a `Documents` option under **Service Categories**, the only document activity that appears in the Activity Stream is a file upload through the Publisher. Document actions performed through Content Manager do not appear in the Activity Stream.

3. Under **People**, specify whose activities to show in your view of the Activity Stream:

> **Tip:**
>
> This setting relates only to the activities that stream from People Connections. Such activities include making connections, posting Feedback and Messages, adjusting your Profile, and so on.

From the Show list, select one of the following options:

- **Only Me**—Show only your own activities in your view of the Activity Stream.
- **Me and My Connections**—Show only your activities and the activities of your connections in your view of the Activity Stream.

- **No Personal**—Do not show any user activities in your view of the Activity Stream, including your own.

- **Selected Connection Lists**—Show the activities of only those users on the selected connections lists in your view of the Activity Stream.

  When you select this option, all available connections lists appear below it. Select one or more connections lists to limit the display of activities to the users on those lists.

  > **✎ Note:**
  >
  > Use this option only after you have created one or more connections lists (for more information, see Creating and Managing Groups of Contacts).

4. Under **Portals**, select to show activities from:

   - **All Portals**—Stream activities from all available portals.

     > **✎ Note:**
     >
     > When **All Portals** and **Selected Connection Lists** (from step 4) are selected, the activity stream shows the selected users personal activities and the activities in the portals of which the selected users are members. For example, the activity stream displays an entry when the user creates a portal (personal activity) and displays an entry when a document is created in a portal of which the user is a member (portal activity).

   - **My Portals**—Stream activities from the portals of which you are a member.

   - **No Portals**—Do not stream any activities from portals other the Home portal.

5. Under **Service Categories**, select the category for which to track activities.

   Select a check box to track the activity of a particular category; deselect a check box to ignore the activity of a particular category.

   > **💡 Tip:**
   >
   > Selecting **No Portals** in the previous step affects the outcome of your category selection: despite their selection here, categories publish no activities to your view of the Activity Stream.

6. Under **Privacy**, identify the types of users who can see your view of the Activity Stream:

   - **Everyone**—All users, whether they are logged in, can see your view of the Activity Stream.

   - **Authenticated Users**—All users who are logged in can see your view of the Activity Stream.

- **My Connections**—The people to whom you are connected can see your view of the Activity Stream.

- **Myself**—Only you can see your view of the Activity Stream.

7. Click **Save**.

Working with the Activity Stream

You can control whose activities and what activities are shown in a given Activity Stream viewer instance. You can also control whether you can like and comment on a streamed item, and how to share a file or URL with other users through the Activity Stream.

Activity Stream viewers provide user customization controls for determining whose and what activities are streamed. You can perform user customizations that affect only your view of the viewer.

Your system administrator can perform application customizations on an Activity Steam viewer that affect everyone's view of it. For example, your system administrator can enable or disable links for liking, sharing, and commenting on individual Activity Stream items. Therefore, some of the actions described in this section might not be available, depending on these customizations.

This section includes the following topics:

- Selecting the People to Stream in an Activity Stream Instance
- Selecting the Portals to Stream in an Activity Stream Viewer
- Selecting the Categories to Stream in an Activity Stream Viewer
- Hiding and Showing the Activities of a Selected User
- Hiding and Showing the Activities of a Selected Portal
- Liking and Commenting On Activity Stream Items
- Sharing Files and Other Objects Through an Activity Stream Item

Selecting the People to Stream in an Activity Stream Instance

Use the **Options** link in an Activity Stream viewer to select the people whose activities you want to follow in the Activity Stream. Use the pencil icon in an Activity Stream - Quick View to perform the same operation.

To select the people to follow in Activity Stream:

1. Go to an Activity Stream viewer or Activity Stream - Quick View.

2. In an Activity Stream viewer, click **Options**.

   In an Activity Stream - Quick View, click the **Change the source, filter, and display options** icon (pencil).

3. For Activity Stream only: in the resulting dialog, click the **Settings** tab to bring it forward.

4. Under **People**, select the people you want to follow:

   - **Only Me**—Show only your own activities in your view of the Activity Stream.

- **Me and My Connections**—Show only your activities and the activities of your connections in your view of the Activity Stream.

- **No Personal**—Do not show any user activities in your view of the Activity Stream, including your own.

- **Selected Connection Lists**—Show the activities of only those users on the selected connections lists in your view of the Activity Stream.

  When you select this option, all available connections lists appear below it. Select one or more connections lists to limit the display of activities to the users on those lists.

> ✏️ **Note:**
>
> Use this option only after you have created one or more connections lists (for more information, see Creating and Managing Groups of Contacts).

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

Selecting the Portals to Stream in an Activity Stream Viewer

Use the **Options** link in an Activity Stream viewer to select the portals you want to follow in Activity Stream. Use the pencil icon in an Activity Stream - Quick View to perform the same operation.

To select the portals you want to follow:

1. Go to an instance of an Activity Stream viewer or Activity Stream - Quick View.

2. In an Activity Stream viewer, click **Options**.

    In an Activity Stream - Quick View, click the **Change the source, filter, and display options** icon (pencil).

3. For Activity Stream only: in the resulting dialog, click the **Settings** tab to bring it forward.

4. Under **Portals**, select to show activities from all available portals in your view of the Activity Stream (**All Portals**), or omit the display of any portal activities (**No Portals**).

> 💡 **Tip:**
>
> When you select **No Portals**, any categories you have selected are ignored (see Selecting the Categories to Stream in an Activity Stream Viewer).

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

Selecting the Categories to Stream in an Activity Stream Viewer

Use the **Options** link on an Activity Stream viewer to select the categories from which to stream activities. Use the pencil icon on an Activity Stream - Quick View to perform the same operation.

> **Note:**
>
> Activity Stream shows file upload activity that occurs through Publisher. Activity Stream does not show file activity that occurs through Content Manager. For example, if you or your connections edit, upload, download, check out, or check in a file through Content Manager, this activity does not appear in the Activity Stream, despite a selection of `Documents` under Options.

To select the categories from whom to stream activities in an Activity Stream viewer:

1. Go to an Activity Stream viewer or Activity Stream - Quick View.

2. In an Activity Stream viewer, click **Options**.

   In an Activity Stream - Quick View, click the **Change the source, filter, and display options** icon (pencil).

3. For Activity Stream only: in the resulting dialog, click the **Settings** tab to bring it forward.

4. Under **Service Categories**, select the categories for which to track activities.

   Select a check box to track the activity of a particular category; deselect a check box to ignore the activity of a particular category.

   > **Tip:**
   >
   > Selecting **No Portals** (as described in Selecting the Portals to Stream in an Activity Stream Viewer) affects the outcome of your category selection: despite their selection here, categories publish no activities to your view of the Activity Stream.

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

Hiding and Showing the Activities of a Selected User

Some of your connections might post activities with a frequency that is more of a distraction than a help. In this case, or for any other reason, you can select to hide the activities streamed from selected users in your view of the Activity Stream (or from the **Activities** page in the Home portal).

You can easily reverse this action by showing one or more hidden users through the **Options** link on the affected Activity Stream viewer.

This section describes how to hide or show the activities of individual users in an Activity Stream viewer instance. It includes the following topics:

- Hiding the Activities of a Selected User
- Showing the Activities of a Hidden User

Hiding the Activities of a Selected User

To hide the activities streaming from a selected user in an Activity Stream viewer instance:

1. Go to an instance of an Activity Stream viewer.

2. Open the **Hide** menu next to the user you want to hide, and select the relevant user name (Figure 23-6).

Figure 23-6   The Hide Option in the Activity Stream
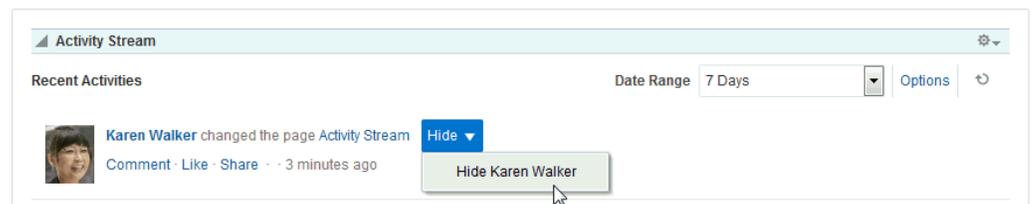
3. Click **OK** in the confirmation dialog.

   The page refreshes, and the viewer no longer shows activities from the selected user.

> **See Also:**
>
> For information about showing a hidden user, see Showing the Activities of a Hidden User.

Showing the Activities of a Hidden User

To reinstate the streaming of activities from a hidden user:

1. Go to an instance of an Activity Stream viewer where a user's activities are hidden.

2. Click **Options**.

3. In the resulting dialog, click the **People** tab to bring it forward.

4. Next to the person whose activities you want to show, click **Show** (Figure 23-7).

Figure 23-7   The Options Link and the Show Button
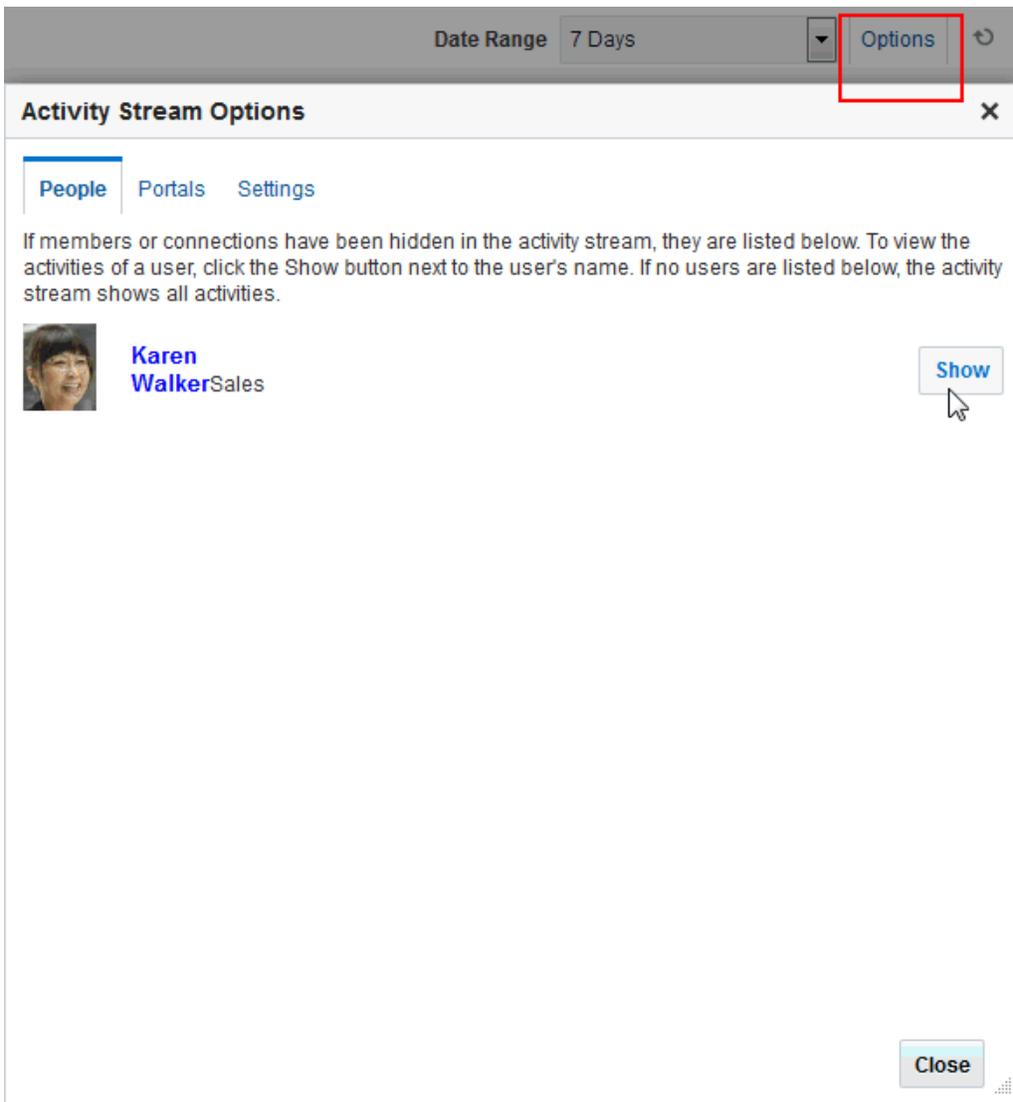
Hiding and Showing the Activities of a Selected Portal

If there is a portal that streams activities that are not currently of interest to you, you can hide that portal's activities from a selected instance of the Activity Stream viewer (or from the **Activities** page in the Home portal).

You can easily reverse this action by showing one or more hidden portals through the **Options** link on the affected Activity Stream viewer.

To hide the activities streaming from a particular portal, the affected Activity Stream viewer instance must be configured to show **All Portals** or **My Portals** (for more information, see Setting Activity Stream Preferences and Selecting the Portals to Stream in an Activity Stream Viewer).

> **Tip:**
>
> Whether the activities streaming from portal are shown can be determined at the application level, in personal Preferences, and on an individual viewer instance by you or by your system administrator. If you find you cannot hide or show activities streaming from portals, it is likely that at one of these levels, the facility to see such activities has been blocked.

This section describes how to hide the activities streaming from a particular portal and how to show those hidden activities. It includes the following topics:

- Hiding the Activities of a Selected Portal
- Showing Hidden Portal Activities

Hiding the Activities of a Selected Portal

To hide the activities streaming from a selected portal in an Activity Stream viewer instance:

> **Note:**
>
> Your Preference settings may prevent any portal activities from streaming. For information about Activity Stream Preferences, see Setting Activity Stream Preferences.

1. Go to an instance of an Activity Stream viewer.

2. Open the **Hide** menu next to an activity streamed from the portal whose activities you want to hide, and select the relevant portal name (Figure 23-8).

Figure 23-8   Selecting to Hide the Portal teamsite2

3. Click **Yes** in the confirmation dialog.

    The page refreshes, and the viewer no longer shows activities from the selected portal.

> **See Also:**
>
> For information about showing a hidden portal, see Showing Hidden Portal Activities.

Showing Hidden Portal Activities

To reinstate the streaming of a portal's hidden activities:

1. Go to an instance of an Activity Stream viewer where a portal's activities are hidden.

2. Click **Options**.

3. In the resulting dialog, click the **Portals** tab to bring it forward.

4. Next to the portal whose activities you want to show, click **Show** (Figure 23-9).

Figure 23-9   The Options Link and the Show Button in Activity Stream Options Dialog
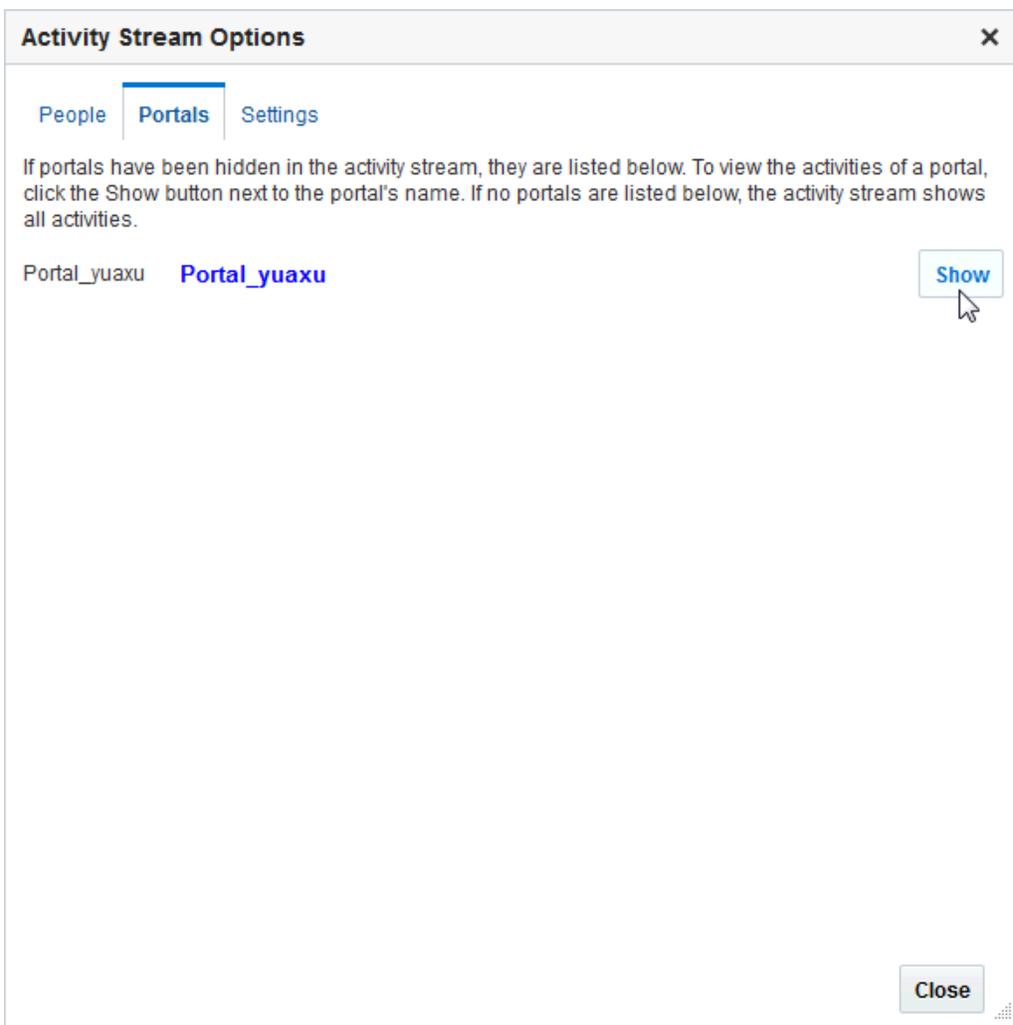
Liking and Commenting On Activity Stream Items

Provided the Activity Stream viewer has been configured to do so, you and the users with access to your Activity Stream can comment on or like a particular streamed item.

To like a streamed item, go to an Activity Stream viewer and click the **Like** link. You can unlike the item by clicking the **Unlike** link.

To comment on a streamed item, click the **Comment** link, enter a comment in the text area, then click **Comment** to publish your comment below the item. Comments are limited to 500 characters. When you add a comment, a delete icon appears for removing your comment.

> ✎ **See Also:**
>
> For more information, see Liking, Commenting On, and Sharing Items.

Sharing Files and Other Objects Through an Activity Stream Item

Provided the Activity Stream viewer is configured to support it, you can share a streamed item with all of the users who are allowed to view your streamed activities. This could be all of your connections or all of the users on a selected connections list. Who an item is shared with is determined by how you or your system administrator has configured Activity Stream.

If you prefer, you can send a streamed item through mail, and consequently select all recipients yourself.

To share a streamed item:

1. Go to the streamed item of interest.

2. Select an option from the **Share** menu (Figure 23-10).

Figure 23-10   Share Menu on a Streamed Activity
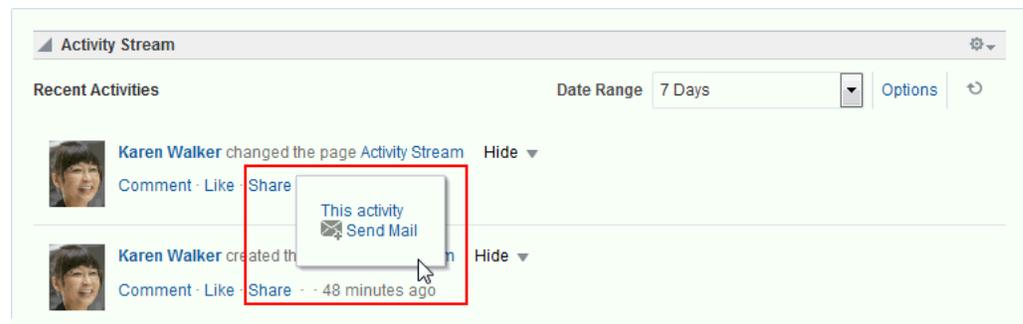
- Select **This activity** to stream a URL to the item (such as a new portal, a new announcement or discussion topic, and the like) to all enabled users.

- Select **Send Mail** to send an email with a link to the item to all specified recipients.

> **✏ See Also:**
>
> For more information, see Liking, Commenting On, and Sharing Items.

24
Working with Announcements

Announcements offer a quick, convenient way to create and broadcast messages instantly or at a specified future date.

> **Note:**
>
> Beginning with 12*c* (12.2.1.3.0), Oracle WebCenter Portal has deprecated support for Jive features (announcements and discussions). If you are upgrading from a prior release, these features remain available in your existing installations that are being upgraded.

Topics:

- About Announcements
- Working with Announcements

> **Permissions:**
>
> This chapter is intended for WebCenter Portal users who want to view, create, and manage portal announcements. To perform the tasks in this chapter, you need *one* or more of the following portal-level permissions:
>
> - `Create, Edit, and Delete Announcements`
> - `Create and Edit Announcements`
> - `View Announcements`

> **Note:**
>
> Tasks discussed in this chapter are not available if announcements are not enabled and exposed. The portal manager adds and configures announcements, as described in Adding Announcements to a Portal in *Building Portals with Oracle WebCenter Portal*.

About Announcements

WebCenter Portal provides the ability to post announcements about important activities and events to all authenticated users. For example, an application specialist can announce the availability of a new feature or the plan to take a portal offline

temporarily for maintenance or the system administrator can announce the plan to shut down WebCenter Portal for maintenance.

Figure 24-1   Sample Announcement in the Announcements - Quick View

Announcements are integrated with many other features, such as the Activity Stream, RSS, and instant messaging and presence, and you can link announcements to other assets. For example, if your company is announcing a new product, you can link from the announcement directly to a discussion forum, where potential customers can ask other customers about the product.

Announcements are limited to the portal where you create them. In the Home portal, announcements are for the WebCenter Portal (or application-wide), and are available to all logged-in (authenticated) users.

Working with Announcements

The **Announcements** page (or console), or the Announcements - Quick View and Announcements viewer on a page can display announcements.

To expose the Announcements page to all portal members, the portal manager needs to add the page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation in *Building Portals with Oracle WebCenter Portal*. For a page to show in portal navigation, the **Visibility** check box for the page must also be selected. For more information, see Showing or Hiding a Page in the Portal Navigation in *Building Portals with Oracle WebCenter Portal*.

You can also manage announcements using the Announcement Manager. Click the **Open Announcement Manager** icon to manage announcements.

Figure 24-2   Open Announcement Manager Icon in the Announcements - Quick View

The Announcements - Quick View includes numerous parameters to customize your view. For example, portal managers can remove the link to the Announcement Manager. This lets you view announcements where manage controls are not needed. Users can view 10 announcements by default, but you can change this number and change how much of the announcement is displayed. The **More Announcements** link

opens a separate window, containing the complete list of all announcements with pagination behavior. This is called the Extended Quick View (or Extended Mini View).

Depending on the privileges you have on the page, you can perform some or all tasks described in this topic:

•

•   View announcements—All participants in the Home portal and portal managers. For more information, see Viewing Announcements.

•

•   Create announcements—All participants. For more information, see Creating an Announcement.

•

•   Edit announcements—Creator of the announcement, discussions server system administrators in the Home portal, and portal managers. For more information, see Editing Announcements.

> **✎ Note:**
>
> If participants have `Create, Edit, and Delete Announcements` permissions, they can edit any announcement in the portals in which they have access. If they have `Create and Edit Announcements` permissions, they can edit only those announcements that they created.

•   Delete announcements—Discussions server system administrators in the Home portal and portal managers.

•   Delete announcements—Discussions server system administrators in the Home portal and portal managers. For more information, see Deleting an Announcement.

> **✎ Note:**
>
> If participants have `Create, Edit, and Delete Announcements` permissions, they can delete any announcement in the portals in which they have access. If they have `Create and Edit Announcements` permissions, they can delete only those announcements that they created.

This section includes the following topics:

•   Working with Announcements
•   Working with the Announcements - Quick View
•   Sending Mail from an Announcement
•   Linking Announcements
•   Subscribing to Announcements Using RSS

Working with Announcements

Announcements not only provides the tools to create, edit, and delete announcements, it also provides controls for determining when an announcement is published and when it expires. When an announcement expires, the announcement is removed from the list. You can use the **Show** lists to personalize your view of announcements. After you create an announcement, you are offered the option to mail or link the announcement to other assets.

Depending on the privileges you have on the page and whether announcements are configured in WebCenter Portal or the individual portal, you may see only a subset of these options in the Announcement Manager. For example, the **Delete** icon is displayed only to users with `Create, Edit, and Delete Announcements` privilege to delete *all* announcements, or `Create and Edit Announcements` to delete only the announcements that the user creates.

This section provides information about viewing, creating, and managing announcements.

This section includes the following topics:

- Viewing Announcements
- Adjusting Your View of the Announcements
- Creating an Announcement
- Editing Announcements
- Deleting an Announcement

Viewing Announcements

To view announcements, either:

- Go to the Announcements view on a page, or navigate to the **Announcement** console on the **Announcements** page.

> **Note:**
>
> The way you access announcements depends on how the portal is designed. The portal manager might also provide you with a pretty URL to access the page.
>
> To expose the Announcements page to all portal members, the portal manager needs to add the page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation in *Building Portals with Oracle WebCenter Portal*. For a page to show in portal navigation, the **Visibility** check box for the page must also be selected. For more information, see Showing or Hiding a Page in the Portal Navigation in *Building Portals with Oracle WebCenter Portal*.

Figure 24-3 shows the announcements console on the **Announcements** page.

Figure 24-3   Announcement Console on an Announcements Page
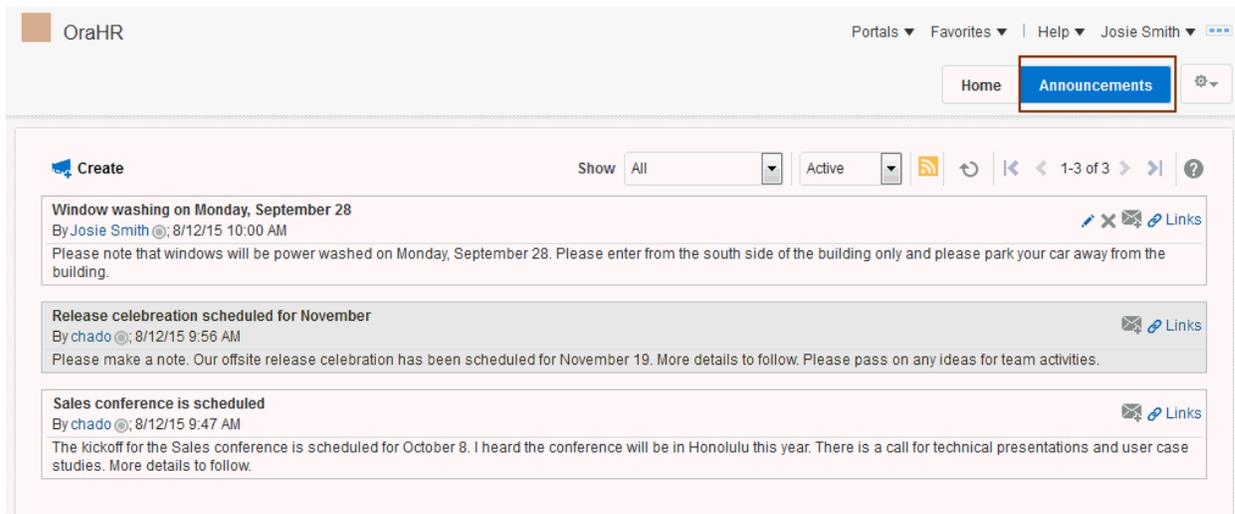
Figure 24-4 shows announcements in the Announcements - Quick View viewer on a page.

Figure 24-4   Announcements in the Announcements - Quick View on a Page
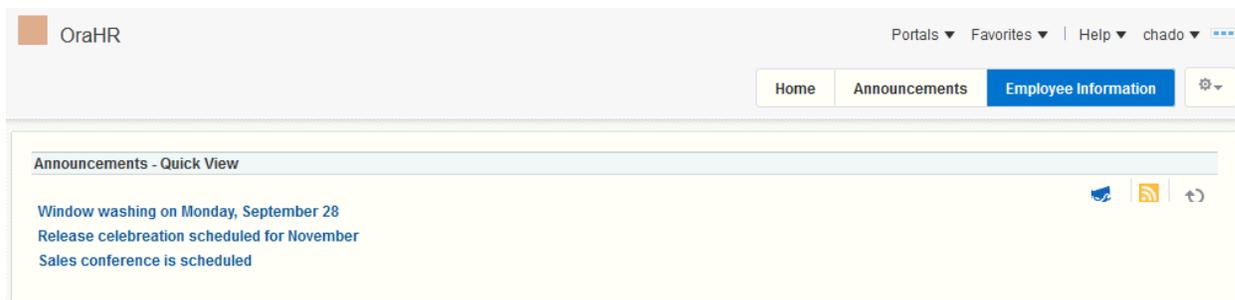
> ✎ **Note:**
>
> Viewing Announcements in the Quick View

Adjusting Your View of the Announcements

You can customize your own view of announcements, which does not affect the view of other users. All users who can view announcements can customize it.

A **Show** list provides options for displaying only those announcements that were created within a selected time range. Choose from displaying all announcements to displaying only those created today, since yesterday, and so on—up to 30 days. For example, you may select the option **Today** from the **Show** menu, and only those announcements posted today display.

Another **Show** list provides options to display current, future, or expired announcements.

To adjust your view of announcements:

1. Go to the portal page that contains the Announcements view.

2. Click the **Show** drop-down list and select from the listed display options (Figure 24-5).

Figure 24-5   Show Menu for Announcements
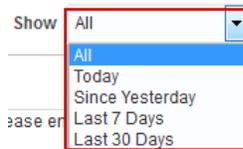
Select from one of the following options:

*   **All**—Displays all available announcements

*   **Today**—Displays only today's announcements

*   **Since Yesterday**—Displays today's and yesterday's announcements

*   **Last 7 Days**—Displays all announcements from the last seven days

*   **Last 30 Days**—Displays all announcements from the last 30 days

The Announcements view refreshes and displays the announcements that match your selection. If the view does not refresh, click the Refresh icon.

3. Select from the other drop-down list to show active, future, or expired announcements (Figure 24-6).

Figure 24-6   Active, Future or Expired Announcements

Table 24-1 shows the different combinations of announcement you can view from the **Show** list for viewing announcements.

Table 24-1   Announcements Displayed Based on Show List

Days Range	Announcement Type	Display Result
All	Active	All announcements as of today
Today	Active	All announcements with a start date of today

Table 24-1   (Cont.) Announcements Displayed Based on Show List

Days Range	Announcement Type	Display Result
Since Yesterday	Active	All announcements with a start date as of yesterday
Last 7 Days	Active	All announcements for the last seven days
Last 30 Days	Active	All announcements for the last 30 days
All	Future	All announcements scheduled for a later date
Today	Future	All announcements scheduled for a later date
Since Yesterday	Future	All announcements scheduled for a later date
Last 7 Days	Future	All announcements scheduled for a later date
Last 30 Days	Future	All announcements scheduled for a later date
All	Expired	All expired announcements
Today	Expired	No announcements
Since Yesterday	Expired	All expired announcements as of yesterday
Last 7 Days	Expired	All expired announcements for the last seven days
Last 30 Days	Expired	All expired announcements for the last 30 days

Creating an Announcement

Create an announcement to distribute information to all members of WebCenter Portal or a single portal in one operation. For example, if you are the system administrator and want to shut down WebCenter Portal for maintenance, you can create an announcement to inform all WebCenter Portal users about the down time, or if you want to post an announcement for an individual portal for its members to view, you can create an announcement just for that portal. On the publication date you specify, while creating the announcement, the announcement appears in the Announcements view and Announcements - Quick View, and on the Activity Stream.

All portal members who have `Create, Edit, and Delete Announcements` or `Create and Edit Announcements` permissions can create announcements.

To create a new announcement:

1. Access the Announcements view, access the **Announcements** console, or open the Announcement Manager from the Announcements - Quick View.

    See Viewing Announcements for more information.

2. Click **Create**.

Figure 24-7   Create an Announcement
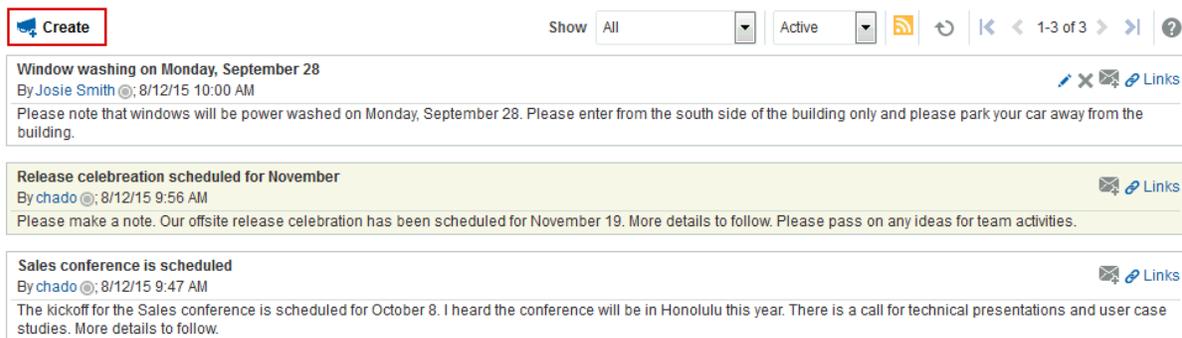
The Create Announcement dialog opens.

Figure 24-8   Create Announcement Dialog
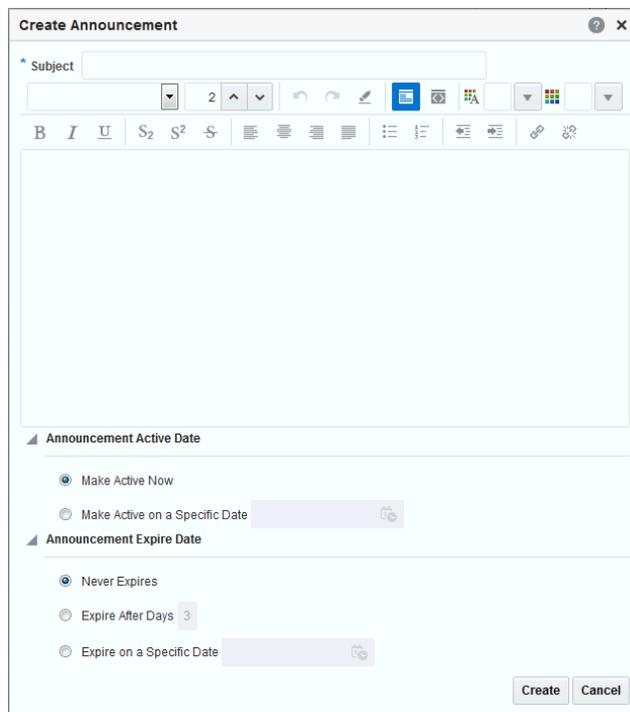
3. In the **Subject** field, enter a title for the announcement.

4. In the message body text box, enter the text of the announcement.

   Use the rich text editor to style the announcement with colors, special fonts, images, and so on. For information about rich text editor controls, see the online help.

5. For **Announcement Active Date**, select from one of the following options:

   • **Make Active Now** — To post the announcement immediately (the default option)

- **Make Active on Specific Date** — To select a date to post the announcement

  Click the **Select Date** icon to the right of the text field to open the **Select Date** picker, select a date or navigate to the appropriate month and date to select it.

  If a later date is selected and mail is configured for notifications, then the notification mail is delivered at a later date, provided the servers are not restarted.

Figure 24-9   Select Date Picker Calendar
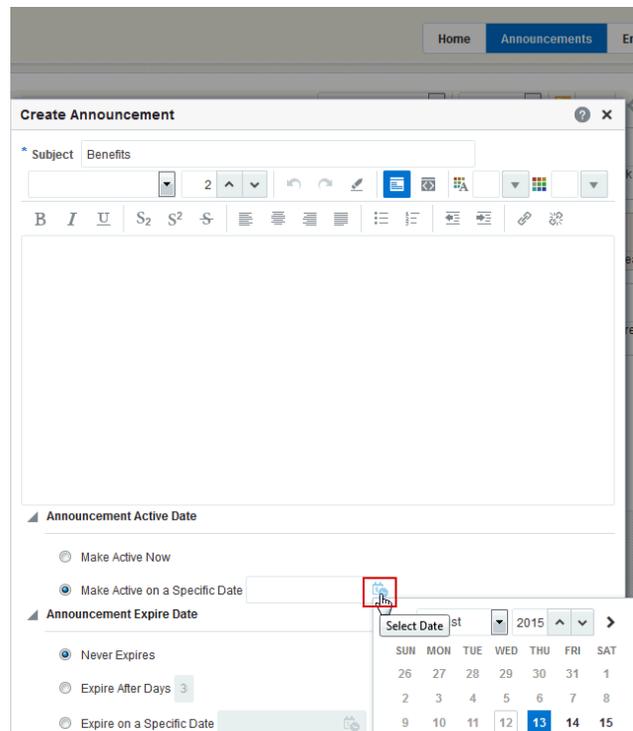
After you select a date, the calendar closes.

6. Under **Announcement Expire Date**, select from one of the following options:

   - **Never Expires** — To post the announcement indefinitely (the default option)

   - **Expire After Days** — To specify the number of days the announcement is active

     Enter the number of days to display the announcement.

   - **Expire on a Specific Date** — To set the date to expire and remove the announcement from the list

     Click the **Select Date** icon next to the text field to open the **Select Date** picker.

Figure 24-10   Select Expiration Date Calendar
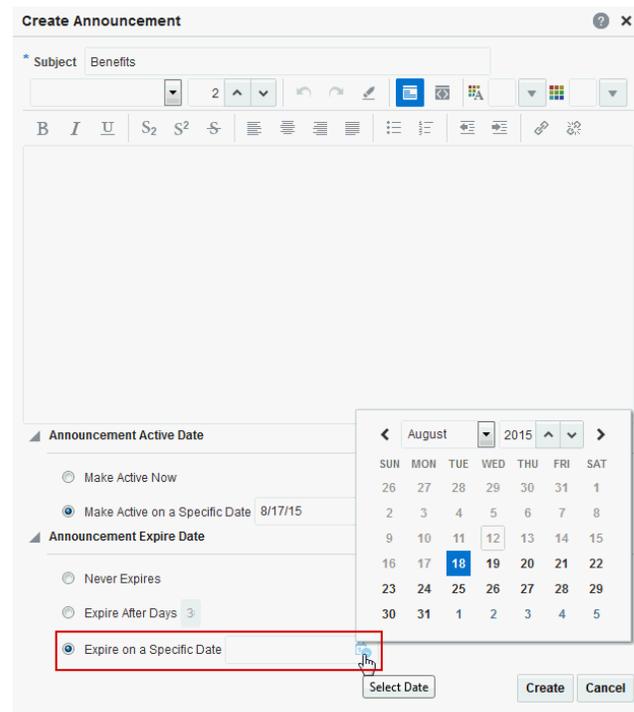
In the calendar, only those dates after the active date are enabled for selection.

7. Click **Create** to create the announcement.

   If you selected to post the announcement immediately, then the new announcement appears in the following locations: in any Announcements view included on a page, on the Activity Stream, and at the top of the list of announcements in the Announcements - Quick View.

Editing Announcements

After you have created an announcement, you easily can modify it. For example, if the details of an announcement change, or you want to change the font or color of the announcement text, you can quickly make these changes. You can change an announcement's title, content and expiration date. However, you cannot change its publication date, which is the date on which the announcement is made active (Announcement Active Date).

> **Note:**
>
> To change an announcement's publication date, you must delete the announcement, and re-create it with the correct publication date.

You can edit an announcement only if you created that announcement or have been granted privileges to do so. If you have `Create, Edit, and Delete Announcements`

permissions, you can edit any announcement in the portals in which you have access. If you have `Create and Edit Announcements` permissions, you can edit only those announcements that you created. Typically, portal managers have privileges to edit all announcements in the Announcements view.

To edit an announcement:

1. Access the Announcements view, access the **Announcements** console, or open the Announcement Manager from the Announcements - Quick View.

2. Click the **Edit Announcement** icon for the announcement you want to edit.

   Notice that the Edit Announcement icon appears in the announcements that were created by the logged in user; the icon does not appear with those announcements that were created by other users (unless the user has `Create, Edit, and Delete Announcements` permissions).

Figure 24-11   Edit Announcement Icons
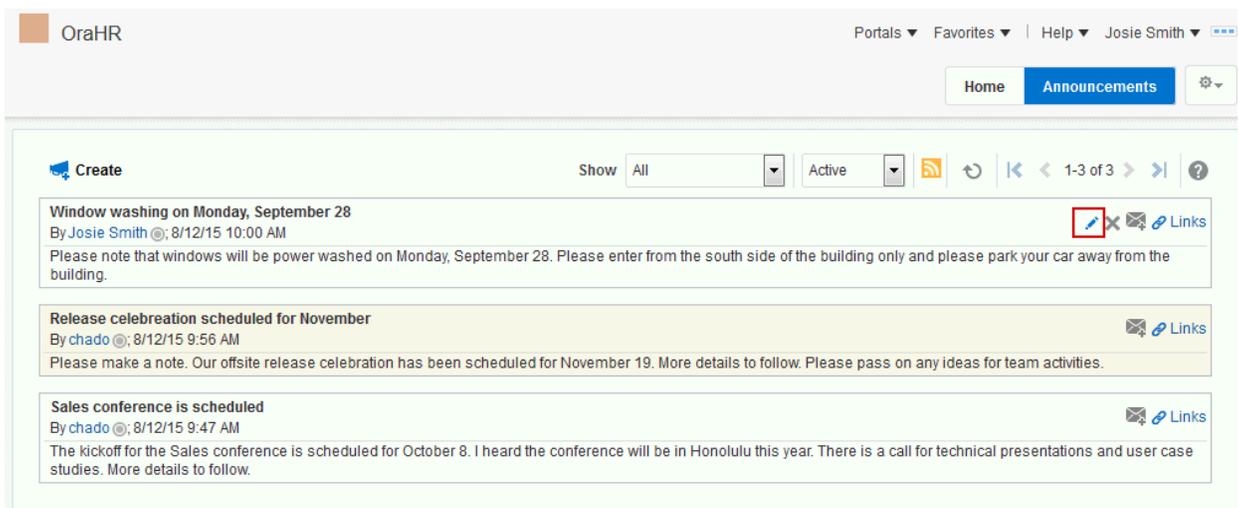
   The Edit Announcement dialog opens.

3. Make the changes you want to the announcement. For example, you can change the text of the announcement, or modify its look and feel.

   The Edit Announcement dialog provides rich text editor controls for styling announcement text. For information on rich text editor controls, see the online help.

   You can change an announcement's title and content, and also its expiration date. However, you cannot change its publication date.

4. Click **Save** to save your changes and close the dialog.

Deleting an Announcement

You can delete an announcement only if you created that announcement or have been granted privileges to do so. If you have `Create, Edit, and Delete Announcements` permissions, you can delete any announcement in the portals in which you have access. If you have `Create and Edit Announcements` permissions, you can delete only

those announcements that you created. Typically, portal managers have privileges to delete all announcements in the Announcements view.

To delete an announcement:

1. Access the Announcements view, access the **Announcements** console, or open the Announcement Manager from the Announcements - Quick View.

   See Viewing Announcements for more information.

2. Click the **Delete Announcement** icon for the announcement you want to delete (Figure 24-12).

   Notice that the Delete Announcement icon appears next to the announcements created by the logged in user; the icon does not appear with those announcements that were created by other users (unless the user has `Create, Edit, and Delete Announcements` permissions).

Figure 24-12   Delete Announcement Icon on an Announcement View
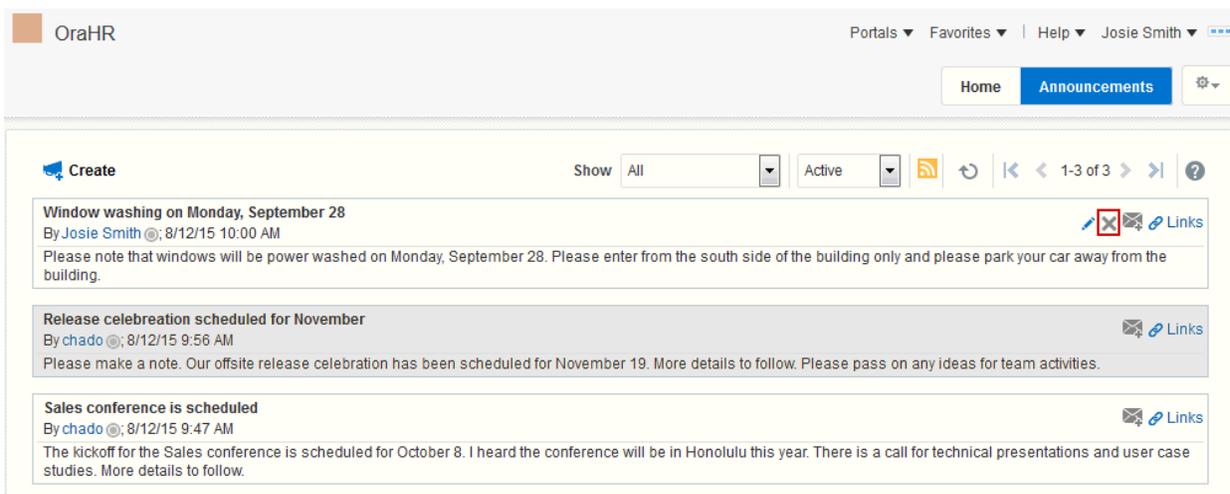
A Delete Announcement confirmation dialog displays.

3. In the Delete Announcement confirmation dialog, click **Delete** to delete the announcement and close the dialog.

   The selected announcement is removed from the announcements view and the Activity Stream.

Working with the Announcements - Quick View

The Announcements - Quick View is essentially a viewer for convenient access to current announcements. More robust features, for such actions as creating and editing announcements, are offered in the Announcements view (see Viewing Announcements).

By default, announcements in the Announcements - Quick View show announcement titles as links. But portal managers can configure it to display only announcement titles, titles with some amount of content, or only content.

> **✎ Note:**
>
> The Announcements - Quick View might not be available in the portal if the view has not been added to a page by your portal manager.

This section includes the following topics:

- Viewing Announcements in the Quick View
- Managing Announcements in the Quick View

Viewing Announcements in the Quick View

The Announcements - Quick View provides a read-only view of announcements.

To view announcements in an Announcements - Quick View:

1. In the **Announcements - Quick View**, click the announcement you want to view (Figure 24-13).

Figure 24-13   Announcements - Quick View

The announcement details display in the Announcement dialog (Figure 24-14). Similar to the announcement content displayed in the Announcements view, this dialog displays content with all the formatting that was applied to it.

Figure 24-14   Announcement Accessed from Quick View
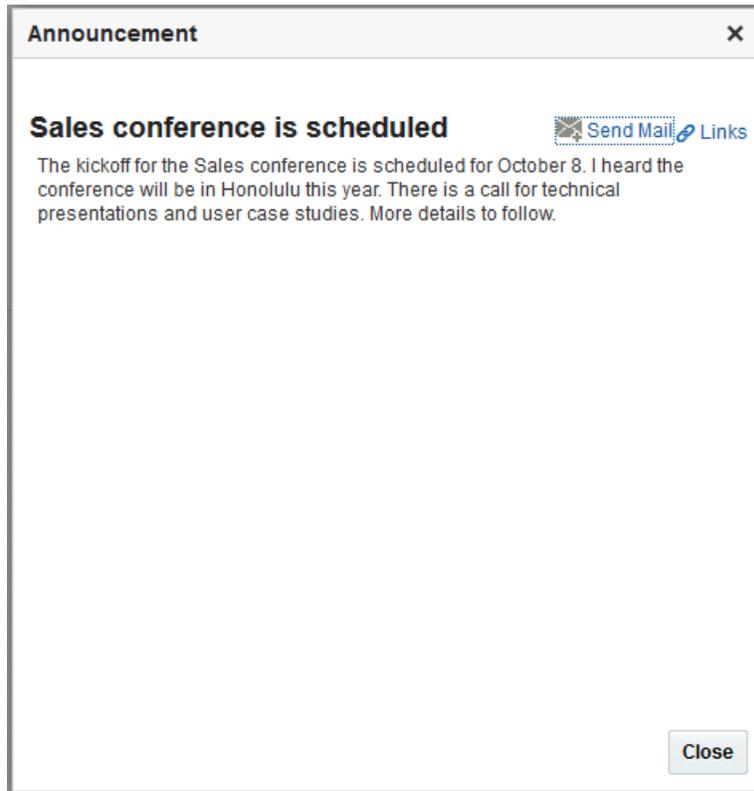
2.   Click **Close** to exit the dialog.

Managing Announcements in the Quick View

You can manage announcements in the Announcements - Quick View with the Announcement Manager. The Announcement Manager provides the functionality that is available in the Announcements view.

System administrators can remove the link to the Announcement Manager. If your system administrator allows this functionality, then you can see the **Open Announcement Manager** icon (Figure 24-15). The Announcement Manager lets you create, edit, delete, (only if you have the permissions to create and edit, or create, edit, and delete) mail, and link announcements. For more information, see Working with Announcements.

Figure 24-15   Open Announcement Manager Icon
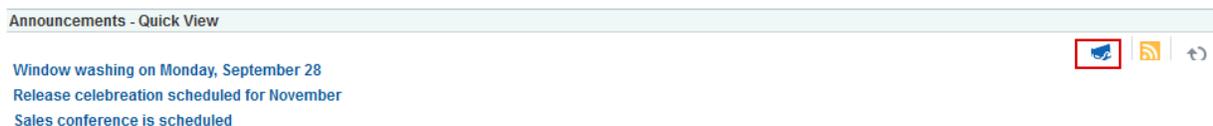
Sending Mail from an Announcement

Each announcement has an associated **Send Mail** icon, which appears when you open an announcement in the Announcements - Quick View, or when you view an announcement from the announcements view.

Figure 24-16 shows the **Send Mail** icon available when you open an announcement from Announcements - Quick View.

Figure 24-16   Send Mail Icon in an Announcement Opened from Announcements - Quick View
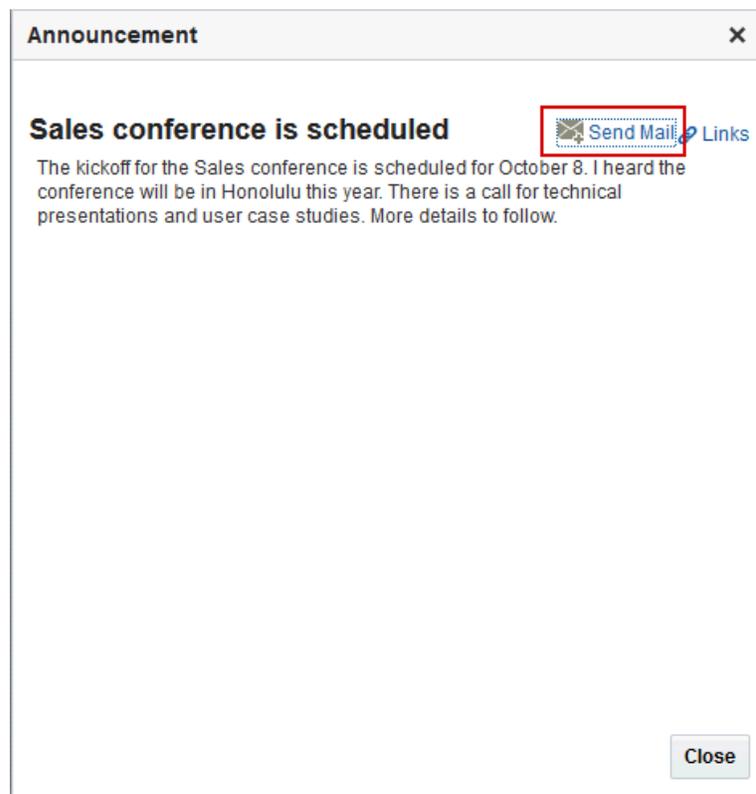
Figure 24-17 shows the **Send Mail** icons that are available in an announcement view.

Figure 24-17   Send Mail Icons in an Announcement View
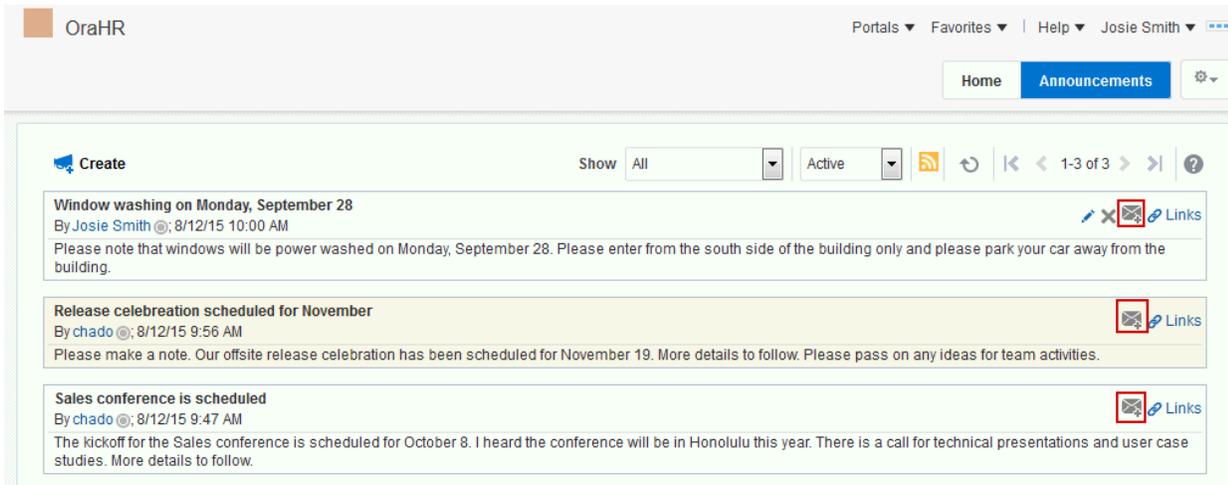
Click the **Send Mail** icon to initiate a mail message containing the announcement text, location, author, and date it was created. This feature makes it easy for you to communicate interesting announcements to others.

The system administrator determines the mail client to use with the **Send Mail** icon. If a local mail client was set up, then a plain text message opens. If WebCenter Portal's Mail feature was set as the mail client, then the HTML Mail Compose dialog opens. With either mail client, you can add or edit the standard, prepopulated message before sending.

Figure 24-18 shows the **Send Mail** window that opens when the **Send Mail** icon for an announcement is clicked.

Figure 24-18   Mail Window from an Announcement Send Mail Action
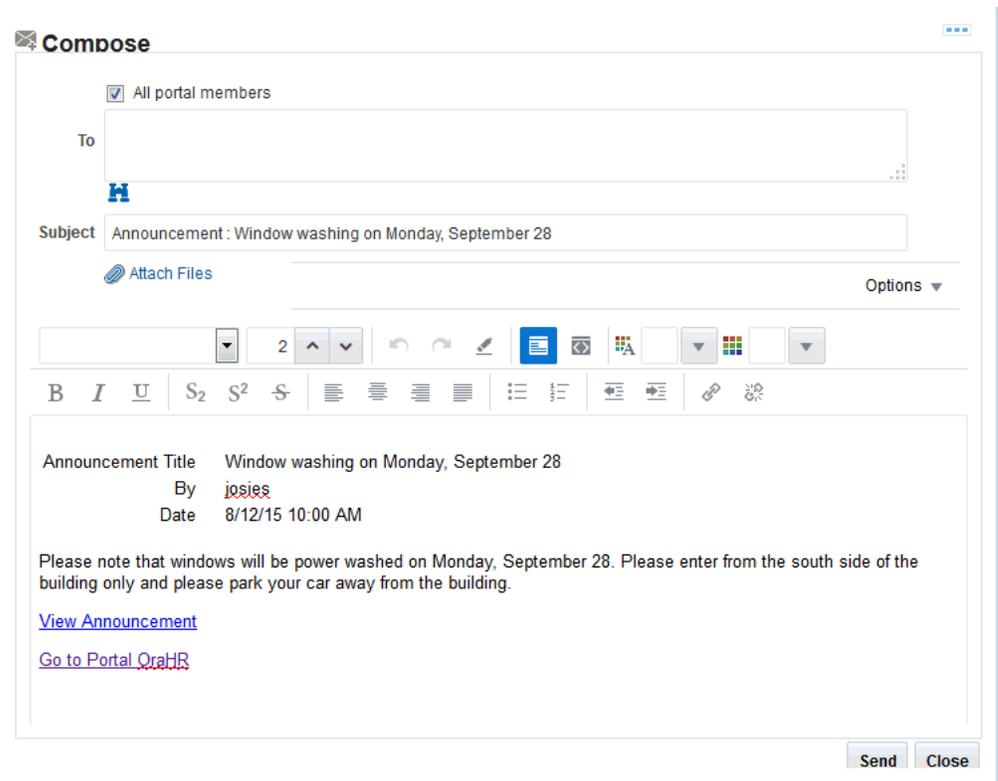
Linking Announcements

Each announcement that you open from the Announcements - Quick View or in the Announcement Manager has an associated **Links** icon in its toolbar to link other assets to the announcement. For example, you can link an announcement to a *new* discussion, document, event, note or URL, or you can link an announcement to an *existing* announcement, discussion, document, or event.

The **Links** icon displays to all users accessing the Announcements and Announcement Manager views, if the Links feature is enabled in the portal.

> **Note:**
>
> For more information about working with links, see Linking Information.

Figure 24-19 shows the Links icon that is available when you open an announcement from the Announcements - Quick View.

Figure 24-19   Links Icon in an Announcement - Quick View
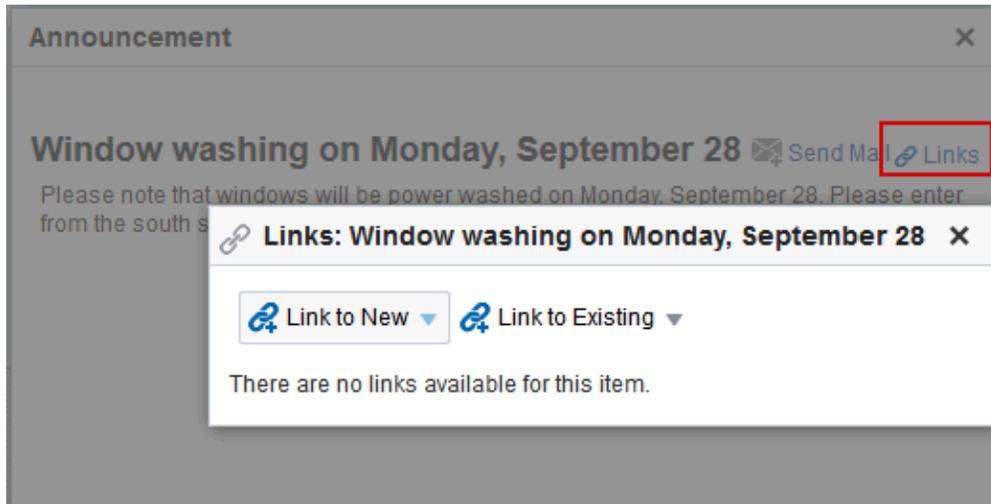
Figure 24-20 shows the Links icons that are available in an announcement view.

Figure 24-20   Links Icons in an Announcement View
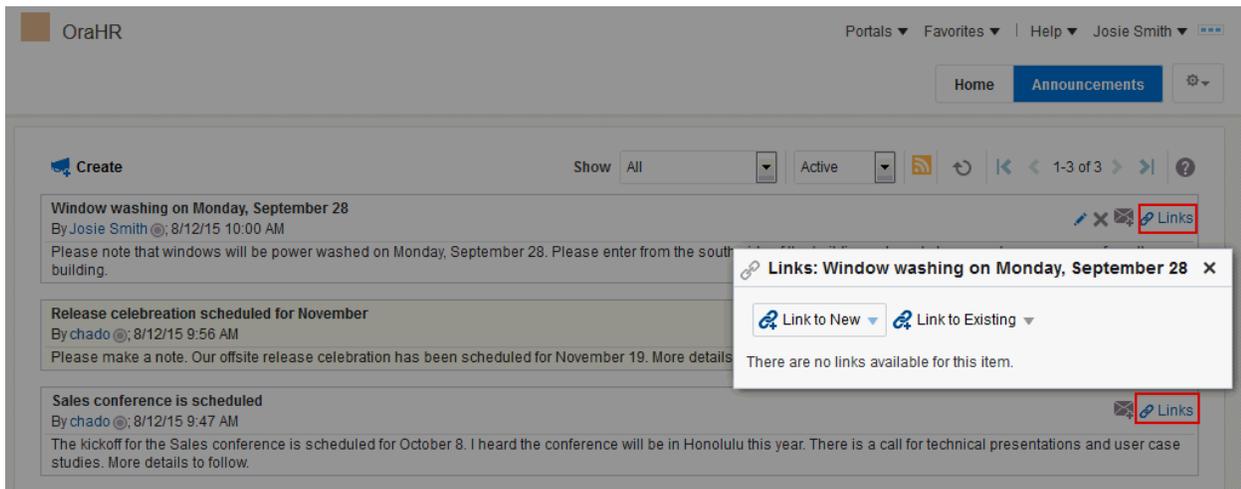
Subscribing to Announcements Using RSS

If RSS is enabled in the portal, you can subscribe to announcements using an RSS Viewer.

Figure 24-21 shows an **Announcements** page with the RSS icon.

Figure 24-21   RSS Icon in Announcements
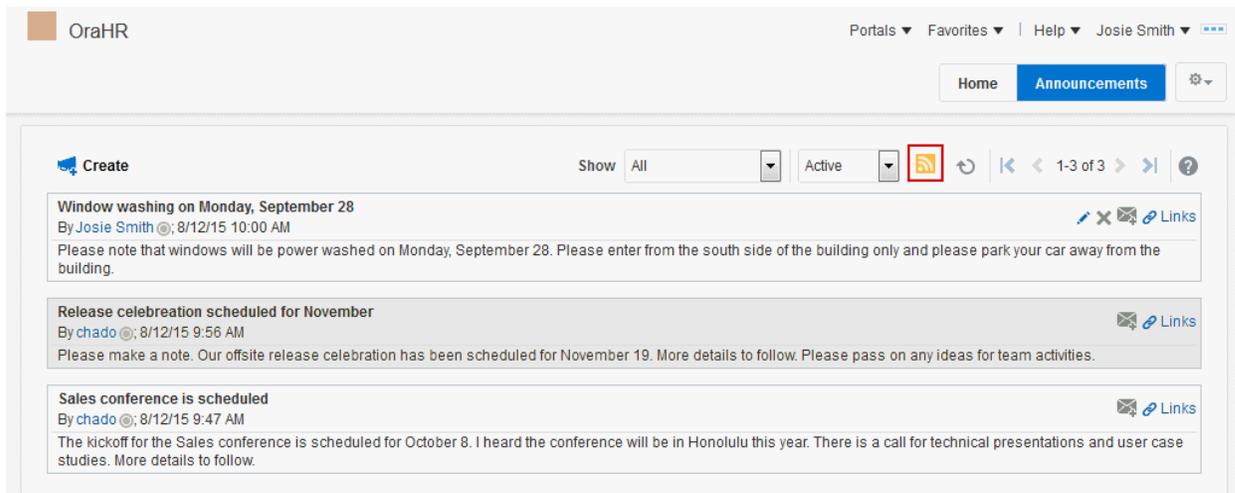
For more information about subscribing to announcements, see Obtaining the Announcements News Feed.

25

Monitoring RSS Feeds

RSS (Really Simple Syndication) provides the ability to publish content from WebCenter Portal as news feeds in RSS 2.0 and Atom 1.0 formats. In addition, RSS enables you to view news feeds from external sources on your portal pages in an RSS Viewer.

> **✎ Note:**
>
> The portal manager has the authority to expose or hide some portal features, such as RSS news feeds, as described in Enabling or Disabling RSS News Feeds for a Portal in *Building Portals with Oracle WebCenter Portal*.
>
> The portal manager adds and configures RSS feeds, as described in Adding RSS Feeds to a Portal in *Building Portals with Oracle WebCenter Portal*.

> **✎ Permissions:**
>
> This chapter is intended for WebCenter Portal users interested in publishing news feeds from WebCenter Portal and external sources. The tasks described in this chapter are available to any WebCenter Portal user.

Topics:

- About RSS
- Obtaining Tool News Feeds
- Refreshing RSS
- Removing RSS Feeds

About RSS

RSS exposes its features in the following ways:

- RSS Icon
- RSS Manager
- RSS View

RSS Icon

RSS news feeds deliver updated content information on discussions, lists, and announcements. Figure 25-1 shows the **RSS** icon available on announcements in the **Announcements** page or console.

> **Note:**
>
> The RSS icon is not available if the portal manager has not enabled RSS in the portal.

Figure 25-1   RSS Icon in Announcements
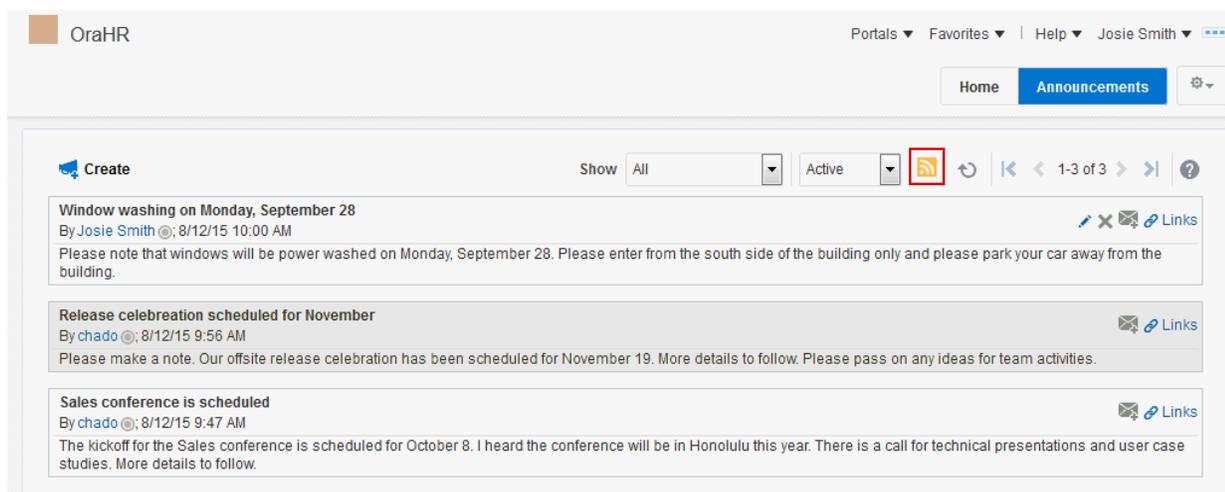
RSS Manager

In a WebCenter Portal, you can obtain news feeds in two ways:

- From tools such as lists, as described in Obtaining Tool News Feeds.
- From external feeds using the RSS Manager, as described in RSS View.

This section includes the following topics:

- Accessing the RSS Manager
- Using the RSS Manager

Accessing the RSS Manager

To access the RSS Manager:

- Click the **RSS** link at the bottom of the WebCenter Portal (Figure 25-2).

> **Note:**
>
> The RSS link is not available if the portal manager has not enabled RSS in the portal. See Adding RSS Feeds to a Portal in *Building Portals with Oracle WebCenter Portal*.

Figure 25-2   RSS Link in a Portal

About WebCenter Portal   RSS   Administrator   Privacy Statement

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Using the RSS Manager

The RSS Manager displays nodes for all the portals for which RSS feeds have been enabled. The news feeds you obtain from WebCenter Portal are context-aware, providing content only from the portal from which they originate.

Portals display in the RSS Manager if RSS is enabled in the portal (see Enabling or Disabling RSS News Feeds for a Portal in *Building Portals with Oracle WebCenter Portal*) and if the tools that include RSS feeds (such as Discussions, Announcements, and Lists) have been enabled in that portal (see Enabling and Disabling Tools and Services Available to a Portal in *Building Portals with Oracle WebCenter Portal*

> **Note:**
>
> Beginning with 12*c* (12.2.1.3.0), Oracle WebCenter Portal has deprecated support for Jive features (announcements and discussions). If you are upgrading from a prior release, these features remain available in your existing installations that are being upgraded.

The level of detail provided through a news feed depends on the feed source. For example, when you pull a news feed from a particular list, it shows recently added or revised row details and provides links to individual rows. When you click such a link, it also takes you back to the portal, with the list content displayed.

Figure 25-3   Expanded Portal Nodes in the RSS Manager

To use the RSS Manager:

1. From the **Filter** list, select the RSS-enabled portals you want to view in the RSS Manager:

- **Show all** to view a list of all the RSS-enabled portals to which you have access.

- **Show joined** to view a list of all the RSS-enabled portals of which you are a member. This is the default selection.

- **Show public** to view a list of all the RSS-enabled portals that are public.

2. Expand a portal node to obtain both RSS 2.0 and Atom 1.0 news feeds.

> **Note:**
>
> The portal manager must enable RSS news feed before you can obtain feed URLs from it. Additionally, your reader of choice must support HTTP authentication.

3. Click the RSS or Atom icon and link to view the feed directly or to copy the feed URL:

- Right-click the *icon* to copy the feed URL using your browser's copy link command.

- Click the *link* to view the feed. Use your login credentials to access the feed viewer.

Make sure you use the feed with an RSS 2.0-enabled or Atom 1.0–enabled reader.

RSS View

RSS allows you to view a news feed from an external site to your portal (Figure 25-4).

Figure 25-4   RSS View

Your portal manager can configure RSS to display content from any external RSS feed. See Editing the Feed Location of an RSS Task Flow in *Building Portals with Oracle WebCenter Portal*. Additionally, WebCenter Portal supports login credential passing, by using an external application. See Providing Login Information for External Applications.

Accessing External Applications

Each time you access a secure news feed item, you must log on to that secure application to view content. You can either supply login credentials each time you access an application, or let an external application store and manage your login credentials. After your credentials for a particular application are stored, you are logged in to that application automatically when you log in to WebCenter Portal. You can provide this capability for all frequently used external applications.

Perform the steps listed in Providing Login Information for External Applications if the secured application you want to access is not registered as an external application.

Obtaining Tool News Feeds

Each participating tool provides news feeds from locations unique to that tool.

This section steps you through obtaining those feeds. It includes the following topics:

- Obtaining the Discussion Forums News Feed
- Obtaining List News Feeds
- Obtaining the Announcements News Feed

Obtaining the Discussion Forums News Feed

Use discussion forum news feeds to keep track of additions and revisions to a selected portal's discussions. There are three locations from which to obtain discussion forums news feed URLs: the RSS Manager, the Discussions page (or console), and the Discussion Forums view. All discussion RSS and Atom URLs provide the same feed; that is, additions and revisions to all discussions in a selected portal.

This section includes the following topics:

- Obtaining a Discussion Forum News Feed from the RSS Manager
- Obtaining a News Feed from the Discussions Page
- Obtaining a News Feed from a Discussion Forums View

Obtaining a Discussion Forum News Feed from the RSS Manager

The RSS Manager provides discussion forum news feeds for both RSS 2.0 and Atom 1.0 news readers. Select a feed from any news-feed-enabled portal of which you are a member. Use discussion forum news feeds to track additions and revisions to a selected portal's discussion forums.

To obtain a discussion forum news feed URL from the RSS Manager:

1. Click the **RSS** link at the bottom of WebCenter Portal (Figure 25-5).

> ✎ **Note:**
>
> The RSS link is not available if the portal manager has not enabled RSS in the portal.

Figure 25-5   RSS Link

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2. In RSS Manager, if required, expand the node of the portal that contains the discussions you want to use as a news feed.

    You can expand a portal node by clicking the **Expand** icon to the left of it or by right-clicking the portal name and selecting an expand option from the menu.

3. Right-click the **RSS 2.0** or **Atom 1.0** icon next to **Discussions** (Figure 25-6), and, from the resulting context menu, select the copy-link command.

    For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 25-6   RSS 2.0 and Atom 1.0 Icons Next to a Discussions Node in the RSS Manager
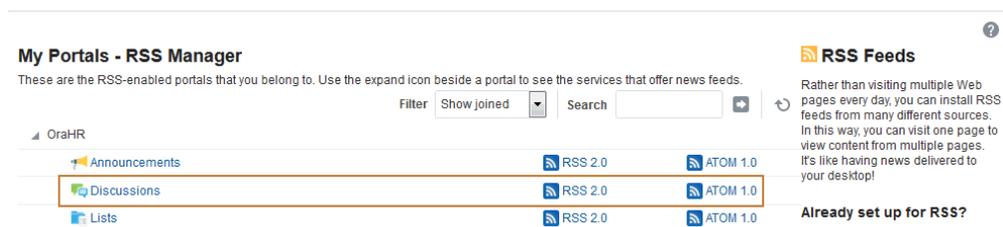
Alternatively, if you drag the **RSS** icon onto a news reader, you can avoid most of the other steps. You may need to enter your WebCenter Portal credentials. See About RSS for more information.

4. Go to your news reader and initiate an add-subscription action.

    How you do this depends on the news reader you use.

5. Paste the link you copied in step 3 into the relevant field in your preferred news reader.

    You may need to enter your WebCenter Portal credentials. See About RSS for more information.

Obtaining a News Feed from the Discussions Page

The **Discussions** page (or console) provides a convenient location for grabbing a news feed URL while monitoring discussions.

To get an RSS URL for all discussions of a portal from the Discussions page:

1. Go to the portal that contains the discussion forums you want to use as an RSS feed.

2. Click **Discussions** on the navigation bar to open the **Discussions** page (or console).

The **Discussions** page is available in a portal if Discussions is enabled and a Discussions page has been added by the portal manager. For information about enabling tools in a portal, see Enabling and Disabling Tools and Services Available to a Portal in *Building Portals with Oracle WebCenter Portal*.

To expose the Discussions page to all portal members, the portal manager needs to add the page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation in *Building Portals with Oracle WebCenter Portal*. For a page to show in portal navigation, the **Visibility** check box for the page must also be selected. For more information, see Showing or Hiding a Page in the Portal Navigation in *Building Portals with Oracle WebCenter Portal*.

3. Right-click the **RSS** icon on the **Discussions** page (Figure 25-7), then select the copy-link command.

> **Note:**
>
> The RSS icon is not available if the portal manager has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 25-7   RSS Icon on a Discussions Page
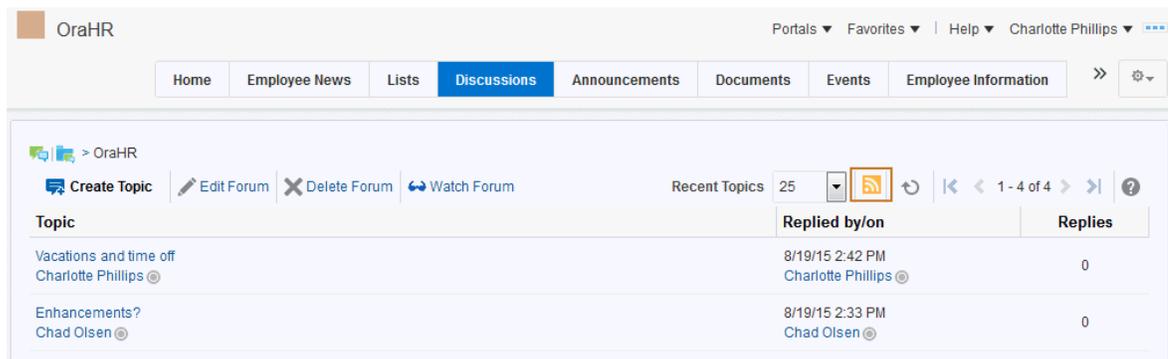
Alternatively, if you drag the **RSS** icon onto your news reader, you can avoid most of the other steps. You may need to enter your WebCenter Portal credentials. See About RSS for more information.

4. Go to your RSS reader and initiate an add-subscription action.

How you do this depends on the RSS reader you use.

5. Paste the link you copied in step 3 into the relevant field in your preferred RSS reader.

You may need to enter your WebCenter Portal credentials. See About RSS for more information.

> **Note:**
>
> The news feed URL on the Discussions page is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, then do either of the following:
>
> • Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
>
> • Get the Atom 1.0 URL from the RSS Manager and use that URL here. See Obtaining the Discussion Forums News Feed for more information.

Obtaining a News Feed from a Discussion Forums View

The Discussion Forums view provides another location from where you can obtain a discussions news feed for a selected portal. The placement of this view within a portal is at the discretion of the portal's manager. But, wherever you find it, an **RSS** icon is available to provide you with an RSS news feed URL. This section describes how to use it.

To obtain a news feed URL from a Discussion Forums view:

1. Go to the page in the required portal that contains discussion forums.

2. Right-click the **RSS** icon on the view (Figure 25-8), and then select the copy-link command.

> **Note:**
>
> The RSS icon is not available if the portal manager has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 25-8   RSS Icon in a Discussion Forums View
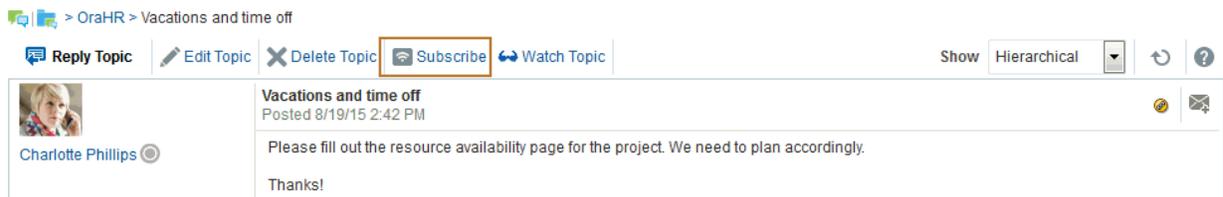
Alternatively, if you drag the **RSS** icon onto your news reader, you can avoid most of the other steps.

You may need to enter your WebCenter Portal credentials. See About RSS for more information.

3. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

> **Note:**
>
> The news feed URL in the Discussions view is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:
>
> • Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
>
> • Get the Atom 1.0 URL from the RSS Manager and use that URL here. See Obtaining the Discussion Forums News Feed for more information.

You may need to enter your WebCenter Portal credentials. See About RSS for more information.

Obtaining List News Feeds

Lists provide a vital form of tracking that can be used to track just about everything within an organization. For example, a group might want a membership list that outlines assigned roles and contact information. A project lead might set up a list that tracks issue resolution.

It follows that it would be useful to track revisions to such lists from one convenient location: your favorite news reader.

Lists provides two options for keeping track of changes through a news reader:

• Keep track of all recently added or modified lists in a given portal.

• Keep track of recently added or modified data rows in a given list.

You can obtain the news feed URL for lists from three locations: the RSS Manager, the **Lists** page, and any Lists view on a given page. The RSS Manager and the **Lists** page provide access to both types of Lists feeds. Individual List views provide feeds for data changes to the rows of the displayed list.

The following topics describe how to obtain a news feed for recently added or modified list rows or lists from a selected portal:

• Obtaining a List News Feed from the RSS Manager

• Obtaining a News Feed from the Lists Page

• Obtaining a News Feed from Lists

Obtaining a List News Feed from the RSS Manager

The RSS Manager provides two types of list news feeds: a feed of recently added or revised lists in a portal and a feed of recent data changes to the rows of one particular list. Additionally, the RSS Manager provides feeds for an RSS 2.0 reader and an Atom

1.0 reader. The main requirement for any news reader you use is that it supports HTTP authentication (for more information, see About RSS).

To obtain a list news feed from the RSS Manager:

1. Click the **RSS** button at the bottom of WebCenter Portal (Figure 25-9).

> **Note:**
>
> The RSS link is not available if the portal manager has not enabled RSS in the portal.

Figure 25-9   RSS Link

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2. In the **RSS Manager**, expand the node for the portal that contains the lists from which to obtain an RSS feed.

3. Right-click the **RSS 2.0** or **Atom 1.0** icon next to **List Service** to get RSS feeds for all lists in the portal (Figure 25-10), and from the resulting context menu, select the copy-link command.

> **Note:**
>
> The RSS icon is not available if the portal manager has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 25-10   Lists Node on the RSS Manager Page

Alternatively, if you drag the news feed icon onto your reader you can omit most of the other steps. You may need to enter your WebCenter Portal credentials. See About RSS for more information.

4. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

5. Paste the link you copied in step 3 into the relevant field in your preferred RSS reader.

   You may need to enter your WebCenter Portal credentials. See About RSS for more information.

Obtaining a News Feed from the Lists Page

The **Lists** page is available in a portal if Lists is enabled and the Lists page (or console) has been added by the portal manager. For information about enabling tools in a portal, see Enabling and Disabling Tools and Services Available to a Portal in *Building Portals with Oracle WebCenter Portal*.

The **Lists** page contains all the lists available in your portal. As you navigate through portal pages, you may come across a list you find particularly informative, such as a list of project issues. Each list comes with its own RSS news feed, making it easy to subscribe to additions and revisions to the list.

Note that the **Lists** page provides news feeds for RSS 2.0 readers only. If you want to obtain a feed for an Atom 1.0 news reader, use the RSS Manager.

To obtain a news feed from the **Lists** page:

1. Go to the portal that contains the list(s) you want to track.

2. Navigate to the **Lists** page or console (if available).

   To expose the **Lists** page to all portal members, the portal manager needs to add the page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation in *Building Portals with Oracle WebCenter Portal*. For a page to show in portal navigation, the **Visibility** check box for the page must also be selected. For more information, see Showing or Hiding a Page in the Portal Navigation in *Building Portals with Oracle WebCenter Portal*.

3. Open a required list.

4. Right-click the **RSS** icon, and select the copy-link command.

   > **Note:**
   >
   > The RSS icon is not available if the portal manager has not enabled RSS in the portal.

   For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 25-11   A List on the Lists Page

5. Go to your RSS reader and initiate an add-subscription action.

6. Paste the link you copied into the relevant field in your RSS reader.

> **Note:**
>
> The news feed URL on the **Lists** page is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:
>
> • Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
>
> • Get the Atom 1.0 URL from the RSS Manager and use that URL here. See Obtaining a List News Feed from the RSS Manager for more information.

You may need to enter your WebCenter Portal credentials. See About RSS for more information.

Obtaining a News Feed from Lists

Each **Lists** view provides RSS news feeds for recent additions and revisions to all of the lists it contains and also for recent data changes to the rows of an individual list.

To obtain a news feed from a Lists view:

1. Go to the portal that contains the list you want to track.

2. To obtain a news feed of data changes to the rows of an individual list, display the list in the right pane by selecting the list name from the left pane (Figure 25-12), then right-click the **RSS** icon in the right pane, and select the copy-link command from the resulting context menu.

> **Note:**
>
> The RSS icon is not available if the portal manager has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 25-12   A List view

Alternatively, if you drag the **RSS** icon onto your news reader you can omit most of the other steps. You may need to enter your WebCenter Portal credentials. See About RSS for more information.

3. Go to your RSS reader and initiate an add-subscription action.

   How you do this depends on the RSS reader you use.

4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

> **Note:**
>
> The news feed URL in the List view is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:
>
> • Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
>
> • Get the Atom 1.0 URL from the RSS Manager and use that URL here. See Obtaining a List News Feed from the RSS Manager for more information.

You may need to enter your WebCenter Portal credentials. See About RSS for more information.

Obtaining the Announcements News Feed

Announcements are excellent candidates for news feeds. Usually they are short, concise, and full of timely and valuable information. If you are a member of multiple portals, it would be convenient to be able to access all announcements from one location: your favorite news reader.

You can obtain an announcement news feed from three locations: the RSS Manager, the Announcements page (or console), and an Announcements view.

This section includes the following topics:

• Obtaining an Announcements News Feed from the RSS Manager

• Obtaining a News Feed from the Announcements Page

• Obtaining a News Feed from the Announcements View

Obtaining an Announcements News Feed from the RSS Manager

The RSS Manager provides two types of feeds for announcements: RSS 2.0 and Atom 1.0. Use either of these to keep track of all new and revised announcements in a particular portal.

To obtain an Announcements news feed from the RSS Manager:

1. Click the **RSS** link at the bottom of WebCenter Portal (Figure 25-13).

> **Note:**
>
> The RSS link is not available if the portal manager has not enabled RSS in the portal.

Figure 25-13   RSS Link

2. In the **RSS Manager**, expand the node for the portal that contains the announcements you want to track through a news reader.

   You can expand a portal node by clicking the **Expand** icon to the left of it or by right-clicking the portal name and selecting an expand option from the menu.

3. Right-click the **RSS 2.0** or **Atom 1.0** icon next to **Announcements** (Figure 25-14), and, from the resulting context menu, select the copy-link command.

   For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 25-14   Announcements Node on the RSS Page
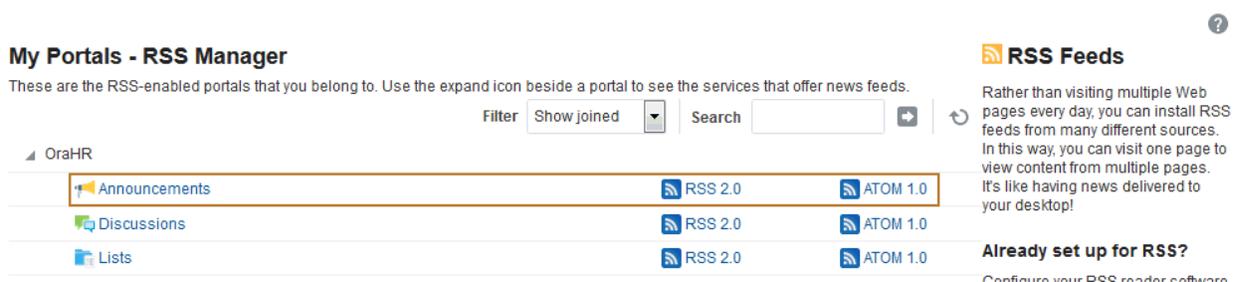
Alternatively, if you drag the news feed icon onto your reader, you can omit most of the other steps. You may need to enter your WebCenter Portal credentials. See About RSS for more information.

4. Go to your RSS reader and initiate an add-subscription action.

How you do this depends on the RSS reader you use.

5. Paste the link you copied in step 3 into the relevant field in your preferred RSS reader.

You may need to enter your WebCenter Portal credentials. See About RSS for more information.

Obtaining a News Feed from the Announcements Page

The Announcement Manager is exposed from the Announcements page (or console) in WebCenter Portal. You can use it to create and revise announcements and to obtain an announcements news feed URL.

Unlike the RSS Manager, the Announcement Manager provides a news feed only for RSS 2.0 news readers. If you prefer an Atom 1.0 feed, use the RSS Manager to obtain the feed URL. See Obtaining an Announcements News Feed from the RSS Manager for more information.

To obtain a news feed from the Announcements page:

1. Open the **Announcements** page or console.

The **Announcements** page (or console) is available in a portal if Announcements is enabled and the Announcements page has been added by the portal manager. For information about enabling tools in a portal, see Enabling and Disabling Tools and Services Available to a Portal in *Building Portals with Oracle WebCenter Portal*.

To expose the Discussions page to all portal members, the portal manager needs to add the page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation in *Building Portals with Oracle WebCenter Portal*. For a page to show in portal navigation, the **Visibility** check box for the page must also be selected. For more information, see Showing or Hiding a Page in the Portal Navigation in *Building Portals with Oracle WebCenter Portal*.

For information about announcements, see Working with Announcements.

> **Note:**
>
> You can also access the Announcement Manager by clicking the **Open Announcement Manager** icon in the Announcements view. This icon is not displayed in the Announcements view if you do not have the required privileges.

2. Right-click the **RSS** icon on the right on the **Announcements** page or console (Figure 25-15), and select the copy-link command from the resulting context menu.

> **Note:**
>
> The RSS icon is not available if the portal manager has not enabled RSS in the portal.

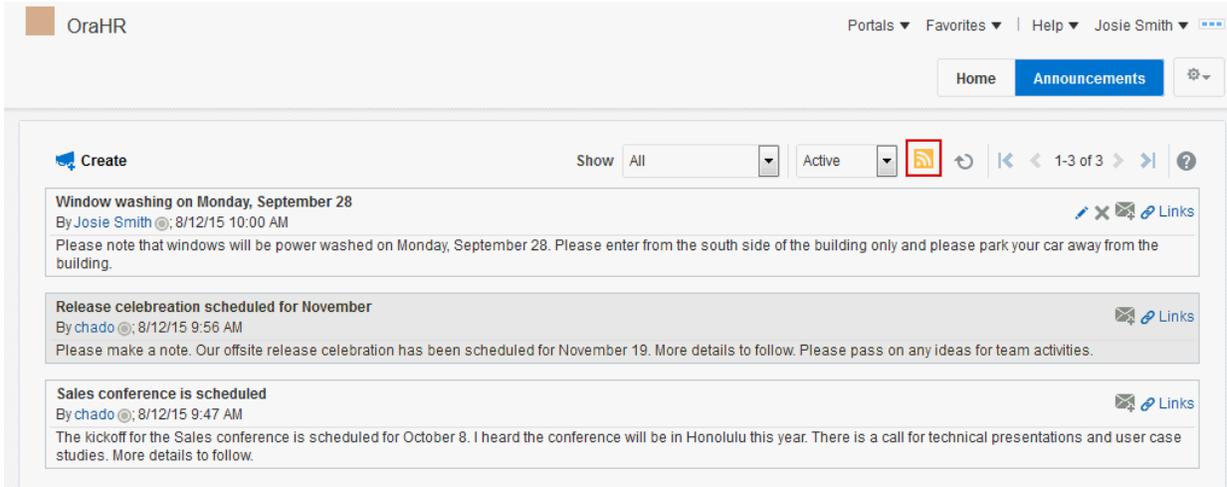For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 25-15   RSS Icon on the Announcements Page

Alternatively, if you drag the news feed icon onto your reader you can omit most of the other steps. You may need to enter your WebCenter Portal credentials. See About RSS for more information.

3. Go to your RSS reader and initiate an add-subscription action.

How you do this depends on the RSS reader you use.

4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

> **Note:**
>
> The news feed URL on the Announcements page is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:
>
> • Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
>
> • Get the Atom 1.0 URL from the RSS Manager and use that URL here. See Obtaining an Announcements News Feed from the RSS Manager for more information.

You may need to enter your WebCenter Portal credentials. See About RSS for more information.

Obtaining a News Feed from the Announcements View

Announcements also provide access to a news feed URL. Like the Announcements page, the view provides feeds only for RSS 2.0 news readers. If you prefer an Atom

1.0 feed, use the RSS Manager to obtain the feed URL. See Obtaining an Announcements News Feed from the RSS Manager for more information.

To obtain a news feed from the Announcements view:

1. Go to the page that contains the Announcements view.

2. Right-click the **RSS** icon on the Announcements view (Figure 25-16), and select the copy-link command from the resulting context menu.

> **Note:**
>
> The RSS link is not available if the portal manager has not enabled RSS in the portal.

For example, in the Firefox browser, the copy-link command is **Copy Link Location**. In the Internet Explorer browser, the copy-link command is **Copy Shortcut**.

Figure 25-16   RSS Icon in the Announcements View

Alternatively, if you drag the news feed icon onto your reader you can omit most of the other steps. You may require to enter your WebCenter Portal credentials. See About RSS for more information.

3. Go to your RSS reader and initiate an add-subscription action.

    How you do this depends on the RSS reader you use.

4. Paste the link you copied in step 2 into the relevant field in your preferred RSS reader.

> **Note:**
>
> The news feed URL in the Announcements view is for RSS 2.0 news readers only. If you prefer to use an Atom 1.0 news reader, do either of the following:
>
> • Append `&format=ATOM1.0` to the RSS news feed URL you pasted.
>
> • Get the Atom 1.0 URL from the RSS Manager and use that URL here. See Obtaining an Announcements News Feed from the RSS Manager for more information.

You may need to enter your WebCenter Portal credentials. See About RSS for more information.

Refreshing RSS

The RSS component, along with other page components, gets refreshed with every server request. However, as the content from news feeds may be dynamic, you have the option of refreshing RSS yourself by clicking the **Refresh** icon (Figure 25-17), when required.

To see the latest RSS feeds, click the **Refresh** icon (Figure 25-17).

> **Note:**
>
> Do not click the Reload or Refresh button in your browser. Click the **Refresh** icon to update your view.

Figure 25-17   Refresh Icon on an RSS View
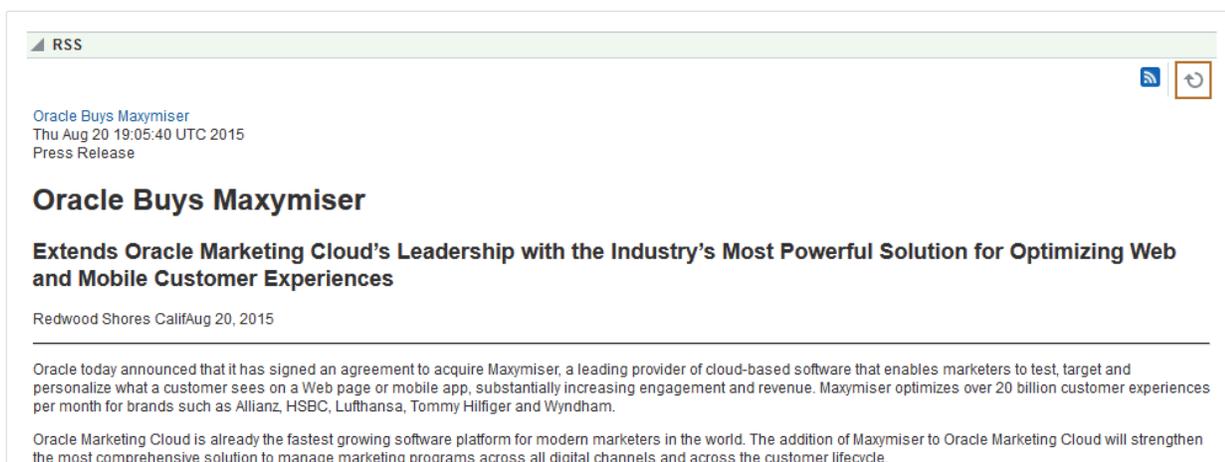
The view updates and displays latest data from the external source.

Removing RSS Feeds

If the Delete RSS icon is available, you can delete the RSS component from a page by using the **Delete RSS** icon (Figure 25-18). Portal managers can specify the remove setting for the RSS view. See Deleting the RSS Task Flow in*Building Portals with Oracle WebCenter Portal*.

Figure 25-18   Remove Icon on an RSS View

When you click the **Delete RSS** icon, the Delete Component dialog displays. Click **Delete** in this dialog to delete the RSS component from the page.

Part VI

Staying Organized

This part of *Using Portals in Oracle WebCenter Portal* describes portal features you can use for personal organization, such as favorite web sites, calendars and events, personal notes, and lists.

- Managing Your Favorites
- Working with Calendars and Events
- Managing Your Notes
- Working with Lists
- Linking Information
- Working with Tags

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26
Managing Your Favorites

Create, organize, and manage Favorites to keep your own personal list of favorite web sites and pages to access from any browser.

> ✎ **Permissions:**
>
> The tasks described in this chapter are available to any WebCenter Portal user.

Topics:

- About Favorites
- Accessing Your Favorites
- Adding Favorites
- Adding Favorites Folders
- Managing Favorites in Preferences

About Favorites

The great advantage to WebCenter Portal Favorites is their portability. Favorites are not dependent on a particular type of browser, so any browser you use to access WebCenter Portal provides access to your WebCenter Portal Favorites. You can create favorites that link to sites within WebCenter Portal or to external sites. This makes WebCenter Portal the best choice for managing and tracking your favorites list.

> ✎ **Note:**
>
> URLs that start with a slash (/) are the only URLs recognized as internal to WebCenter Portal. If you create a favorite to a WebCenter Portal page that does not start with a slash (/), but rather starts with `http://`, when you navigate to that page through your favorite, it will first show a message warning that you are leaving WebCenter Portal.

Favorites are personal. The favorites you see on the **Favorites** menu are the favorites you create. No other user sees your favorites, and you do not see any other user's favorites. If you like, though, you can share favorites with other users, by making one or more of them discoverable in a search.

Favorites are created at the application level; consequently, when you move from one portal to another, the favorites on the **Favorites** menu stay the same.

WebCenter Portal provides a Manage Favorites page in Preferences, which you can use to further customize your favorites. Use the Manage Favorites page to:

- Control the display order of links on the **Favorites** menu

- Choose a method for opening a favorite target

- Create folders for organizing your favorites

- Create, edit, or delete favorite links and folders

For more information about the Manage Favorites page, see Managing Favorites in Preferences.

Accessing Your Favorites

The easiest way to access the Favorites user interface is to open the **Favorites** menu (Figure 26-1). However, the availability of navigational links and menus, such as the **Favorites** menu, is determined by the people who design and build your portal. This being so, you may not see a **Favorites** menu.

Figure 26-1   Favorites Menu
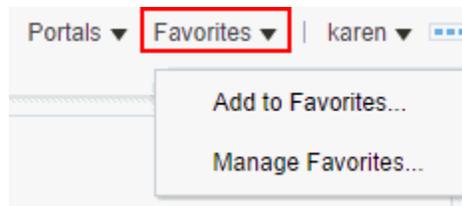
Adding Favorites

Add favorite links for quick access to WebCenter Portal pages and the web sites you find most useful. If you like, you can share favorites with other users by making one or more of them discoverable in a search.

You can add favorites if your portal includes a **Favorites** menu as described here, or through the Manage Favorites page in Preferences (see Adding a Favorite Using the Manage Favorites Page).

To add a favorite:

1. Obtain the URLs you want to save in your favorites:

    - For pages external to WebCenter Portal, go to a favorite web location and copy its URL.

    - For WebCenter Portal pages, log in and go to the page you want to make a favorite.

    - If you know the URL, enter it manually when prompted.

> **Note:**
>
> URLs that start with a slash (/) are the only URLs recognized as internal to WebCenter Portal. If you create a favorite to a WebCenter Portal page that does not start with a slash (/), but rather starts with `http://`, when you navigate to that page through your favorite, it will first show a message warning that you are leaving WebCenter Portal.

2. From the **Favorites** menu, select **Add to Favorites**.

3. In the **Name** field in the Add to Favorites dialog, enter a display name for the favorite.

Figure 26-2   Add To Favorites Dialog
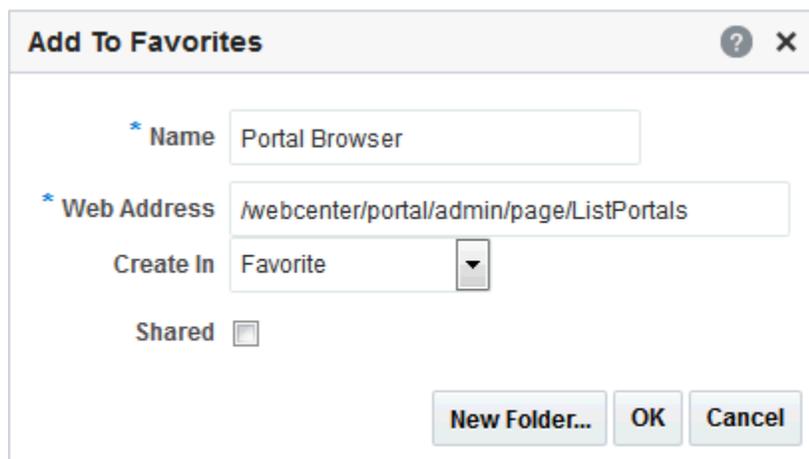
> **Note:**
>
> The value you enter for **Name** becomes the favorite's link text. The name of the current page is provided by default. You can change this or leave it as is.

4. In the **Web Address** field, enter the target URL for the favorite.

    The default entry for this field is the URL of the current WebCenter Portal page; you have three options:

    •   Leave the default entry (the path to the current page) as is.

    •   Paste a copied URL.

    •   Enter the URL manually.

5. From the **Create In** pick list, select the favorites folder in which to create the favorite.

> **See Also:**
>
> WebCenter Portal provides one top-level default folder: **Favorites**. You can also create your own folders by clicking the **New Folder** button.
>
> See Adding Favorites Folders.

6. To enable this favorite to be discovered by other users during a search, select **Shared**.

   Deselect **Shared** if you do not want other users to have any access to this favorite.

7. Click **OK** to add the favorite to the **Favorites** menu and the Manage Favorites page.

Adding Favorites Folders

To keep your list of favorites manageable, you can organize them into folders. The folder hierarchy you create appears on the **Favorites** menu and on the Manage Favorites page. Because the favorites folders you create are user-level customizations, they display only in your view of WebCenter Portal.

> **Note:**
>
> You can create a favorites folder as described here, or on the Manage Favorites page (see Editing Favorites and Favorites Folders).
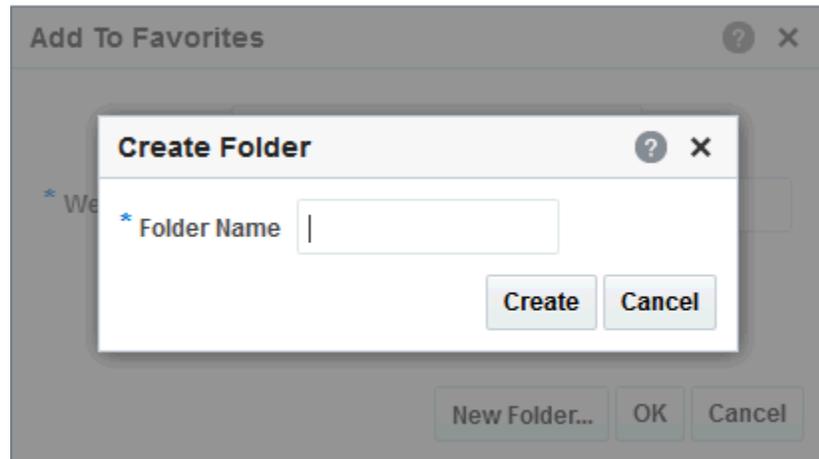
To add a favorites folder:

1. Open the Add To Favorites dialog.

> **See Also:**
>
> For more information, see Accessing Your Favorites.

2. Click **New Folder** to open the Create Folder dialog.

Figure 26-3   New Folder Button and Create Folder Dialog

3. In the **Folder Name** field, enter a name for the new folder.

4. Click **Create** to save the new folder and close the Create Folder dialog.

    The new folder appears as a selection in the Add To Favorites dialog on the **Create In** list.

5. Click **OK** to close the Add To Favorites dialog.

Managing Favorites in Preferences

The Manage Favorites page in Preferences provides a convenient, one-stop location for creating, editing, and deleting favorite links and folders and rearranging their display order on the **Favorites** menu.

Figure 26-4   Manage Favorites Page
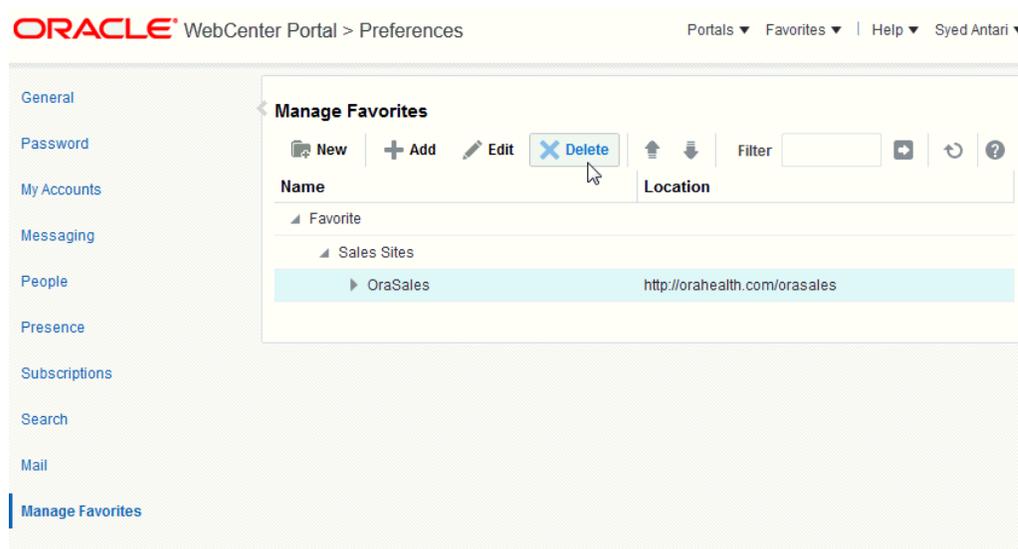
This section describes how to use the controls available on the Manage Favorites page. It includes the following topics:

- Adding a Favorite Using the Manage Favorites Page
- Adding a Favorites Folder Using the Manage Favorites Page
- Editing Favorites and Favorites Folders
- Rearranging Favorites and Favorites Folders
- Searching for Favorites
- Deleting Favorites and Favorites Folders

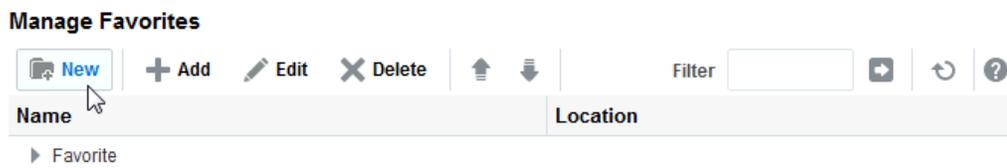## Adding a Favorites Folder Using the Manage Favorites Page

To keep your list of favorites manageable, you can organize them into folders. The folder hierarchy you create appears in the **Favorites** menu and on the Manage Favorites page. Because the favorite folders you create are user-level customizations, they display only in your view of WebCenter Portal.

In addition to adding favorites folders through the Add To Favorites dialog (see Adding Favorites Folders) you can add them through the Manage Favorites page.

To add a favorites folder:

1. Open the Manage Favorites page (for more information, see Accessing Your Favorites).
2. Optionally, select the folder in which to create the new folder.
3. Click the **New** icon in the toolbar.

Figure 26-5   New Icon in Manage Favorites Page

4. In the resulting Create Folder dialog, in the **Folder Name** box enter a display name for the favorite folder.

Figure 26-6   Create Folder Dialog
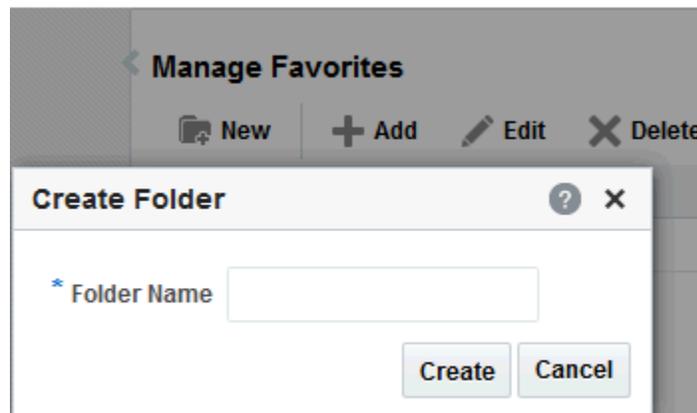
5. Click **Create**.

   The new folder appears on the Manage Favorites page and in the **Favorites** menu.

Adding a Favorite Using the Manage Favorites Page

When you want to add multiple favorites, use the Manage Favorites page rather than the Favorites menu. This is because the Manage Favorites page remains open until you close it, saving you steps in the creation process.

To add favorites:

1. Obtain the URLs you want to save in your favorites:

   • For pages external to WebCenter Portal, go to a favorite web location and copy its URL.

   • For WebCenter Portal pages, log in and go to the page you want to make a favorite.

   • If you know the URL, enter it manually when prompted.

   > **Note:**
   >
   > URLs that start with a slash (/) are the only URLs recognized as internal to WebCenter Portal. If you create a favorite to a WebCenter Portal page that does not start with a slash (/), but rather starts with `http://`, when you navigate to that page through your favorite, it will first show a message warning that you are leaving WebCenter Portal.
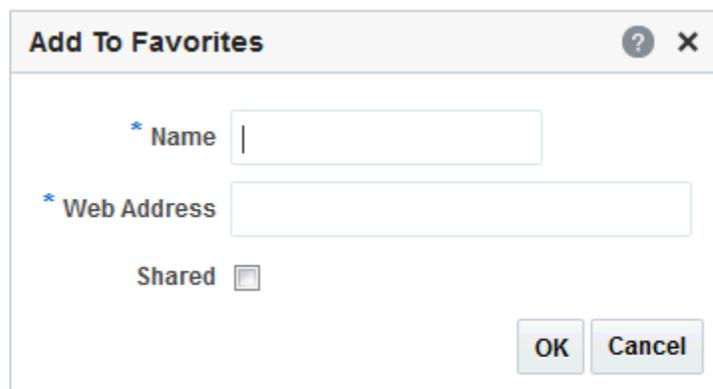
2. Open the Manage Favorites page.

3. Click in the row of the folder in which to create the new favorite.

4. Click the **Add** icon in the toolbar.

Figure 26-7   Add Icon in Manage Favorites Page
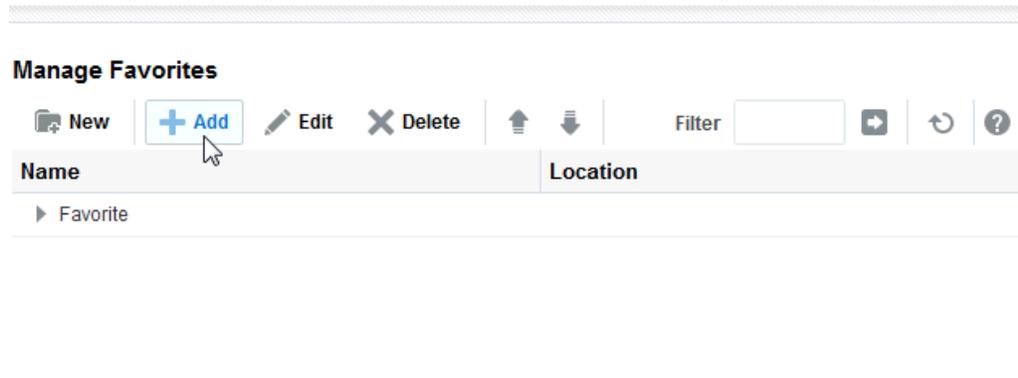
5. In the Add To Favorites dialog, in the **Name** field enter a display name for the favorite.

Figure 26-8   Add To Favorites Dialog

6. In the **Web Address** field, paste the URL you copied in step 1, or enter a URL manually.

7. To enable the sharing of this favorite in other users' search results, select **Shared**.

8. Click **OK**.

    The new favorite appears in the Manage Favorites page and in the **Favorites** menu.

Editing Favorites and Favorites Folders

The Manage Favorites page provides controls for editing favorites and favorites folders. Use this feature to revise a folder or favorite name, a favorite target URL, or a open behavior for a favorite. Open behavior determines how a favorite target URL opens from the **Favorites** menu or the Manage Favorites page. Choose from opening a favorite target in the current browser window or a new browser window or tab.

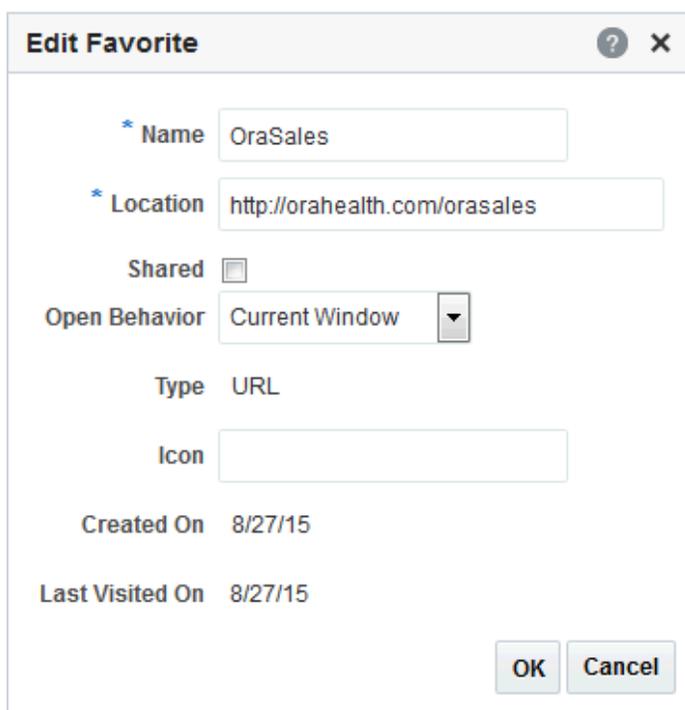To edit a favorite or favorite folder:

1. Open the Manage Favorites page.

2. If necessary, expand favorites folders to access the favorite or folder you want to edit.

    > ⚲ **Tip:**
    >
    > To expand a folder, click the Expand icon to the left of the folder.

3. Click in the row of the favorite or favorite folder you want to edit, and click **Edit** in the toolbar to open the Edit Favorite dialog or Edit Folder dialog.

Figure 26-9   Edit Favorite Dialog

4. Edit values as desired:

Table 26-1   Values for Edit Favorite and Edit Folder Dialogs

Label	Applies To	Value
Name	Edit Favorite and Folder	The display name of the favorite or folder. Enter a name to appear in the **Favorites** menu and on the Manage Favorites page.
Location	Edit Favorite	The favorite target URL.
Shared	Edit Favorite	Specify whether to allow other users to discover this favorite through a search. Selected means yes, deselected means no.

Table 26-1   (Cont.) Values for Edit Favorite and Edit Folder Dialogs

Label	Applies To	Value
Open Behavior	Edit Favorite	An option for specifying how a favorite opens Choose from: • **New Window**—The favorite opens in a new browser tab or window. • **Current Window**—The current browser window redraws, displaying the favorite target. **Note:** The open behavior you specify for a Favorite does not apply to Favorites returned in a search. To control the open behavior of a Favorite returned in a search, right click the search result and select an open behavior from your browser's context menu.
Type	Edit Favorite	(Read-only) The link type, always URL.

Icon	Edit Favorite and Folder	Enter the location of an icon to display along with the display name shown in the **Favorites** menu
		
		Enter any of the following formats:
		
		• An absolute path to the image, such as:
		
		`http://oracleimg.com/admin/images/ocom/hp/`
		`oralogo_small.gif`
		• A path relative to the source page, such as:
		
		`bullet.jpg`
		• A path relative to the application's context root, such as:
		
		`/images/error.png`
		• A path relative to the web server by application name, such as:
		
		`//adf-richclient-demo-context-root/images/error.png`

Created On	Edit Favorite and Folder	(Read-only) The date the favorite or folder was created.
Last Visited On	Edit Favorite	(Read-only) The date the favorite was last visited using the favorites link.

5. Click **OK** to save your changes.

Rearranging Favorites and Favorites Folders

The Manage Favorites page provides controls for moving a favorite or a favorite folder higher or lower in the **Favorites** menu. You can accomplish a move by clicking icons or by dragging and dropping. Use this feature to arrange your view of the **Favorites** menu exactly to your liking.

To rearrange favorites and favorites folders:

1. Open the Manage Favorites page (for more information, see Accessing Your Favorites).

2. If necessary, expand favorites folders and then select the favorite or folder you want to rearrange.

> 💡 **Tip:**
>
> To select a favorite or a folder, click in its row.

3. Click the **Move Up** or **Move Down** icon in the toolbar to rearrange the selected favorite or folder (Figure 26-10).

Figure 26-10   Move Icons in Manage Favorites Page
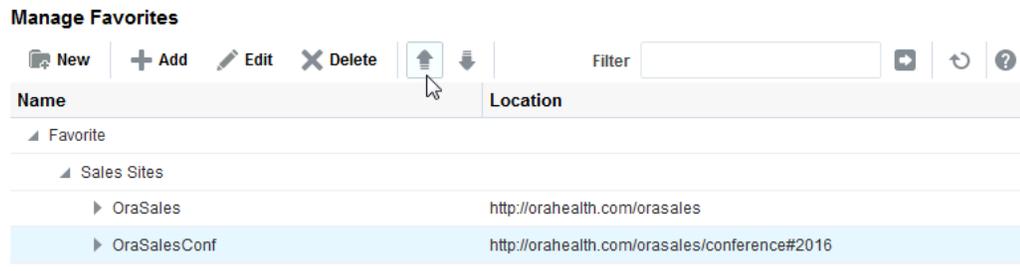
Alternatively, drag the favorite or folder to its target position.

> ⚠️ **Caution:**
>
> In WebCenter Portal, you cannot move a favorite into an existing folder using only the keyboard. To work around this issue, create a duplicate favorite within the target folder, then delete the original favorite.

The favorite or folder is repositioned on the Manage Favorites page and in the **Favorites** menu.

Searching for Favorites

The Manage Favorites page includes a search feature that enables you to locate favorites. You can use the favorites search feature to search for favorite display names or target URLs. This search feature does not search for favorite folder names. Search results display on the Manage Favorites page.

To search for favorites:

1. Open the Manage Favorites page (for more information, see Accessing Your Favorites).

2. Enter a search term in the **Filter** box, and click the **Filter** icon (Figure 26-11).

Figure 26-11   Filter Feature in Manage Favorites Page
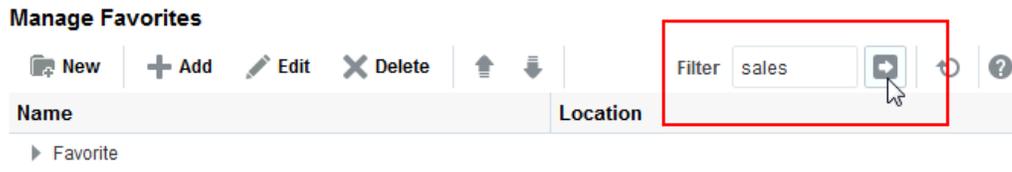
Results display in the Manage Favorites page.

> 💡 **Tip:**
>
> To exit search results, you must exit the Manage Favorites page.
> Alternatively, you can delete the search term from the **Filter** box and
> click the **Filter** icon. A search without a search term returns the Manage
> Favorites page to its default view.

Deleting Favorites and Favorites Folders

When you delete a favorite or a favorites folder, it is permanently removed from both
the **Favorites** menu and the Manage Favorites page. Additionally, when you delete a
favorites folder all the favorites it contains are also deleted.

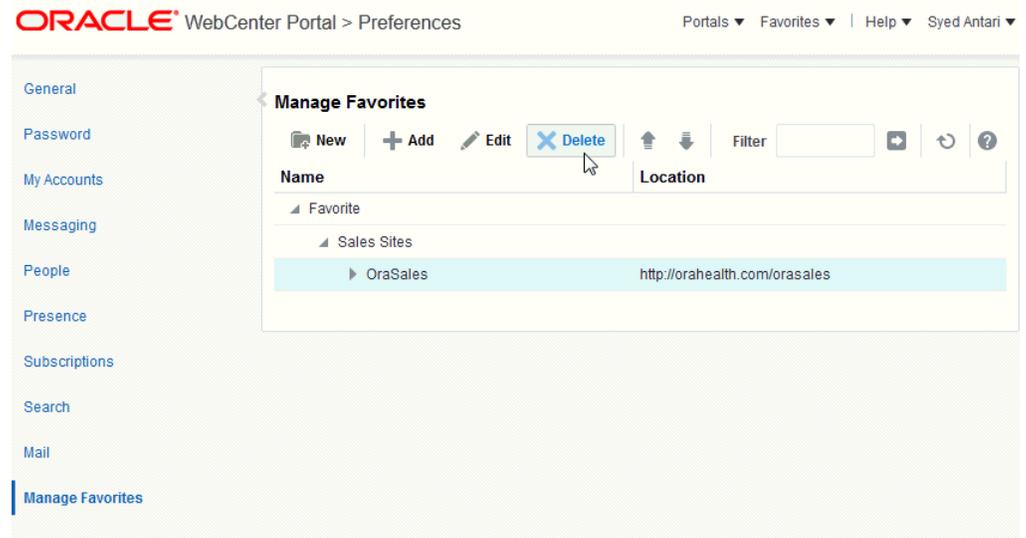To delete favorites and favorites folders:

1. Open the Manage Favorites page (for more information, see Accessing Your
   Favorites).

2. Select the favorite or favorite folder you want to delete.

> 💡 **Tip:**
>
> To select a favorite or favorite folder, click in its row.

3. Click the **Delete** button on the toolbar (Figure 26-12).

Figure 26-12   Delete Button in Manage Favorites

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

    The selected favorite or favorite folder and any favorites the folder contained are permanently removed from the Manage Favorites page and the **Favorites** menu.

27
Working with Calendars and Events

Events include calendars that you can use to schedule meetings and appointments, and also let you view your own personal Microsoft Exchange calendar within the Home portal. Overlaying portal calendars on top of the Home portal calendar allows you to view your entire schedule in a single place.

> **✎ Note:**
>
> Tasks discussed in this chapter are not available if events are not enabled and exposed. The portal manager adds and configures events, as described in Adding a Calendar and Events to a Portal in *Building Portals with Oracle WebCenter Portal*.

> **✎ Permissions:**
>
> This chapter is intended for WebCenter Portal users who want to use the calendar and events feature to schedule and track events. However, you might not be able to do some tasks if *one* or more of the following advanced permissions for events have been set:
>
> - `Create, Edit, and Delete Events`
> - `View Events`

Topics:

- About Events
- Working with Events

About Events

Events include appointments, meetings, presentations, and so on. Within WebCenter Portal, there are two kinds of events:

- **Personal events** are those that are not related to a specific portal. They could include personal appointments with a doctor or dentist, or lunch with a friend.

  Personal events come from your Microsoft Exchange calendar and display in the Events viewer on a page in the Home portal, only to the user who logged in to the Exchange calendar. See Where to View Events for viewing events in your personal calendar.

- **Portal events** are those that are related to a specific portal. They could include weekly meetings, presentations, or a customer visit.

Portal events display to all members of the portal on the portal's dedicated **Events** page (or console) or in any Events viewer that is located on a page in the portal.

To expose the Events page to all portal members, the portal manager needs to add the page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation in *Building Portals with Oracle WebCenter Portal*. For a page to show in portal navigation, the **Visibility** check box for the page must also be selected. For more information, see Showing or Hiding a Page in the Portal Navigation in *Building Portals with Oracle WebCenter Portal*.

.Members with the required level of permission can schedule or update events.

> **Note:**
>
> If your portal is using the default user roles, then the required permissions to create an event is included in the *Portal Manager* role. Portal Managers can manage all events.

Calendar Overlaying

In addition to viewing your personal events in your Home portal, you can also view portal events from selected portals all together in one place. This is referred to as *calendar overlaying*. In this way, all your important events are available in one location, your Home portal.

In a portal, if an Events page (or console) has been added, you can also add events to it. However, you can view personal events only in your Home portal.

See Where to View Events for more information about viewing events with or without calendar overlaying.

> **Note:**
>
> Calendar overlaying must be enabled by your application specialist or portal manager and set to a value other than `None`, if you want to view your personal events from your Microsoft Exchange calendar. See Enabling Calendar Overlaying in *Building Portals with Oracle WebCenter Portal* for more information.

Where to View Events

Your portal may provide a variety of locations from which to view events.

> **See Also:**
>
> Viewing Events and Displaying Multiple Calendars Together.

- Every portal in which events is enabled or included in the portal template includes an **Events** page (or console) that can be displayed or hidden. The portal manager can provide a link to the Events viewer or add the Events page to the portal navigation. Once added to the portal navigation, portal members can use the Events page to access events. A portal manager may also choose to hide the Events page by deselecting its Visible property. Figure 27-1 shows portal events on the Events page or console.

Figure 27-1   Events on the Events Page
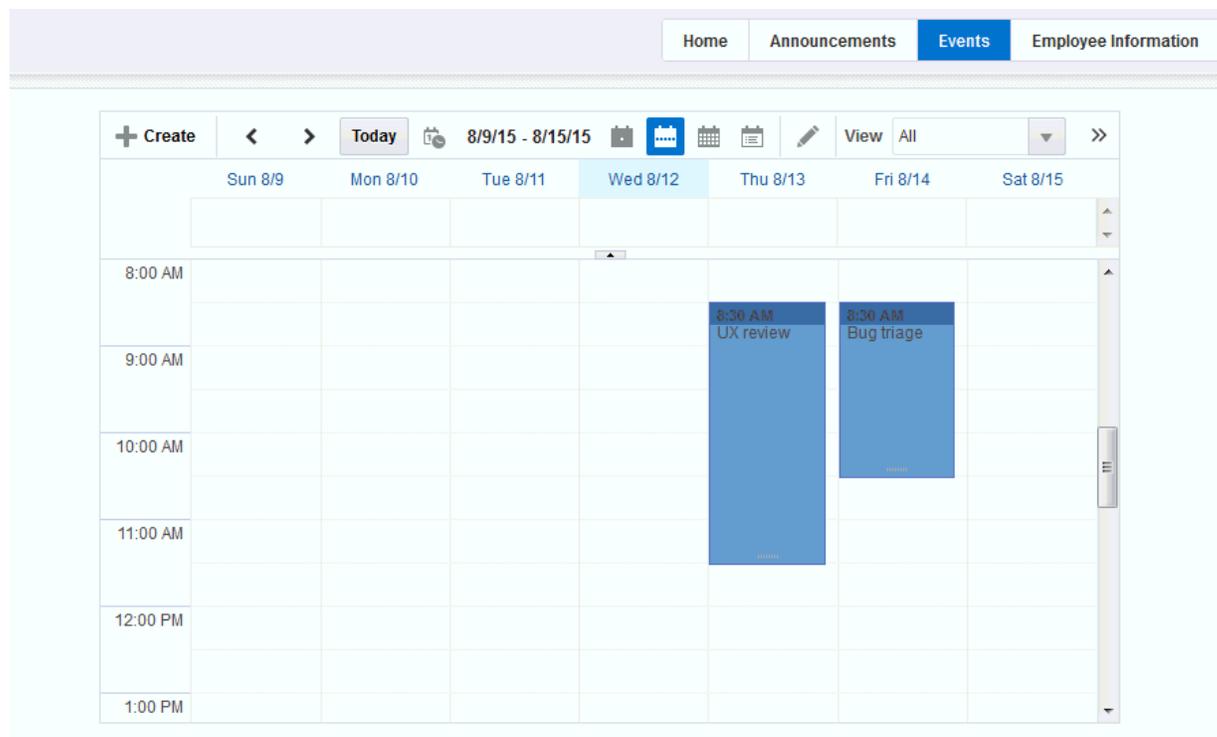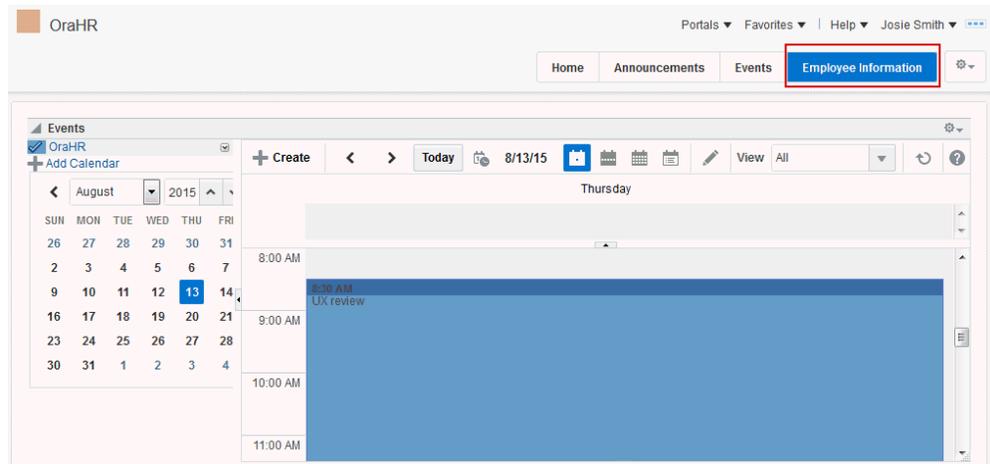

- If your portal manager has added the Events viewer to a page in a portal, you can view it from the portal navigation. Figure 27-2 shows events on another page in the portal.

> **Note:**
>
> You can only view personal events in the Home portal.

Figure 27-2   Events on a Portal Page

- Your portal manager can also add events to a page in the Home portal, make that page visible, and give participants access to that page. In the Home portal, the Events viewer does not initially display the calendar of events from your personal calendar. You need to click **Login to Personal Calendar**. Figure 27-3 shows the events view on a page in the Home portal *without* calendar overlaying.

Figure 27-3   Events Viewer in Home Portal Before Logging In (Without Calendar Overlaying)
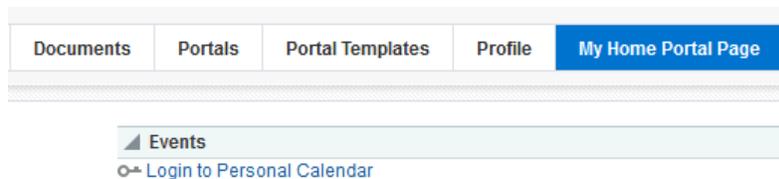

> **See Also:**
>
> For information about logging in to your Microsoft Exchange calendar, see Accessing Your Personal Events.
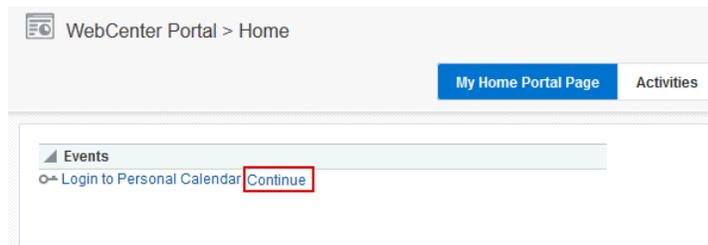
If you do not have a Microsoft Exchange calendar, or do not want to display personal events, but still want to view portal events in the Home portal, ask your portal manager to enable calendar overlaying. You can still see your portal events, as shown in Figure 27-4.

Figure 27-4 shows events in the Home portal *with* calendar overlaying.

Figure 27-4   Events Viewer in Home Portal Before Logging In (With Calendar Overlaying)
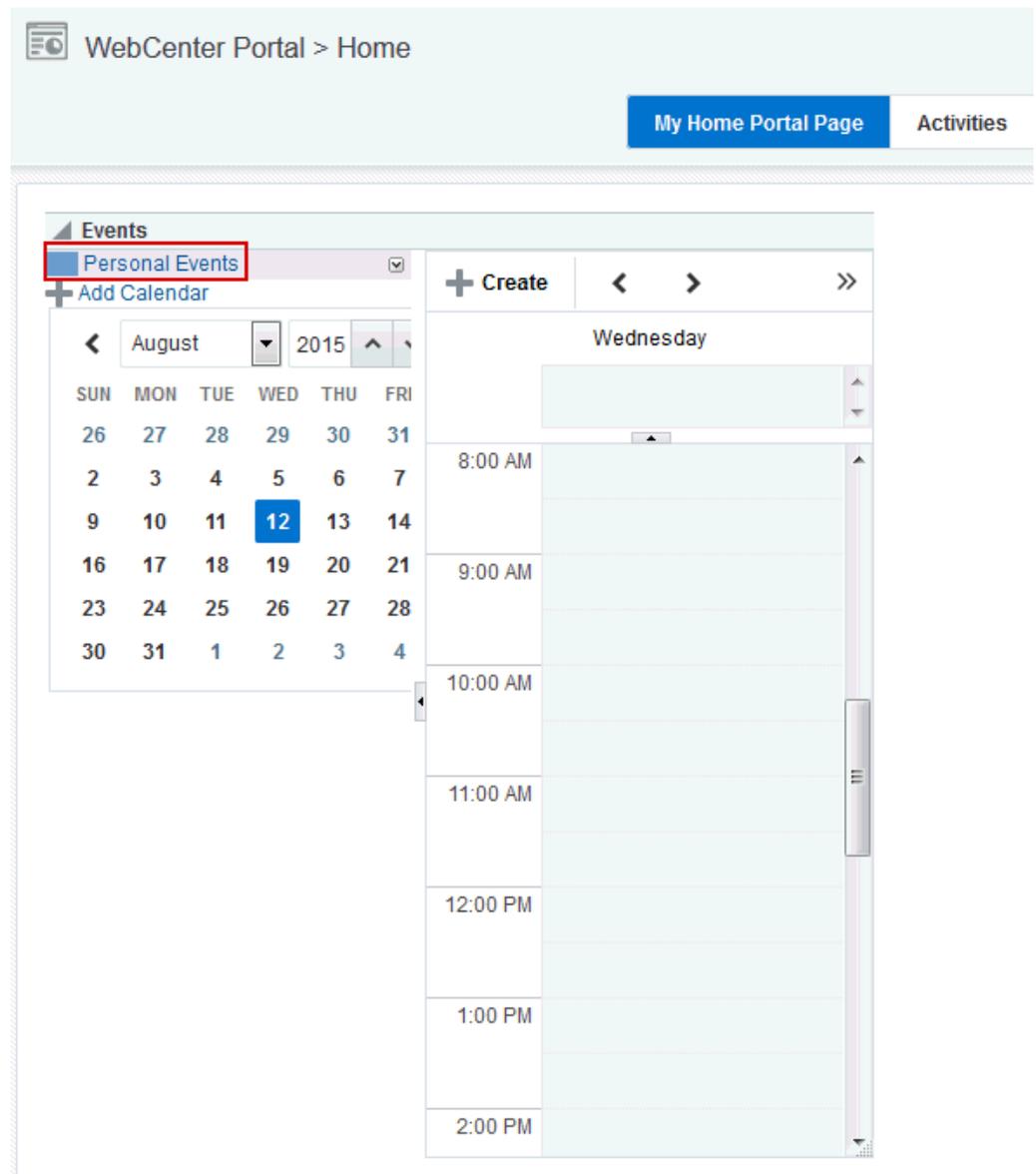
If calendar overlaying is enabled, then click **Personal Events** (Figure 27-4) to see **Login to Personal Calendar** and then click **Continue** (Figure 27-5).

Figure 27-5   Events in Home Portal with Calendar Overlay Enabled

> **Note:**
>
> Calendar overlaying must be enabled by your portal manager and set to a value other than `None`, if you want to view your personal events from your Microsoft Exchange calendar. See Enabling Calendar Overlaying in *Building Portals with Oracle WebCenter Portal* for more information.

Integration of Calendars Events with Other Features

Through its tight integration with links, the events feature provides the opportunity to associate events with other WebCenter Portal assets. Linking enables you to associate documents, notes, announcements, discussions, and URLs with an event. You can create links from an event by editing the event and clicking the **Links** icon. For more information, see Working with Links Features.

Events also enables you to send mail messages about portal events to members of the portal. You can send mail from an event by editing the event and clicking the **Send Mail** icon. See About the Send Mail Feature for information about working with the Mail feature.

Working with Events

Events include appointments, meetings, presentations, and so on. WebCenter Portal provides two kinds of event views for displaying personal and portal events:

- The **Events** view provides a fully featured calendar where as well as viewing events in a variety of layouts, you can also create and manage events and display events from multiple calendars.

- The **Events - Mini View** provides a more compact view of events as a list. You can view upcoming events and edit existing events. You cannot create new events in this view. This is useful if you want to provide information about events, but do not have enough space on the page for a full calendar.

> **Note:**
>
> The steps in the following sections apply to both personal events and portal events. Where there are any differences, these are noted.

- Accessing Your Personal Events
- Viewing Events
- Scheduling Events
- Revising Scheduled Events
- Cancelling Scheduled Events
- Displaying Multiple Calendars Together
- Subscribing to Events

Accessing Your Personal Events

You can maintain a calendar of personal events outside of WebCenter Portal that does not relate to specific portals. If you use Microsoft Exchange Server for this calendar, you can include your personal events in the Home portal. This keeps all your calendar information in a single place, making it much easier for you to organize your day.

You can view personal events in the Home portal. You can also edit or delete personal events or create new personal events that are pushed to your Exchange calendar.

> **Note:**
>
> Your portal manager can set up a page to view events in the Home portal, from where you can view your personal events. See Showing Events on a Page in the Home Portal in *Building Portals with Oracle WebCenter Portal*.
>
> When setting up the Events view, your portal manager can also enable calendar overlaying to display portal events alongside personal events in the Home portal. You can view your personal calendar events alongside portal events, but you cannot push portal events into your Exchange calendar. See Calendar Overlaying for more information about calendar overlaying,

To access your personal events:

1. Navigate to the Home portal of the portal, and then to the page which contains your personal events (see Figure 27-3).

2. Click **Login to Personal Calendar** (Figure 27-6).

   In the Home portal, the Events view does not initially display the calendar of events from your personal calendar. Instead it displays a link prompting you to **Login to Personal Calendar** (Figure 27-6).

   > **Note:**
   >
   > If you see the link **Try Again** instead of **Login to Personal Calendar**, there is a problem with the connection to the Microsoft Exchange Server. Contact your system administrator.

Figure 27-6   Events View in Home Portal Before Logging In (Without Calendar Overlaying)
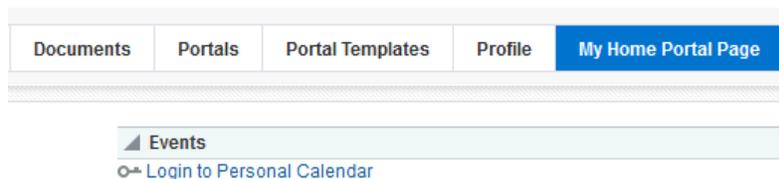
If you do not have a Microsoft Exchange calendar, or do not want to display personal events, but still want to view portal events in the Home portal, your portal manager can enable calendar overlaying (see Calendar Overlaying). Click **Personal Events** (Figure 27-7) and then click **Continue** (Figure 27-8).

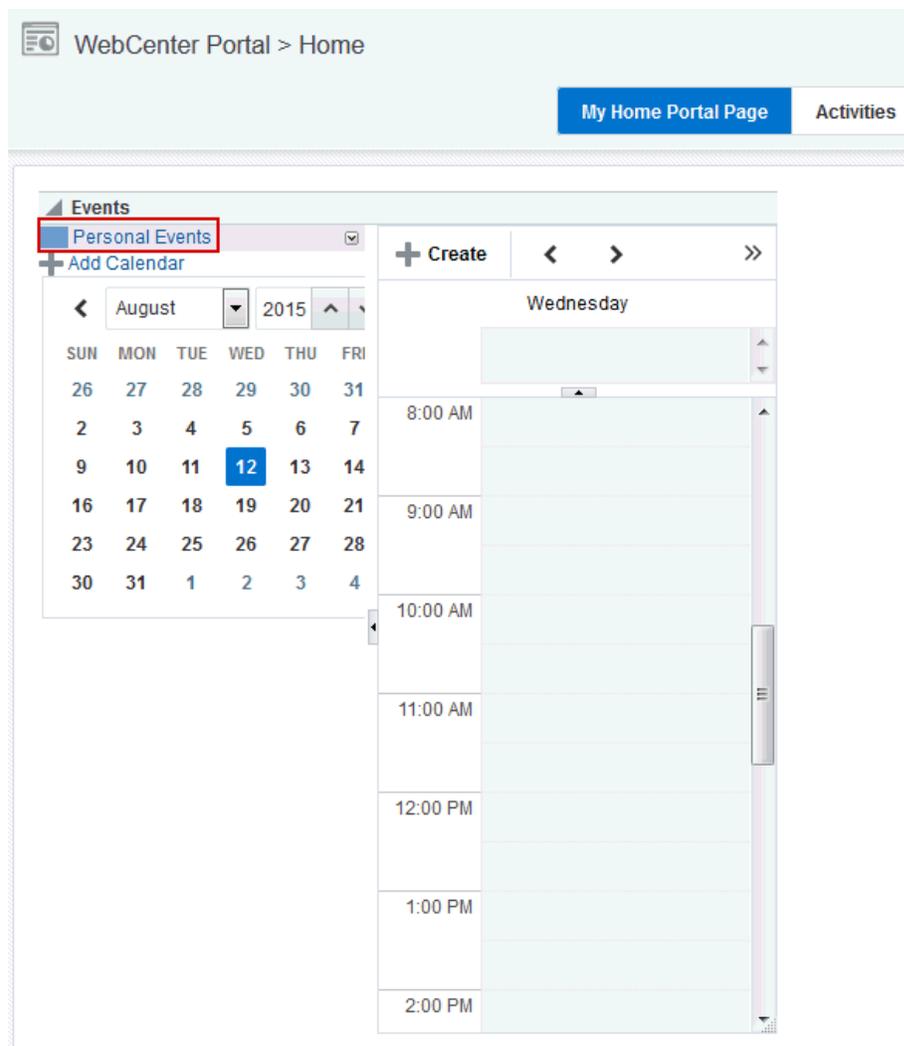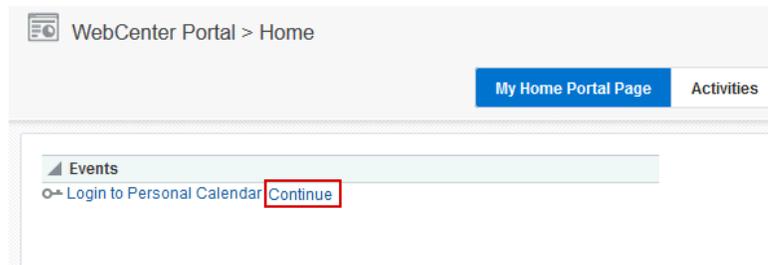**Figure 27-7   Personal Events Link on a Page in the Home Portal**

Figure 27-8   Events View on a Page in the Home Portal (With Calendar Overlay Enabled)


3. In the **External Application Login** dialog that appears, enter your Microsoft Exchange login credentials and click **OK.**

> **Note:**
>
> The **External Application Login** dialog may include additional fields and information, depending on the requirements of the mail service that provides it. For more information about external applications and storing your login credentials in WebCenter Portal, see Providing Login Information for External Applications.

Your personal calendar opens (Figure 27-9).

Figure 27-9   Personal Calendar
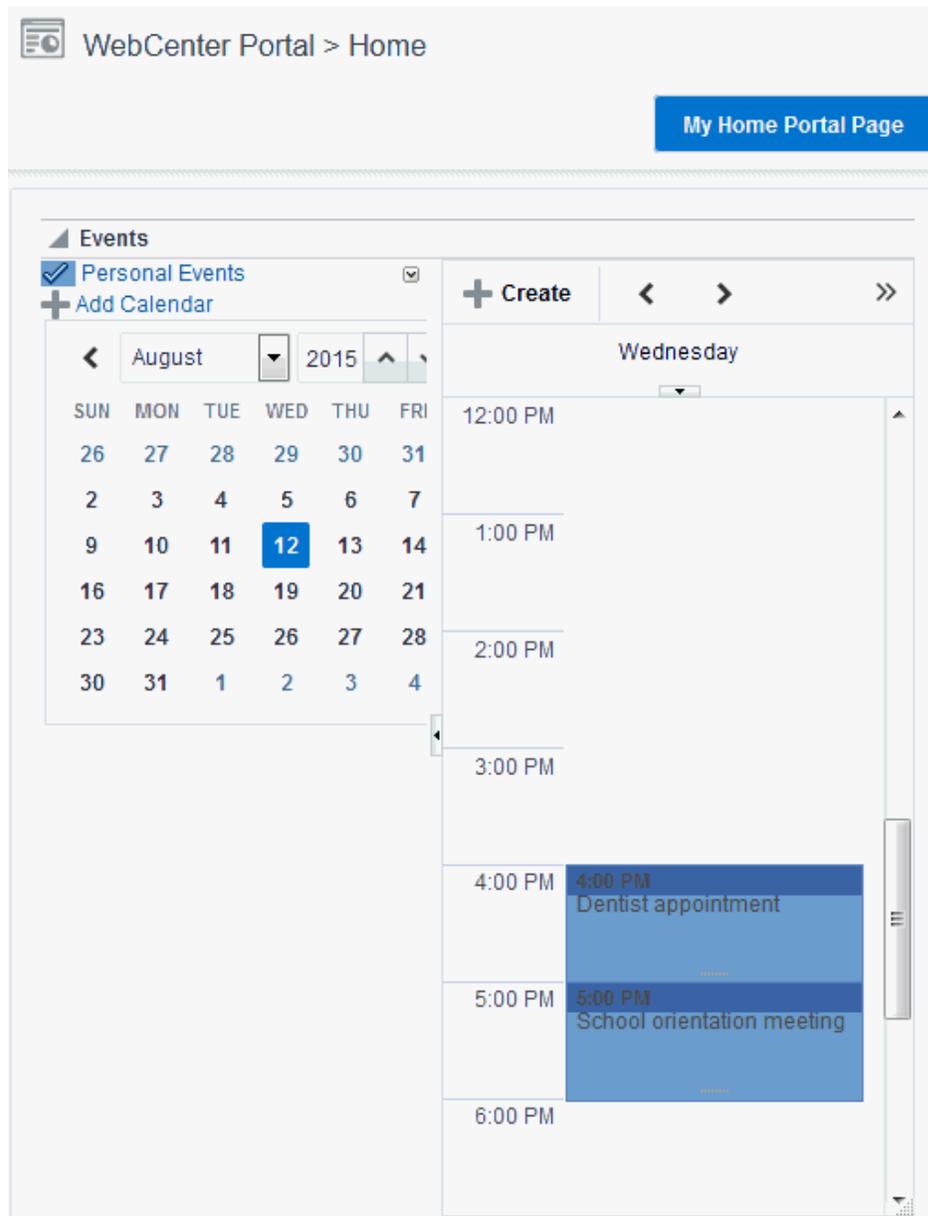
Viewing Events

You can view events as a grid or a list; choose to display events by day, week, or a month; filter events by category; select the range of hours displayed per day; and include a second time zone in the display.

> **Note:**
>
> Where to View Events for information on viewing events on the Events page, on a page in the portal, and on a page in the Home portal.
>
> To expose the Events page to all portal members, the portal manager needs to add the page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation in *Building Portals with Oracle WebCenter Portal*. For a page to show in portal navigation, the **Visibility** check box for the page must also be selected. For more information, see Showing or Hiding a Page in the Portal Navigation in *Building Portals with Oracle WebCenter Portal*.

This section includes the following topics:

- Using the Calendar Interface
- Viewing Event Details
- Filtering Events by Category
- Setting Display Preferences

Using the Calendar Interface

You can use icons to display events in grid form or as a list. When you display events as a grid, you can show them by day, week, or month. When you display events as a list, the number of upcoming events listed depends on the display options selected.

> **See Also:**
>
> See Setting Display Preferences for information about changing List view display options.

Usually, in grid mode, events are displayed for the current day, week, or month. To view events for a specific point in time, you can use the previous or next icons or select a date so that the calendar displays events for a specific date.

The following table lists the different icons available and describes their function.

> **Note:**
>
> The following options are not available in the Events - Mini View.

Table 27-1   Calendar Icons

Icon	Description
‹	Click to display events from the previous day, week, or month.
›	Click to display events from the next day, week, month.
Today	Click to display events for the current date (today).
	Click to display events for a specific date. **Note:** If the calendar overlay feature is enabled in Full mode then the Date Picker is always visible to the left of the calendar.
	Click to display events one day at a time. Right-click or double-click in a row to open the Create Event dialog. Roll your mouse pointer over an event to view a summary of event details. Click an event, or roll your mouse pointer over the event and press Enter to open the Edit Event dialog.
	Click to display events for the whole week. Right-click or double-click a calendar cell to open the Create Event dialog. Roll your mouse pointer over an event to view a summary of event details. Click an event, or roll your mouse pointer over the event and press Enter to open the Edit Event dialog.

Table 27-1   (Cont.) Calendar Icons

| Icon	Description
	Click to display events for the whole month.
	Right-click or double-click a calendar cell to open the Create Event dialog. Roll your mouse pointer over an event to view a summary of event details. Click an event, or roll your mouse pointer over the event and press Enter to open the Edit Event dialog.
	Click to display a list of upcoming events for the current day, week, month, or a specified number of days as identified in the Event Preferences dialog.
	Click the **Create a new event** icon to open the Create Event dialog. Roll your mouse pointer over an event to view a summary of event details. Click an event, or roll your mouse pointer over the event and press Enter to open the Edit Event dialog.
	Click to open the Event Preferences dialog to specify calendar times, secondary time zones, and configure the list view.
	See Setting Display Preferences.
View All ▼	Select one or more event categories by which to filter the events in the calendar.
	Categories are set up by the portal manager or application specialist.
	See Filtering Events by Category.

Table 27-1   (Cont.) Calendar Icons

Icon	Description
↻	Click to refresh the page with any recent changes.

Viewing Event Details

The **Events** page (or console) or Events view displays basic information about events. To view more information, such as the location, start and end times, priority, category, or links, simply hover your mouse over an event.

The popup window (Figure 27-10), displays the following information:

- The title of the event

- Details of the date and time of the event, including the secondary time zone if one has been specified

- The priority of the event

- The category to which the event belongs

- The location of the event, if specified

- Any links associated with the event

Figure 27-10   An Event Showing Details
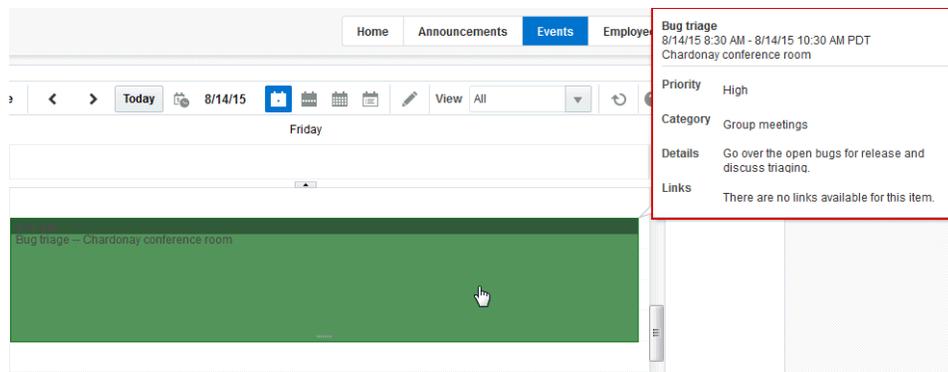
To view any specific details of the event, you must edit the event. See Revising Scheduled Events for more information.

Filtering Events by Category

You can filter the events displayed in the calendar to show only those that belong to one or more particular categories, for example Team Meeting, Customer Meeting, Vacation, and so on.

> **See Also:**
>
> Event categories are created by the portal manager in the portal administration settings. After they are created, you can use them to assign categories to your events, which enables you to then filter events by category. If your portal manager did not create categories, you will not be able to categorize events. See Creating and Managing Portal Event Categories in *Building Portals with Oracle WebCenter Portal*.

To filter events by category:

1. Go to the Events view or **Events** page where you want to filter events.

> **Note:**
>
> You cannot filter events in the Events - Mini View. The **View** drop-down list is available only for portal events, not personal events.

2. In the toolbar, from the **View** drop-down list (Figure 27-11), select one or more categories by which you want to filter the events displayed in the calendar.

Figure 27-11   View List for Filtering by Event Category
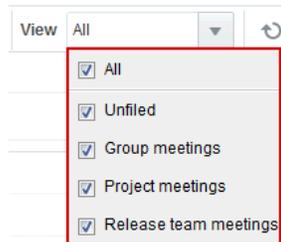
When you close the drop-down list, only those events that belong to the selected category or categories are displayed in the calendar.

> **Tip:**
>
> To remove event filtering, deselect any of the categories in the **View** drop-down list.

Setting Display Preferences

Events display preferences allow you to do the following:

- Determine the earliest time displayed on the calendar when events are viewed by day or week.

- Identify a secondary time zone.

- Specify how to display events in List view: by day, week, month, or for a specified number of days.

To set these preferences:

- Click the **Set Event Preferences** icon.

Figure 27-12   Set Event Preferences Icon

The Event Preferences dialog opens.

Figure 27-13   Event Preferences Dialog

> **Note:**
>
> The **Set Event Preferences** icon, and therefore the Event Preferences dialog, is not available in the Events - Mini View viewer.

This section includes the following topics:

- Setting the Calendar Start Time
- Setting a Secondary Time Zone
- Configuring List View

Setting the Calendar Start Time

In Day and Week view, the calendar grid is divided into hours. If vertical space for your calendar is limited, you can specify the earliest hour to display on the calendar grid to save space. If the space available has enough room to display hours from before the specified start time until 11PM, it does so.
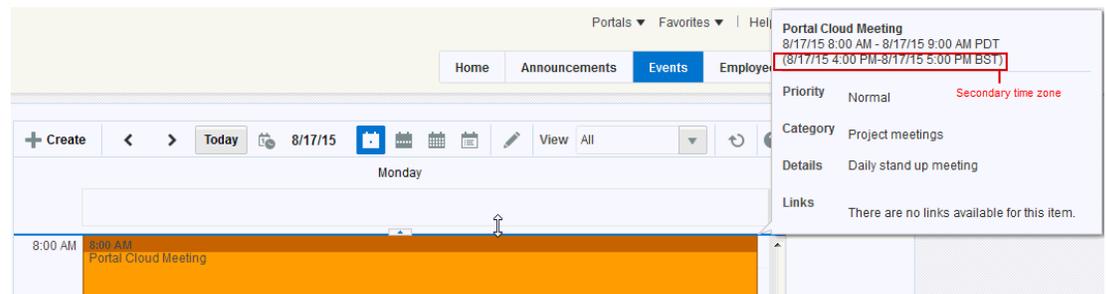
To set the calendar start time:

1. Go to the Events view or **Events** page where you want to set the calendar start time.

2. Click the **Set Event Preferences** icon on the toolbar (Figure 27-12).

3. In the Event Preferences dialog (Figure 27-13), from the **Start Time** drop-down list, select the earliest hour to display on the grid.

   Choose from 12AM to 11PM.

4. Click **OK** to save your changes.

Setting a Secondary Time Zone

These days, it is not unusual to be working in teams with members in different locations. When scheduling meetings, it is useful to know the hours most optimal to all invitees. To make this easier, you can specify a secondary time zone to see what time a meeting is in that time zone as well as your own.

When you hover your mouse over an event, the event details window shows the time of the meeting in your time zone and in the secondary time zone (Figure 27-14).

Figure 27-14   Event Details Window Displaying Primary and Secondary Time Zones

To set a secondary time zone:

1. Go to the Events view or **Events** page where you want to set a secondary time zone.

2. Click the **Set Event Preferences** icon on the toolbar (Figure 27-12).

3. In the Event Preferences dialog (Figure 27-15), from the **Secondary Time Zone** drop-down list, select a secondary time zone to display along with the primary time zone.

Figure 27-15   Event Preferences Dialog Showing Secondary Time Zones
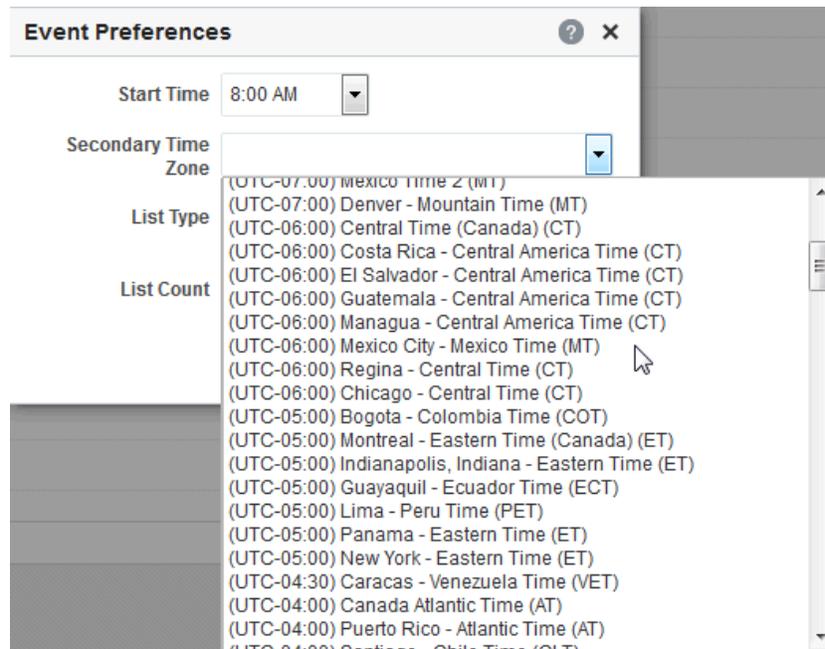
4. Click **OK** to save your changes.

Configuring List View

You can specify how you want to display events, when the calendar is displayed in List view. You can display events by day, week, month, or for a specified number of days.

To configure List view:

1. Go to the Events view or **Events** page where you want to configure List view.

2. Click the **Set Event Preferences** icon on the toolbar (Figure 27-12).

3. In the Event Preferences dialog (Figure 27-16), from the **List Type** drop-down list, select how you want to display events in List view:

Figure 27-16   Event Preferences Dialog Showing List Types
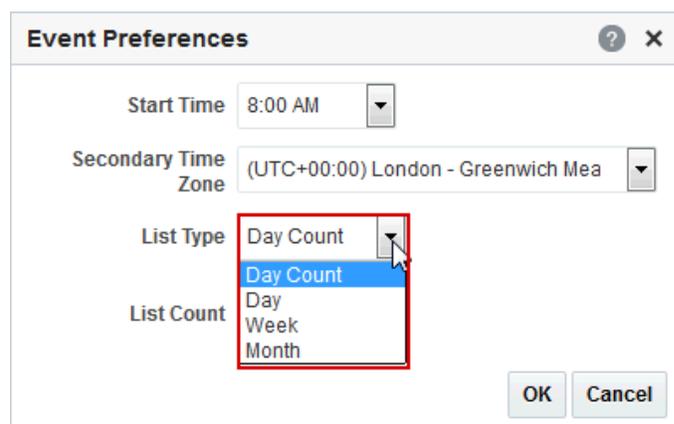
- **Day Count**—List all upcoming events for a specified number of days.

- **Day**—List all upcoming events for the currently selected day.

- **Week**—List all upcoming events for the currently selected week.

- **Month**—List all upcoming events for the currently selected month.

4. If you selected **Day Count** in the previous step, in the **List Count** field, specify the number of days for which you want to display events. The default is 14.

5. Click **OK** to save your changes.

Scheduling Events

You can schedule portal events and personal events. When you schedule a personal event, the details are pushed to your Microsoft Exchange calendar.

> **Note:**
>
> You cannot schedule new events in the Events - Mini View.

To schedule an event:

1. Go to the Events view or **Events** page where you want to schedule the event.

   To expose the Events page to all portal members, the portal manager needs to add the page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation in *Building Portals with Oracle WebCenter Portal*. For a page to show in portal navigation, the **Visibility** check box for the page must also be selected. For more information, see Showing or Hiding a Page in the Portal Navigation in *Building Portals with Oracle WebCenter Portal*.

2. Click **Create** on the toolbar.

   Figure 27-17   Create a New Event Icon

   The Create Event dialog opens. The fields in the Create Event dialog are slightly different depending on whether you are creating a personal event or a portal event. These differences are pointed out later in this procedure.

   > **Note:**
   >
   > You can also easily invoke the Create Event dialog in grid view by double-clicking an empty space or right-clicking an empty space and selecting **Create**. The advantage of this is that the date and time of the event are automatically specified in the dialog.

   The figure shows the Create Event dialog invoked from the Events page.

Figure 27-18   Create Event Dialog Invoked From the Events Page

The figure shows the Create Event dialog invoked from a page in the Home portal. Notice that calendar overlaying is not shown.

Figure 27-19   Create Event Dialog Invoked From a Home Portal Page

3. In the **Title** field, enter a brief descriptive title for the event.

    For example, `Project Update`.

4. In the **Location** field, enter the location of the event.

    For example, `Conference Room 5`.

5. From the **Calendar** drop-down list, select the calendar in which you want to create the event.

    > **Note:**
    >
    > The **Calendar** drop-down list is available only when the calendar overlay feature is enabled and at least one other calendar is displayed.
    >
    > The **Calendar** drop-down list is not available for events created from the **Events** page (where calendar overlaying is not available).

6. Select **All Day Event** to block out the entire day for the event.

All day events can span multiple days. In Day and Week view mode, all day events are displayed in a separate area at the top of the calendar. In Month view, all day events are displayed surrounded by a block of color.

7. In the **Start Time** field enter a date and time to start the event.

> 💡 **Tip:**
>
> You can click the **Select Date and Time** icon and select a start time from the Date and Time Picker, if you prefer.

For all day events, you specify the date only.

8. In the **End Time** field enter a date and time to finish the event.

> 💡 **Tip:**
>
> You can click the **Select Date and Time** icon and select an end time from the Date and Time Picker, if you prefer.

For all day events, you specify the date only.

9. (Optional) From the **Priority** drop-down list, select a priority for the event: **Highest**, **High**, **Normal**, **Low**, or **Lowest**.

The priority of an event determines where it appears when events conflict. An event with Highest priority is displayed first. The event priority is also displayed in the event popup window when a user hovers the mouse over the event.

10. (Optional) If your portal manager set up event categories, from the **Category** drop-down list, you can select a category to classify this event.

Categories are useful for creating distinct groups of events, organized according to their general purpose.

See Creating and Managing Portal Event Categories in *Building Portals with Oracle WebCenter Portal*.

The event category is displayed in the event popup window when a user hovers the mouse over the event. Events in different categories can be displayed in different colors if the portal manager used colors to specify categories.

You can also filter a calendar to display events belonging to a specific category.

> ✎ **Note:**
>
> The **Category** drop-down list is available only for portal events.

11. Optional: In the **Details** field, enter any additional details you want to include, up to a maximum of 4000 characters.

For example, you might want to describe the purpose of the meeting, provide a brief agenda, or indicate if attendees need to prepare anything for the meeting.

> **✎ Note:**
>
> The details that you enter here are available only when editing the event; they do not display in the event popup window when users hover over the event. You should not assume that all users will read these details. Important details about the meeting should be communicated in a different way, for example, through the meeting notification email or by creating an announcement.

12. Optional: Select **Private** if you do not want other users to be able to view your personal events.

If events are included on a page in the portal that you have made available to other users, then those users are not able to see the event.

> **✎ Note:**
>
> The **Private** check box is available only for personal events.

13. Click **Create** to add the event to the calendar.

Figure 27-20   Events in Day View
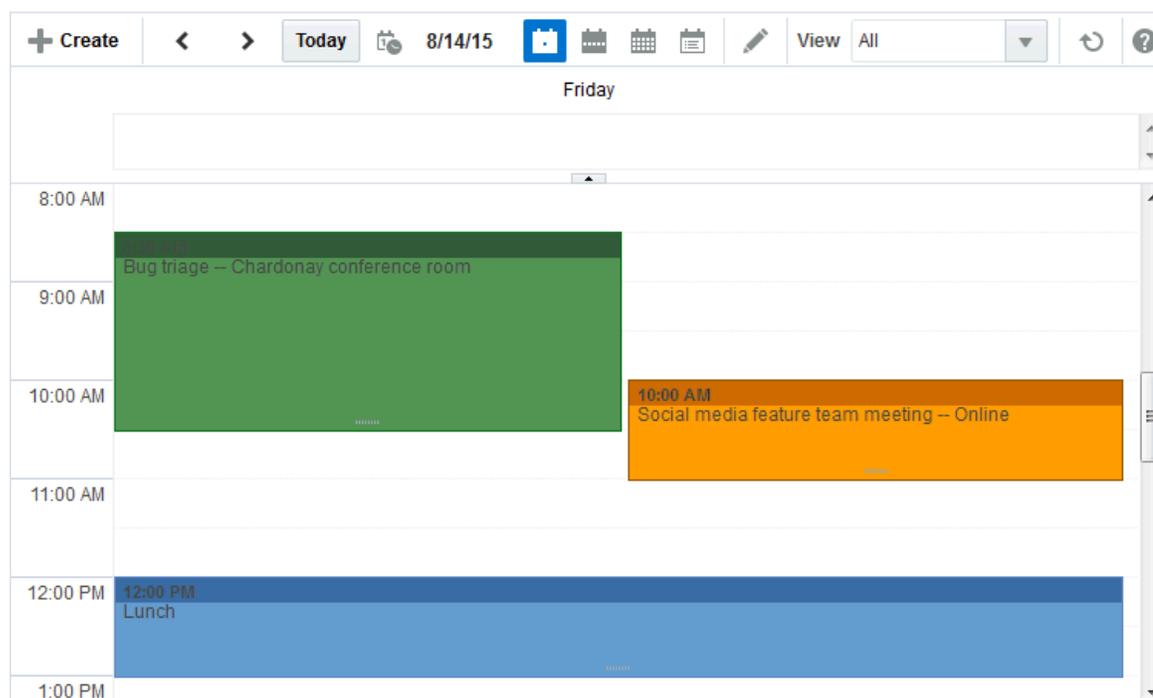
Revising Scheduled Events

You may want to change some aspect of an event; for example, it may become necessary to change the time to accommodate a particular attendee, or the location may become unavailable.

To revise a scheduled event:

1. Click the event to open the Edit Event dialog or right-click and select **Edit**.

> 💡 **Tip:**
>
> In the Events view or **Events** page, you can also access the Edit Event
> dialog by right-clicking an event and selecting **Edit**, or by moving the
> mouse pointer (or using the `Tab` key) to highlight an event and pressing
> `Enter`.

Figure 27-21   Edit Event Dialog Invoked from a Portal Page
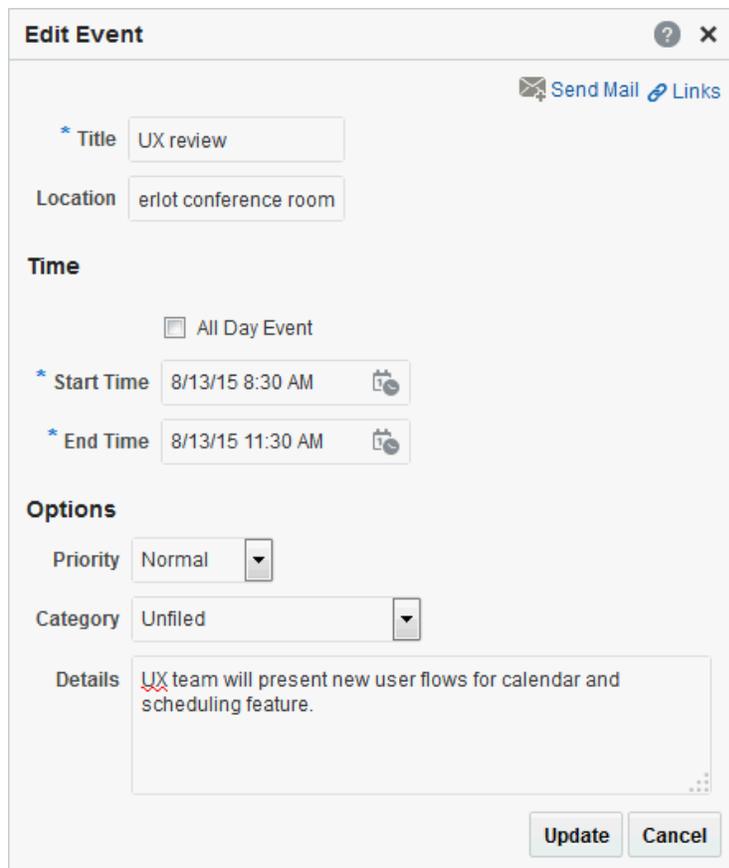
2. Revise the event details.

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> **✎ See Also:**
>
> Scheduling Events for information about the different options available in the dialog.
>
> About the Send Mail Feature for information about using the Send Mail feature.
>
> Working with Links Features for information about creating links to other assets.

3. Click **Update** to save your changes.

Cancelling Scheduled Events

To cancel a scheduled event:

1. Right-click the event and select **Delete** (Figure 27-22).

Figure 27-22   Delete Option for an Event
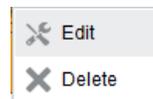
> **💡 Tip:**
>
> You can also delete an event by hovering your mouse over the event and pressing the `Delete` key or, in the Edit Event dialog (see Revising Scheduled Events), by clicking **Delete**.
>
> To delete an event from the Events - Mini View, you must open the Edit Event dialog and click **Delete**.

2. Click **Delete** in the Delete Confirmation dialog.

The event is removed from the calendar.

Displaying Multiple Calendars Together

Within WebCenter Portal, you can be a member of several portals. Each of those portals may have its own calendar of events. In addition to that, you may also have your own calendar where you track those events that concern only yourself. At the start of each day, it is not practical to have to view each of these calendars individually to determine your schedule for the day.

WebCenter Portal lets you view multiple calendars together. This is called *calendar overlaying*. You can do this in the Home portal so that you can also include your personal appointments from your personal calendar as well as view events from other portals. You can also overlay calendars in the Events view on a portal page.

> **✎ Note:**
>
> Multiple calendars are available if calendar overlaying is enabled (see Calendar Overlaying). Multiple calendars are *not* available on the Events page. Calendar overlaying must be enabled on the Home portal page and the page in your portal where you can view events.
>
> See also, Where to View Events.

The events from each calendar are displayed in a different color to help identify the source of the event. (Categories are available if your portal manager set up categorization for events.) If calendars are overlaid on a page in the Home portal or on a portal page, category colors are used only for events from the current portal. All events from overlaid calendars are displayed in the color defined for that portal if the events do *not* have categories. But if the overlaid calendars have event categories, then the events *with* category will be shown for the calendars from other portals, provided the portal in which overlay is enabled has that same category.

This section includes the following topics:

- Displaying Additional Calendars
- Editing Calendar Display Options

Displaying Additional Calendars

When the calendar overlaying feature is enabled, users can display as many calendars as they want. Each calendar's events are displayed in a different color to make it easier to distinguish which calendar it belongs to.

To display additional calendars:

1. Go to the Home portal or the appropriate portal and locate the page that contains events.

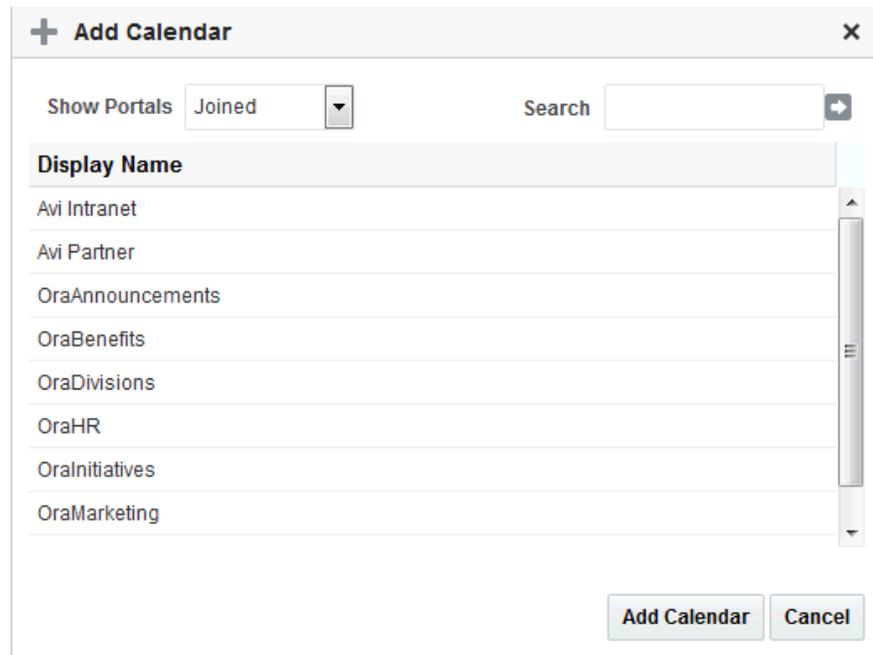2. In the calendar overlay area of events, click the **Add Calendar** icon (Figure 27-23).

Figure 27-23   Add Calendar Icon

3. In the Add Calendar dialog (Figure 27-24), select the portal whose calendar you want to display.

   You can select multiple portals.

Figure 27-24   Add Calendar Dialog

4. Click **Add Calendar.**

   The calendar overlay area now includes the selected portals on the left.

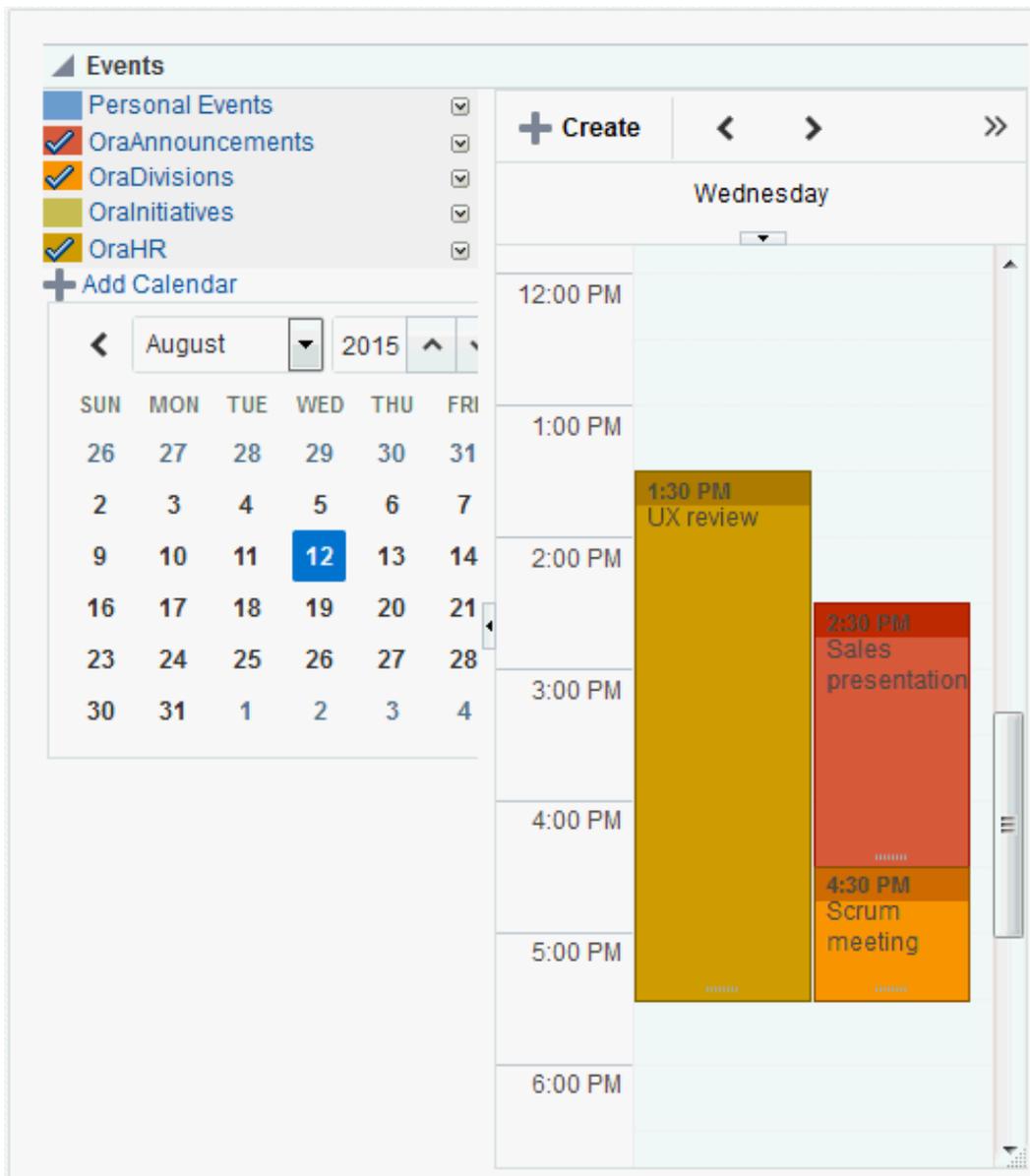5. Select the check box next to each portal whose calendar you want to view.

   > **Note:**
   >
   > Events must be enabled and available in the portals you select.

   The events from each portal are displayed in a different color (Figure 27-25).

**Figure 27-25   Events From Multiple Calendars**

Editing Calendar Display Options

After adding a portal's events to your calendar you can change various display options, including the order the calendar appears in the list and the color used to identify events from the calendar.

To edit calendar display options:

1. Go to the Home portal or the appropriate portal and locate the page that contains events.

2. Click the arrow icon to the right of the portal for which you want to edit display options.

   The calendar overlay menu opens (Figure 27-26).

Figure 27-26   Calendar Overlay Menu
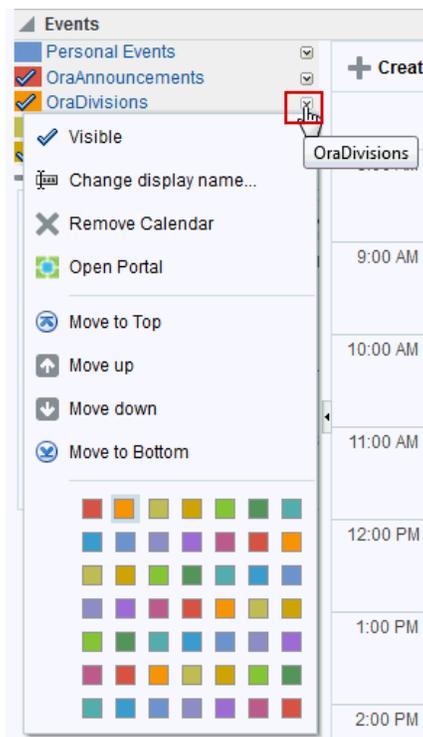
3. From the menu, select:

   • **Visible** to toggle the display of this portal's events in the calendar.

     You can also toggle the display of a portal's events by clicking the portal name (Full view only) or the colored square next to the portal name.

   • **Change display name** to make the name in the list of portals in Full view more meaningful to you than just the portal name.

   • **Remove Calendar** to remove this portal's calendar.

   • **Open Portal** to open the portal associated with this calendar.

   • **Move to Top**/**Move up**/**Move down**/**Move to Bottom** to rearrange this portal in the list.

     The order in which the portals are listed determines the order in which events are listed when events from multiple portals occur in the same time slot. Events from the portal at the top of the list are displayed first.

   • A color to change the color used for the events from this portal.

Subscribing to Events

By default, if you subscribe to be notified when an event is created, updated, or deleted, the notification appears in your Activity Stream (if the view is available in your portal). However, you can subscribe to receive notifications by mail when events for a particular portal are created, updated, or deleted.

> **See Also:**
>
> See Subscribing to the Application, to Portals, and to Objects for information about how to subscribe.

When you subscribe to a portal's events, whenever an event is created, updated, or deleted in that portal, a notification is sent to you. If the client to which that notification is sent supports iMAP (for example, Microsoft Outlook, Mozilla Thunderbird, Gmail, and so on), the notification email includes the ability to accept or decline the event, propose a new time for the event, and so on within the email.

If you accept an event, it is added to the calendar in your email client.

28
Managing Your Notes

Create, edit, and manage personal notes to track personally relevant information, such as personal reminders.

> **Note:**
>
> Tasks discussed in this chapter are not available to you if notes is not exposed. The portal manager adds the note viewer on a page, as described in Adding Personal Notes to a Portal in *Building Portals with Oracle WebCenter Portal*.

> **Permissions:**
>
> This chapter is intended for WebCenter Portal users interested in creating personal notes in WebCenter Portal. The tasks described in this chapter are available to any WebCenter Portal user with access to a page that contains notes. However, to add linked notes to an asset, you have to be assigned the portal permission `Customize Pages` .
>
> You will not be able to do some tasks if *one* or more of the following advanced permissions for notes have been set:
>
> * `Create, Edit and Delete Notes`
> * `Create Notes`
> * `Edit Notes`
> * `Delete Notes`
> * `View Notes`

Topics:

* About Notes
* Working with Notes

About Notes

Notes provides useful features for writing yourself reminders in the form of personal notes. You can create notes from the Notes view, which displays the personal notes of the currently logged in user (Figure 28-1). Only the notes that you create are displayed in the Notes view. No other user sees your notes, and you do not see any other user's notes.

Figure 28-1   Notes View

You can filter your notes list by their titles. Filtering allows you to narrow the focus of your notes to just the notes that match your filtering criteria. Consider devising a naming scheme for your notes to make the most of filtering.

You can link a note to an asset like a document, a list, or an announcement. While you can link to a new note (Figure 28-9), you cannot link to existing notes. All users who have access to the asset can view the linked note too. See Linking Notes for more information.

Working with Notes

WebCenter Portal offers a way for you to keep track of useful, sometimes vital, bits of information through notes.

This section describes how to use notes. It includes the following topics:

- Creating a Note
- Filtering and Clearing Notes Filters
- Editing Note Details
- Refreshing Your View of Notes
- Deleting Notes
- Linking Notes

Creating a Note

Create notes to track personally relevant bits of information, such as personal reminders.

To create a note:

1. Navigate to the page that contains the Notes view.

2. Click the **Create a new note** icon.

Figure 28-2   Create a New Note Icon in a Notes View

A panel opens with fields for entering your note (Figure 28-3).

Figure 28-3   Panel for Creating a New Note

3. In the **Title** field, enter a note title.

   The note title is rendered as a link in the list of notes. You can filter your notes by their titles. Consider devising a naming scheme for your notes to make the most of filtering. See Filtering and Clearing Notes Filters for more information.

4. In the **Detail** field, enter the note content.

5. Click **Save** to save the note.

   When you click **Save**, the detail panel remains open, allowing you to create additional notes. After you finish, click **Close** to exit the panel.

Filtering and Clearing Notes Filters

Your note list may become lengthy, making it a challenge to find a particular note. In a given session, you can shorten the list of notes by filtering out all but the note titles that contain your filtering criteria. Enter a search or filter value to temporarily limit the display to notes that match your criteria. You can search the notes list by whole or partial words. Filtering looks for matches anywhere in the title.

To clear the filter, click the filtering icon again.

To filter notes:

1. Navigate to the page that contains the notes view, and click the **Filter notes** icon (Figure 28-4).

Figure 28-4   Filter Notes Icon
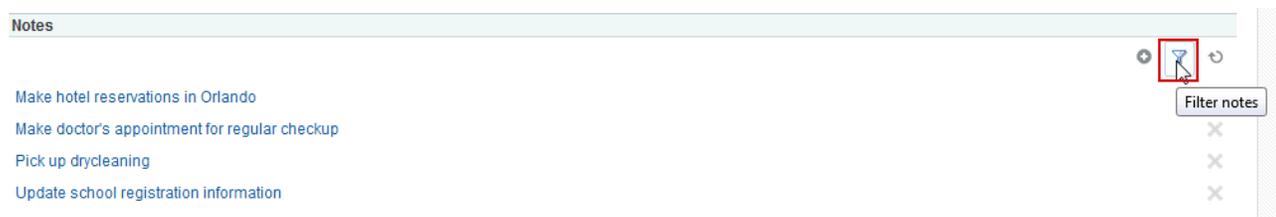
A filtering toolbar opens.

2. Enter your search term in the field provided in the filtering toolbar, then click the **Filter** icon next to the field, to apply the filter (Figure 28-5).

Figure 28-5 Filtering Toolbar

> **Note:**
>
> Filtering (or search) terms are not case sensitive. You can use whole or partial words. Filtering looks for matches anywhere in the title.

3. Click the **Filter** icon to remove the filter and display your entire list of notes.

Editing Note Details

If you need to do so, you can easily update the details of your notes.

To edit note details:

1. Navigate to the page that contains the notes view, then click the title of the note that you want to edit (Figure 28-6).

Figure 28-6 Edit Note Shown for a Note Title in the Notes View

The Notes panel opens at the top of your notes list.

2. Edit the details in the **Title** and **Detail** fields.

3. Click **Update** to save your changes and exit the edit panel.

Refreshing Your View of Notes

The notes view includes a **Refresh notes** icon that you can use to refresh your display of notes (Figure 28-7). Refreshing your view of notes is useful for viewing any recent changes.

To refresh the Notes view:

- Navigate to the page that contains the Notes view, then click the **Refresh notes** icon (Figure 28-7).

> **✎ Note:**
>
> Do not click the Reload or Refresh button in your browser. Click the **Refresh** icon to update your view.

Figure 28-7   Refresh Notes Icon in the Notes View

The notes view is updated to show recent changes.

Deleting Notes

When a note has outlived its usefulness, you can remove it from your notes view. Each note has its own **Delete note** icon.

To delete a note:

1. Navigate to the page that contains the Notes view, and click the **Delete note** icon next to the note you want to delete (Figure 28-8).

Figure 28-8   Delete Note Icon

A Delete Note confirmation dialog appears.

2. Click the **Delete** button to delete the applicable note.

Linking Notes

You can create a linked note to an asset. For example, when working on a list, you can create a note from the list or from a list row, and that note is linked to the entire list or the row from where you created the linked note. For more information about creating linked notes, see Adding and Linking to a Note.

Figure 28-9 shows how a note can be created from (and thus linked to) an announcement.

Figure 28-9   Linking an Announcement to a New Note

29
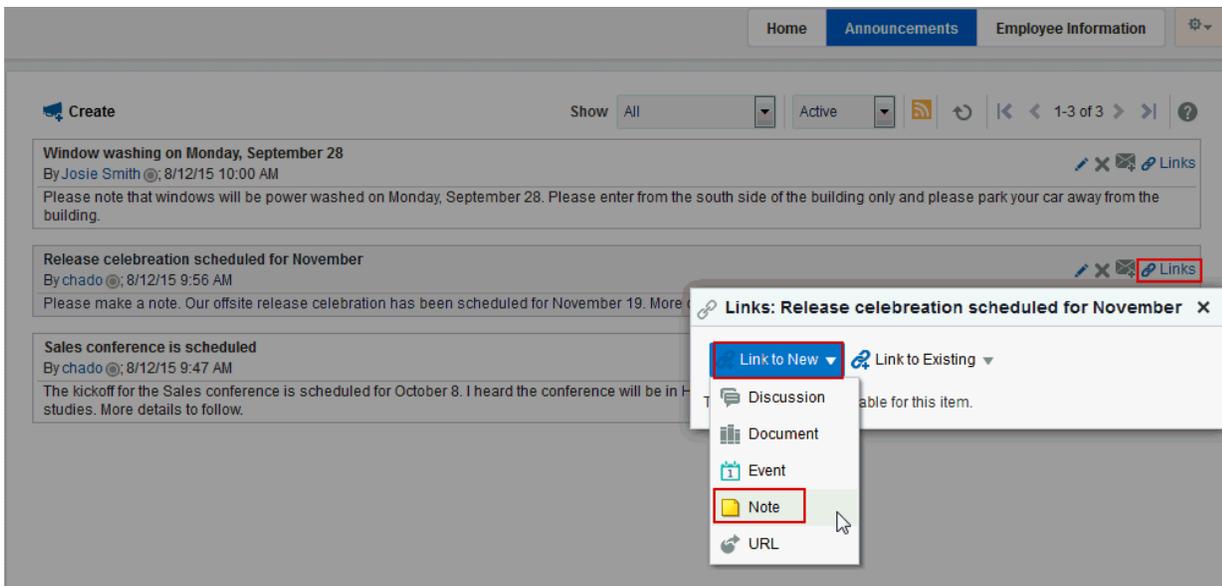
Working with Lists

Create, manage, and publish lists to track issues, capture project milestones, publish project assignments, and much more

> **Note:**
>
> Tasks discussed in this chapter are not available if lists are not enabled and exposed. The portal manager adds and configures lists, as described in Adding Lists of Information to a Portal in *Building Portals with Oracle WebCenter Portal*.

> **Permissions:**
>
> The tasks described in this chapter are available to any WebCenter Portal user with access to a page that contains a list.
>
> However, you might not be able to do some tasks if *one* or more of the following advanced permissions for lists have been set:
>
> - `Create, Edit, and Delete Lists`
> - `Create Lists`
> - `Edit Lists`
> - `Delete Lists`
> - `Edit List Data`
> - `View Lists`

Topics:

- About Lists
- Working with Lists Features

About Lists

You can create, publish, and manage lists in WebCenter Portal on the **Lists** page or console.

Lists are useful for many portal activities, such as tracking issues, capturing project milestones, publishing project assignments, and much more. The lists you create in WebCenter Portal can be widely varied in their complexity. For example, you can start with a list of team members, and then include columns for contact information, project

role, and links to relevant documents, such as any plans or proposals associated with a listed team member.

Lists are available to all portals except the Home portal. Whether the Lists view or Lists page (or console) is exposed for use depends on the actions of your portal manager.

For information about working with lists as a portal manager, see Adding Lists of Information to a Portal in *Building Portals with Oracle WebCenter Portal*.

The lists you create in a portal are unique to that portal. A portal cannot consume the lists created in another portal.

If the Lists page is available, use the controls on the **Lists** page to create and revise lists and list data and to view all of a portal's current lists.

Figure 29-1   A List on the Lists Page

On the **Lists** page or console, you can make use of templates for rapid creation of lists and tools for designing and revising list structure. If you prefer, you can create a list from scratch, adding, and configuring all of the columns yourself, or you can create a list from an Excel spreadsheet.

See Creating and Managing Lists for more information.

The lists that you create using the Lists page appear in the List viewer (if available) on another page. A List viewer can be placed on any page by the portal manager. While you can use the Lists page or console to create different lists, the List viewer provides a means of working with a particular list on a page.

Figure 29-2   A List in the List Viewer

The List viewer provides easy access to all the features required for adding and revising list data, importing/exporting list data, filtering list data, obtaining a list RSS feed, and linking to other WebCenter Portal assets from the list and from a row in the list.

Additionally, the List viewer provides access to customization tools that enable you to control the look of a particular list instance and its data. For example, use customization to control color banding of rows or columns or to apply filters to list data.

See About Customizing Lists for more information.

Use the **Lists** page and the List viewer to add and revise list data throughout the life of the list. Add and revise content directly on a list, or use the list Export and Import features to send list data to an Excel file, revise it there, and then import it back into the original list in WebCenter Portal.

See Adding and Managing List Data and Exporting a List and Importing a List from an Excel Spreadsheet.

> **Note:**
>
> To expose the **Lists** page to all portal members, the portal manager must add the page link to the portal navigation. For a page to show in portal navigation, the **Visibility** check box for the page must also be selected.
>
> See Adding an Existing Page to the Portal Navigation in *Building Portals with Oracle WebCenter Portal*

Through its tight integration with links, lists provide the opportunity to associate other WebCenter Portal items with an entire list or an individual list row. Linking enables you to associate documents, notes, and URLs with a list or a list row.

See Working with Links in Lists and List Rows.

Lists additionally provide RSS feeds for all lists and for individual lists.

See Obtaining List News Feeds.

Working with Lists Features

This section provides information about using the features available through the **Lists** page and the List viewer. It includes the following topics:

- Viewing Lists
- Creating and Managing Lists
- Adding and Managing List Data
- About Customizing Lists
- Mailing a Link to a List to Other Users
- Exporting a List and Importing a List from an Excel Spreadsheet

Viewing Lists

To view the lists associated with a particular portal, you must have access to that portal. If you have access, you can view all of a portal's lists on its **Lists** page or console. The List viewer can also be added to a page in WebCenter Portal by the portal manager. See Figure 29-2 for a list displayed in the List viewer and Figure 29-3 for lists on a Lists page.

The **Lists** page is available in a portal if Lists is enabled and a Lists page has been made available by the portal manager. For information about enabling tools in a portal, see Enabling and Disabling Tools and Services Available to a Portal in *Building Portals with Oracle WebCenter Portal*.

To expose the Lists page to all portal members, the portal manager needs to add the page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation in *Building Portals with Oracle WebCenter Portal*. For a page to show in portal navigation, the **Visibility** check box for the page must also be selected. For more information, see Showing or Hiding a Page in the Portal Navigation in *Building Portals with Oracle WebCenter Portal*.

To view a list on the **Lists** page or console:

1. Go to the portal that contains the list you want to view, and open the **Lists** page.
2. From the **Lists** panel, select the list you want to view.

   List details appear on the right (Figure 29-3).

Figure 29-3   List of Lists on a Lists Page

> **Note:**
>
> If RSS is enabled in the portal, you can track the creation of and revisions to lists from one convenient location: your favorite news reader. See Obtaining List News Feeds.

Creating and Managing Lists

This section describes how to create, edit, copy, and delete lists on the **Lists** page or console.

This section includes the following topics:

- Creating Lists
- Editing List Structure
- Copying a List
- Deleting Lists

Creating Lists

> **Note:**
>
> You can create a new list if the **Lists** page or console is available. If your portal manager has placed a list viewer on a page, you will not be able to create a new list.

In WebCenter Portal, you can create a list using any of the following sources:

- Create a blank list for which you create and configure all columns (up to 30).
- Create a list from a template, and use the template or modify the template.

- • Create a list from a Microsoft Excel spreadsheet.

To create a list:

1. Go to the **Lists** page (or console) of the portal where you want to create a list.

   If the Lists page is not exposed, you will not be able to create a new list.

2. In the **Lists** panel toolbar, click the **Create a new list** icon.

Figure 29-4   Create a New List Icon on a Lists Page
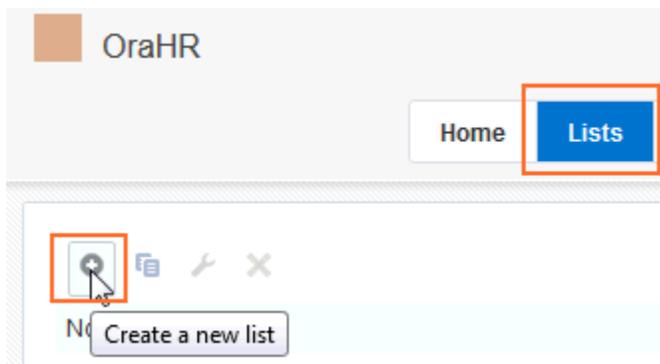
3. In the Create List dialog, enter a name for the list in the **Name** field.

Figure 29-5   Create List Dialog
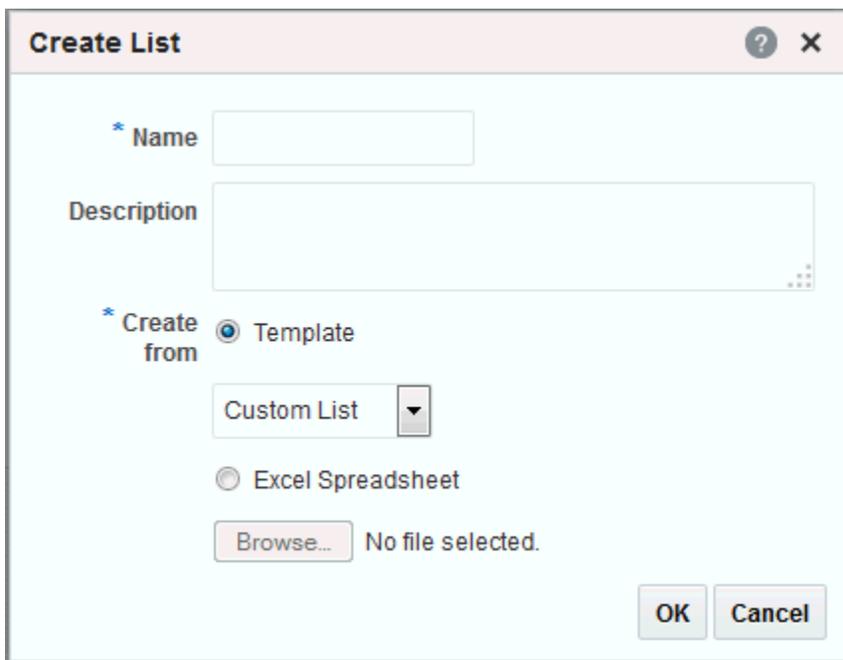
4. Optionally, in the **Description** field enter a description of the list.

> **Tip:**
>
> In a completed list, the description appears between the list title and list data.

5. For **Create From**, select to create the list using a predefined **Template** or from an **Excel Spreadsheet**.

6. If you select to create a list from a **Template**, select a template from the **Template** drop-down list:

   - **Custom List**—To create a list without using a template.

   - **Issues**—To create a list of, for example, project issues. By default, this template provides the columns No., Description, Target Date, Assigned, Status, and Comments.

   - **Milestones**—To create a list of, for example, project milestones. By default, this template provides the columns Date, Description, and Status.

   - **Objectives**—To create a list of, for example, project objectives. By default, this template provides the columns Title and Description.

   If you select to create a list from an **Excel Spreadsheet**, click **Browse** to navigate to and select the spreadsheet:

   - The first row of the spreadsheet is used as column headings. The subsequent rows are added as data.

   - All the columns are created with the data type `Plain Text`. After creation, you can modify the data types as desired.

     For information about data types, see #unique_445/ unique_445_Connect_42_CIHJDGBE.

> **Tip:**
>
> You can use the Excel Spreadsheet option to import a list from a different portal or from a different WebCenter Portal instance. That is, you can export the list from the portal or WebCenter Portal instance and import it into the current portal or instance.

7. Click **OK**.

   The new list appears in the **Lists** panel on the **Lists** page.

Figure 29-6   Newly Created List on the Lists Page (Console)
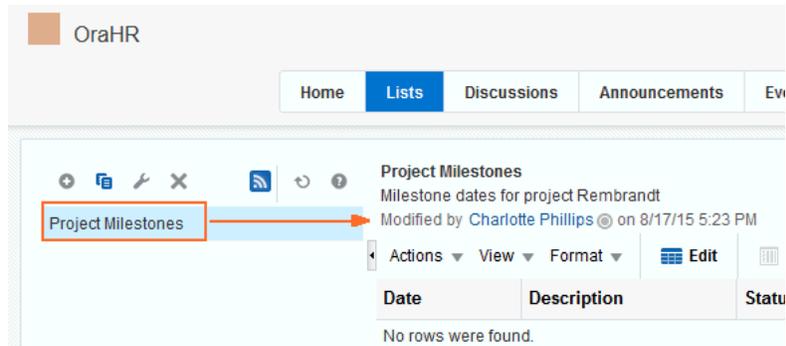
You may now revise default list columns and add new columns to the list by clicking the **Edit list** icon. For a custom list, you must add columns to the list before you can add rows.

For more information, see Editing List Structure.

> **See Also:**
>
> For information about adding new list rows, see Adding and Managing List Data.

Editing List Structure

When you edit list structure, you can revise everything about the list. For example, you can change column details; remove, add, and rearrange columns; and rename or add another description for the list.

> **Note:**
>
> You can edit a list if the **Lists** page or console is available. If your portal manager has placed a list viewer on any page in the portal, you will not be able to create or edit a list.

- Renaming a List and Revising a List Description
- Adding Columns to a List
- Revising List Column Details
- Rearranging List Columns on All Instances of a List
- Deleting a List Column

Renaming a List and Revising a List Description

To rename a list and revise a list description:

1. Go to the portal where you want to rename a list or revise a list description, and open its **Lists** page.

> **Tip:**
>
> If the Lists page is not exposed, you will not be able to rename a new list or revise its description.

2. In the **Lists** panel, select the list you want to change, and click the **Edit list** icon.

Figure 29-7   Edit List Icon on LIsts Page
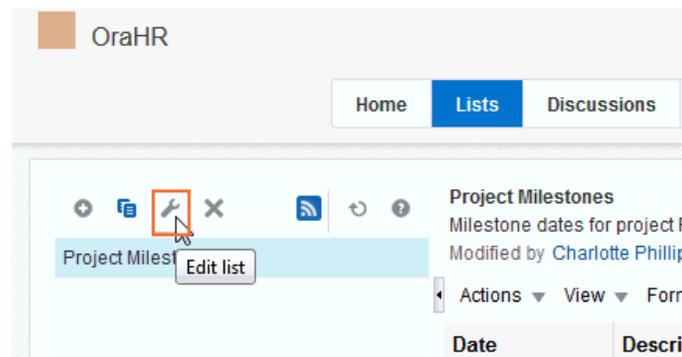
The list displays in edit list mode.

Figure 29-8   List in Edit List Mode
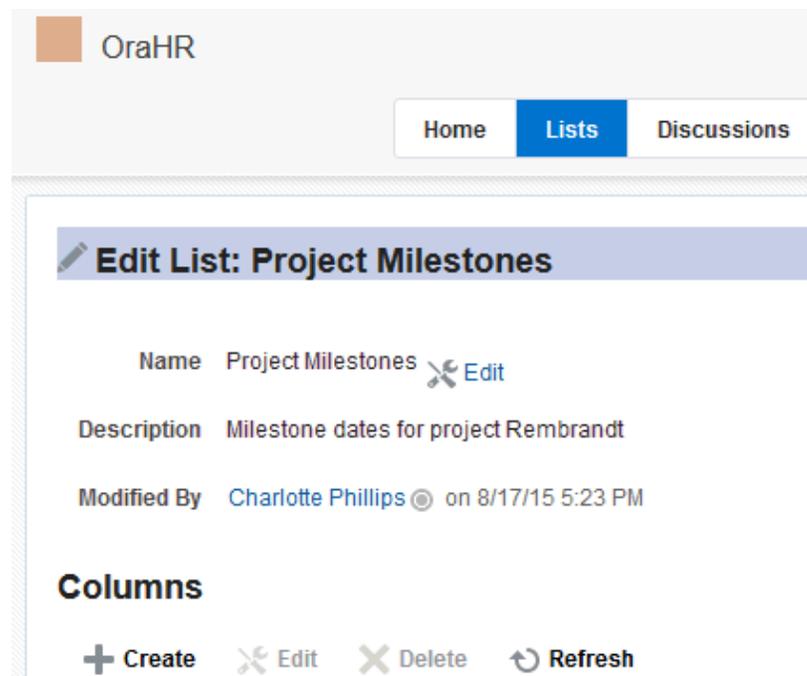
3. Click **Edit** to the right of the **Name** field to open a dialog for revising the list name and description.

Figure 29-9   Edit List Dialog
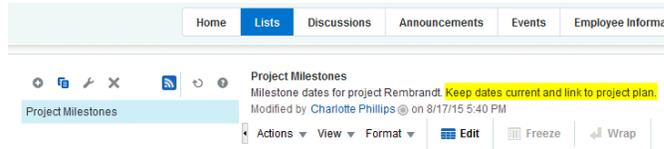
4. Revise the list name, and enter or revise the description.

5. Click **OK** to close the dialog and save your changes.

6. Click **Close** to return to view list mode.

Adding Columns to a List

This procedure is useful when you create a custom list or you want to alter a list that you created from a template or a spreadsheet. A list supports up to 30 columns.

When you add a column to a list, the new column is added after the selected column. If no column is selected, the new column is added as the first column.

To add columns to a list:

1. Go to the **Lists** page of the portal where you want to add columns to a list.

   If the Lists page is not exposed, you will not be able to add columns.

2. In the **Lists** panel, select the list to which to add columns and click the **Edit list** icon.

Figure 29-10   Edit List Icon
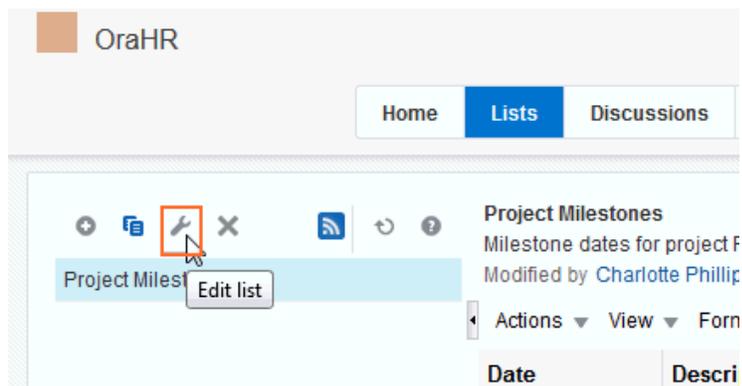
The **Lists** page displays in list edit mode.

Figure 29-11   List in Edit List Mode
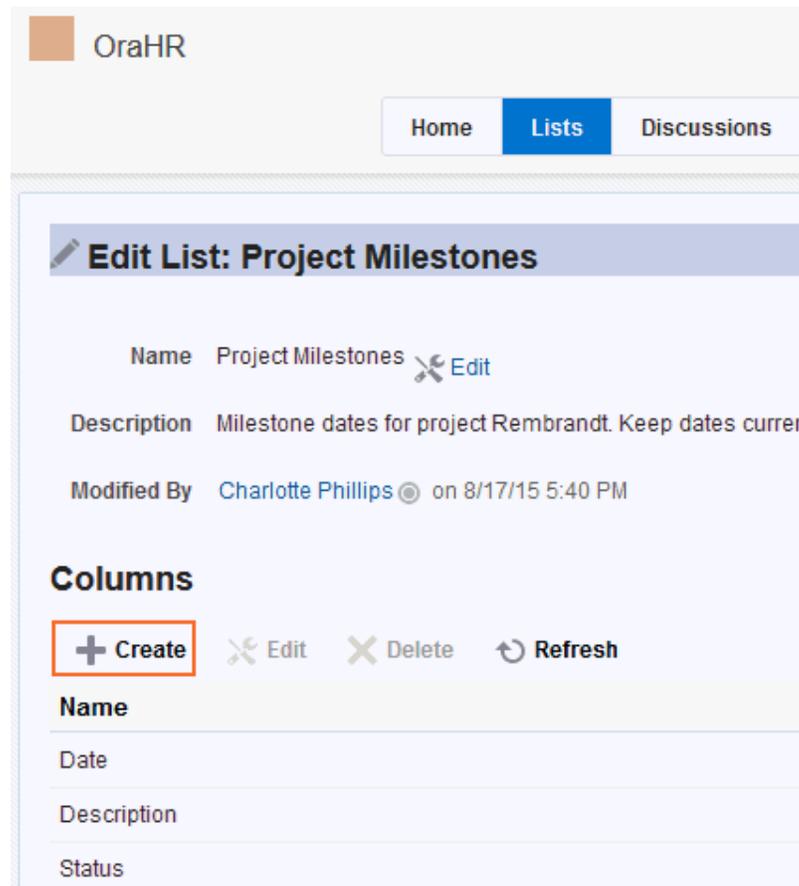
3. Under **Columns**, click the **Create** button to open the Create Column dialog.

Figure 29-12   Create Column Dialog

Select a column to add a new column after it.

4. In the **Name** field, provide a name for this column.

5. From the **Data Type** list, select the type of data you want to enter in this column.

> **✎ Note:**
>
> The data type you select affects the type of data that can be entered for the column and the way the data is rendered. It also affects the type of validation that is run on column data when you and other authorized users add list rows. For example, if you select a `DateTime` data type, and a user enters text that is not in the `DateTime` format, WebCenter Portal displays an error.

This table lists and describes the data types available to list columns, and provides information about the additional details that appear for each type.

Data Type	Description	Comments
`Plain Text`	Unformatted text, provides options for making the text a link	Additional column details include: • Required • Default Value • Maximum Length • Number of Lines for Editing • Allow Links • Link Window • Display Width • Hint
`Rich Text`	Rich, formatted text entered through a rich text editor, may include links	Additional column details include: • Required • Display Width • Hint
`Number`	Numerical values	Additional column details include: • Required • Format • Default Value • Minimum Value • Maximum Value • Display Width • Hint For Format, select from: • `Number`—an unformatted number; decimal separator is based on the currently selected locale. • `Currency`—value is formatted as a currency value; the currency symbol and decimal separator are based on the currently selected locale. • `Percent`—value is formatted as a percentage; the value *0.6* is formatted as `0.6%`; the value *60* is formatted as `60%`. The Number data type supports numbers from 1.79769313486231570e+308 with 14 to 15 significant digits.[1]

Data Type	Description	Comments
DateTime	Dates and times in the format specified in a given user's WebCenter Portal Preferences.	Additional column details include: • Required • Format • Default Value • Display Width • Hint For Format, select from: • `Date`—For requiring a date. • `Time`—For requiring a time. • `Date and Time`—For requiring a date and a time. The way the selected Format is rendered is controlled by the user's date and time preferences. The **Default Value** field includes a date picker, which you can use to select a default date in the correct format. The current date is highlighted, with a box around it. This field does not require leading zeroes, for example, for September 9, 2015, it does not require `09/04/2015`. Instead, you can use `9/4/2013`.
Boolean	Either `TRUE` or `FALSE`	Additional column details include: • Default Value • Display Width • Hint `TRUE` or `FALSE` is rendered as a check box. Selected equals `TRUE`; deselected equals `FALSE`.
Picture	A URL to an image (the image is rendered in list view mode)	Additional column details include: • Required • Display Width • Hint
Person	A valid user name	Additional column details include: • Required • Range of Users • Default Value • Display Width • Hint The **Range of Users** field enables you to limit the valid range of users to the membership of the current portal (or to include all users). The **Default Value** field includes a **Find user** icon, which you can use to locate and select a default user. The list column contains a presence indicator next to the user name. Click the presence indicator to open a context menu with options for making contact with the person instantly.

[1] Number data-type columns adhere to the range and precision specified for the 8 byte IEEE 754 double data type. When the maximum number of significant digits is exceeded, the number is rounded.

6. After you select a data type, enter values for the remaining fields.

This table lists the possible remaining fields and their associated data types.

Column Detail	Description	Associated Data Type(s)
Allow Links	Specify whether to allow column data to be hyperlinked. Specifying **Allow Links** enables the user to enter both a column value and a URL. If a URL is specified, the column value is rendered as a hyperlink.	Plain Text
Default Value	Optionally, provide a default value for the column entry, such as a default image, number, user name, and the like.	• Plain Text • Number • DateTime • Boolean • Person
Display Width	Enter a value in pixels to set the column width.	All data types
Format	Use this pick list to specify the format for column values.	• Number • DateTime
Hint	Enter text to assist the user in understanding the content to enter into the column. This text appears when focus is on this column in edit list data mode.	All data types
Link Window	Indicate how a hyperlink on column data should open. Choose from: • New Window—The link opens in a new browser tab or window. • Current Window—The link opens in the current browser window.	Plain Text
Maximum Length	Enter the maximum number of characters for this column entry. This includes character spaces.	Plain Text
Maximum Value	Indicate the highest number that can be entered in this column.	Number
Minimum Value	Indicate the lowest number that can be entered in this column.	Number
Number of Lines for Editing	Indicate the number of lines to make available for editing. When the value is 1, the user enters data in a single line text field when editing list data. Long values scroll horizontally. When the value is greater than 1, the user enters data in a multiline text field. Long values scroll vertically. This makes entering and viewing large values much easier.	Plain Text
Range of Users	Indicate whether to limit the selection of users to members of the current portal (portal Members) or to allow a selection from all authenticated users (All Users).	Person
Required	Select this check box to require that data is entered in this column.	• Plain Text • Rich Text • DateTime • Number • Picture • Person

7. Click **OK** to save your changes and exit the dialog.

8. Click **Close** to exit List Edit mode.

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Revising List Column Details

You can revise every detail of a list column. That is, you can rename the column, change the column data type, require a value, or remove a value requirement. Keep in mind, however, if you change a column data type, any values currently entered in the list column are either converted to the new data type or removed irrevocably.

For example, if you move from a `Plain Text` data type to a `Number` data type, values that can be converted to a number are retained; other values are removed. Before any values are removed by the change, you are asked for confirmation. In contrast, if you move from a `Number` data type to a `Plain Text` data type, all values are retained.

> **Note:**
>
> Validation occurs only on data entry. If a user changes column details after data has been entered into the column, the existing data is not affected (that is, validated) even if it does not meet the new column detail conditions on the columns.
>
> If you want to validate new list data, you can export the list data to an Excel spreadsheet and then import it. On import, all rows are validated. The rows that fail validation are noted. You can fix invalid rows in the spreadsheet and import again.

> **See Also:**
>
> Exporting a List and Importing a List from an Excel Spreadsheet.

To revise list column details:

1. Go to the **Lists** page of the portal where you want to revise list column details.

   If the Lists page is not exposed, you will not be able to revise column details.

2. In the **Lists** panel, select the list you want to change and click the **Edit list** icon.

Figure 29-13   Edit List Icon
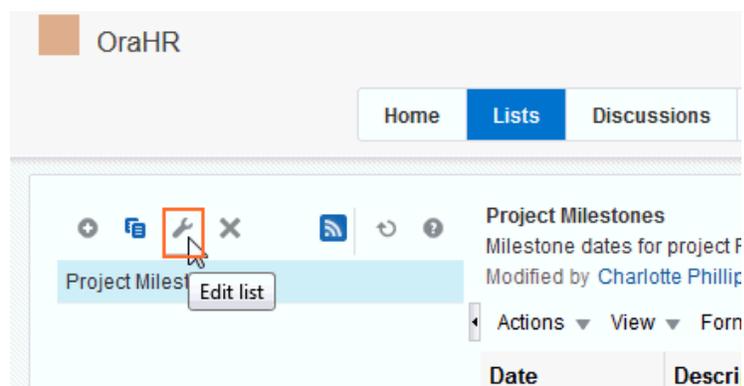
The **Lists** page opens in edit list mode.

Figure 29-14   List in Edit List Mode

3. Under **Columns**, select the list column you want to revise and click **Edit** .

Figure 29-15   Edit Column
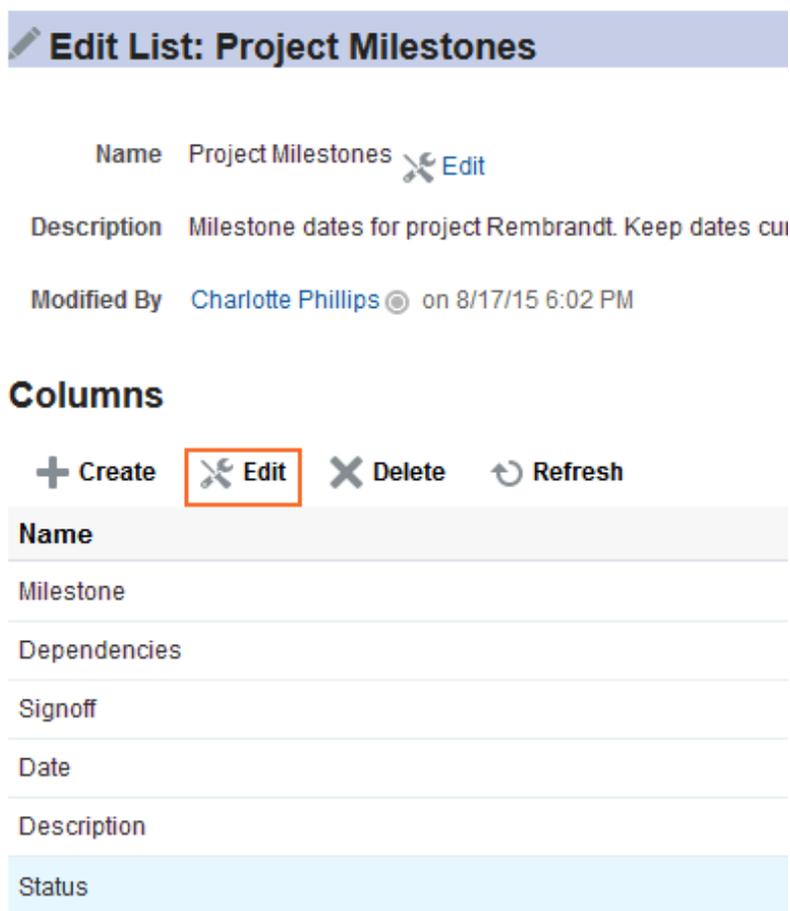
The Edit Column dialog opens.

Figure 29-16   Edit Column Dialog

4. Edit column details as needed, then **OK** to save your changes and close the dialog.

5. Click **Close** to exit edit list mode.

Rearranging List Columns on All Instances of a List

You can rearrange list columns in the list structure, affecting all instances of a list, by clicking rearrange icons or by dragging and dropping.

> **See Also:**
>
> For information about rearranging column order of a particular list instance in your view or everyone's view, see Changing Column Order on a List Instance.
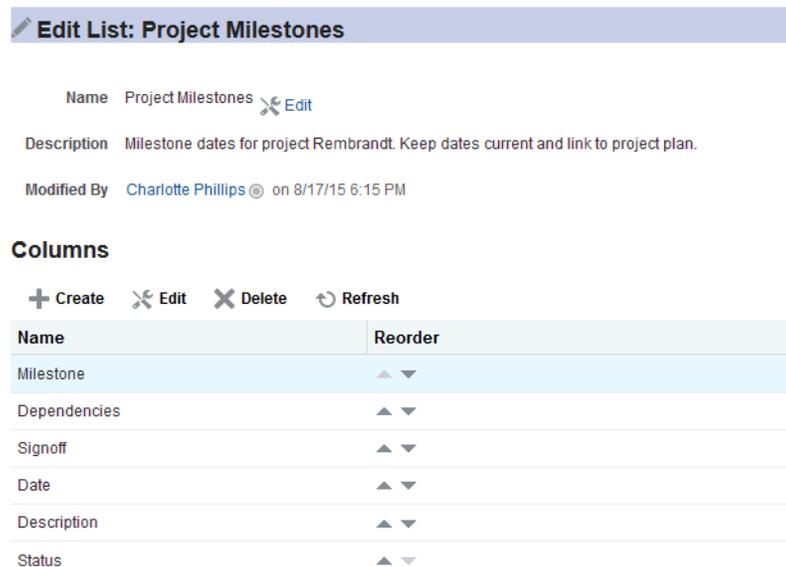
To rearrange columns on *all* instances of a list:

1. Go to the **Lists** page of the portal where you want to rearrange list columns.

> **Tip:**
>
> If the Lists page is not exposed, you can't rearrange column details on all instances of a list.

2. In the **Lists** panel, select the list you want to change and click the **Edit list** icon to open the list edit mode.

3. In the **Columns** section, click an icon under the **Reorder** column to move a column higher or lower in the order of columns.

Figure 29-17   Reorder Column Icons on Edit List Page
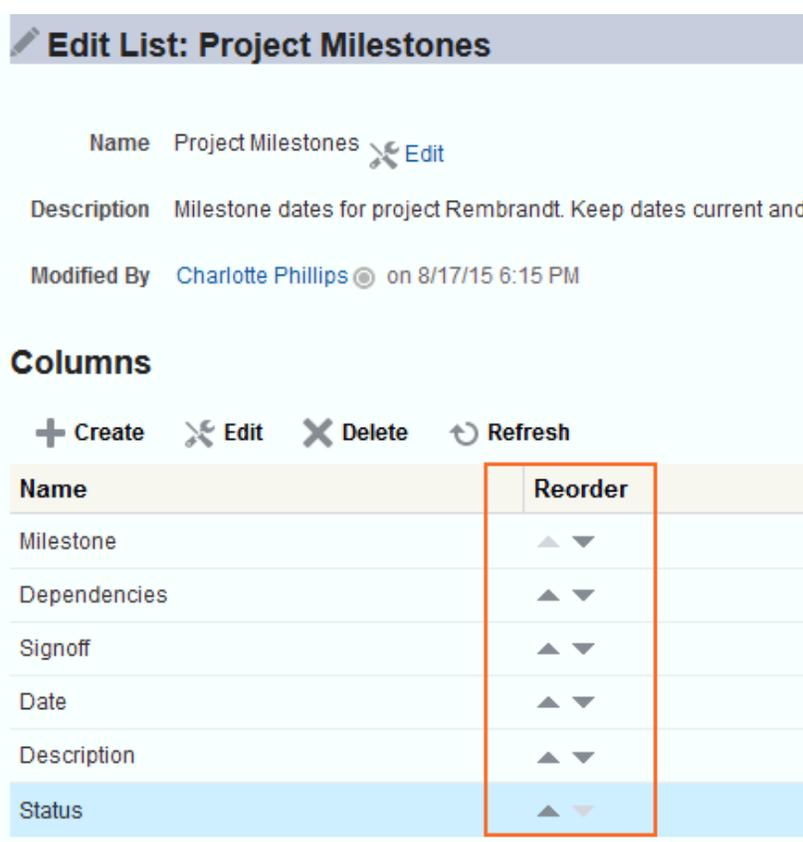
> **Tip:**
>
> Moving a column higher causes it to appear further to the left in column display order. Moving a column lower causes it to appear further to the right.

Alternatively, drag and drop a column higher or lower in the column hierarchy.

4. Click **Close** to exit list edit mode.

Deleting a List Column

To delete a list column:

1. Go to the **Lists** page of the portal where you want to delete list columns.

> **Tip:**
>
> If the Lists page is not exposed, you can't delete columns in a list.

2. In the **Lists** panel, select the list you want to change and click the **Edit list** icon to open the list edit mode.

Figure 29-18   List in Edit List Mode

3. Select a column, and click **Delete**.

Figure 29-19   Delete Button on Edit List Page
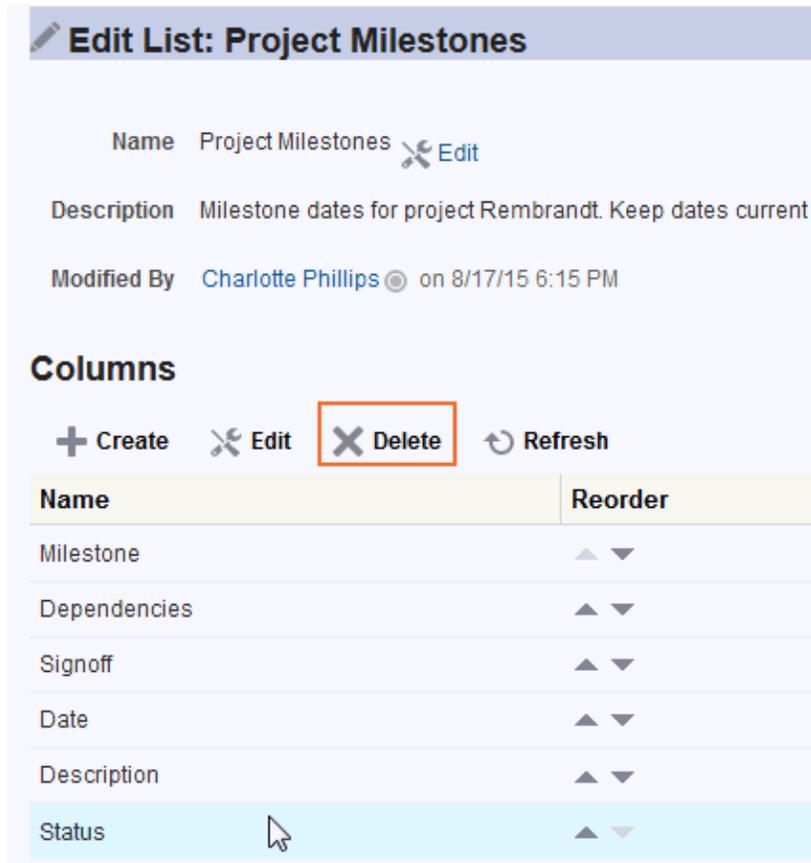
4. In the resulting confirmation dialog, click **Delete** to complete the deletion.

5. Click **Close** to exit list edit mode.

Copying a List

You can use an existing list as a template simply by copying it. First, copy the list, and then edit the copied list.

To copy a list:

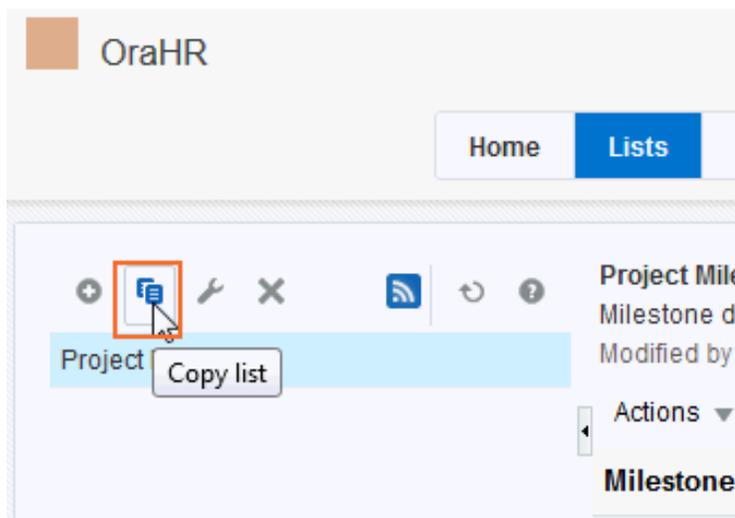1. Go to the **Lists** page of the portal that contains the list you want to copy.

> ✎ **See Also:**
>
> For information about navigating to a **Lists** page, see Viewing Lists.
>
> You can copy a list if the Lists page is available. If your portal manager has placed a list viewer on a page, you will not be able to copy a list.
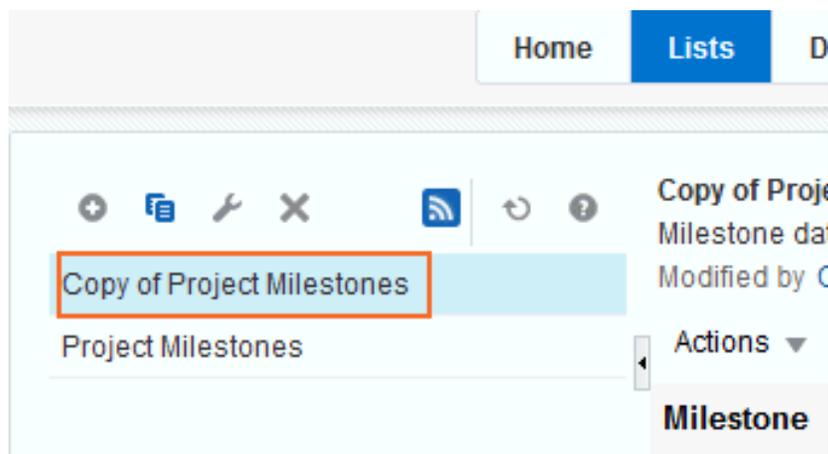
2. In the **Lists** panel, select the list you want to copy.

3. Click the **Copy List** icon.

Figure 29-20   Copy List Icon on the Lists Page (Console)

A copy of the list becomes available for selection in the **Lists** panel.

Figure 29-21   Copy of a List

4. Rename the list and edit the list structure.

    For information about changing the list name or description, see Renaming a List and Revising a List Description. For information about revising list structure, see Editing List Structure.
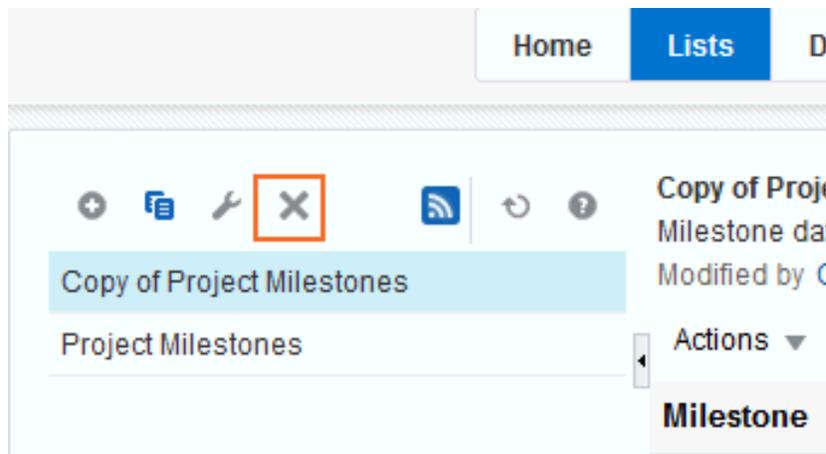
Deleting Lists

To delete a list:

1. Go to the **Lists** page of the portal that contains the list you want to delete.

> **See Also:**
>
> For information about navigating to a **Lists** page, see Viewing Lists.
>
> You can delete a list if the Lists page is available. If your portal manager has placed a list viewer on a page, you will not be able to delete a list.

2. In the **Lists** panel, select the list you want to delete.

   To select multiple lists, press Ctrl+click; to select a range of lists, press Shift+click.

3. Click the **Delete list** icon (Figure 29-22).

Figure 29-22   Delete List Icon on the Lists Page (Console)

4. In the confirmation dialog, click the **Delete** button.

   The selected lists are removed from the **Lists** panel.

Adding and Managing List Data

After you have created a list structure, you and other users who have access can add, edit, and refresh list data, and delete lists rows.

> **Note:**
>
> To work with list data, you need the permission `Edit List Data`. For more information about roles and permissions, see Managing Roles and Permissions for a Portal in *Building Portals with Oracle WebCenter Portal*.

- Adding Data of a Given Data Type to a List
- Editing List Data
- Deleting List Rows
- Refreshing List Data

- Working with Links in Lists and List Rows

> **See Also:**
>
> See Creating and Managing Lists for more information about list structure. See #unique_445/unique_445_Connect_42_CIHJDGBE and #unique_445/unique_445_Connect_42_CIHCBABH for more information about list data types.

Adding Data of a Given Data Type to a List

This section describes how to add data to a list. When you add data to a list, you do so row-by-row (unless you are importing a spreadsheet). The placement of a new row depends on the following considerations:

- When you add a new row, it is created after the selected row.
- If no row is selected, the new row is created as the first row.
- After you save, list data is refreshed and rows are shown in sort order.

> **See Also:**
>
> Sorting List Data on a Column.

You can add one or multiple list rows before you add content, or you can create a list row and add content to it right away.

This section provides an overview procedure for adding list data, and steps you through how to add data for the supported data type. It includes the following topics:

- Adding Data to a List
- Adding Plain Text Data to a List
- Adding Rich Text Data to a List
- Adding DateTime Data to a List
- Adding Picture Data to a List
- Adding Person Data to a List

> **Tip:**
>
> The `Number` and `Boolean` data types are not included here because, for a `Number` data type, you simply enter a number, and, for a `Boolean` data type, you simply select or deselect a check box.

Adding Data to a List

To add data to a list:

1. Go to the **Lists** page or the List viewer that displays the list you want to populate with data, and click the **Edit List Data** icon (Figure 29-23).

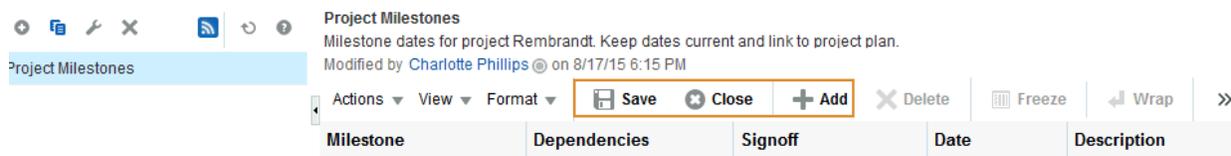**Figure 29-23 Edit List Data Icon**

> **Tip:**
>
> You can also enter list edit mode by selecting **Edit** from the **Actions** drop-down list or by pressing Ctrl+E.
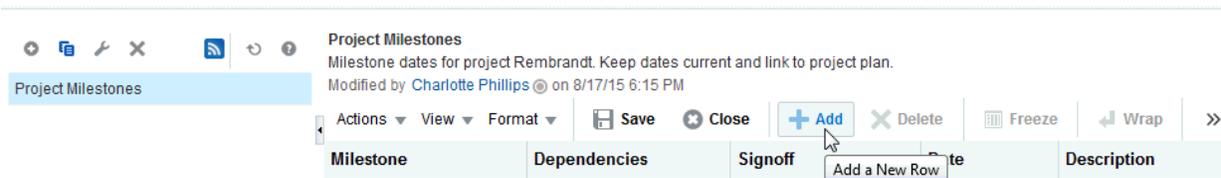
The List Data appears in Edit mode (Figure 29-24).

Figure 29-24 List Data in Edit Mode

2. Click the **Add a New Row** button to add a row to the list (Figure 29-25).

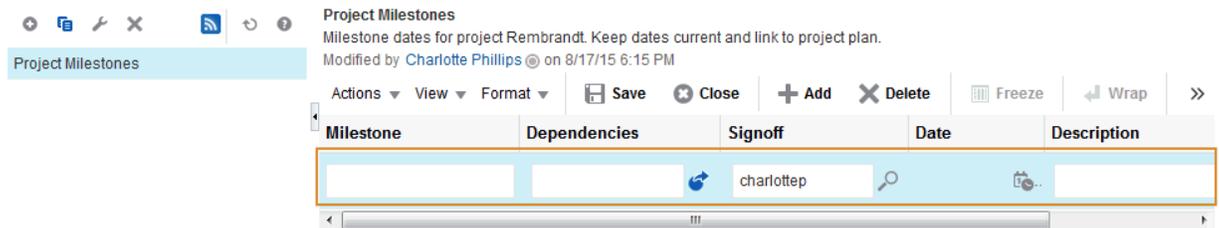**Figure 29-25 Add A New Row Icon on a List**

> **Tip:**
>
> You can also start the add-row process by selecting **Add Row** from the **Actions** drop-down list or by pressing Ctrl+I.

The new row is added after the selected row. If no row is selected, it is added as the first row (Figure 29-26).

Figure 29-26   A Newly Added Row

3. Add data to the new row.

> **Tip:**
>
> You can only edit the row with focus. Click a row to give it focus and edit it.

4. Repeat the steps to create new rows and add data.

5. When you finish adding rows and data, click **Save** to save your changes and then click **Close** to exit edit list data mode.

> **Tip:**
>
> To save, you can also select **Save** from the **Actions** drop-down list, or press Ctrl+M. To close, click **Close**, select **Close** from the **Actions** drop-down list, or press Ctrl+Q.

When you save your changes, the list data is refreshed and the rows are rendered in sort order (for more information, see Sorting List Data on a Column).

Adding Plain Text Data to a List

The `Plain Text` data type allows for the entry of unformatted text, and provides options for making the text a link.

> **Tip:**
>
> To create a hyperlink on a `Plain Text` data type, the list column must be configured to allow the creation of hyperlinks. For more information, see Adding Columns to a List.

To enter `Plain Text` data into a list row:

1. Open the edit list data mode (see Adding Data to a List).

2. Go to the column row that is formatted to support the `Plain Text` data type:

- To enter unlinked text, enter text in the field provided.

- To enter linked text (**Allow Links** is selected in the Create/Edit Column dialog):

a. Click the **Edit Column Link** icon to the right of the data entry field (Figure 29-27).

Figure 29-27   Edit Column Link Icon
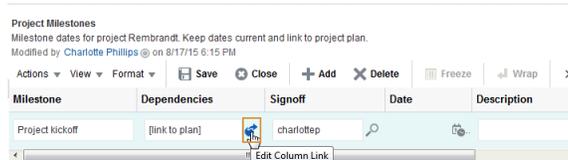
b. In the **Edit Column Link** dialog that opens, enter text in the **Text** field, and enter a full URL in the **Link Location** field (Figure 29-28).

Figure 29-28   Edit Column Link Dialog
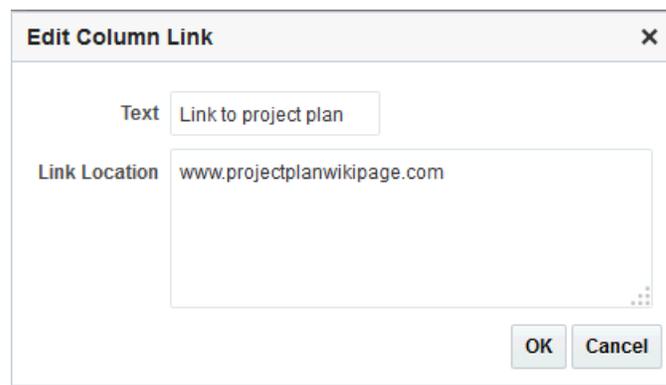
c. Click **OK**.

> **Tip:**
>
> To remove a link, click the **Edit Column Link** icon, and delete the URL from the resulting dialog.

3. When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit the edit list data mode.

> **Tip:**
>
> To save, you can also select **Save** from the **Actions** menu, or press `Ctrl+M`. To close, click **Close**, select **Close** from the **Actions** drop-down list, or press `Ctrl+Q`.

If both text and a link location were specified, the text is rendered as a hyperlink (Figure 29-29).

Figure 29-29   A Plain Text Field with a Hyperlink

Adding Rich Text Data to a List

The `Rich Text` data type allows for the entry of rich, formatted text through a rich text editor. Rich text may include links.

To enter `Rich Text` data into a list row:

1. Open the edit list data mode (see Adding Data to a List).

2. Go to the column that is formatted to support the `Rich Text` data type, and click the **Edit Text** icon to the right of the data entry field (Figure 29-30).

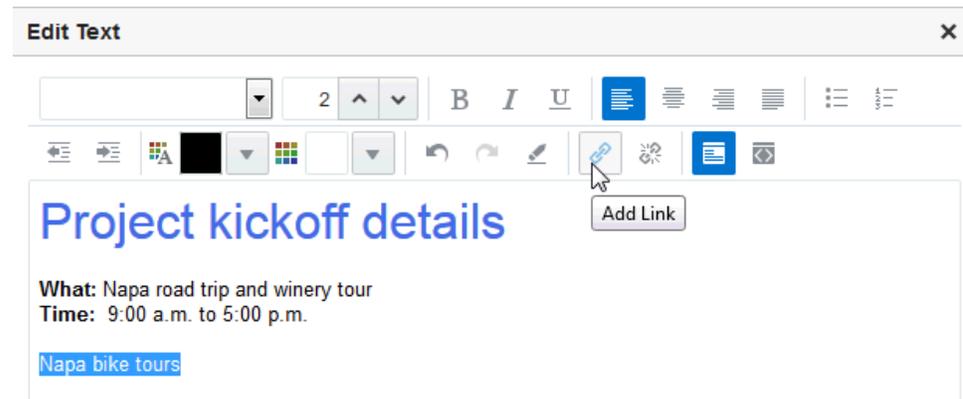**Figure 29-30   Edit Text Icon For a Rich Text Column Field**

3. Enter text and apply styles according to your requirements in the rich text editor (Figure 29-31).

4. To add a link:

    a. Highlight the link text, and click the **Add Link** icon in the editor's toolbar (Figure 29-31).

Figure 29-31   Add Link through Rich Text Editor

b.   In the resulting dialog, enter a URL in the field provided.

c.   Click **OK**.

> 💡 **Tip:**
>
> To remove a link, highlight the linked text and click the **Remove Link** icon.

5.   Click **OK** to exit the editor.

6.   When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit edit list data mode.

> 💡 **Tip:**
>
> To save, you can also select **Save** from the **Actions** menu, or press `Ctrl +M`. To close, click **Close**, select **Close** from the **Actions** drop-down list, or press `Ctrl+Q`.

Adding DateTime Data to a List

The `DateTime` data type allows for the entry of dates and times in the format specified in a given user's WebCenter Portal Preferences (for more information, see Setting Date and Time Preferences).

To enter `DateTime` data into a list row:

1.   Open the edit list data mode (see Adding Data to a List).

2.   Go to the column that is formatted to support the `DateTime` data type, and enter a value or click the **Select** <`date-time data type`> icon to the right of the data entry field (Figure 29-32).

Figure 29-32   Select Date Icon
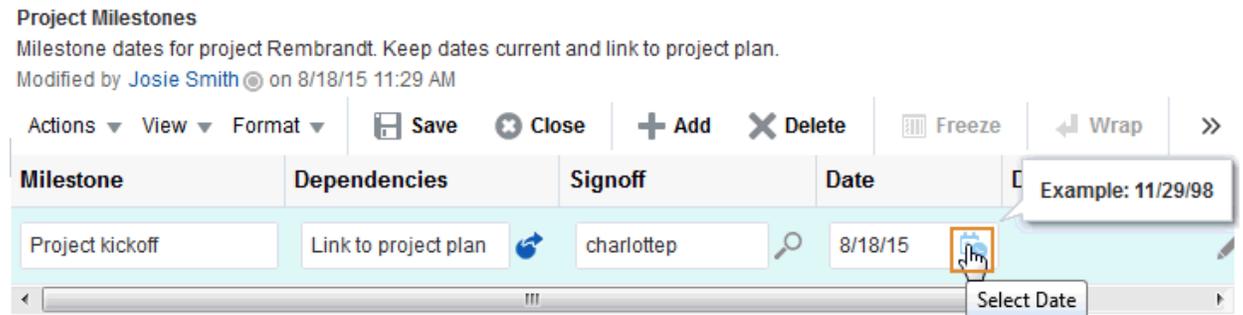
3. If you click the icon, from the calendar that appears, select a date according to the column's requirements.

4. If the column requires a date, the calendar closes after you select a value.

5. When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit edit list data mode.

> 💡 **Tip:**
>
> To save, you can also select **Save** from the **Actions** menu, or press `Ctrl +M`. To close, click **Close**, select **Close** from the **Actions** drop-down list, or press `Ctrl+Q`.

Adding Picture Data to a List

The `Picture` data type allows for the entry of a URL to an image (the image is rendered in list view mode).

To enter a `Picture` data type into a list row:

1. Open the edit list data mode (see Adding Data to a List).

2. Go to the column that is formatted to support the `Picture` data type, and enter a URL to a picture or click the **Edit Picture** icon to the right of the data entry field (Figure 29-33).
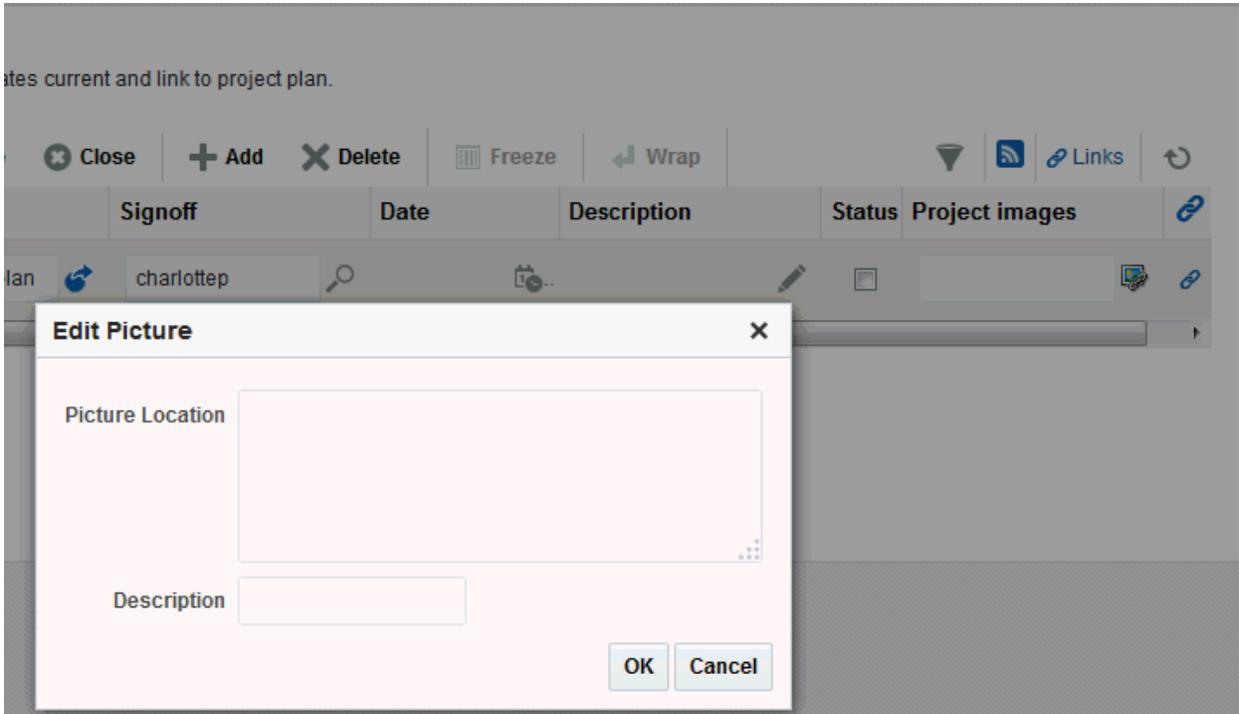
Figure 29-33   Edit Picture Icon
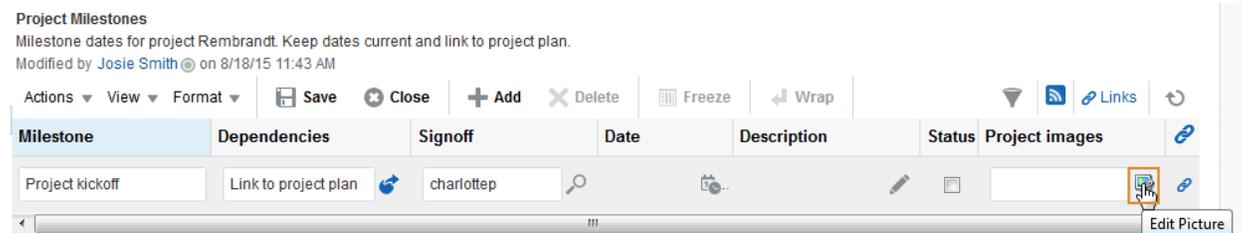
3. Click the icon and, in the Edit Picture dialog, enter a URL to an image in the **Picture Location** field (Figure 29-34).

For example, enter:

```
http://www.oracleimg.com/admin/images/ocom/hp/oralogo_small.gif
```

Figure 29-34   Edit Picture Dialog

> 💡 **Tip:**
>
> The image must be available in a location that does not require login credentials for access.
>
> You can select an image that is located in your WebCenter Portal Document Library. In the Documents view, select the image and use the **Get a Link** option on the **View** drop-down list to access a link to the image. Copy the link and paste it into the **Picture Location** field.

4. Provide `ALT` text for the image in the **Description** field.

5. Click **OK**.

6. When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit the edit list data mode.

> 💡 **Tip:**
>
> To save, you can also select **Save** from the **Actions** drop-down list, or press `Ctrl+M`. To close, click **Close**, select **Close** from the **Actions** drop-down list, or press `Ctrl+Q`.

Adding Person Data to a List

The `Person` data type allows for the entry of a user name from your company's identity store. The selection of a `Person` may be further limited to the members of the current portal. If you search for a user name, the values returned indicate whether such a limit is in place.

To enter a `Person` data type into a list row:

1. Open the edit list data mode (see Adding Data to a List).

2. Go to the column that is formatted to support the `Person` data type, and enter a user name or click the **Find user** icon to the right of the data entry field (Figure 29-35).

   For tips on searching for a user in the identity store, see Searching for a User or Group in the Identity Store in *Building Portals with Oracle WebCenter Portal*.

Figure 29-35   Find User Icon
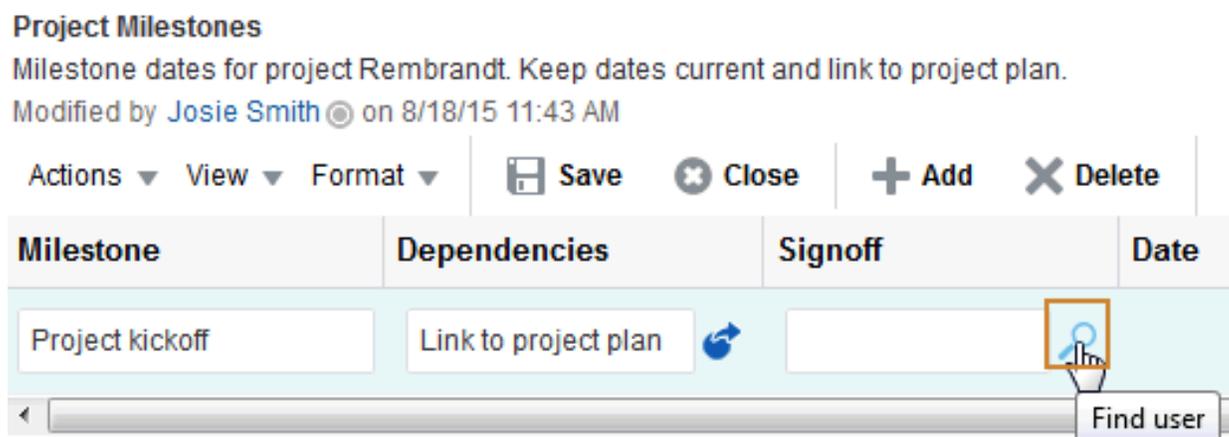
If you click the **Find user** icon, search for a user name in the **Search** field and then click the **Search** icon. Either all names in your company LDAP directory, or those users who belong to the current portal, that match your search criteria appear in the results area.

3. Select a user, and click **OK** to populate the field with your selection.

4. When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit the edit list data mode.

> 💡 **Tip:**
>
> To save, you can also select **Save** from the **Actions** drop-down list, or press `Ctrl+M`. To close, click **Close**, select **Close** from the **Actions** drop-down list, or press `Ctrl+Q`.

Editing List Data

When a list is in edit mode, you can edit one or multiple list rows. In edit mode, you can initiate a row edit simply by clicking within the row. You can continue to click in rows and edit row content until you exit edit mode.
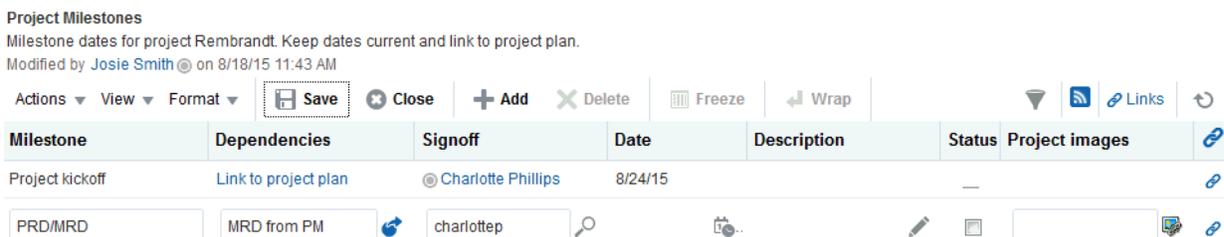
To edit list data:

1. Go to the list that contains data you want to edit, and click **Edit List Data** (Figure 29-36).
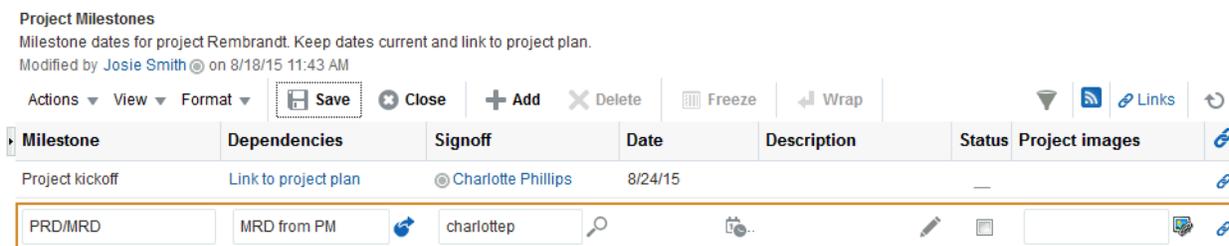
Figure 29-36   Edit List Data Icon

The selected list row opens in Edit mode (Figure 29-37).

Figure 29-37   Edit List Mode

2. Click any list row to revise its data (Figure 29-38).

Figure 29-38   A Selected Row for Edit

> **Tip:**
>
> The type of list data affects the action that you take:
>
> - To edit a `Picture` data type, click the **Edit Picture** icon next to the data entry field. Enter the URL to the picture and ALT text.
>
> - To edit a `Rich Text` data type, click the **Edit Text** icon next to the data entry field to launch the editor.
>
> - To edit a hyperlink in a column that allows links, click the **Edit Link** icon.

3. Continue clicking rows and revising data until you are finished.

4. When you finish adding rows and data, click **Save** to save your changes and click **Close** to exit the edit list data mode.

> **Tip:**
>
> To save, you can also select **Save** from the **Actions** drop-down list, or press `Ctrl+M`. To close, click **Close**, select **Close** from the **Actions** drop-down list, or press `Ctrl+Q`.

Deleting List Rows

You can delete one or multiple list rows in one operation.

> **Tip:**
>
> Selecting a row and clicking **Delete** marks a list row for deletion. The row is removed from your view, but the list data continues to exist in the WebCenter Portal's repository. The actual delete takes place when you save the change.

To delete one or multiple list rows:

1. Go to the list that contains the rows to delete.

2. Click the **Edit List Data** icon to open the list in edit mode (Figure 29-39).

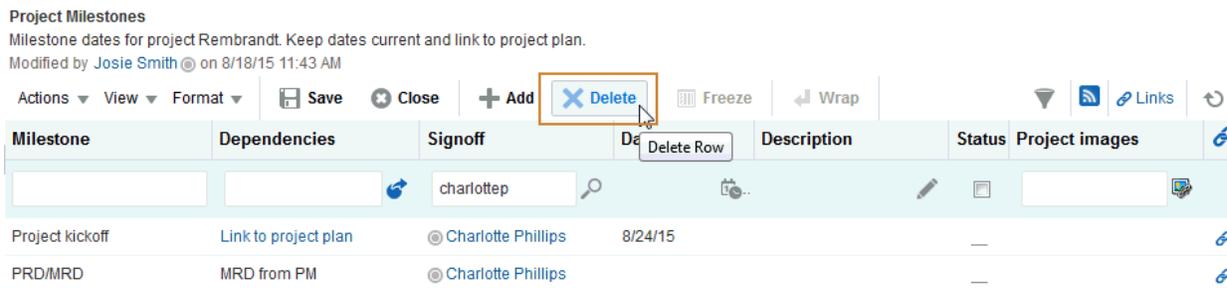**Figure 29-39   Edit List Mode**

3. Select one or more rows to delete.

   In Windows, use Ctrl+Click to select multiple rows. In UNIX, simply click multiple rows. In both operating systems, use Shift+Click to select a range of rows.

4. Click **Delete** (Figure 29-40).

Figure 29-40   Delete Button For a Selected Row

The selected rows are marked for deletion are removed from your view of the list.

5. Click **Save** to save your changes and click **Close** to exit the edit list mode.

> **Tip:**
>
> To save, you can also select **Save** from the **Actions** drop-down list, or press `Ctrl+M`. To close, click **Close**, select **Close** from the **Actions** drop-down list, or press `Ctrl+Q`.
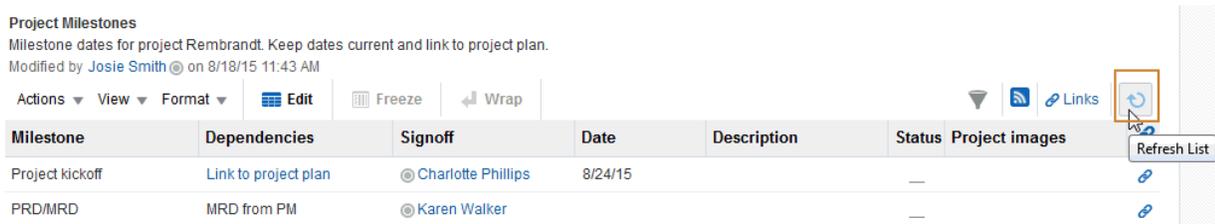
Refreshing List Data

To refresh the display of data in a list,

- Click the **Refresh List** icon (Figure 29-41).

> **Note:**
>
> Do not click the Reload or Refresh button in your browser. Click the **Refresh List** icon to update your view.

Figure 29-41   Refresh List Icon

Working with Links in Lists and List Rows

Links assist with setting up associations from one WebCenter Portal asset to another. For example, using links you can associate a project plan document with a list of project issues. When users access the list, they can also immediately access the project plan by clicking a link that appears on the list.

Links retain their originating location. For example, if you create a link on a list row, then that link appears only on that row, and not on all the other rows in the same list.

Figure 29-42   Links in a List and Rows

See Linking Information for more information about working with links.

About Customizing Lists

You can perform user customizations on your own view of a list instance. The portal manager can perform application customizations on a list instance, affecting everyone's view. User customizations involve changes made in page *view* mode; while application customizations involve changes made in page *edit* mode. Everyone can perform user customizations their own view of a list; but page edit privileges are always required for application-level list customizations.

> **Note:**
>
> User and application customizations apply to a list rendered in a List viewer. They do not apply to lists rendered on the **Lists** page.

A second instance of a list is not affected by the customizations you make to the first instance. For example, imagine that you have placed the *Issues* list on both the *Sales* page and the *What's New* page. If you sort the list by the *Number* column on the *Sales* page, the *Issues* list is not automatically sorted by *Number* on the *What's New* page.

While application customizations affect everyone's view of a list instance, user customizations are layered over them. For example, someone may perform an application customization on a list containing columns A, B, and C, so that column C is first in list column order (C, A, B). You can then perform a user customization on the list so that column A is first in list column order in your personal view of the same list instance (A, C, B).

> **Note:**
>
> If the same property is set at both the application and user levels, the user value takes precedence in your own view. For application-level customizations, see About Customizing Lists in *Building Portals with Oracle WebCenter Portal*.

The following sections describe user-level customizations you can make to a list instance:

- Sorting List Data on a Column
- Resizing List Columns
- Changing Column Order on a List Instance
- Hiding and Showing List Columns
- Freezing a Column Position
- Wrapping Column Data
- Applying Color Banding to List Rows
- Filtering List Data

Sorting List Data on a Column

By default, list data is sorted by create date. You can control the sort order of list data by clicking sort icons in each column's header. You can perform an advanced sort using **View** drop-down list options.

Sort list data in the List viewer. You can sort list data on the **Lists** page, but the sort does not persist. It will revert if you change lists or navigate away from the page.

> **Note:**
>
> To sort list data on a column position in your view, perform the following actions in page view mode. To sort list data on a column for all users, the application specialist or portal manager can perform the following actions in the page editor.

This section describes regular and advanced sorting. It includes the following topics:

- Sorting List Data Using Column Icons
- Performing an Advanced Sort of List Data

> **Note:**
>
> When WebCenter Portal is using an Oracle database, a click on a column header in the List View results in a linguistic sort based on your locale. For non-Oracle databases, the sorting is based on the linguistic sorting specified in the database (collation in the case of SQL Server). This means when you connect to a WebCenter Portal instance in different languages, list rows are sorted according to the default collation of the database, regardless of the language your application is currently using.

Sorting List Data Using Column Icons

To sort list data on a column using column icons:

1. Go to the list instance you want to change.

2. Go to the column you want to sort, and position your mouse over the column header.

   Notice that the sort icons appear when your mouse is over the column header ([Figure 29-43](#)).

Figure 29-43   Sort Icons on a List Column

3. Click the **Sort Ascending** icon to sort the list in ascending order (1, 2, 3, a, b, c); or click the **Sort Descending** icon to sort the list in descending order (c, b, a, 3, 2, 1).

> **Tip:**
>
> You can also sort list data on a column by selecting a column and then selecting **Sort** and then **Ascending** or **Descending** from the **View** drop-down list. You can right-click a column and select these options from a context menu.

## Performing an Advanced Sort of List Data

The **View** drop-down list provides an **Advanced** option that provides another way to sort list data.

To use the **Advanced** option to sort list data:

1. Go to the list instance you want to change.

2. From the **View** drop-down list, select **Sort** and then select **Advanced** to open the Advanced Sort dialog (Figure 29-44).

Figure 29-44   Advanced Sort Dialog
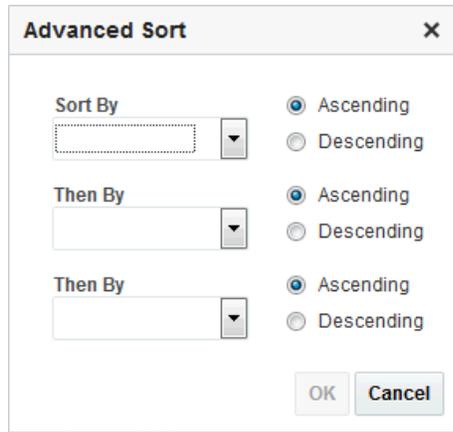
3. From the **Sort By** list, select the column to be considered first in sorting list data.

    The **Sort By** and **Then By** fields are arranged in order of precedence, with **Sort By** considered first, and **Then By** in second and third positions.

4. Select either **Ascending**, to sort list data on the selected column in ascending order (1, 2, 3, a, b, c), or **Descending**, to sort list data on the selected column in descending order (c, b, a, 3, 2, 1).

    > **Note:**
    >
    > Currently, you can sort against only one column.

5. Click **OK**.

    > **Tip:**
    >
    > You can access the options described in this section by right-clicking a column header and selecting from a context menu.

Resizing List Columns

You can control the width of a list column by dragging it wider or by setting a specific column width through a dialog. You can also control column width by expressing a default width in column details (for more information, see the `Display Width` details in #unique_445/unique_445_Connect_42_CIHCBABH).

> **Tip:**
>
> - Resize columns in the List viewer. You can resize columns on the **Lists** page, but these are not persisted and will revert when changing lists or navigating away.
>
> - To resize list columns in your view, perform the following actions in page view mode. To resize list columns for all users, the application specialist or portal manager can perform the following actions in the page editor.

To resize list columns:

> **Note:**
>
> To resize list columns, the list must contain at least one row.

1. Go to the list instance you want to change.

2. Resize columns using one of the following methods:

   - Click and hold on a column splitter, and drag it to make the column wider or narrower.

   - In the list, select the column to resize.

     From the **Format** drop-down list, select **Resize Columns**.

     In the Resize Column dialog, enter a column width and select a unit of measure (Figure 29-45).

     Figure 29-45   Resize Column Dialog

     Choose from the following options:

     – **Pixels**—Express column width in a specified number of pixels.

     – **Percent**—Express column width as a percentage of the total list width.

     > **Tip:**
     >
     > You can access the options described in the section by right-clicking a column and selecting from a context menu.

3. Click **OK**.

Changing Column Order on a List Instance

You can rearrange the order of list columns by dragging a column and dropping it to the desired position or by using the reorder dialog.

> **Note:**
>
> To change column order on a list instance in your view, perform the following actions in page view mode. To change column order on a list instance for all users, the application specialist or portal manager can perform the following actions in page edit mode.

To change column order:

> **Note:**
>
> To reorder columns by dragging, the list must have at least one row.
>
> You can only change column order in the List viewer. You cannot change column order on the **Lists** page.

1. Go to the list instance you want to change.

2. Rearrange list columns using one of the following methods:

    • Click and hold a list column title, then drag and drop it to the desired location.

    • Select **Reorder Columns** from the **View** drop-down list.

      In the Reorder Column dialog, select a column and click a **Move** icon to the right of the list of **Visible Columns** to reposition your selection (Figure 29-46).

Figure 29-46   Reorder Columns Dialog
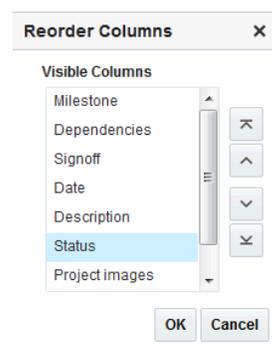
> **Tip:**
>
> You can access the options described in the section by right-clicking a column and selecting from a context menu.

3. Repeat until you have columns arranged in the desired order.

4. Click **OK**.

Hiding and Showing List Columns

You can use an option on a list's View drop-down list to hide selected list columns.

> **Note:**
>
> To hide or show columns in your view, perform the following actions in page view mode. To hide or show columns for all users, the application specialist or portal manager can perform the following actions in page edit mode.

Hide or show list columns in the List viewer. You can hide or show columns on the **Lists** page, but this setting does not persist and reverts when changing lists or navigating away.

To hide or show list columns:

1. Go to the list instance you want to change.

2. From the **View** drop-down list, select **Columns** (Figure 29-47):

Figure 29-47   Columns Submenu from the View Drop-down List
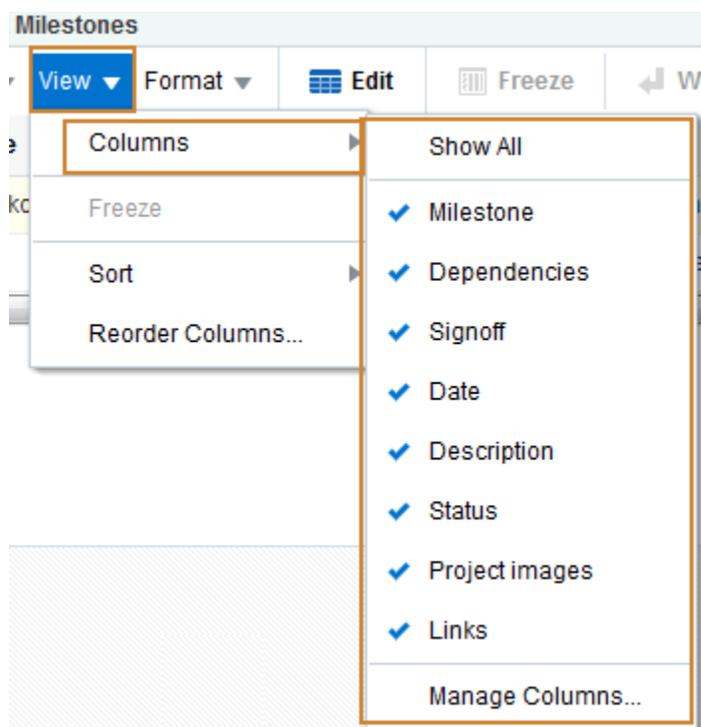
- Select a column you want to show (a check appears on the menu next to shown columns).

- Deselect a column you want to hide (no check appears on the menu next to hidden columns).

- Select **Show All** to show all columns (all columns are selected on the menu).

- Select **Manage Columns** to open the Manage Column dialog (Figure 29-48). Select a column and use the arrow icon to move it appropriately. You can show or hide all columns by selecting the Move all or Remove all arrow icon.

Figure 29-48   Manage Columns Dialog
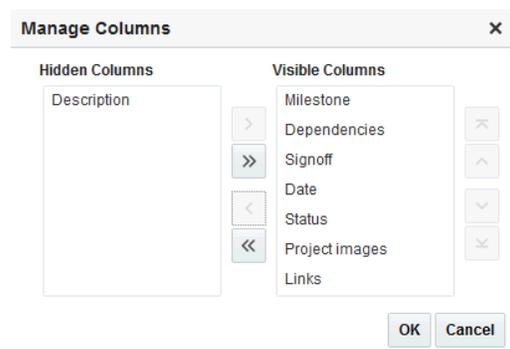
3. Click **OK**.

Freezing a Column Position

When a list is too wide to display all of its columns in one view, you can scroll the list left and right. If there is a column you always want to keep in view, you can use column freezing to hold a column in place during scrolling. Freezing causes a selected column to hold its position while the columns to the right of it scroll by. You can set **Freeze** on one column on a given list instance. Freezing holds in place the selected column and any column to the left of it.

> **Note:**
>
> To freeze a column position in your view, perform the following actions in page view mode. To freeze a column position for all users, the application specialist or portal manager can perform the following actions in page edit mode.
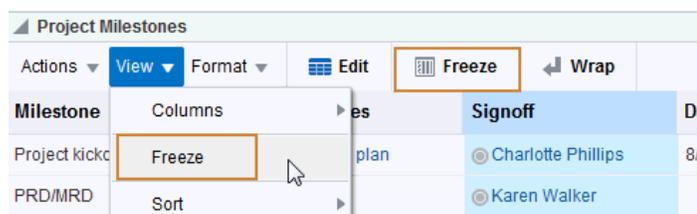
To freeze a column position:

1. Go to the list with a column you want to freeze.

2. Select the relevant column by clicking its header.

   The **Freeze** icon becomes available.

3. Click **Freeze** (Figure 29-49).

   > **Tip:**
   >
   > You can also freeze a column by selecting it and then selecting **Freeze** from the **View** menu.

Figure 29-49   Freeze Options

To unfreeze a column, select the column, and click the **Freeze** icon again or select **Unfreeze** from the **View** drop-down list.

> **Tip:**
>
> You can access the options described in the section by right-clicking a column and selecting from a context menu.

Wrapping Column Data

Use the Wrap feature to control whether to allow column data to wrap in a selected list column. Data that wraps breaks onto additional lines if it would otherwise exceed the column width. Data that does not wrap, shows only as much data as fits into the current column width (you can widen the column to view the data if you prefer, see Resizing List Columns).

> **Note:**
>
> By default, column data is wrapped.

To wrap column data:

1. Go to the list in which to wrap column data.

2. Select the relevant column by clicking its header.

3. Click **Wrap**.

   Toggle the Wrap icon or the Wrap menu item to wrap text or turn the text wrap off.

   > **Tip:**
   >
   > You can also wrap data by selecting the column and then selecting **Wrap** from the **Format** drop-down list.
   >
   > You can access the options described in the section by right-clicking a column and selecting from a context menu.

   If any data was previously truncated, it now appears in the row with line breaks to accommodate the column's width.

   To turn wrapping off, select the relevant column and click the **Wrap** icon again or select Wrap from the Format drop-down list.

Applying Color Banding to List Rows

Color banding refers to a transparent overlay of color applied at specified intervals to list rows or columns. When you define color banding on a list, you specify whether to apply color banding and how often to apply it.

You can easily enhance the readability of a list by applying row or column color banding.

You can apply color banding to your personal view of a list instance or to everyone's view of a list instance. To apply color banding for all users, the application specialist or portal manager has to perform the task in page edit mode.

> ✎ **Note:**
>
> You can only apply color banding in the List viewer. You cannot apply color banding on the **Lists** page.

This section describes how. It includes the following topics:

- Applying Color Banding to Your Personal View of a List
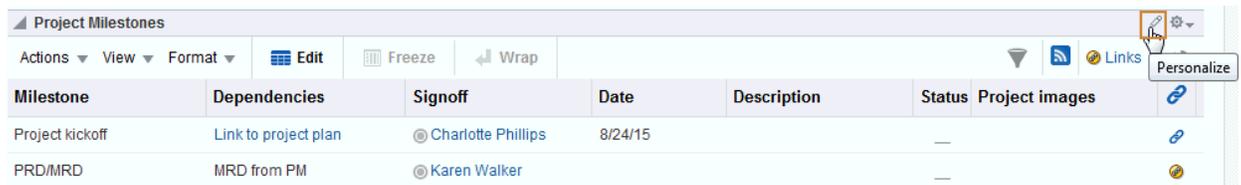- Removing Personal Color Banding

Applying Color Banding to Your Personal View of a List

You can apply color banding to list rows or to list columns.

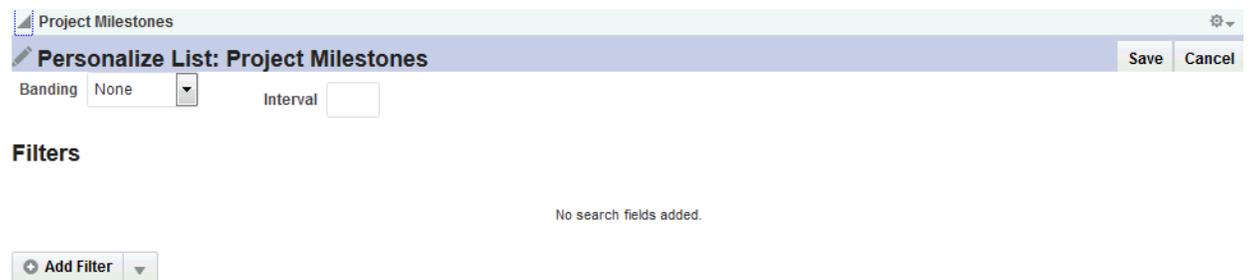To apply color banding to your personal view of a list instance:

1. Go to the list you want to change.
2. Click the **Personalize** icon on the header (Figure 29-50).

Figure 29-50   Personalize Icon

The Personalize List panel appears (Figure 29-51).

Figure 29-51   List in Personalize List Mode

3. From the **Banding** drop-down list, select a banding style for the list instance.

   Choose from:

- **Row**—To specify color banding on list rows.

- **Column**—To specify color banding on list columns.

- **None**—To turn color banding off.

4. In the **Interval** field, enter the number of rows or columns in which color bands should not appear.

   For example, when you apply color bands to rows, a value of 1 applies a color band to the second row, fourth row, sixth row, and so on.

5. Click **Save** to save your settings and return to the list.

   List data is refreshed, now reflecting your color banding settings.

Removing Personal Color Banding

To remove personal color banding from a list:

1. Go to the list view from which to remove color banding.

2. Click the **Personalize** icon on the header (Figure 29-50).

   The Personalize List panel is displayed (Figure 29-51).

3. From the **Banding** drop-down list, select **None**.

4. Click **Save** to save your settings and return to the list.

   List data is refreshed, now showing no color banding.

Filtering List Data

Lists provide data filtering options for your personal view of a list instance and for everyone's view of the instance. Filtering provides a means of limiting the display of list data to those rows that match your filtering criteria.

Temporary, personal filtering (also called *ad hoc filtering*) is available with both the List viewer and **Lists** page. Custom filtering that affects everyone's view of a list instance is available only with the List viewer.

This section describes the processes of applying ad hoc, permanent personal, and permanent list filters. It includes the following topics:

- Applying an Ad Hoc Filter to a List Instance

- Applying a Permanent, Personal Filter to a List Instance

- Removing a Permanent, Personal List Filter

Applying an Ad Hoc Filter to a List Instance

Use *ad hoc* list filtering to easily find a particular list entry or group of entries in a list instance.

> **✏ Note:**
>
> *Ad hoc* list filtering applies only to `Plain Text` and `Person` data types. Columns that use other data types, such as `Date` and `Number`, are not used in *ad hoc* filtering. For example, if you have dates shown in format `dd-mon-yy` and you filter on `jan`, you do not see rows with dates in January.

To apply an *ad hoc* filter to a list instance:

1. Go to the list that contains the data you want to temporarily filter.

2. Click the **Filter Rows** icon in the List toolbar (Figure 29-52).
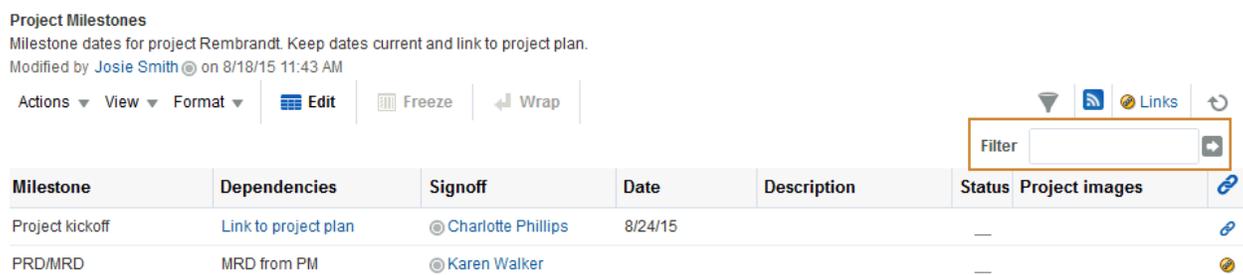
Figure 29-52   Filter Rows Icon
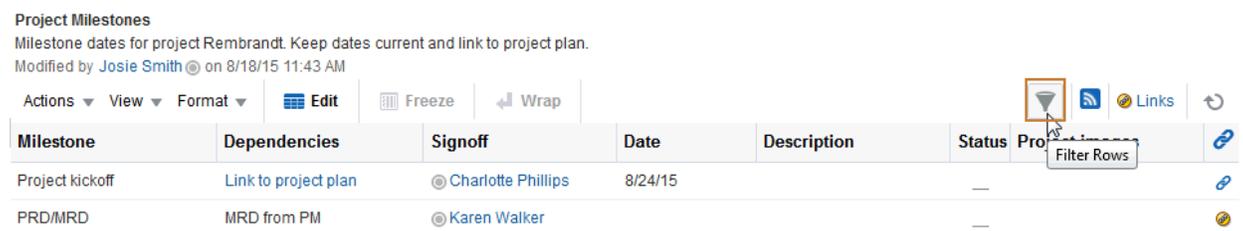
> **💡 Tip:**
>
> You can also select **Filter Rows** from the **Actions** menu.

The **Filter** field appears (Figure 29-53).

Figure 29-53   Filter Field

3. Enter space-separated keywords in the **Filter** field, and click the **Filter** icon to execute the filter.

   All row details that match any of the keywords are shown.

4. Click the **Filter Rows** icon again to hide the **Filter** field and remove the temporary filter.

> **Tip:**
>
> You can also select **Cancel Filter** from the **Actions** drop-down list.

Applying a Permanent, Personal Filter to a List Instance

In addition to an *ad hoc* filter, you can apply a permanent personal filter to your view of a list instance. The term *permanent* is used to convey that you can keep your list filtered in a particular way for as long as you like. The filter is retained across page navigations within a browser session and across browser sessions.

It is still possible to remove such a filter. This section describes how to apply and remove a permanent personal filter.
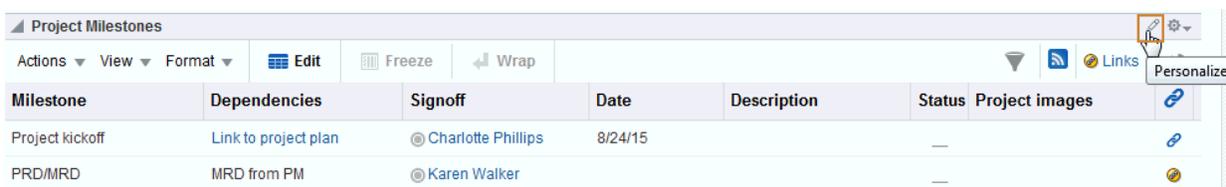
To apply or remove a permanent filter on your view of a list instance:

1. Go to the list that contains the data you want to permanently filter.

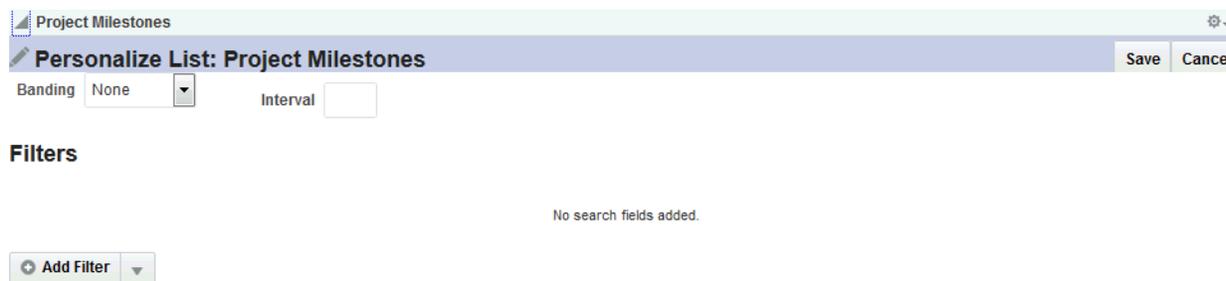2. Click the **Personalize** icon on the header (Figure 29-54).

> **Note:**
>
> The Personalize icon is available on a List viewer on a page. It is not available on a List viewer on the Lists page.

Figure 29-54   Personalize Icon

The Personalize List panel appears (Figure 29-55).

Figure 29-55   List in Personalize List Mode

3. From the **Add Filter** drop-down list, select a column against which to apply a filter.

   The selected column name appears in the Filters section.

4. Select an operator from the list, and enter the filter value in the field provided (Figure 29-56).

Figure 29-56   Filter Operator and Value

The filter operators that appear on the list vary according to the data type of the selected column. Table 29-1 lists and describes filter operators as they apply to different data types.

Table 29-1   Filter Operators for List Data Types

Data Type	Description
Boolean	Use `Boolean` data type filter operators to specify that Boolean values in the selected list column must: • = —Match the value you specify • <>—Not match the value you specify The Boolean value is expressed as a check box. A selected box means TRUE or YES; a deselected box means FALSE or NO.
DateTime	Use `DateTime` data type filter operators to specify that date and time values in the selected column must be: • = —The same as the date or date and time that you specify • >= —More recent or the same as the date or date and time that you specify • <>—Any date or date and time other than the value you specify • >—More recent than the date or date and time that you specify • <= —Preceding or matching the date or date and time that you specify • <—Preceding the date or date and time that you specify
Number	Use `Number` data type filter operators to specify that number values in the selected column must be: • = —Equal to the value you specify • >= —Equal to or greater than the value you specify • <>—Greater or lesser than the value you specify • >—Greater than the value you specify • <= —Equal to or lesser than the value you specify • <—Lesser than the value you specify

Table 29-1   (Cont.) Filter Operators for List Data Types

Data Type	Description
Person	Use `Person` data type filter operators to specify that person values in the selected list column must: • = —Match the user name you specify • Starts With—Start with the character(s) you specify • Ends With—End with the character(s) you specify • Contains—Include the character(s) you specify • <>—Contain any user name other than the one you specify
Picture	You cannot apply filter operators to a `Picture` data type in a list.
Plain Text	Use `Plain Text` data type filter operators to specify that values in the selected column must: • = —Match the characters you specify • Starts With—Start with the character(s) you specify • Contains—Include the character(s) you specify • Ends With—End with the character(s) you specify • <>—Contain any value other than the one you specify
Rich Text	You cannot apply filter operators to a `Rich Text` data type in a list.

5. When you define multiple filters, **Match All Any** options appear:

    • Select **All** to require that displayed rows match all conditions.

    • Select **Any** to require that displayed rows match at least one condition.

6. Click **Save** to save your filter criteria and return to the list.

    The list is refreshed, now displaying data that matches your filter criteria.

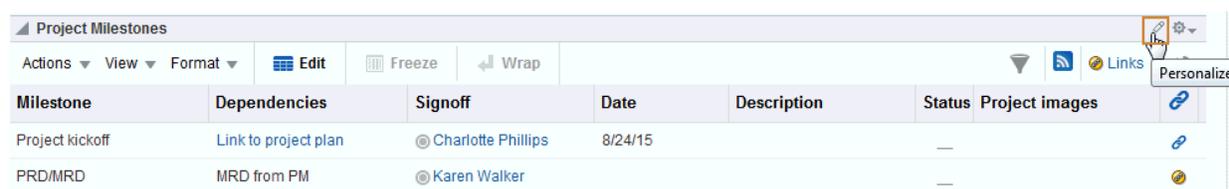## Removing a Permanent, Personal List Filter

To remove a permanent, personal list filter:

1. Go to the list from which you want to remove personal filtering.

2. Click the **Personalize** icon on the Lists toolbar (Figure 29-57).

> **Note:**
>
> The Personalize icon is available on a List viewer on a page. It is not available on a List viewer on the Lists page.

Figure 29-57   Personalize Icon

The Personalize List panel is displayed.

3. Click the **Remove** icon next to the filtering criteria you want to remove (Figure 29-58).

Figure 29-58   Remove Icon on a Filter
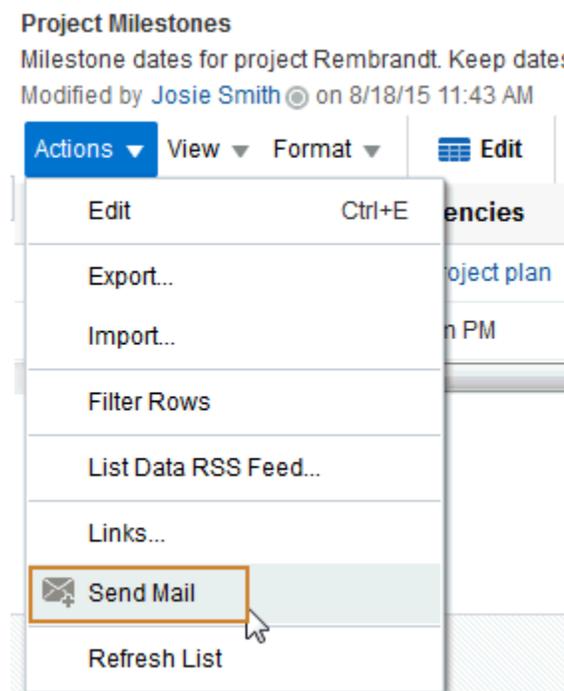

4. Click **Save**.

The list data is refreshed, displaying data previously hidden by a filter.

Mailing a Link to a List to Other Users

To mail a link to a list:

1. Go to the list instance you want to send as a link through mail.

2. From the list **Actions** drop-down list, select **Send Mail**.

Figure 29-59   Send Mail Option on Actions Drop-down List

A compose message window opens, addressed to portal members, with the following information:

- The name of the portal from which the list instance originates

- The list title and description

- A link to the portal

- A link to the list instance

> **Note:**
>
> To view the list, users must have access to the portal that contains the list instance.

3. Compose the message and send the mail message.

   See Working with Mail for more information.

Exporting a List and Importing a List from an Excel Spreadsheet

You can export and import lists. If you can view the list, you can export it to Microsoft Excel 1997 - 2003 and 2007 formats and revise list data in Excel. If you have sufficient privileges to edit the list, you can import the revised list back into WebCenter Portal.

> **Tip:**
>
> You can also create a list by importing an Excel spreadsheet. See Creating Lists for more information.

The following sections in *Building Portals with Oracle WebCenter Portal* describe how to export and import lists and provides information about additional software that may be of use in this process:

- About Exporting and Importing Lists

- Exporting a List to a Spreadsheet

- Importing an Exported List

30

Linking Information

This chapter describes how to use the features provided through links. Links provide a way to view, access, create associations between different assets where links are available.

This chapter includes the following topics:

- About Links
- Working with Links Features

> ✏ **Permissions:**
>
> This chapter is intended for WebCenter Portal users who want to view, create, and manage links.
>
> Such users must be granted, minimally, the portal-level permission `View Pages and Content` to view links. They can view shared links only for assets for which they have `view` permission.
>
> Authenticated users who plan to create and manage links require the portal-level permission `Customize Pages`. They must have `view` permission on the resource. However, you might not be able to do some tasks if *one* or more of the following advanced permissions for links have been set:
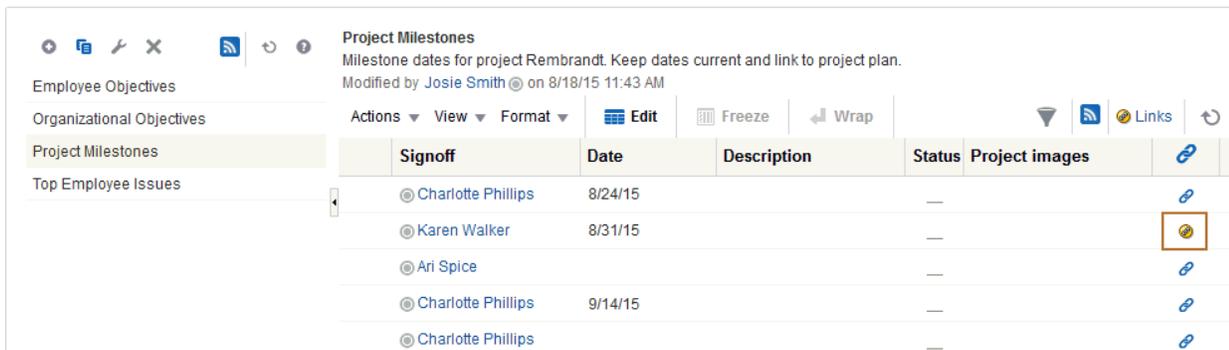>
> - `Create and Delete Links`
>
> - `Create Links`
>
> - `View Links`
>
> To associate links with other assets, such as announcements, discussions, documents, events, you must have the required permissions for those assets. See Managing Roles and Permissions for a Portal in *Building Portals with Oracle WebCenter Portal*.

About Links

Linking gives users a means of explicitly associating two assets with each other through easy-access reference points, called *links*. Links assist with setting up these associations from one WebCenter Portal asset to another. For example, using links you can associate a project plan document with a list of project issues. When users access the list, they can also immediately access the project plan by clicking a link that appears on the list. Links also provide a quick way to create new assets while establishing a link at the same time.

Figure 30-1   A Link in a List Row

Links are scoped to portals. For example, the links that display in the *Finance* portal differ from the links that display in the *Infrastructure* portal, even though links are accessed from the same places in both portals. The assets to which you can link also depend on the following:

*   The tools that have been enabled in your portal.

*   The tools for which you have permissions.

Anywhere you see a **Links** icon, you can create a link to both new and existing assets.

There are two **Links** icons that each indicate the state of the Links dialog:

*   The empty **Links** icon indicates that no links are present in the Links dialog.

Figure 30-2   Links Icon (No Links Present)

*   The gold **Links** icon indicates that links are present in the Links dialog.

Figure 30-3   Links Icon (Links Present)

Use the **Link to Existing** option in the Links dialog to link to existing WebCenter Portal assets, such as documents.

Use the **Link to New** option in the Links dialog to both create aWebCenter Portal asset and link to it in a single operation. Select **Link to New** to upload and link to documents, enter the URL of a web page to link to, and create and link to other types of assets.

The items you can link to differ between the **Link to New** and **Link to Existing** lists. For example, while you can link to a new note, you cannot link to an existing note. Additionally, the items you can link to from the Home portal differ from those you can link to from a portal. The following table lists the types of assets you can link to and from.

Table 30-1   Linking to Assets

Asset Type	Link to New	Link to Existing	Home Portal	Portal
Document/Wiki	Yes	Yes	Yes	Yes
Event	Yes	Yes	No	Yes
Note	Yes	No	Yes	Yes
URL	Yes	No	Yes	Yes

Given the right permissions, other users can see your links, and you can see the links of other users. What you can do with a link (such as view, create, delete) depends on your advanced permissions for Links. However, with notes, you can delete a link only if you also have delete permission for Notes.

What you can do with the *linked asset* is handled by the target asset's security and your permissions to work with these assets.

Links retain their originating location. For example, if you create a link on a list row, then that link appears only on that row, and not on all the other rows in the same list. Suppose you link to a project plan document from the list row that has an associated task, the link to that document appears only on that row's Links dialog (Figure 30-4). It does not display on the Links dialog associated with the other rows on the same list.

Figure 30-4   Links in a List and Rows
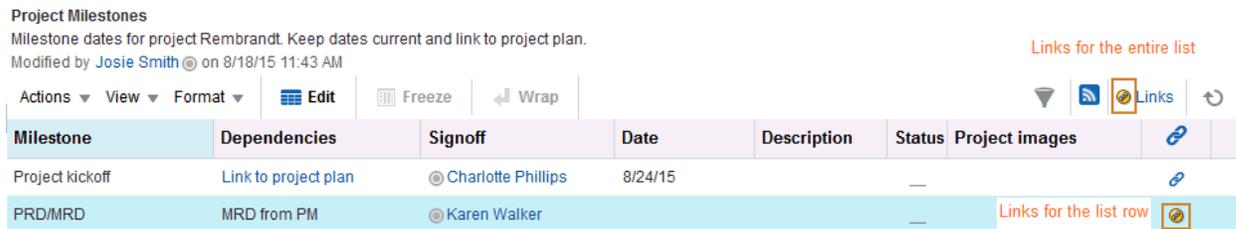
Most links are bidirectional, but some are not. Links on notes, URLs, and list rows do not create a reciprocal link on the link target. For example, if you create a link from an event to a note, from an event to a URL, or from a list row to a document, then a reciprocal link is not created on the link target. However, a link from an entire list (rather than an individual list row) does create a reciprocal link from the target.

Working with Links Features

Many WebCenter Portal features include a linking capability that enables you to associate assets in WebCenter Portal, and with internal and external web pages. For example, the **Lists** page (or console) has its own link (Figure 30-5), and within lists, there are **Links** icon on each list and on each list row.

Figure 30-5   Link Icons on the Lists Page

You can link relevant documents, discussions, notes, web pages, events, and announcements. When viewing the details of an event, you can link to the event's agenda. In a list of project assignments, you can link to the functional and design specifications relevant to each assignment. In a discussion forum, you can link to a related discussion, document, web page, or WebCenter Portal page.

This section describes how to link one asset to another and how to access those links. It includes the following topics:

- Linking to Existing Assets
- Linking to New Assets
- Accessing Link Targets
- Deleting a Link

Linking to Existing Assets

This section describes how to use the **Link to Existing** option on the Links dialog to link to announcements, discussion forum topics, documents, and events currently available in your portal.

This section includes the following topics:

- Opening the Links Dialog to Link to Existing Assets
- Linking to an Existing Announcement
- Linking to an Existing Discussion Forum Topic
- Linking to an Existing Document
- Linking to an Existing Event

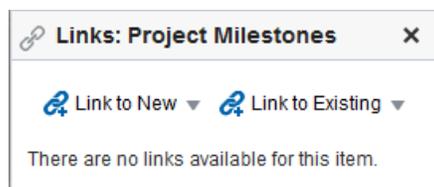## Opening the Links Dialog to Link to Existing Assets

To create a link to an existing asset, first go to the asset from which you want to link and open the Links dialog by clicking the Links icon. From there, the steps vary depending on the type of asset you are linking to.

To open the Links dialog:

1. Go to the asset from which you want to link.
2. Click the asset's (or row's) associated **Links** icon (Figure 30-6).

Figure 30-6   Links Icon

The Links dialog (Figure 30-7) opens.

Figure 30-7   Links Dialog

3. From the Links dialog, select **Link to Existing** and then select the type of asset you want to link to.

> **Note:**
>
> The assets that are available depend on your permissions and the tools or services that are enabled. For example, if you do not have the required permissions to work with announcements or announcements are not enabled, you will not see the Announcement option. For more information, see Enabling and Disabling Tools and Services Available to a Portal in *Building Portals with Oracle WebCenter Portal*.

For information about how to link to existing assets, see the following sections:

• Linking to an Existing Announcement

• Linking to an Existing Discussion Forum Topic

• Linking to an Existing Document

• Linking to an Existing Event

> **Note:**
>
> In the following procedures, Lists is used as an example of an asset from which links to existing assets are created.

Linking to an Existing Announcement

You can bring timely announcements to the most viewed areas in your portal by linking to them.

Chapter 30
Working with Links Features

> **✎ Note:**
>
> You cannot link to a new announcement.

To link to an existing announcement:

1. Go to the asset from which you want to link to an announcement and click the **Links** icon.

   See Opening the Links Dialog to Link to Existing Assets for more information.

2. From the Links dialog, select **Link to Existing** and then select **Announcement** (Figure 30-8).

   Figure 30-8   Link to an Existing Announcement
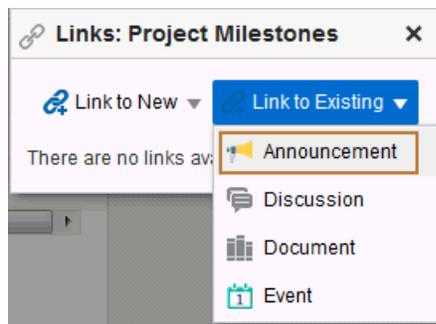
   The Link to Existing Announcement dialog opens (Figure 30-9).

   Figure 30-9   Existing Announcements
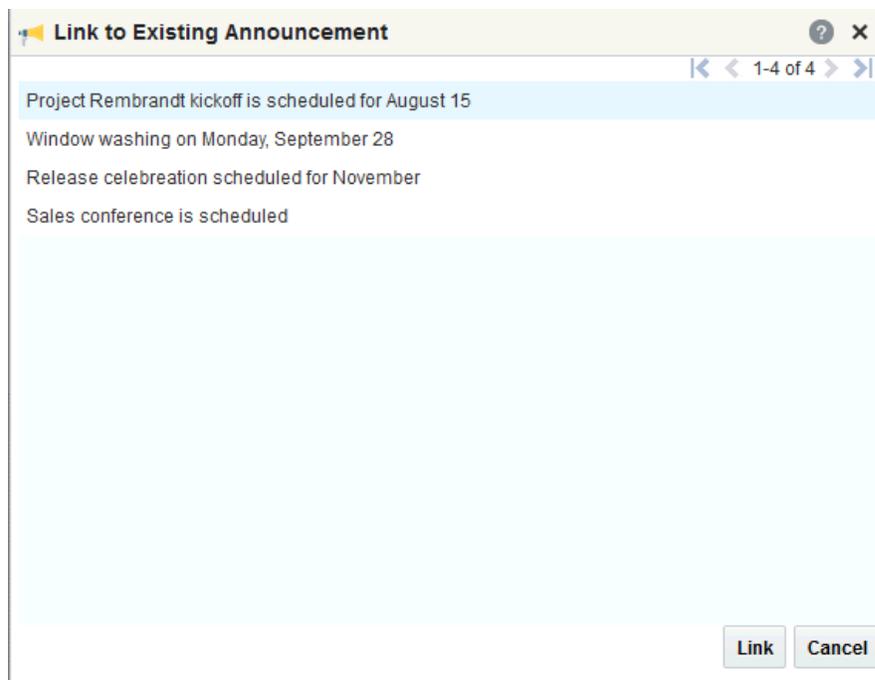
3. Click the announcement to which you want to link.

4. Click **Link**.

   The title of the selected announcement appears in the list of links on the Links dialog (Figure 30-10).
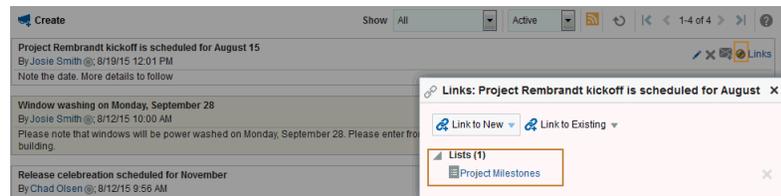
   Figure 30-10   Newly Added Announcement Link on Links Dialog
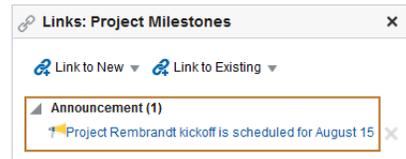
5. Close the Links dialog.

   The link from the announcement topic to the list also appears in the Announcements view (Figure 30-11).

   Figure 30-11   Link to List from Announcement Topic

Linking to an Existing Discussion Forum Topic

Help users find answers to questions before they even ask them by linking to relevant discussion forum topics.

To link to an existing discussion forum topic:

1. Go to the asset from which you want to link to a discussion forum message and click the **Links** icon.

   See Opening the Links Dialog to Link to Existing Assets for more information.

2. From the Links dialog, select **Link to Existing** and then select **Discussion** (Figure 30-12).

   Figure 30-12   Link to an Existing Discussion
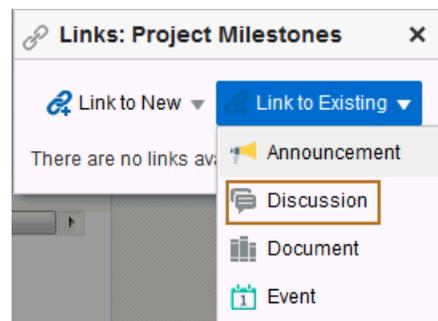
The Link to Existing Discussion Topic opens, listing available topics
(Figure 30-13). If the portal supports multiple discussion forums, then a drop-down
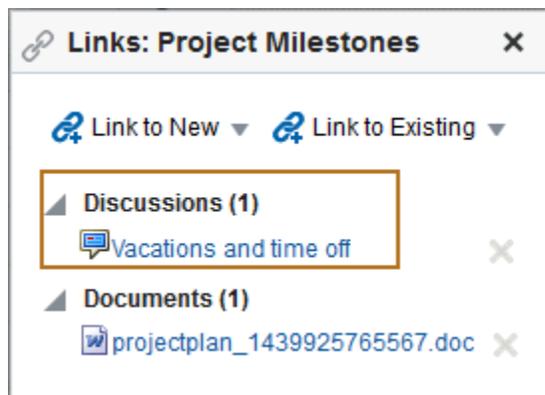list at the top allows you to select a different forum.

Figure 30-13   Existing Discussion Topics
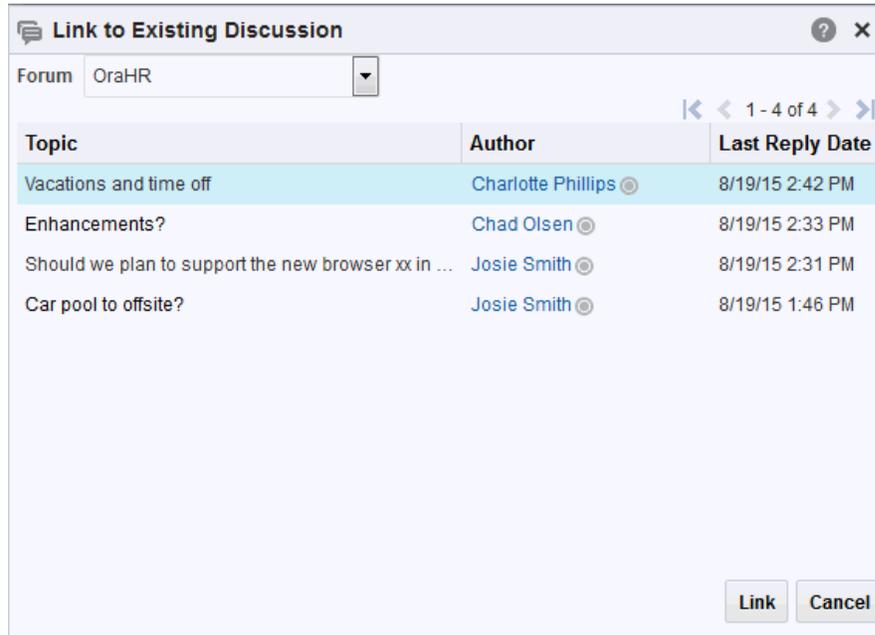
3. Select the discussion topic to which you want to link.
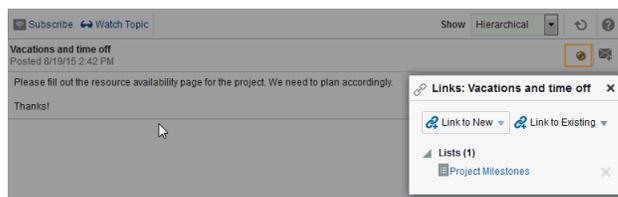
4. Click **Link**.

   The title of the selected discussion topic appears in the list of links on the Links
   dialog (Figure 30-14).

Figure 30-14   Newly Added Discussion Topic Link on Links Dialog

5. Close the Links dialog.

   The link from the discussion topic to the list also appears in the Discussion Forum
   topic view (Figure 30-15).

Figure 30-15   Link to List from Discussion Topic

Linking to an Existing Document

To save users from having to search for documents in the document library, link to them directly. For example, link to a meeting's agenda directly from the meeting's event details.
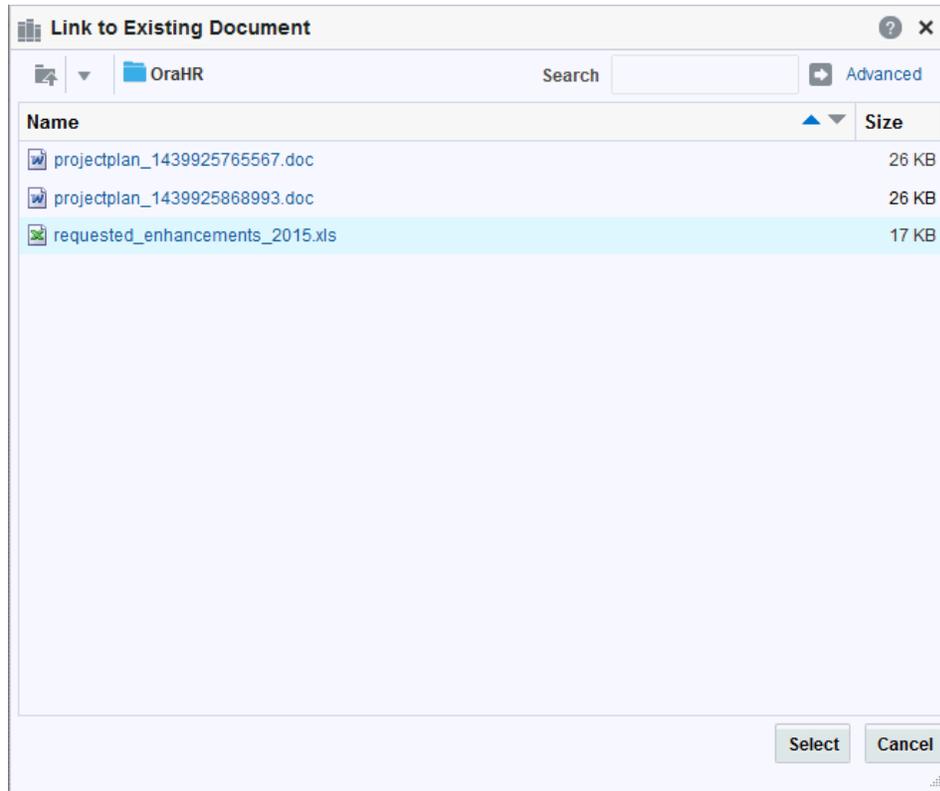
To link to an existing document:

1. Go to the asset from which you want to link to a document and click the **Links** icon.

   See Opening the Links Dialog to Link to Existing Assets for more information.

2. From the Links dialog, select **Link to Existing** and then select **Document** (Figure 30-16).

Figure 30-16   Link to Existing Document
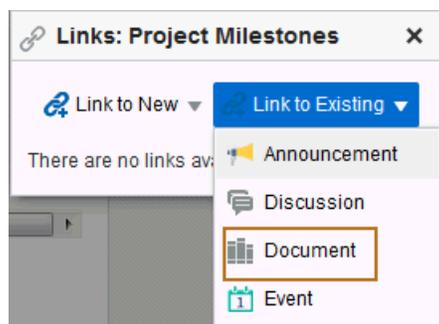
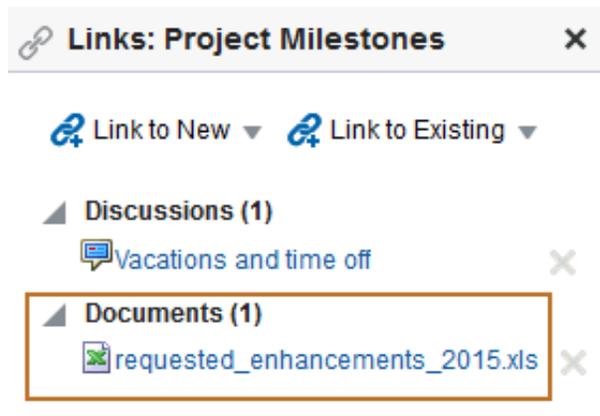The Link to Existing Document dialog (Figure 30-17) opens.

Figure 30-17   Existing Documents

3.   Select the document, and then click **Select**.

The document link appears in the list of links on the Links dialog (Figure 30-18).

Figure 30-18   Newly Added Document Link on the Links Dialog


4.   Close the Links dialog.

Linking to an Existing Event

You can link to information about events that are relevant to the current asset. For example, you could provide a link from an issues document to an event scheduled to discuss those very issues.

To link to an existing event:

1. Go to the asset from which you want to link to an event and click the **Links** icon.

   See Opening the Links Dialog to Link to Existing Assets for more information.

2. From the Links dialog, select **Link to Existing** and then select **Event** (Figure 30-19).

Figure 30-19   Link to Existing Event
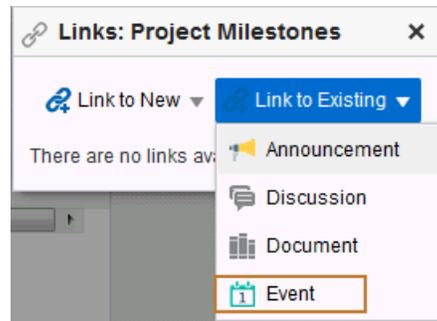
The Link to Existing Event dialog (Figure 30-20) opens, showing the current day's events.

Figure 30-20   Existing Events
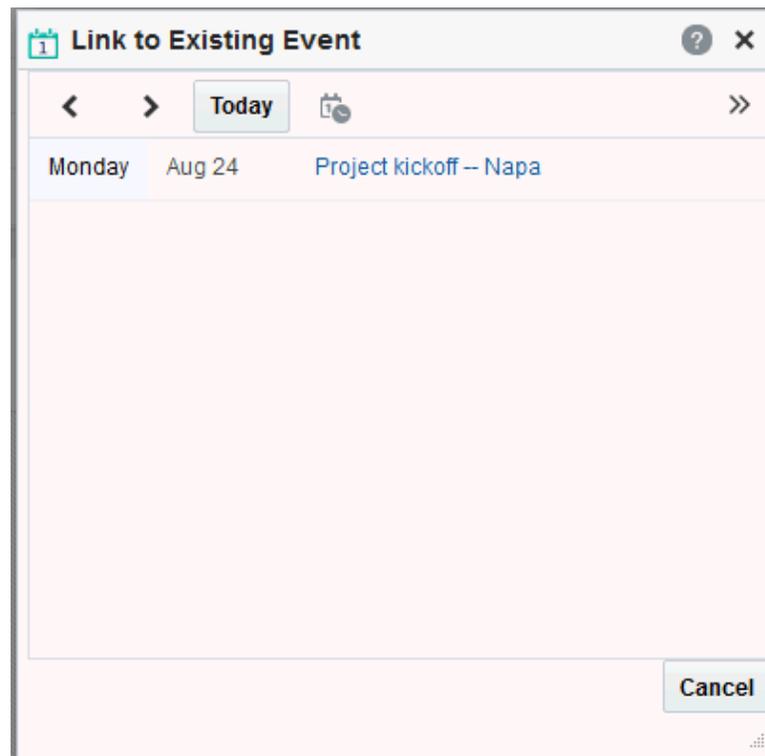
3. Click the **Previous** and **Next** icons to go to the day of the event you want to link to, or click the **Select Date** icon and select the date of the event you want to link to, if you don't see the event.

4. Select the event to which you want to link.

   The title of the selected event appears in the list of links in the Links dialog (Figure 30-21).
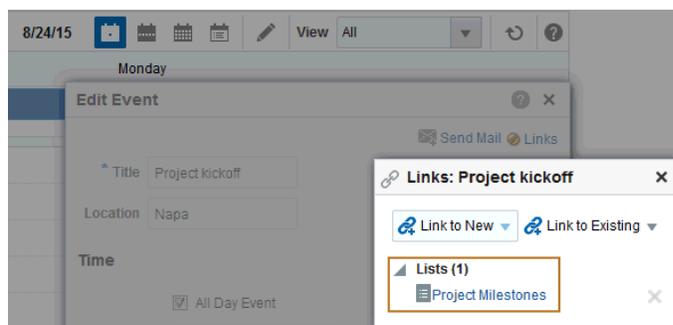
Figure 30-21   Newly Added Event on Links Dialog
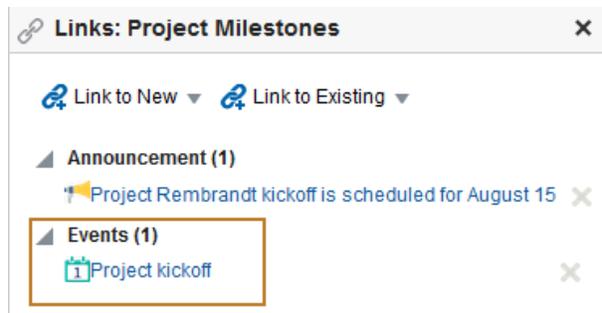
5. Close the Links dialog.

   The link from the event to the list also appears in the Events view (Figure 30-22).

Figure 30-22   Link to List from an Event

Linking to New Assets

When you select **Link to New**, you accomplish two things at the same time: you create a new asset, and you create a link to that asset. Use the **Link to New** option on the Links dialog to link to a new discussion forum topic, a new document, a new event, a new note, or a web page.

This section describes how to link to these types of assets. It includes the following topics:

- Opening the Links Dialog to Link to a New Asset

- Adding and Linking to a Discussion Forum Topic

- Adding and Linking to a Document

- Adding and Linking to an Event
- Adding and Linking to a Note
- Linking to a Web Page

Opening the Links Dialog to Link to a New Asset

When you want to create a link to a new asset, go to the asset from which you want to link and open the Links dialog. From there, the steps vary depending on the type of asset you are creating and linking to.
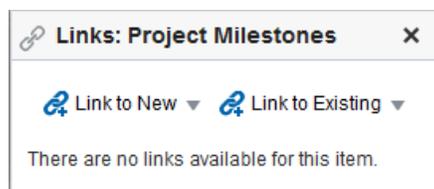
To open the Links dialog:

1. Go to the asset from which you want to link.
2. Click the asset's (or row's) associated **Links** icon (Figure 30-23).

   Figure 30-23   Links Icon

   The Links dialog (Figure 30-24) opens.

   Figure 30-24   Links Dialog

3. From the Links dialog, select **Link to New** and then select the type of asset you want to create and link to.

   For information about what to do next, see the following sections:

   - Adding and Linking to a Discussion Forum Topic
   - Adding and Linking to a Document
   - Adding and Linking to an Event
   - Adding and Linking to a Note
   - Linking to a Web Page

   > **Note:**
   >
   > In the following procedures, Lists is used as an example of an asset from which links to new assets are created.
   >
   > You cannot link to new announcements.

Adding and Linking to a Discussion Forum Topic

> **✎ Note:**
>
> Beginning with 12*c* (12.2.1.3.0), Oracle WebCenter Portal has deprecated support for Jive features (announcements and discussions). If you are upgrading from a prior release, these features remain available in your existing installations that are being upgraded.

You can create a new topic thread directly from the asset that first prompted the discussion, adding a link at the same time.
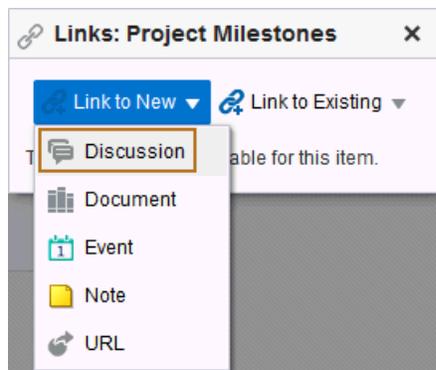
To link to a new discussion forum topic:

1. Go to the asset from which you want to link to a new discussion forum topic and click the **Links** icon.

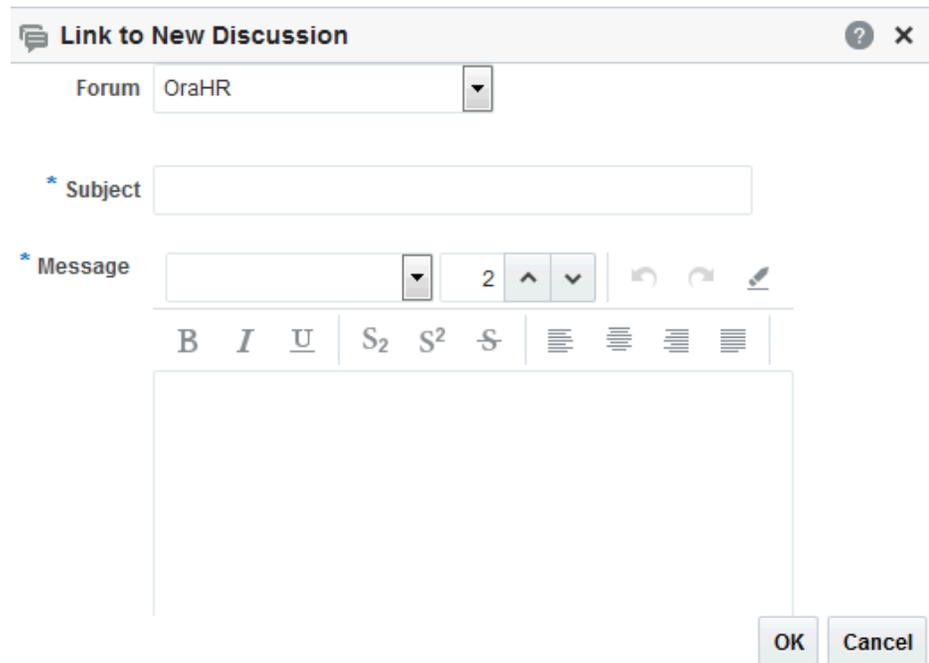   See Opening the Links Dialog to Link to a New Asset for more information.

2. From the Links dialog, select **Link to New** and then select **Discussion** (Figure 30-25).

Figure 30-25   Link to New Discussion Topic

The Link to New Discussion dialog (Figure 30-26) opens.

Figure 30-26   Link to New Discussion Dialog

3. If the portal is configured for multiple discussion forums, then in the **Forum** list, select the forum in which you want to create the discussion topic.

4. In the **Subject** field, enter a subject for the new topic.

5. In the **Message** field, enter the content.

6. Click **OK**.

   The topic is added to the appropriate discussion forum for the portal, and the link is added to the Links dialog (Figure 30-27).

Figure 30-27   Newly Created and Linked Discussion
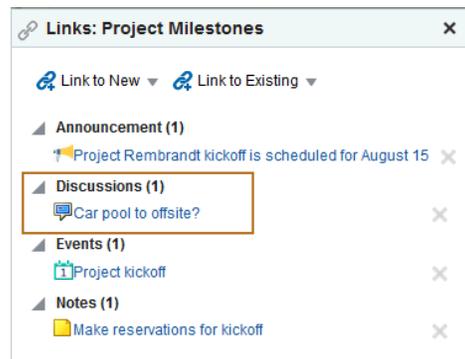
7. Close the Links dialog.

Adding and Linking to a Document

When viewing an asset, such as a discussion forum topic, you might be aware of an informative document that would help other users. You can add the document or wiki

to the document library directly from the original asset, adding a link to it at the same time.
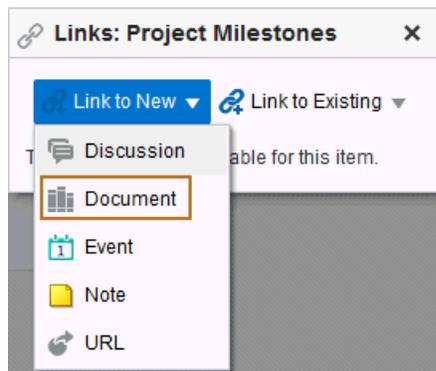
To link to a new document:

1. Go to the asset from which you want to link to a new document and click the **Links** icon.

   See Opening the Links Dialog to Link to a New Asset for more information.

2. From the Links dialog, select **Link to New** and then select **Document** (Figure 30-28).

Figure 30-28   Link to New Document

The Link to New Document dialog (Figure 30-29) opens.

Figure 30-29   Link to New Document Dialog
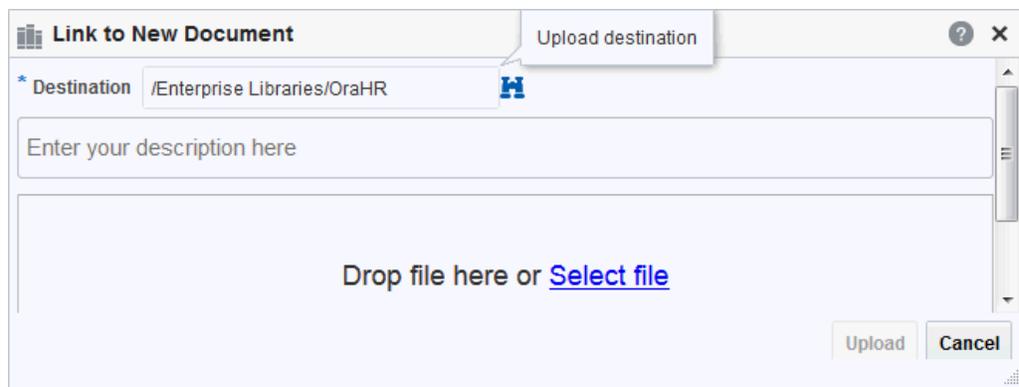
3. Click **Select File**, and navigate to the location of the document you want to upload.

4. Select the document, and click **Open**.

5. Enter an optional description and change the default destination directory, if necessary. Click the **Browse** icon to locate a destination, if necessary.

6. Click **Upload**.

   The document is uploaded, and the link is added to the Links dialog (Figure 30-30).

Figure 30-30   Newly Added and Linked Document
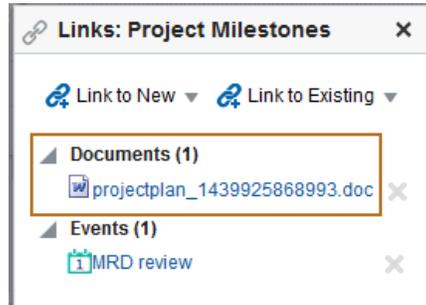
The location of the uploaded document depends on where you initiated the linking action. The document could be uploaded to the selected portal's document library or to the root folder of your WebCenter Portal default document repository connection.

7. Close the Links dialog.

Adding and Linking to an Event

You can create a new event and add a link to it at the same time. For example, to schedule a meeting to address issues raised in a project, you can link the new event to the project issues list.

To add and link to a event:

1. Go to the asset from which you want to link to a new event and click the **Links** icon.

   See Opening the Links Dialog to Link to a New Asset for more information.

2. From the Links dialog, select **Link to New** and then select **Event** (Figure 30-31).

Figure 30-31   Link to New Event
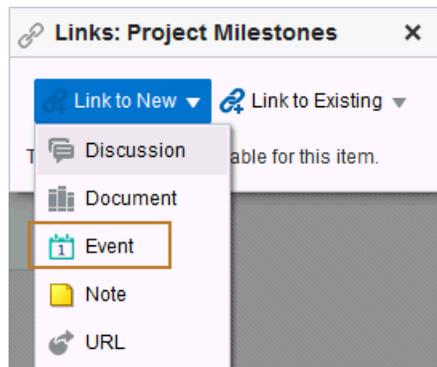

The Link to New Event dialog (Figure 30-32) opens.

Figure 30-32   Link to New Event Dialog

3. Enter the title, location, and other event details.

   See Scheduling Events for more information.

4. Click **Create**.

   The event is created and the link is added to the Links dialog (Figure 30-33).

Figure 30-33   Newly Created and Linked Event

5. Close the Links dialog.

Adding and Linking to a Note

Create a personal note from an asset, or to add an annotation to an asset, like an online post-it note. The note is also linked to the asset, serving as a reminder whenever you view it.

To add and link to a note:

1. Go to the asset from which you want to add and link to a note and click the **Links** icon.

   See Opening the Links Dialog to Link to a New Asset for more information.

2. From the Links dialog, select **Link to New** and then select **Note** (Figure 30-34).
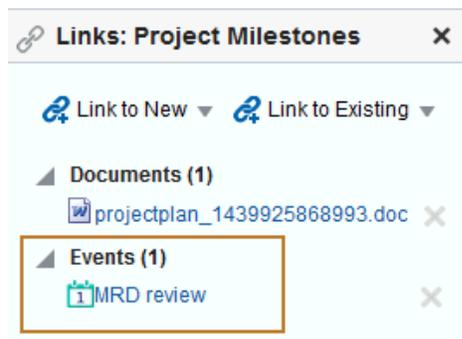
Figure 30-34   Link to New Note

The Link to New Note dialog (Figure 30-35) opens.

Figure 30-35   Link to New Note Dialog

3. In the **Title** field, enter a title for the note.

4. In the **Detail** field, enter the note content.

5. Click **Create**.

   For more information about notes, see Managing Your Notes.

   The newly created note link is added to the Links dialog (Figure 30-36).

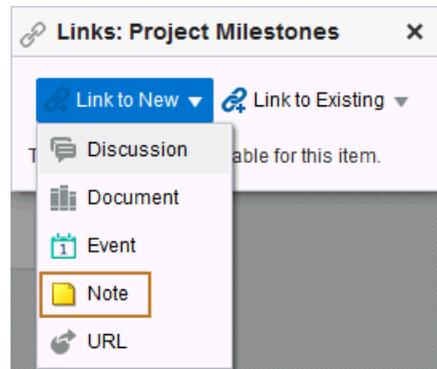**Figure 30-36   Newly Created and Linked Note**

6. Close the Links dialog.

Linking to a Web Page

From an asset, you can link to a web page to provide access to additional information.
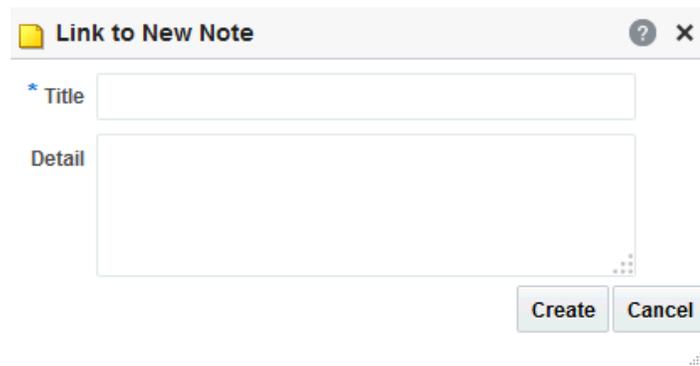
To link to a web page:

1. Go to the asset from which you want to link to a web page and click the **Links** icon.

   See Opening the Links Dialog to Link to a New Asset for more information.

2. From the Links dialog, select **Link to New** and then select **URL** (Figure 30-37).

Figure 30-37   Link to New URL

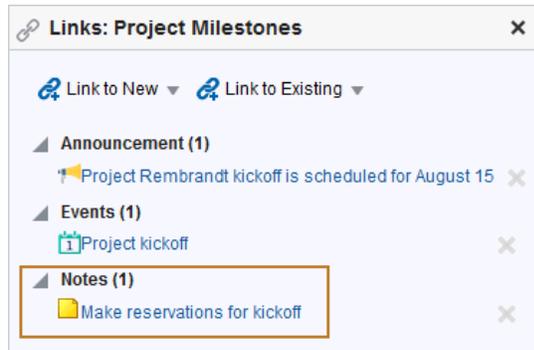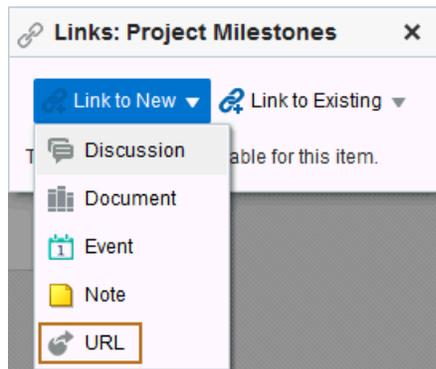The Link to New URL dialog (Figure 30-38) opens.

Figure 30-38   Link to New URL Dialog
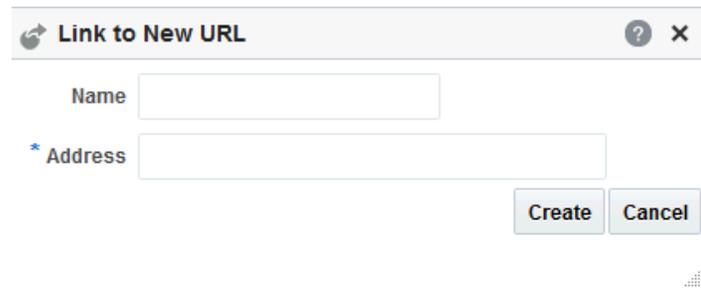
3. In the **Name** field, enter a display name to use for the link.

4. In the **Address** field, enter the URL of the page to which you want to link.

> **✎ Note:**
>
> **Note**: For an external URL to be found valid by WebCenter Portal, the system administrator must add it to the list of valid URLs in the `valid-link-url.xml` file. See Adding a List of Valid External URLs in *Administering Oracle WebCenter Portal*. If an external URL is not listed in the file, the following error message appears:
>
> *The URL entered is not available in the list of valid URLs. Contact your system administrator for the list of valid URLs.*

5. Click **Create**.

    The link is added to the Links dialog.

Figure 30-39   Newly Created and Linked URL
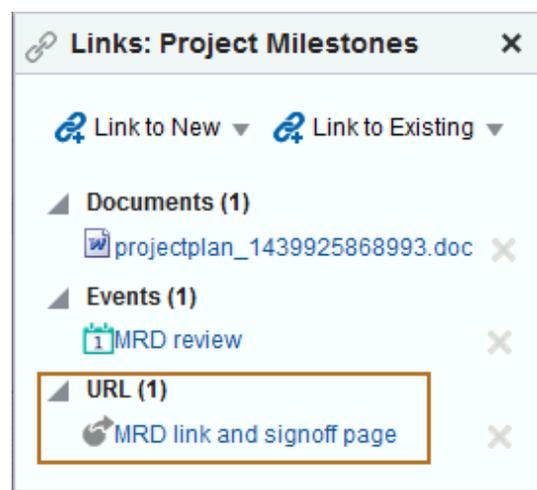
6. Close the Links dialog.

Accessing Link Targets

You access link targets from the Links dialog. If links exist from an asset, it is indicated by the gold Links icon (Figure 30-40).

To access a link target:

1. Click the **Link** icon (Figure 30-40) associated with the asset.

Figure 30-40   Link Icon That Has Links

2. Click the link you want to open on the resulting Links dialog (Figure 30-41

Figure 30-41   Links in the Links Dialog
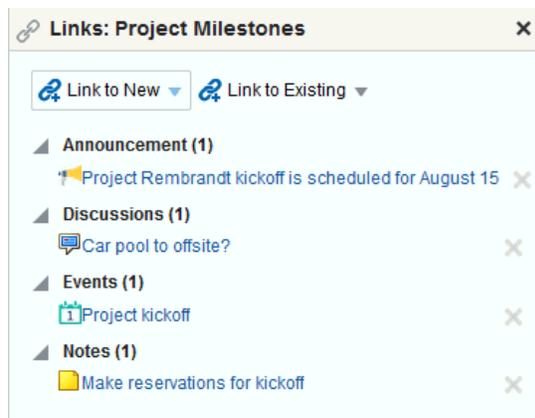
Deleting a Link

Delete a link when it is no longer useful or when it is obsolete. For example, you can delete a link to an event after the event date has passed.

To delete a link:

1. Go to the asset associated with the link you want to delete, such as the document, list, list row, or other item for which the link was created.

2. Click the **Links** icon (Figure 30-42).

Figure 30-42   Links Icon

The Links dialog opens, showing a list of current links to the asset.

3. Click the **Delete** icon next to the link you want to delete (Figure 30-43).

Figure 30-43   Delete Icons Next to Links

The two assets are no longer linked. You can link the two assets again, if you wish to do so. See Linking to Existing Assets and Linking to New Assets.

31

Working with Tags

Use tags to bookmark portal pages using your own meaningful terms.

> ✎ **Note:**
>
> To use tags, the **Tags** icon must be available on a page. This is typically accomplished when a Tags component is included in the page template that is used to create pages in the portal, but a page creator can also add a Tags component to a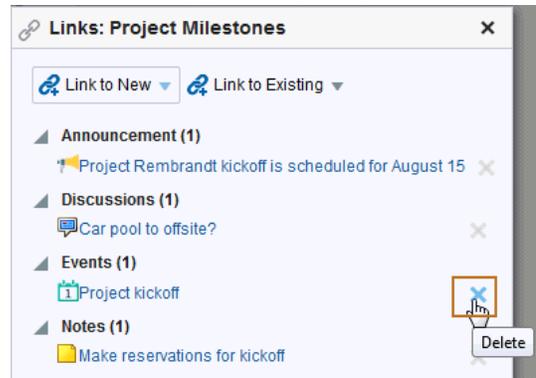n individual page. This is an advanced task, described in Adding a Tags Icon to a Portal Page in *Building Portals with Oracle WebCenter Portal*.

> ✎ **Permissions:**
>
> The tasks described in this chapter are available to any WebCenter Portal user with access to portal pages that contain tags.

Topics:

- About Tags
- About the Tag Center
- Tagging Portal Pages
- Working with Tags in the Tag Center
- Working with Tags in the Tags View
- Working with the Tag Cloud and Tag Cloud Related Resources Views
- Working with the Similarly Tagged Items View

About Tags

A *tag* is a word you associate with a portal page, applying your own classification to improve search results, and to gather disparate items into a cohesive body of knowledge and share it with others. For example, you could apply the tag `staff` to a page that provides useful information about the organizational structure of your company. When you or others search for `staff`, the tagged page appears in the results.

You can provide one or multiple tags to a given page. And multiple users can use the same tag term that you used and apply it to the same item. Duplicates of tags across users are tabulated and provide extra weight to the relevance of the tag term.

You have the option of sharing tags or keeping them to yourself. Share tags to enable other users to discover them in their searches. When you do not share a tag, users searching on an identical term do not discover the items you tagged with that term, unless some other user tagged the item with the same term and shared that tag.

Tags are available for managing in several Tagging views and in the Tag Center, where you can see what tags were used and what items were tagged. Tagging assists with building a knowledge network where each user can benefit from the assessments of all users.

When looking at tags in the Tag Center, note the number of times the tag was applied to a particular object. This number indicates the tag's relevance to that object, and ultimately causes a collective classification scheme popularly known as a *folksonomy*. This can make information easier to search and navigate over time.

About the Tag Center

The Tag Center is a dynamically-generated page that displays all the tags you and other users have applied to portal pages.

Figure 31-1   The Tag Center (List View)
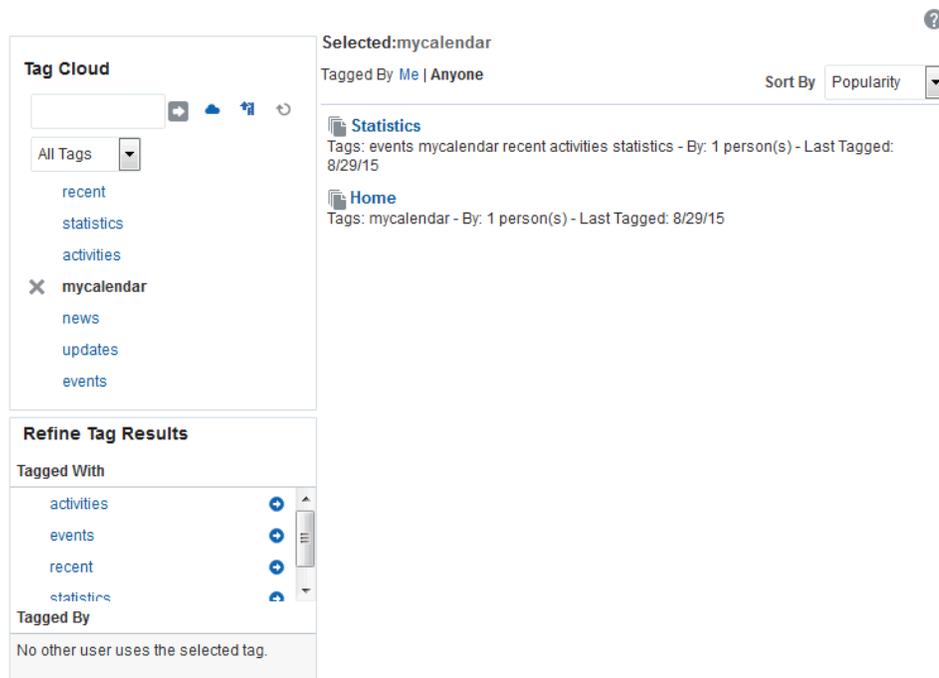
The Tag Center offers the most complete use of tag data by providing access not only to your tags, but to the tags applied by other users. Additionally it provides a visual depiction of tag popularity, which enables you to refine tag results using filters. You can filter for multiple tags simultaneously or filter by other users who have applied the same tags. A sorting feature provides an additional means of controlling your view of tagged pages and documents.

The Tag Center has three sections:

- The **Tag Cloud** section, which you can use to view a cloud or list of the tags currently applied to pages. This section reflects the same information as the Tag Cloud view, which may be added to a page by a portal manager as a separate view.

- The **Refine Tag Results** section with two types of lists: a **Tagged With** list of all other tags used on items that also use the currently selected tag and a **Tagged By** list of other users who have applied the selected tag.

- The **Selected** *tag* tagged items section, which provides a list of all pages to which you have access that use the currently selected tag and options to edit, sort, and filter the items. This section reflects the same information as the Tag Cloud Related Resources view, which may be added to a page by a portal manager as a separate view.

The Tag Cloud is a visual depiction of currently applied tags.

Figure 31-2   Tag Cloud

Tags are presented according to the frequency of their use. More frequently used tags display in bold fonts and varying font sizes—the larger the font, the more frequently the tag has been applied. Click a tag in the tag cloud to execute a search that returns a list of all items to which you have access that use the tag.

To learn how to work with tags in the Tag Center see Working with Tags in the Tag Center.

Tagging Portal Pages

On any page where you see the **Tags** icon, you can associate tags with the page.

Figure 31-3   Tags Icon

> **Note:**
>
> The **Tags** icon is typically available on a portal page when a Tags component is included in the page template that is used to create pages in the portal, but a page creator can also add a Tags component to an individual page. This is an advanced task, described in Adding a Tags Icon to a Portal Page in *Building Portals with Oracle WebCenter Portal*.

To tag a portal page:

1. Go to the page you want to tag.
2. Click the **Tags** icon.

   The Tag This Page dialog opens.

Figure 31-4   Tag This Page Dialog
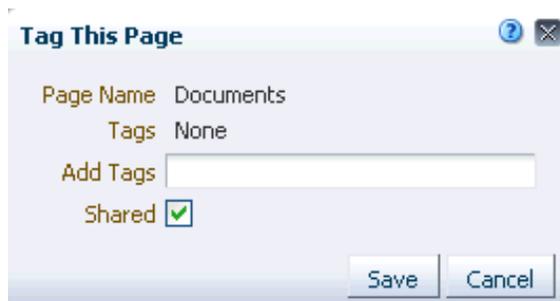
3. In the **Add Tags** field, enter one or more tags, separated with a space. Use underscores or hyphens in multi-word tag entries.
4. To share your tag(s) with other users, click the **Shared** check box. If your system administrator has disabled the **Shared** check box, then it does not appear.

   When other users search for a term you used as a tag, the page you tagged appears in their search results. If you deselect the **Shared** check box, then their search will omit your tagged page from their search results, unless they have tagged the page themselves using the same term. Regardless of whether you select or deselect **Shared**, your own search results will always find the pages you tagged.
5. Click **Save** to apply the tag(s) to the page and close the dialog.

Working with Tags in the Tag Center

This section describes how to work with tags in the dynamically-generated Tag Center (see About the Tag Center). It includes the following topics:

- Opening the Tag Center
- Selecting Different Views and Arrangements of the Tag Cloud in the Tag Center
- Selecting Different Views and Arrangements of Tagged Pages in the Tag Center
- Refining the Display of Information in the Tag Center

- Discovering Who Has Used a Tag in the Tag Center

Opening the Tag Center

To open the Tag Center (Figure 31-5), click a tag displayed in a Tags view on a page. See Viewing Tags in the Tags View .

Figure 31-5   Tag Center (List View)
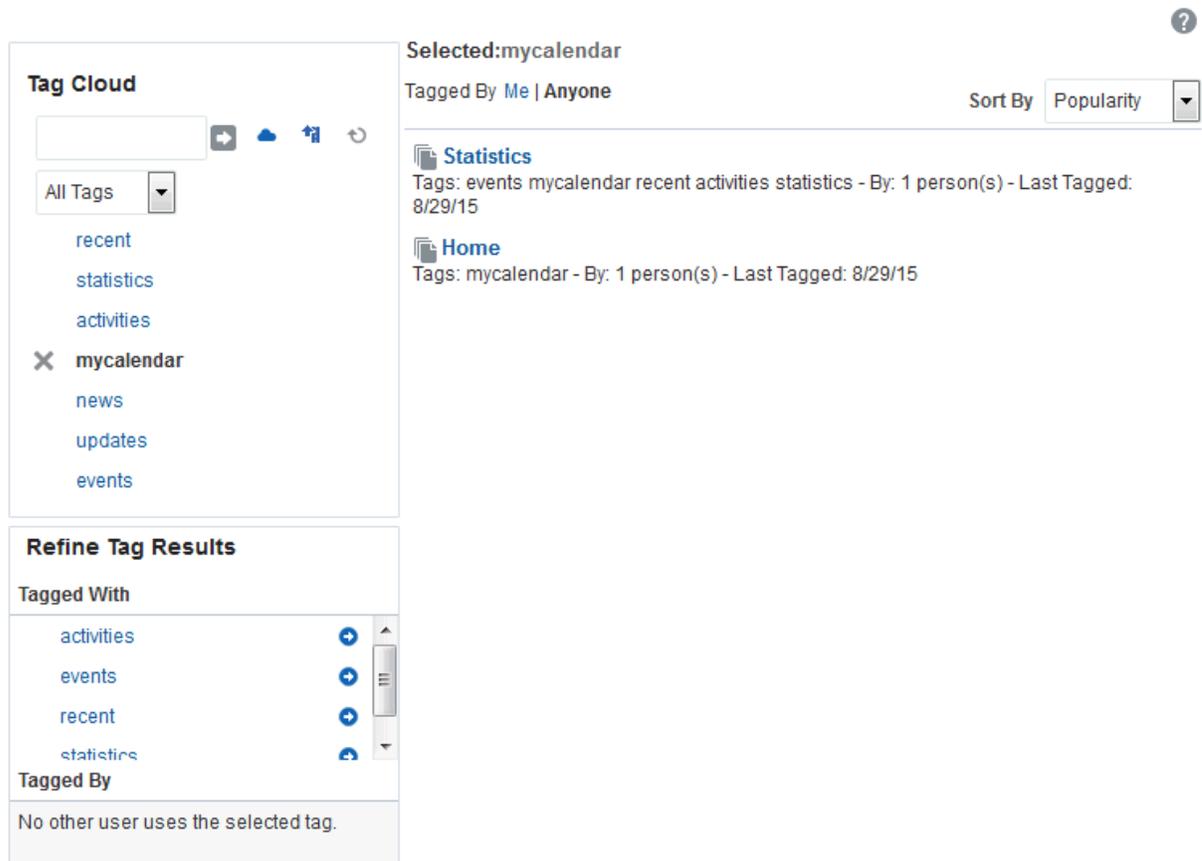
Additionally, the system administrator can add a page for the Tag Center in the Home portal.

The selected tag determines all the tag-related information that appears in the Tag Center. For example:

- The selected tag is highlighted in the **Tag Cloud** section (Figure 31-6).

Figure 31-6   Tag Cloud
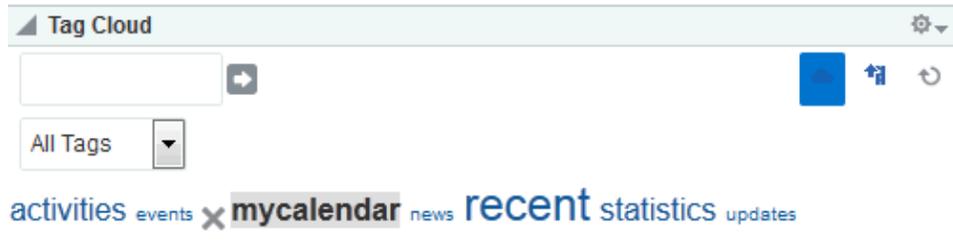
You can select another tag in the Tag Cloud to change the information that is displayed in the Tag Center. Additionally, you can rearrange your view (see Selecting Different Views and Arrangements of the Tag Cloud in the Tag Center).

- Other tags used on pages that also use the currently selected tag display in the **Refine Tag Results** section in the **Tagged With** list (Figure 31-7).

Figure 31-7   Tagged With List in the Tag Center
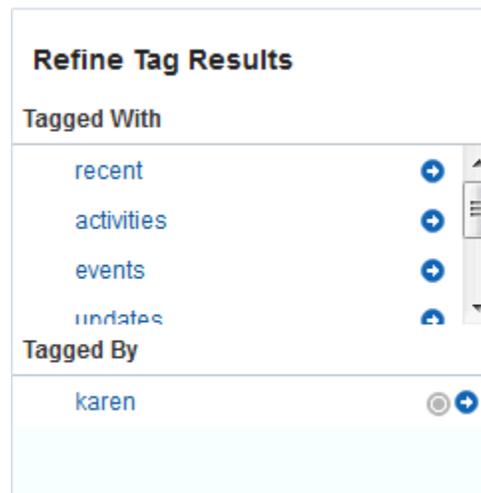
- Other users who applied the selected tag are listed in the **Refine Tag Results** section in the **Tagged by** list (Figure 31-8).

Figure 31-8   Tagged By List in the Tag Center
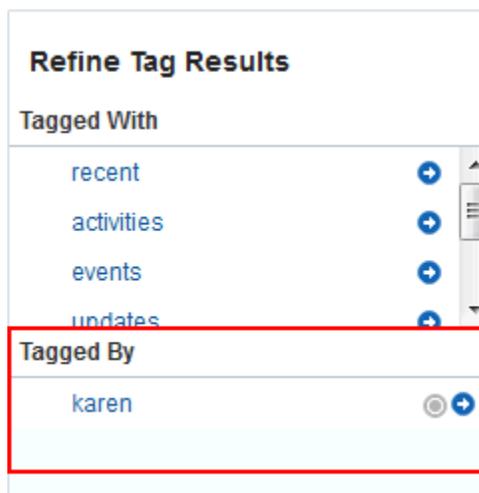
- Pages tagged with the currently selected tag appear in the **Selected**: *tag* tagged items section (Figure 31-9). Click a tagged page link to display the item.

Figure 31-9   Items Tagged with "recent" in the Tag Center
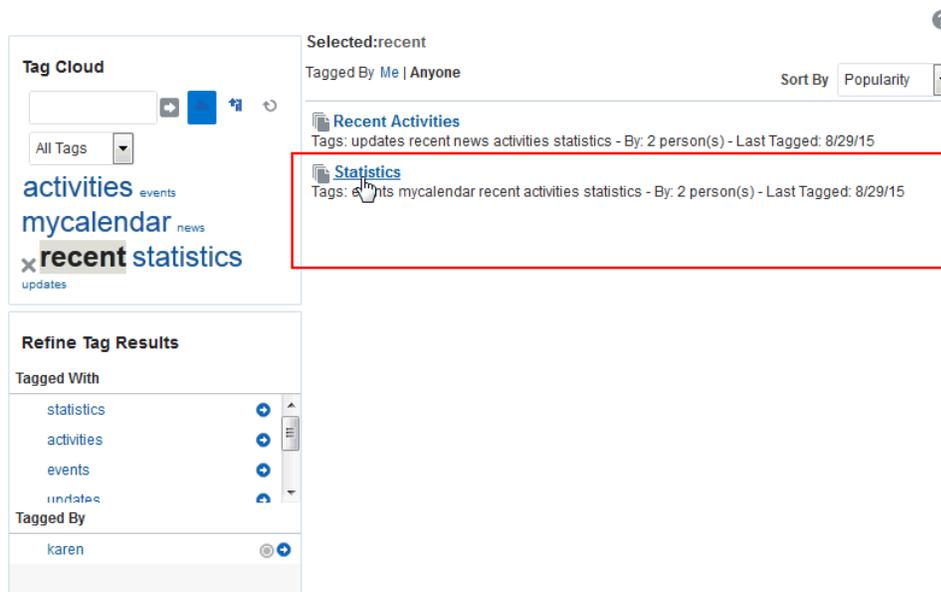
Selecting Different Views and Arrangements of the Tag Cloud in the Tag Center

The Tag Center's Tag Cloud (Figure 31-10) is a visual depiction of all the tags used. By default, tags are presented according to the frequency of their use. More frequently used tags display in bold fonts and varying font sizes—the larger the font, the more often the tag has been applied.

You can adjust your view of the Tag Cloud using its sorting and filtering features.

Figure 31-10   Tag Cloud

To adjust your view of the Tag Cloud in the Tag Center:

- To filter tags, enter a search term in the text box on the Tag Cloud toolbar, and click the **Search** icon.

    The tag display refreshes showing only those tags that meet the search criteria. To refresh the search criteria, select an option from the menu:

    – **All Tags** to remove the search criteria, showing all tags added by all users

    – **My Tags** to remove the search criteria, showing only your tags

    – **All tags containing '*term*'** to show all tags added by all users that meet the search criteria

    – **My tags containing '*term*'** to show only your tags that meet the search criteria

- To switch between displaying the tags in cloud view or list view, click the cloud icon (Figure 31-11).

Figure 31-11   Cloud Icon in the Tag Cloud
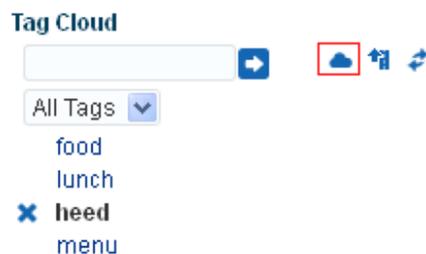
- To sort the tags:

    1. Click the **Sorting options** icon on the Tag Cloud toolbar to open the Sorting options dialog (Figure 31-12).

        The Sorting options dialog opens ().

Figure 31-12   Sorting Options Dialog
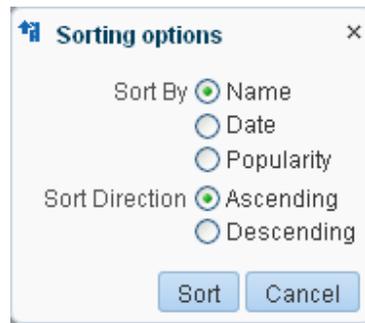
2. Choose from:

   – **Name** to sort the list alphabetically. If you choose **Ascending**, the list is sorted from 1 to 9 and a to z. If you choose **Descending**, the list is sorted from z to a and 9 to 1

   – **Date** to sort the list based on when tags were added. If you choose **Ascending**, the tags are sorted from those applied most recently to those applied longest ago. If you choose **Descending**, the tags are sorted from those applied longest ago to those applied most recently.

   – **Popularity** to sort the list based on how frequently the tag has been applied. If you choose **Ascending**, the tags are sorted from those that have been applied most frequently to those that have been applied least frequently. If you choose **Descending**, the tags are sorted from those applied least frequently to those applied most frequently.

3. Click **Sort** to apply your selection and close the Sorting options dialog.

• To refresh the list of tags, click the **Refresh tags** icon.

• To show all tags or just your tags, choose from:

   – **All Tags** to show every tag added by all users

   – **My Tags** to show only the tags you have added

Selecting Different Views and Arrangements of Tagged Pages in the Tag Center

The Tag Center provides a selection of sorting criteria to enable you to display tagged pages in the way that you prefer. Click a tagged page link to display the page.

Using the **Tagged By** and **Sort By** options (Figure 31-13), you can choose which tagged pages to show and the order in which to show them.

Figure 31-13   Tagged By and Sort By Options for Tagged Pages in the Tag Center

To choose the tagged pages to view, choose from:

- **Tagged by Me** show only the pages that use the selected tag that you have tagged yourself

- **Tagged by Anyone** to show all pages that use the selected tags

To arrange the order of displayed tagged pages, choose from:

- **Popularity** to sort the list from pages that have been tagged most frequently with the current tag to those tagged least frequently

- **Name** to sort the list alphabetically from 1 to 9 and a to z

- **Date** to sort the list from pages that have been tagged most recently to those tagged longest ago

Refining the Display of Information in the Tag Center

You can further refine your view of information in the Tag Center by selecting additional tags in the **Tagged With** list (Figure 31-14).

Figure 31-14   Tagged with Panel in the Tag Center
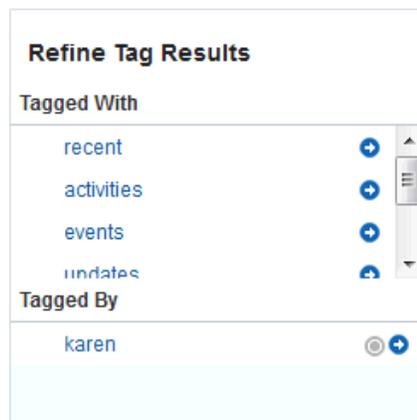
The **Tagged With** panel displays all the other tags used on pages that also use the currently selected tag. Click a tag in the **Tagged With** list to further restrict the

information in the Tag Center to information associated with both the selected tag and the related tag you clicked.

For example, imagine that the Tag Center displays all items tagged with the term `dev`. Click `analysis` in the **Tagged Wi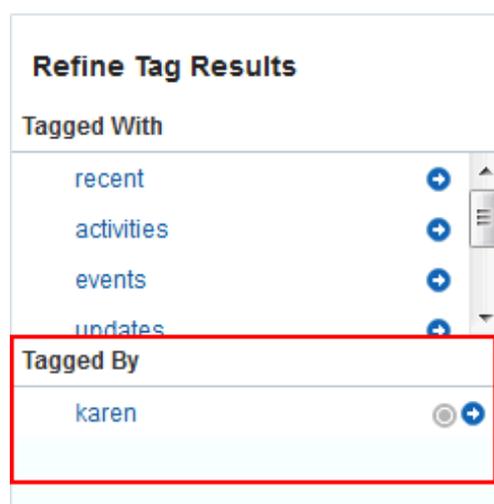th** list to further refine the information in the Tag Center to information that is associated with both `dev` and `analysis`.

Discovering Who Has Used a Tag in the Tag Center

You can further refine your view of information in the Tag Center by selecting other users in the **Tagged By** list (Figure 31-15).

Figure 31-15   Tagged By List in the Tag Center

The **Tagged By** list lists all other users who have applied the selected tag or tags. Click a user in the **Tagged By** list to limit the information in the Tag Center to information tagged with the selected tag and also tagged by the user you clicked.

For example, if the currently-selected tag is `recent`, and the user `karen` appears under **Tagged By**, then clicking `karen` shows information associated with the tag `recent`, applied by `karen`.

Working with Tags in the Tags View

The Tags view is available when the Tags task flow has been added to a portal page (as described in Adding a Tagging Task Flow to a Page in *Building Portals with Oracle WebCenter Portal*).

This section describes how to work with tags in the Tags view. It includes the following topics:
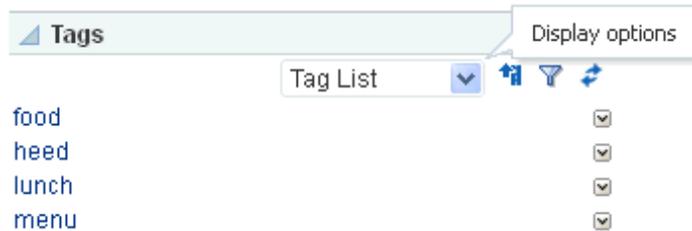
• Viewing Tags in the Tags View
• Sorting Tags in the Tags View

- • Filtering Tags in the Tags View
- • Renaming a Tag from the Tags View
- • Deleting a Tag in the Tags View

Viewing Tags in the Tags View

The Tags view shows all tags (Figure 31-16) and tagged pages.

Figure 31-16   Tags View

From the drop-down list, select:

- • **Tag List** to view a list of tags, which you can click to open the Tag Center and further refine your selection (see Working with Tags in the Tag Center). You can also use it to display a tag cloud or tagged pages.

- • **Tag Cloud** to view a tag cloud depiction of your tags, which you can also click to open the Tag Center and further refine your selection.

- • **Tagged Items** to view all the items that have been tagged, which you can click to open the associated page.
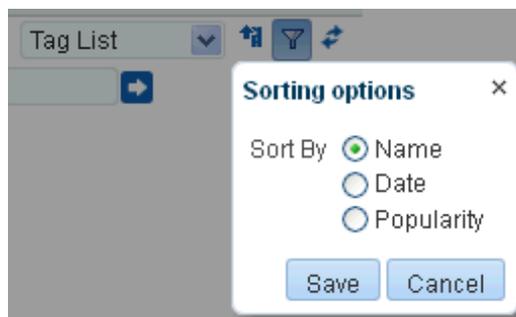
Sorting Tags in the Tags View

When your tag or tagged items list is long, sorting the list makes it easier to find specific tags or tagged pages by name, date, or popularity.

To sort tags or tagged items in the Tags view:

1. Click the **Sorting options** icon at the top of the Tags view to open the Sorting options dialog (Figure 31-17).

Figure 31-17   The Sorting Options Dialog

2. Select sorting criteria.

   • **Name** to sort the list alphabetically from 1 to 9 and a to z.

   • **Date** to sort the list from the tags applied most recently to those applied longest ago. When tagged items are shown, **Date** sorts the list from the items tagged most recently to the items with the oldest tags.

   • **Popularity** to sort the list from the tags that have been applied most frequently to those that have been applied least frequently. When tagged items are shown, **Popularity** sorts the list from the items that have been tagged by the most people to the items tagged by the fewest.

3. Click **Save** to apply your selection and close the dialog.

Filtering Tags in the Tags View

Filtering provides a way to view a subset of tags or tagged items.

To filter tags or tagged items in the Tags view:

1. Click the **Filter** icon to open a filtering term field (Figure 31-18).

Figure 31-18   Filter Icon
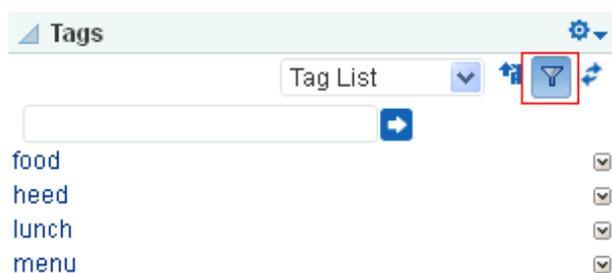
Filtering works for both Tags and Tagged Items views.

2. Enter a filtering term, and click the **Search** icon.

   The list refreshes, showing only those tags or tagged items that match or include the filtering term.

3. Clear the filtering term, and click the **Search** icon to restore all tags or tagged items in the list.

4. Click the **Filter** icon to exit filtering.

Renaming a Tag from the Tags View

When you rename a tag, you rename all instances of the tag that you applied. If other users applied the same tag, their instances are not renamed.

To rename tags in the Tags view:

1. Click the tag actions icon next to the tag, and select **Rename** (Figure 31-19).

Figure 31-19   Tag Actions Menu

2. In the Rename dialog, enter a new name for the selected tag, and click **Rename** (Figure 31-20).

Figure 31-20   Rename Dialog

All tags you created using the original tag name are renamed.

Deleting a Tag in the Tags View

When you delete a tag, it is deleted wherever you applied it. If other users applied the same tag, their tags are left as is.

To delete a tag in the Tags view:

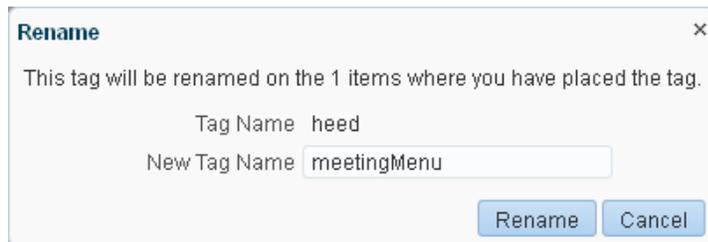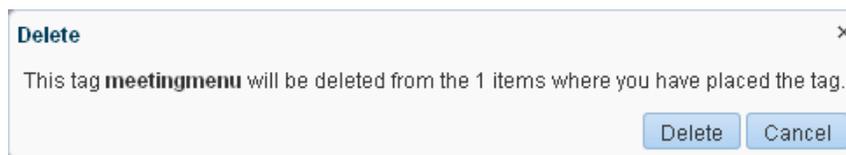1. Click the tag actions icon next to the tag, and select **Delete** (Figure 31-21).

Figure 31-21   Tag Actions Icon

2. In the Delete dialog, click **Delete** (Figure 31-22).

Figure 31-22   Delete Dialog

The tag is removed from the Tags view and from any items to which it was applied.

Working with the Tag Cloud and Tag Cloud Related Resources Views

The Tag Cloud and Tag Cloud Related Resources views are available when the associated task flows have been added to a portal page (as described in Adding a Tagging Task Flow to a Page in *Building Portals with Oracle WebCenter Portal*).

Working in the Tag Cloud view (Figure 31-23) is identical to working in the Tag Cloud section of the Tag Center. See Selecting Different Views and Arrangements of the Tag Cloud in the Tag Center.

Figure 31-23   Tag Cloud View

When you select a tag in the Tag Cloud view, you see the results in the Tag Cloud Related Resources view (Figure 31-24).

Working in the Tag Cloud Related Resources view is identical to working in the tagged items section of the Tag Center. See Selecting Different Views and Arrangements of Tagged Pages in the Tag Center. Click a tagged page link to display the page.

Figure 31-24   Tag Cloud Related Resources View

Working with the Similarly Tagged Items View

The Similarly Tagged Items view is available when the Similarly Tagged Items task flow has been added to a portal page (as described in Adding a Tagging Task Flow to a Page in *Building Portals with Oracle WebCenter Portal*)

The Similarly Tagged Items view (Figure 31-25) provides a list of links to other pages that have at least one tag in common with the current page. Click a tagged item link to display the item

Figure 31-25   Similarly Tagged Items View

A

Appendix

This part provides an Home portal appendix with supporting information for the chapters in this guide.

- Searching for Information with Oracle Secure Enterprise Search

Searching for Information with Oracle Secure Enterprise Search

Use the features of Oracle Secure Enterprise Search (SES) to search for information in WebCenter Portal.

> ✏ **Permissions:**
>
> The tasks described in this chapter are available to any WebCenter Portal user with access to a page that contains search.

Topics:

- About Searching in WebCenter Portal
- Searching Using Facet Support
- Searching Without Using Facet Support
- Limitations with Search

About Searching in WebCenter Portal

WebCenter Portal provides global (application-wide) search. By default, the search field is at the top-right of the application. Information is searched by name and content. A search looks for your search terms in every searchable object enabled in the application, returning only the results you are authorized to view. For example, if you are not a member of the *Finance* portal, then any search results from that portal do not display.

In addition to WebCenter Portal's search, the Documents tool provides its own search engine for file searches. This saves time and increases the relevancy of results by narrowing the scope of a search to files. The Documents tool searches within a specific portal's document library. For more information, see Searching Libraries, Folders, and Documents.

> **✎ Note:**
>
> System administrators and Portal Managers can customize the search user interface, so your screen shots may look different. They can configure the scope of searches to specific portals, tools or services, and document types; they can add or hide attributes provided with search results; and they can change the size of the search box.
>
> Global search does not search portal assets, such as portal templates, page templates, and resource catalogs. If you need to search portal assets (as opposed to user-specific data, such as documents and portals), use the **Filter** field on their respective application pages.

WebCenter Portal can be configured with Oracle Secure Enterprise Search (SES) adapter for searching your application:

Oracle SES provides unified ranking results for the following assets:

- Documents, including wikis and blogs

- Announcements and discussions

- Portals, lists, page metadata, and people

For example, when you run a search for a user name, most likely, you are looking for that persons's contact information (that is, the exact user name in your organization), not necessarily documents that the user wrote. The unified ranking in Oracle SES enables you to see the most relevant results.

Additionally, with Oracle SES as the search engine, you can use the wildcard character [*] in the middle or end of a term for wildcard matching. For example, when you search for keywords like `wiki` or `page`, Oracle SES does not return the wiki page MyWikiPage in search results. However, `My*` or `My*Page` does return MyWikiPage.

Searching Using Facet Support

This section describes your search experience if your application or portal has been configured to use Faceted Search.

> **✎ Note:**
>
> Your search environment varies depending on how your system administrator or portal manager configured search.
>
> If your application or portal is configured to use unfaceted search, see Searching Without Using Facet Support.
>
> Your system administrator can tell you which search environment you have running. The way you access search depends on how the portal is designed. The application specialist might also provide you with a pretty URL to access the page.

This section includes the following topics:

- [Running a Global Search](#)
- [Running Faceted Searches to Narrow Results](#)
- [Running Filtered Searches to Narrow Results](#)
- [Running Sorted Searches to Narrow Results](#)

Running a Global Search

To perform a global search:

1. Locate the global search field, and enter a search term. For example, the search field at the top right of the application.
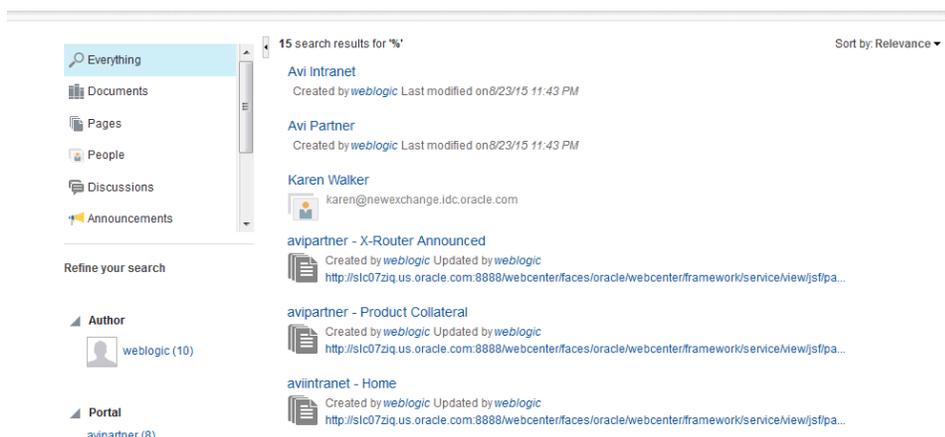
Figure A-1 Search Field
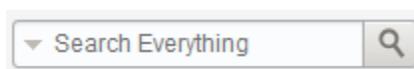
2. Press **Enter** or click the **Search** icon next to the global search field.

Figure A-2 Search Icon

Results display in the search results page.

Figure A-3 Search Results

> **✎ Note:**
>
> Thumbnails for documents appear in place of icons when thumbnail creation is enabled in WebCenter Content and when single sign-on is configured on both WebCenter Portal and WebCenter Content.

Running Faceted Searches to Narrow Results

You can use facets to navigate indexed data without running a new search. Some search terms can provide massive results, but faceted navigation within search lets you clarify exactly what you are looking for, or even discover something new.

For example, Figure A-4 shows a search filtered to show only results from the **Avi** portal created by the **weblogic** user. You can add more facets, for example clicking **This Year** under the **Last Modified Date** facet, to continue narrowing this search.

Figure A-4   Faceted Result List
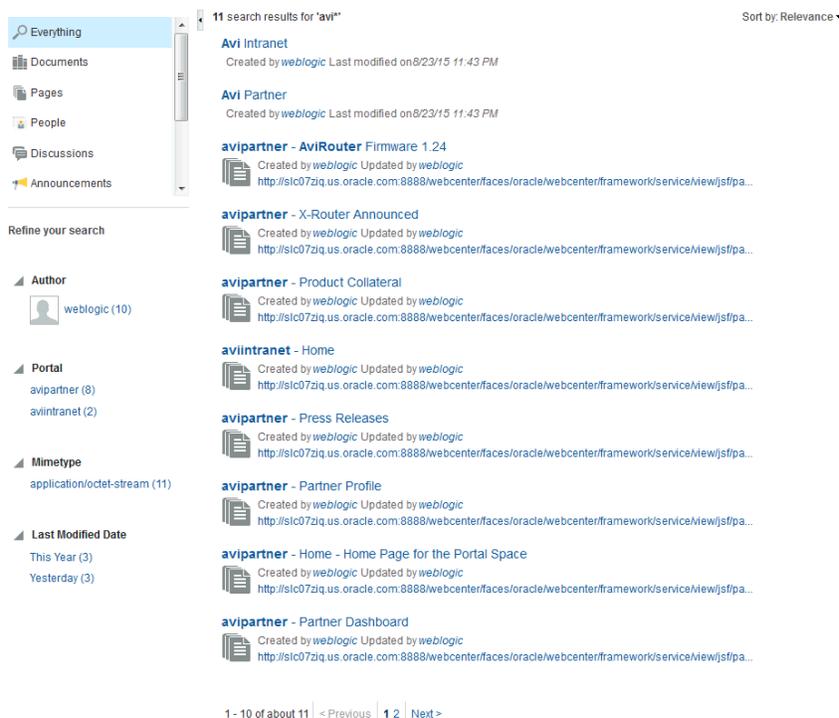
The following facets are included by default, although your system administrator may configure different facets:

- Author
- Last Modified Date
- Mimetype
- Tags

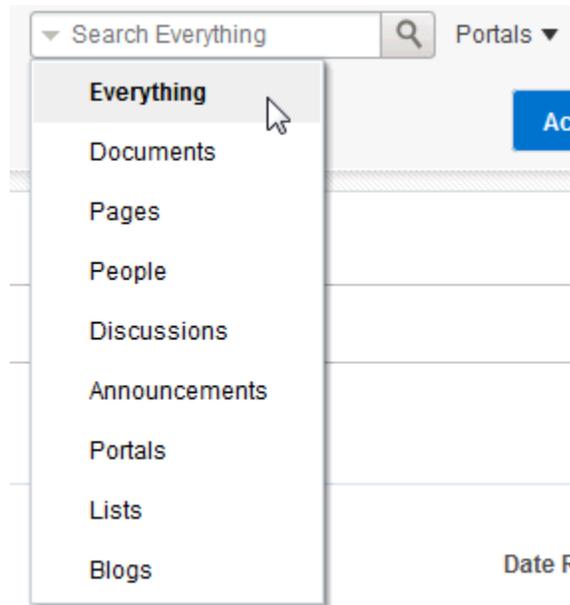- Portal

Click the **Remove Filter** icon to remove each facet and return to a complete result list.

Running Filtered Searches to Narrow Results

You can narrow your results using the filter list in the global search box.

Figure A-5   Filtered Search

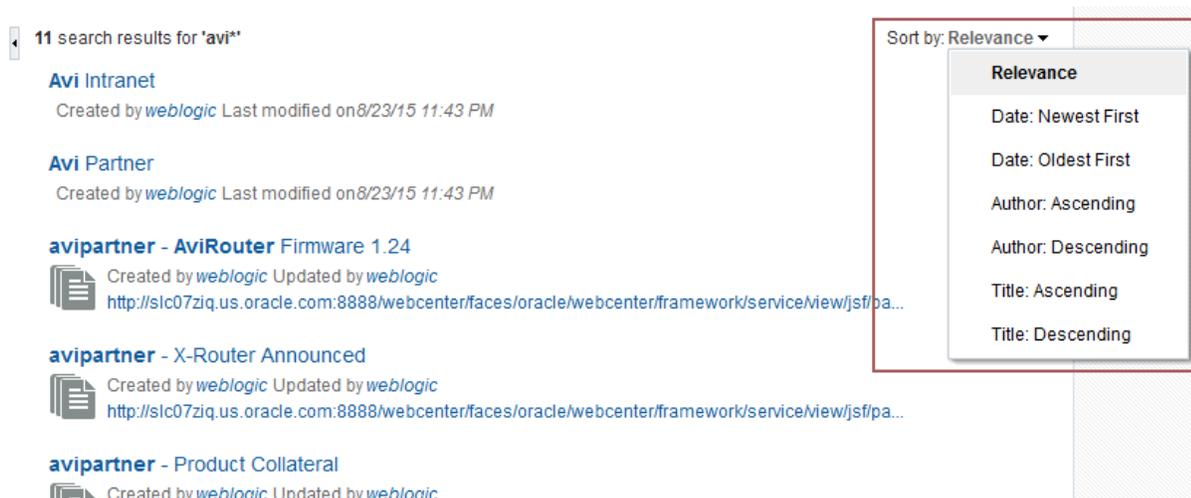Or, you can filter results the same way using the facets on the left side of search results.

Figure A-6   Search Results Filtered

Running Sorted Searches to Narrow Results

You can narrow your results using the **Sort by** drop-down list to the right of page ().

Figure A-7   Sorting in Search

By default, searches are sorted with the most relevant results first, with the following sorting options available:

- Date: Newest First

- Date: Oldest First

- Author: Ascending

- Author: Descending

- Title: Ascending

- Title: Descending

Searching Without Using Facet Support

This section describes your search experience if your application or portal manager has been configured without facet support.

> **Note:**
>
> Your search environment varies depending on how your system administrator or portal manager configured search.
>
> If your organization customized the search user interface, the search pages might look different than what is shown.

This section includes the following topics:

Running a Global Search (Without Facet Support)

To perform a global search:

1. Locate the global search field and enter a search term.

   For example, Figure A-8 shows the search field at the top right of the application.

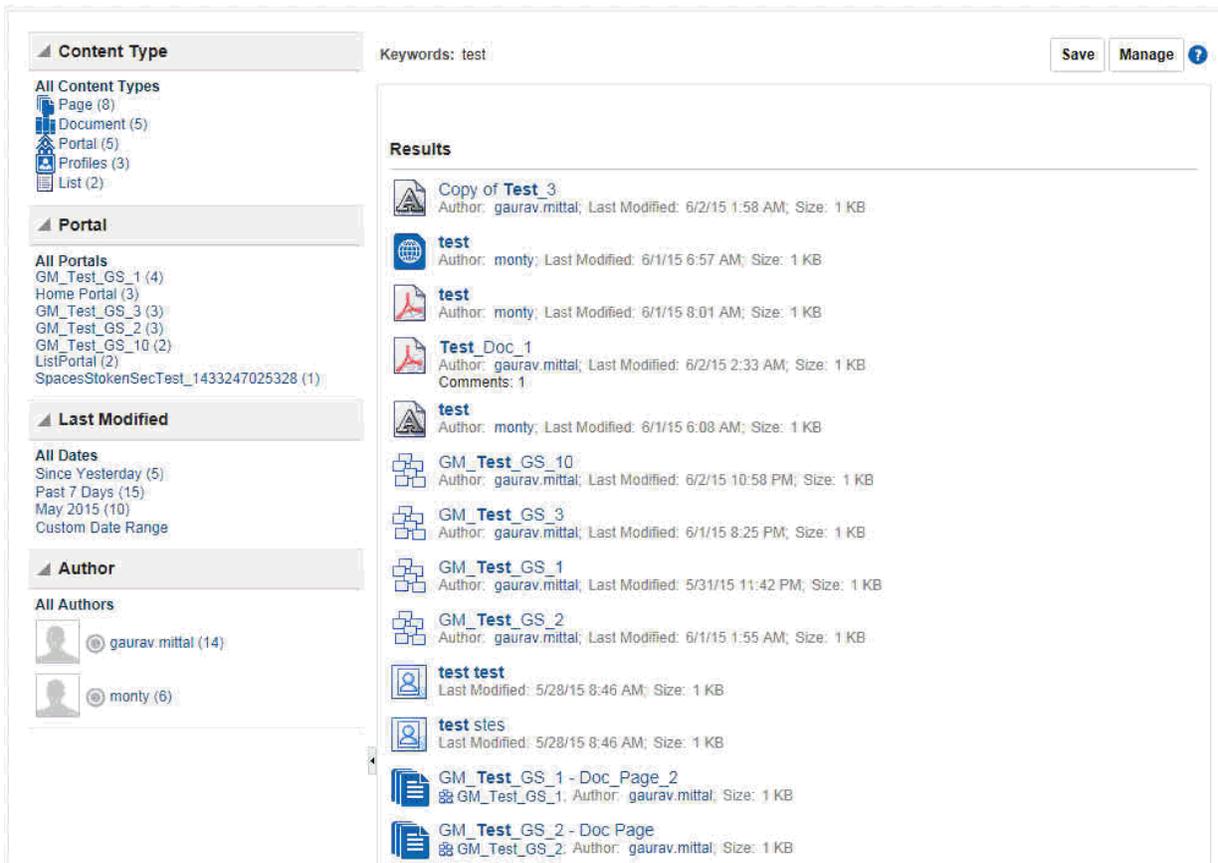   **Figure A-8   Global Search Field**

2. Press **Enter** or click the **Search** icon next to the global search field (Figure A-9).

   Figure A-9   Search Icon

   Results display in the search results page (Figure A-10).

Figure A-10   Global Search Results

3. Click a link to open a result.

When Oracle SES 11.1.2.* is configured, users can individually configure how their search results are displayed. Specifically, each user can control which tools and services are included in their search and the order in which they are listed in the results. Set this in your Preferences (for information see Setting Individual Preferences for Search Results).

Using Refiners to Narrow Search Results

You can narrow your results in the Refine Search section to produce a smaller set of results. For example, to see all documents that one particular person posted, rather than scrolling through pages of results to find them, you can simply click that person's name or profile picture, and the results are filtered to show only results from that person.

With the Oracle SES 11.1.2.2 adapter, you can narrow the search by Author (uploader/modifier), Last Modified date, Content Type, Portal, and Tags.

> **Note:**
>
> Oracle SES results for Author include *all* user names that have modified a document/wiki/blog.
>
> Some WebCenter Portal components, like tagged items and favorites, do not supply refiners for search, and do not appear in refined searches.

To refine the display of search results:

1. Perform a global search as described in Running a Global Search (Without Facet Support).

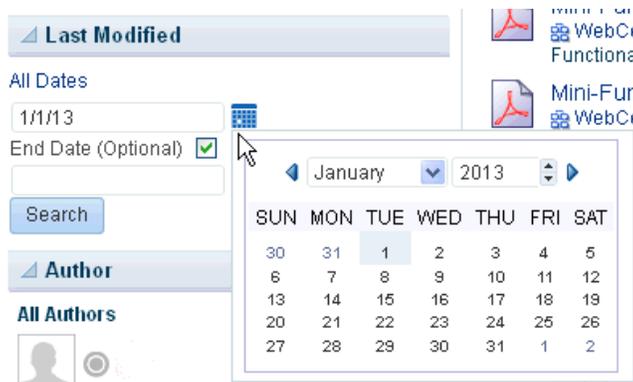   The search results display on the search results page.

2. To refine the display of search results by date, choose a time-range limitation from the Last Modified box.

   For example, click **Since Yesterday** to view results posted since the previous day, or click **Past 7 Days** to view results posted in the past week. The number next to each time range indicates the search's best guess at how many search results fall within the specified range.

   Some date selections, such as years or months, provide additional refinement options when you choose them. For example, when you refine a search by all results occurring within 2007, your refined results display and additional refinements appear in the Last Modified box.

   Click **Custom Date Range** and enter a date in the field provided (optionally, with an end date also), or click the **Select Date** icon and choose a date from a date picker (Figure A-11).

   Figure A-11   Date Picker for Custom Date Range

3. To refine the display of search results to a person who authored/uploaded/modified it, choose someone listed under Author (Figure A-12).

Figure A-12   Authors on the Search Results Page

For example, click **pat** to view all results contributed by the user Pat.

The number next to each user name indicates the search's best guess at how many search results are associated with the specified user.

Click **More...** or **Less...** to see more or less authors listed in the Author area.

4. When a refinement is selected, it appears above the Results list with a **Delete** icon, enabling you to remove the refinements you have applied to search results (Figure A-13).

Figure A-13   Delete Icon to Remove Refinement of Search Results

Click the **Delete** icon to remove that particular search results refinement and broaden the list of displayed results.

Saving Searches

After you have performed a search, you can save it so that you can run it again later without having to reenter the search terms. You can also share the saved search with portals.

> **Note:**
>
> You can save searches only if your portal is configured to use search *without* facet support.

This section includes the following topics:

- Saving a Search
- Running a Saved Search
- Sharing a Saved Search
- Customizing a Saved Search
- Deleting a Saved Search

Saving a Search

Saved searches are useful for the searches you run frequently. They assist in keeping you current as new information is added to the search pool.

✎ Note:

You can use the save search feature only if your application or portal is configured to use search without facet support.
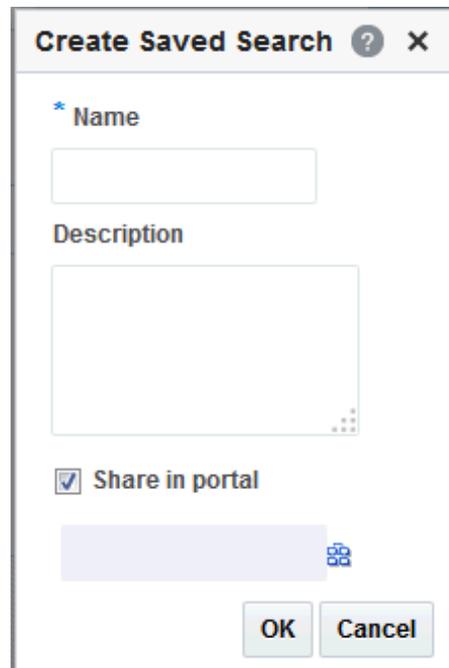

To save a search:

1. Perform a global search as described in Running a Global Search (Without Facet Support).

   The search results display on the Search results page.

2. Click **Save** below the search field (Figure A-14).

   Figure A-14   Save and Manage Buttons

   The Create Saved Search dialog opens (Figure A-15).

   Figure A-15   The Create Saved Search Dialog

3. In the **Name** field, enter a meaningful name for the search.

   The value you enter in the **Name** field is the value that appears on the dropdown list of saved searches.

   The search that was in the **Search** field is saved, no matter what name you give it. For example, if the search term was *admin*, but you enter *jcr* in the **Name** field. The saved search searches for the term *admin* and not *jcr*.

4. Optionally, in the **Description** field, enter a description of the search.

5. Select the **Share in portal** check box to enable other members of the portal to see this search on the portal's dropdown list of saved searches. Only one portal can be specified.

6. Click the **Select Portal** icon to select the portal in which to share the saved search.

7. Click **OK** to save the search.

Running a Saved Search

You can save searches for a quick and easy way to do repeat searches. The saved searches to which you have access depends on the location.

- Go to the Home portal (see How do I access the Home portal?). After you have saved searches, there is a dropdown list for Saved Searches in the Home portal.

- Go to any page containing the All Saved Searches component (Figure A-16).

  In a portal, All Saved Searches lists all your saved searches for the portal and all shared saved searches for the portal (made both by yourself and other users). It does not list your global saved searches or saved searches made against other portals.

  In the Home portal, All Saved Searches lists all your global saved searches.

Figure A-16   All Saved Searches

- Go to any page where the saved search was placed.

  The Saved Search list shows the results of the particular search.

To run a saved search:

1. Log in and find the saved search:

   - Locate the page containing the All Saved Searches component.

   - Locate the page containing the saved search. In this case, the search results are immediately visible.

2. From the All Saved Searches component or the Saved Search panel in the Home portal, click the link for the saved search you want to run.

> **Tip:**
>
> The description is rendered as a tooltip when you move your cursor over the name of the saved search.

3. View the results on the dynamically-generated Search Results page.

> **Note:**
>
> Not all your results display on the page. There is a setting to the number of results shown per page.

Sharing a Saved Search

You can share a saved search if you think the results of a search might be useful for other portal members.

To share a saved search:

1. Go to the portal where the search was performed and saved.

2. Click **Manage** (Figure A-17).

Figure A-17   Save and Manage Buttons

3. The **Manage Saved Searches** window opens. In the Saved Searches drop-down list, select the saved search you want to share.

4. Select the **Share in portal** check box, and click the **Select portal** icon to select the portals in which you want to share this saved search.

   The saved search is now available for other members of the portal to run. The search is listed in the Saved Searches list for all portal members and in the All Saved Searches list, if one exists.

5. Click **Apply**, then **OK**.

Customizing a Saved Search

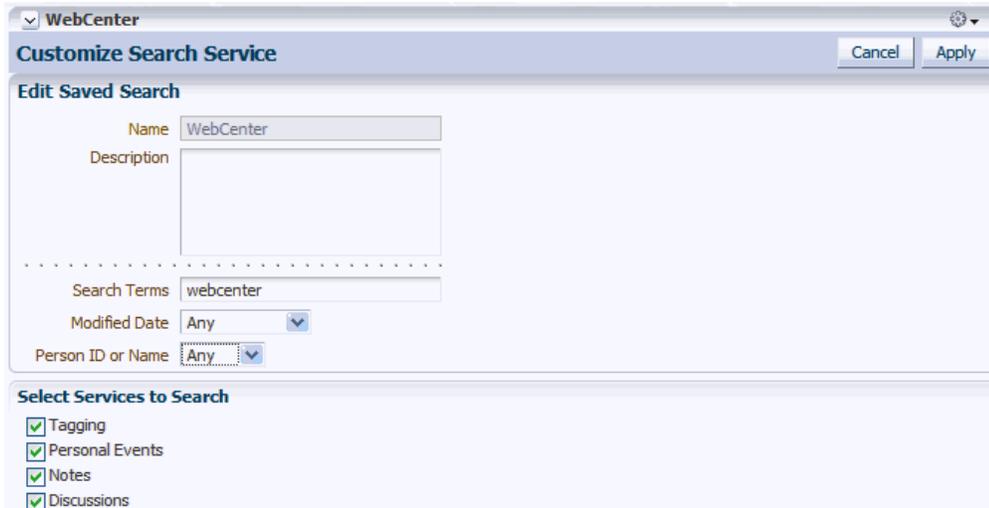After you have added a saved search to a page, you can customize it.

Click the **Personalize** icon (Figure A-18) to make changes to the saved search.

Figure A-18   Personalize Icon

In the Customizing Saved Searches dialog, you can to change the search terms, add refiners, or choose the tools and services to search (Figure A-19).

Figure A-19   Customizing Saved Searches Dialog

Deleting a Saved Search

To delete a saved search:

1. Click **Manage** (Figure A-20).

Figure A-20   Save and Manage Buttons

2. The **Manage Saved Searches** window opens. In the Saved Searches drop-down list, select the saved search you want to delete.

3. Click the **Delete** button, then **Apply** and **OK**.

Setting Individual Preferences for Search Results

In addition to the customizations the system administrator can make to the way search results are displayed, individual users also can customize the way they see their results. Specifically, each user can control which tools and services are included in their search and the order in which they are listed in the results.

> **✎ Note:**
>
> If your search environment has been configured to use facet support, these search preferences are not reflected in search results. This setting is configured by the system administrator on the Search administration page and by the Portal Manager in the portal administration Search page only.

When you search content, you may find that the results from one tool or service are more relevant to you than results from other tools. You may find it useful to be able to exclude some tools from a search and specify the order in which the results from selected tools are listed.

Use search preferences to choose the tools to search and set the display order for search results. This section includes the following topics:

- Selecting the Tools and Services to Search
- Specifying a Display Order for Search Results

Selecting the Tools and Services to Search

Your WebCenter Portal application specialist makes tools and services available to portals. By default, all enabled services are searched. You can disable any service for which you do not want to see search results. For example, if you frequently search for a particular type of technology, including your personal contacts in the search is probably not useful.

> **✎ Note:**
>
> Selecting the tools and services to search on the Preferences pages is supported only in non-faceted search task flows; hence, this setting will have no impact on your display results in faceted search task flows.

To specify which tools and services should be searched:

1. From your user name menu in the menu bar, select **Preferences**.

2. On the **Search** page:

   - To add a tool or service to a search, select it in the **Available Services** list and click the **Move selected items to list** icon to move it to the **Selected Services** list.

   - To remove a tool or services from search, select it in the **Selected Services** list and click the **Remove selected items from list** icon to move it to the **Available Services** list.

Figure A-21   Preferences - Search Page
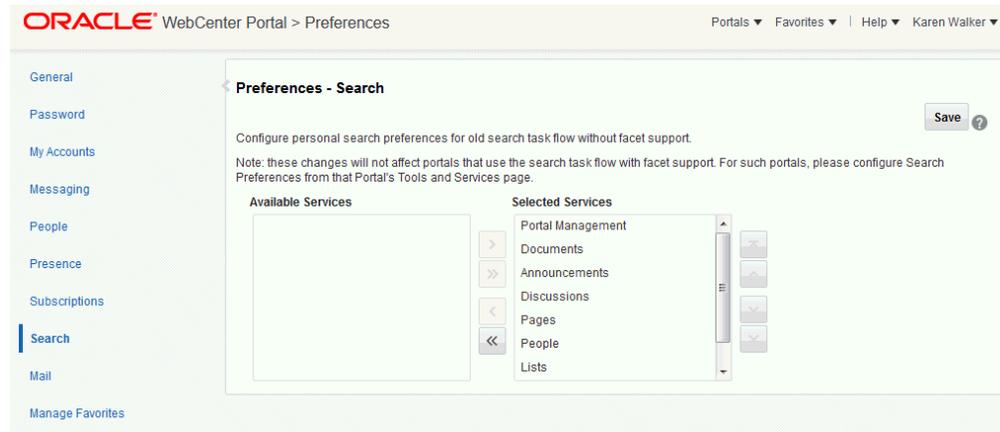
3. Click **OK** to exit Preferences, or click **Apply** to save your changes without exiting.

The selections you make in the **Selected Services** list are included in future searches. The services in the **Available Services** list are not searched.

Specifying a Display Order for Search Results

You may find that some tools and services provide more relevant search results than others. For example, you may find that search results from Documents prove more useful than Lists. Preferences provide controls for specifying the order in which tools and services are listed in search results.
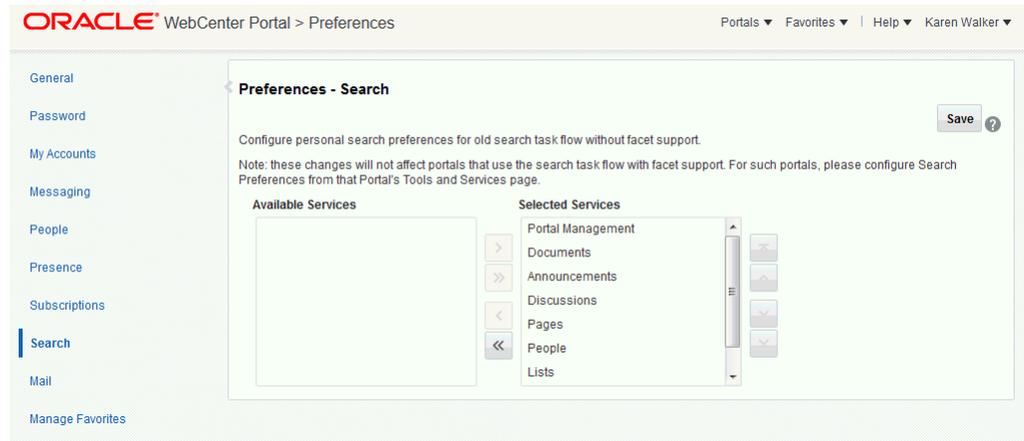
> **Note:**
>
> Specifying a display order for search results is supported only in non-faceted search task flows; hence, this setting will have no impact on your display results in faceted search task flows.

To specify a display order for search results:

1. From your user name menu in the menu bar, select **Preferences** (see Accessing the Preferences Pages).

2. On the **Search** page (Figure A-22), choose one or more tool or service on the **Selected Services** list and click the **Move** icons to the right of the list to move your selections higher or lower on the list.

The order you specify here determines the order they are listed in search results.

Figure A-22   Preferences - Search Page

3. Click **OK** to save your changes and exit Preferences.

   Alternatively, click **Apply** to save your changes without exiting.

Limitations with Search

Note the following limitation with searching in WebCenter Portal:

- The user profile fields searched depend on the security settings configured on the **Preferences - People - Profile** page. A user who has not logged in can search by values in the fields set to `Everyone`. An authenticated user can search by values in the fields set to `Authenticated Users` and Everyone. A user who has a connection to the user of the profile can search by values in the fields set to `User's Connections`, `Authenticated Users`, and Everyone. The user of the profile can search by values in the fields of all sections.