Oracle® Fusion Middleware

Oracle WebCenter Portal Online Help

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Online Help Topics for General Information

Welcome to 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.

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

To learn more, see the documentation for WebCenter Portal in the Oracle Fusion Middleware library on the Oracle Help Center.

Related Topics

Accessing Help in Oracle WebCenter Portal

Contact Us

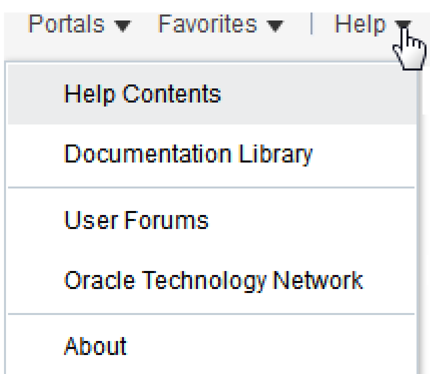
Accessing Help in Oracle WebCenter Portal

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

Help Menu

The **Help** menu at the top of WebCenter Portal includes the following options:

Figure 1-1 Help Menu



- **Help Contents** opens the online help Welcome page. Expand the help window to view the left pane:
  - Click the **Table of Contents** icon to view a table of contents showing all help topics
  - Click the **Search** icon to find and navigate to online help topics.
- **Documentation Library** opens the WebCenter Portal documentation library on the Oracle Help Center.
- **User Forums** opens the WebCenter Portal space in the Oracle Developer Community forum.

- **Oracle Technology Network** opens the WebCenter Portal overview page on OTN.
- **About** displays information about the current WebCenter Portal product.

Help Icons

Help icons, located throughout WebCenter Portal, open topics that describe the current page or dialog and provide links to more information.

Figure 1-2 Help Icon

> **Note:**
>
> Not all pages and dialogs have a **Help** icon.

Related Topics

Welcome to Oracle WebCenter Portal

Contact Us

Contact Us

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of Oracle WebCenter Portal documentation. Your input is important in improving documentation quality and content.

We would like to know:

- Did you find any errors?
- Is the information clearly presented?
- Where do you need more information?
- Are the examples correct? Do you need more?
- What did you like most about the documentation?

You can send your comments to us through the WebCenter Portal discussion forum on the Oracle Technology Network at `https://community.oracle.com/welcome`. You are welcome to join an existing thread or to begin a new one. We'll get to your issue more quickly if you prefix the subject with "Doc Comment:" and include the topic title in your message.

If you have problems with the software, please contact Oracle Support Services at `http://www.oracle.com/support/index.html`.

Related Topics

Welcome to Oracle WebCenter Portal

Accessing Help in Oracle WebCenter Portal

2 Online Help Topics for WebCenter Portal Administration

Administration: Attributes

Use the Attributes page to add or modify attributes that are available to all portals. The settings on this page are available to the system administrator.

Every portal includes built-in attributes such as name, description, date created, icon, and so on. On this page, you can add and manage custom attributes that are available for use by any portal. More.

- To create a new global attribute, click **Add Attribute**. Click the Help icon in the Add Attribute dialog for assistance.
- To modify an attribute value, click the **Actions** icon and select **Edit Attribute**.
- To delete an attribute, click the **Actions** icon and select **Delete Attribute**.

Administration: Business Role Pages

Business role pages provide a means of exposing highly relevant content to a specific audience. Business role pages are pages targeted to a particular type of group or user (or user role), such as a sales force, an accounting team, administrative staff, and so on.

A business role page may be available in the Home portal views of all users who share the targeted business role when the WebCenter Portal system administrator publishes business role pages. For example, a business role page that targets all users assigned the `HR_ORG` role appears in the Home portal views of all users assigned the role `HR_ORG`.

More

- To create a new business role page, click **Create**. Click the Help icon in the Create Page dialog for assistance.
- To set page creation defaults for business role pages, click **Set Page Defaults**. Click the Help icon in the Set Page Defaults dialog for assistance.
- To show or hide a business role page in Home portal navigation for all authorized users, select or deselect the **Show Page** check box for the page.
- To edit a custom business role page, click the **Actions** icon for the page and select **Edit Page**.
- To remove all user customizations from all views of a custom business role page, click the **Actions** icon for the page and select **Delete Personalization**. This removes all user customizations added by users to their own views of the page. That is, task flows are returned to their original positions and their original sizes; collapsed task flows are expanded; and so on.

- To copy a built-in business role page, click the **Actions** icon for the page and select **Copy Page**. Click the Help icon in the Copy Page dialog for assistance.
- To rename a custom business role page, click the **Actions** icon for the page and select **Rename Page**.
- To specify the target audience for a custom business role page or revoke access privileges, click the **Actions** icon for the page and select **Set Page Access**. Click the Help icon in the Set Page Access dialog for assistance.
- To edit the source of a custom business role page, click the **Actions** icon for the page and select **Edit Source**.
- To delete a custom business role page, click the **Actions** icon for the page and select **Delete Page**.
- To make a custom business role page public (read-only) or restricted to WebCenter Portal users only, click the **Actions** icon for the page and select **Make Public** or **Remove Public Access**. This selection is active only if the Public-User role has been granted permission to access the page.
- To send mail containing a link to a page, click the **Actions** icon for the page and select **Send Mail**.

Administration: Device Settings

Device settings allow you to control how portals render on different kinds of devices including desktop browsers, smart phones, and tablets.

On the Administration: Device Settings page, you can create and manage device groups and devices.

Administration: Device Settings: Device Groups

To create a device group:

1. On the **Device Groups** tab, click **Create**.
2. On the Create Device Group page, give the new device group a name and a display name. The name must be a unique name and is used internally. The display name is the name that is shown in WebCenter Portal. It also must be unique.
3. In the **Devices** section, use the arrows to move the available devices that you wish to add to the **Selected Devices** list.
4. In the **Assets** section, select the page template and skin that you want this device group to use.

> **Note:**
>
> Click the **Advanced Edit Options** arrow next to an asset, then **Expression Builder** to enter an EL expression in the Expression Editor. An EL allows the skin or template to be selected dynamically. If you need EL assistance, a developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

5. Click **Create**.

Administration: Device Settings: Devices

To create a new device:

1. On the **Devices** tab, click **Create**.

   The Create Device page displays, containing three sections: **Device**, **Optional Attributes**, and **Additional Attributes**.

2. In the **Device** section, specify the following details:

   - **Name** - The name of the device. This name must be unique and cannot contain spaces. One use of this name is that it can be located with an Expression Language expression.
   - **Display Name** - Specify the display name of the device. This name must be unique and will appear in the WebCenter Portal user interface.
   - **User Agent** - Specify the user agent string. WebCenter Portal identifies a device by comparing the user agent string passed in the request header (comes from the user's device) and the string specified in this field. This parameter does not have to be a literal match with the request header. It is taken to be a regular expression, and you can enter any valid regular expression in this field.

     > **Note:**
     >
     > The user agent string is a regular expression and conforms to the syntax specified by the Java platform (java.util.regex.Pattern). As such, certain special characters might need to be escaped with `\` if you want to match them. These characters include `[\^$.|?*+()` and, in some cases, curly braces `{}`. For example, a parenthesis must be escaped as follows: `\(`. For further guidance, refer to a good reference on regular expression syntax.

   - **Description** - (Optional) Specify a description that helps to identify the purpose of the device.

3. Use the **Optional Attributes** section to manage attributes such as display resolution height and width. You can edit their default values as required.

   > **Note:**
   >
   > Optional attributes do not affect the way portals are rendered on a device. They exist simply to provide a way to specify information about a device that may be useful to a page designer. Portal designers can use Expression Language to access the values of device attributes.

4. (Optional) In the **Additional Attributes** section, click **Add Attribute** and specify a name and value.

> **Note:**
>
> Additional attributes do not affect the way portals are rendered on a device. They exist simply to provide a way to specify information about a device that may be useful to a page designer. Portal designers can use Expression Language to access the values of device attributes.

5. Click **Create**.

Administration: General

Use the General page to set application-wide properties for WebCenter Portal:

Administration: General: Application

Out-of-the-box, the Oracle logo and application name **WebCenter Portal** appear in the banner of the Home portal pages. You can change both the logo and name on the Home portal pages to better suit your target audience. For example, you might want to display your company name here or the name of a department within your company.

To change the name or logo for the Home portal:

1. In the **Application Name** field, enter the new name.
2. To change the logo, click **Choose File** next to the **Application Logo** field.
3. In the Open dialog, navigate to the logo you want to use.

   The logo image file can be up to 150 KB. Supported file formats are `.gif` or `.GIF`, `.png` or `.PNG`, and `.jpg` or `.JPG`. If the file is not uploading, check the size of the file you are trying to upload.

   The logo is uploaded to WebCenter Portal's image directory (`/webcenter/images`) .
4. Click **Save**.

   To confirm your changes, navigate to the Home portal to see the new logo in the top left corner of the banner area.

Administration: General: Assets

Select defaults for the page template, application skin, and resource catalogs:

- Choosing a Default Page Template
- Choosing a Default Skin
- Choosing Default Resource Catalogs

Choosing a Default Page Template

In WebCenter Portal, page templates define how individual pages and groups of pages display on a user's screen. Every page displays within a page template. System administrators can define the default page template used to display pages in the following places:

- The Home portal

- New portals, when the portal's template does not specify that a particular page template must be used

To select the default page template for WebCenter Portal:

1. Do one of the following:
   - Select a **Default Page Template** from the available list.

     > **Note:**
     >
     > `[system default]` specifies the default page template defined for WebCenter Portal, hardcoded in `webcenter-config.xml`.

   - Click the **Advanced Edit Options** icon, then select **Expression Builder** to enter an EL expression that determines the default page template dynamically based on certain criteria. If you need EL assistance, an application developer can provide an EL expression.

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

Choosing a Default Skin

As a system administrator, you can customize the default appearance of WebCenter Portal for all users by changing the default skin. A skin changes the way the user interface appears, but does not change the application's behavior.

When you set a skin for WebCenter Portal, the skin is applied to the Home portal and all portals that use the application-level skin setting. The skin is also applied to any new portals that are created.

To apply a skin to WebCenter Portal:

1. Do one of the following:
   - Select an **Application Skin** from the available list.

     Each page template can define a *preferred skin* to identify the skin that works best with that page template. When a page template is selected as the new default page template for a portal or as the system default, the default skin automatically updates to the page template's preferred skin.

     > **WARNING:**
     >
     > Changing the default skin to something other than the preferred skin for the selected default page template may produce unexpected results.

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

     For example, you may like the default skin to change depending on which department or organization the logged in user belongs to.

2. Click **Save**.

   The skin you select is applied to WebCenter Portal, any new portals that are created, and all portals that use the application-level skin setting. The skin is not applied to the portals that override the application-level skin setting.

Choosing Default Resource Catalogs

System administrators can specify the default resource catalogs to be used for pages, page templates, page styles, and task flow assets for:

- A new portals
- The Home portal
- Business role pages
- Page templates in portals
- Page templates in the Home portal

To select default resource catalogs:

1. Select default resource catalogs in the lists below **Resource Catalogs for...**.
2. Optionally, click the **Advanced Edit Options** icon, then select **Expression Builder** to enter an EL expression that determines the default resource catalog dynamically based on certain criteria. For example, you may like the default resource catalog to change depending on which role the logged in user belongs to. If you need EL assistance, an application developer can provide an EL expression.
3. Click **Save**.

Administration: General: Options

You can select footer options for WebCenter Portal, customize the link to the online help, and set the default language:

- Customizing Copyright and Privacy Statements
- Customizing the Online Help Link
- Choosing a Default Display Language

Customizing Copyright and Privacy Statements

System administrators can customize or hide copyright and privacy statements in WebCenter Portal:

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

To customize or hide copyright and privacy statements:

1. Select or deselect **Display Page Footer** to display or hide copyright and privacy information in the page footer.

   Modify the legal notice and privacy URL as appropriate:

   - **Copyright** - Enter a suitable copyright statement for your application. If no copyright information is required, leave this field blank.

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

2. Click **Save**.

Customizing the Online Help Link

System administrators can specify a URL to custom online help to replace the default WebCenter Portal online help that is accessed from the **Help** menu.

To customize the **Help Contents** link:

1. In the **Global Help URL** field, enter the URL to the location of your custom online help.

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

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

   For example:

   `http://myhost:8888/myhelp`

   The default Global Help URL for WebCenter Portal is `/webcenterhelp/spaces?topic=welcome_rr`. Enter this URL if you want to return to the default setting.

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

2. Click **Save**.
3. From the WebCenter Portal **Help** menu, select **Help Contents** to confirm that your custom help opens correctly.

Choosing a Default Display Language

Out-of-the-box, WebCenter Portal supports 27 languages and 100 different locales. It is the system administrator's job to choose a default display language for WebCenter Portal.

To select the default display language for WebCenter Portal:

1. Do one of the following:
   - Select a **Default Language** from the list.

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

     To add a completely new language, your localization team must translate WebCenter Portal resource bundles into the new language, and then these translations must be deployed to the managed server on which WebCenter Portal is deployed.
   - Click the **Advanced Edit Options** icon, then select **Expression Builder** to enter an EL expression that determines the default language dynamically based on certain criteria. If you need EL assistance, an application developer can provide an EL expression.

2. Click **Save**.

Administration: General: Default Portal

By default, users see the portal browser when they log in, but you can change the initial landing page to be the Home portal, a specific portal, or a specific page. You can specify a start page for a specific group, for authenticated users, and for public users.

- Specifying a Default Start Page for Groups
- Specifying a Default Start Page for Authenticated Users
- Specifying a Default Start Page for Public Users

Specifying a Default Start Page for Groups

1. Click **Add Group** if you want selected enterprise groups to see a specific start page.

> **Note:**
>
> For the default portal to be visible to a group member, the group itself should be a member of the portal, if the portal is hidden or private.

2. From the Add Group dialog, search for a group or select a group from the list, then click **OK**.

   The selected group is added to the table.

   Any user belonging to the group will be directed to the default landing page upon logging in to WebCenter Portal. Note that by default, the landing page is set to the portal browser.

3. To change the **Location** of the landing page, select the group name and click **Edit** to open the Edit dialog.
4. Select whether the group will first see the Home portal, or a specific portal or page:

> **Note:**
>
> Make sure that the specified portal or page is available to all users (see Setting Page Security in *Building Portals with Oracle WebCenter Portal*). Otherwise, a user will see `Page Not Found`.

   - **Open the Home Portal**. Select to specify that users see the Home portal when they first log in.
   - **Open a Specific Portal**. Select to specify that a particular portal displays, and enter the portal name as a relative or full URL. For example:

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

     Or, click **Browse** to select from a list of portals in the Add Portal dialog.
   - **Open a Specific Page URL**. Select to specify that a particular page displays, and enter the page location.

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

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

`http://mywebcenter.com:8888/webcenter/portal/`*`portalname`*`/page/landingpage`

`/portals/`*`portalname`*`/page/landingpage`

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

5. Click **OK**, then click **Save**.

Specifying a Default Start Page for Authenticated Users

1. In the **Authenticated Users** section, specify what authenticated users who are not in any of the specified groups see when they first log in.
   - **Open the Portal Browser**. Users see the portal browser when they first log in.
   - **Open the Home Portal**. Select to specify that users see the Home portal when they first log in.
   - **Open a Specific Portal**. Select to specify that a particular portal displays, and enter the portal name as a relative or full URL. For example:

     `http://`*`host:port`*`/webcenter/portal/`*`portal`*

     Or, click **Browse** to select from a list of portals in the Add Portal dialog.
   - **Open a Specific Page URL** (default). Select to specify that a particular page displays, and enter the page location.

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

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

     `http://mywebcenter.com:8888/webcenter/portal/portalname/page/landingpage`

     `/portals/`*`portalname`*`/page/landingpage`

     If you specify an external page, make sure that you specify the full URL.
2. Click **OK**, then click **Save**.

Specifying a Default Start Page for Public Users

You can make a portal available to anyone with access to the WebCenter Portal instance that contains the portal. Registering for a WebCenter Portal account is not required. The public information provided allows the portal to be shared with non-members and people outside of the WebCenter Portal community.

1. In the **Public Users** section, specify what public users see when they first log in.
   - **Open the Welcome Page**. Selected by default. Users see the WebCenter Portal welcome page when they first log in.
   - **Open a Specific Portal**. Select to specify that a particular portal displays, and enter the portal nameas a relative or full URL. For example:

     `http://`*`host:port`*`/webcenter/portal/`*`portal`*

     Or, click **Browse** to select from a list of portals in the Add Portal dialog.

- **Open a Specific Page URL**. Select to specify that a particular page displays, and enter the page location.

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

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

  `http://mywebcenter.com:8888/webcenter/portal/portalname/page/landingpage`

  `/portals/`*`portalname`*`/page/landingpage`

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

2. Click **OK**, then click **Save**.

Administration: General: Session Timeout

When there is no activity for an extended period of time in a WebCenter Portal session, it times out. You can modify the default number of minutes that can elapse before a session times out, and select whether you want to display a popup or a window when the session times out.

To modify the session timeout settings for WebCenter Portal:

1. Select the desired result when WebCenter Portal times out:
   - **Display Timeout Page**. Select to display the WebCenter Portal timeout page in the browser, where the user can click the provided link to log in again and restart at the default start page.
   - **Display Timeout Popup**. Select to display an Expiration Warning notification popup when the Session Timeout value is reached. The user can click **OK** within 2 minutes to prevent the timeout. If the user does not respond to the Expiration Warning within 2 minutes, then the session times out. In the Timeout notification popup, the user can click **OK** to log in again and restart at the page that was active when the session expired.

     The Display Timeout Popup option works if your browser is set to display popups. If your browser is set to block popups, then you see the timeout page.
2. (Optional) In the **Session Timeout (minutes)** field, enter a new value.

   The default value is 20 minutes, the minimum value is 5, and the maximum value is 1440 (24 hours). If this field is left blank, the default value (20) applies.

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

Administration: General: Self-Registration

A system administrator can enable WebCenter Portal self-registration. Through self-registration, users can create their own login and password. A user who self-registers is immediately and automatically granted access to WebCenter Portal and a new user account is created in the identity store.

- Enabling Self-Registration By Invitation-Only
- Enabling Anyone to Self-Register

Enabling Self-Registration By Invitation-Only

A system administrator can extend portal membership to users outside of WebCenter Portal by allowing them to self-register on an *invitation-only* basis. When this option is enabled, portal managers can invite anyone to join their portal by sending them a customized invitation by mail. The invitation includes a secure, self-registration URL which the invited party clicks to accept portal membership.

To allow anyone to self-register with WebCenter Portal through invitations:

1. Select **Allow Self-Registration Through Invitations**.

   When you deselect this option, only existing users are candidates for portal membership.
2. Click **Save**.

After you enable this option, portal managers can invite anyone to become a member of their portal.

Enabling Anyone to Self-Register

When any public user is allowed to self-register, a **Register for an account** link displays on the WebCenter Portal sign in page.

To allow anyone to self-register with WebCenter Portal:

1. Select **Allow Public Users to Self-Register**.

   When you deselect this option, public users cannot self-register with WebCenter Portal.
2. Click **Save**.

Anyone with internet access can now register themselves as a user of the WebCenter Portal application, as described in Registering Yourself with WebCenter Portal in *Using Portals in Oracle WebCenter Portal*. If users experience no response when they attempt to register with WebCenter Portal, they should refresh their browser and try again.

Administration: Personal Pages

Use the **Personal Pages** page in WebCenter Portal Administration to administer the personal pages of all users.

- To edit a personal page, click the **Actions** icon for the page and select **Edit Page** to open the page in the page editor.

- To remove all user customizations from a personal page, click the **Actions** icon for the page and select **Delete Personalization**. This removes all user customizations added by users to their own views of the page; that is, task flows are returned to their original positions and sizes, collapsed task flows are expanded, and so on.
- To copy a personal page, click the **Actions** icon for the page and select **Copy Page**. Click the Help icon in the Copy Page dialog for assistance.
- To rename a personal page, click the **Actions** icon for the page and select **Rename Page**.
- To customize personal page security by setting permissions for users and user roles, click the **Actions** icon for the page and select **Set Page Access**. Click the Help icon in the Set Page Access dialog for assistance.
- To edit the source of a personal page, click the **Actions** icon for the page and select **Edit Source**.
- To delete a personal page, click the **Actions** icon for the page and select **Delete Page** .
- To make a personal page public (read-only) or restricted to WebCenter Portal users only, click the **Actions** icon for the page and select **Make Public** or **Remove Public Access**. This selection is active only if the Public-User role has been granted permission to access the page.
- To send mail containing a link to a page, click the **Actions** icon for the page and select **Send Mail**.

More

Administration: Portal Deployments

To view portal deployment history using the WebCenter Portal Administration:

1. On the **Recent Deployments** tab, click the **Details** link next to a portal to view deployment details.

   The Portal Deployment Details dialog displays the name of the target server and the date and time of deployment. It also shows the comments, if any, added while deploying the portal.
2. Click **Close**.
3. To view each portal's deployment status, click the **Deployment History** tab.
4. Click the deployment status link for a portal to display its deployment operations.
5. Click **Details** next to a deployment operation to display more details.

Administration: Security: Roles

Application roles control the level of access a user has to information and services in WebCenter Portal. Application role assignment is the responsibility of the system administrator. Administrators can assign users a default application role or create additional, custom roles specific to their application deployment. Every application role has specific, defined capabilities known as *permissions*. These permissions allow users to perform specific actions in the Home portal.

To work with application roles or permissions:

1. From the **Role** drop-down, select a role to view its associated permissions.
2. Select or deselect **Permissions** check boxes to enable or disable permissions for the role.

   For the built-in roles, be cautious about changing permissions.
3. From the **Role** drop-down, select a role you want to delete, and click **Delete**. Click **Delete** again in the confirmation prompt.

   > **Note:**
   >
   > The default application roles of `Administrator`, `Public-User`, and `Authenticated-User` cannot be deleted. The `Application Specialist` and `Portal Creator` roles can be deleted.

   The role is removed from the table. Any users that were assigned to this role assume the default `Authenticated-User` role.
4. To define a new role for WebCenter Portal users, click **Create Role** to open the Create Role dialog.
5. Click the Help icon in the Create Role dialog for assistance.

Administration: Security: Users and Groups

System administrators can manage application roles for all the users who have access to WebCenter Portal, that is, all users defined in the identity store. From the **Users and Groups** page, you can assign users and groups to roles, change user role assignments, and revoke roles.

Assigning Users (and Groups) to Application Roles

To assign a user (or a group of users) to a different application role:

1. From the drop-down list:
   - Select **User** to grant permissions to one or more users defined in the identity store.
   - Select **Group** to grant permissions to a group of users.
2. If you know the exact name of the user or group, enter the name in the text box, separating multiple names with commas.

   If you are not sure of the name you can search the identity store:

   a. Click the **Find** icon () to open the Find User (or Find Group) dialog.

   b. Enter a search term for a user or group, then click the **Search** icon to display users (or groups) matching your search criteria.

   c. Select one or more names from the list.

   To assign roles to multiple users or groups, Ctrl + click to select multiple names.

   d. Click **OK**.

3. To assign a role, select an appropriate **Role** from the drop-down list for the selected users (or groups).

   > **Note:**
   >
   > Choose **Administrator** only if you want to assign full, administrative privileges for WebCenter Portal.

   - If the role you want is not listed, create a new role that meets your requirements.
   - When no role is selected, the user assumes the `Authenticated-User` role.

4. Click **Grant Access**.

   User/user group names and new role assignments appear in the table.

> **Note:**
>
> Group names are clickable, enabling you to drill down to see user names of the current group members.

Assigning a User to a Different Application Role

To assign a user to a different role:

1. In the **Manage Existing Grants** table, scroll down to the user whose role assignment you want to modify. Only users with non-default role assignments are listed in the table.
2. Click the **Actions** icon, then select **Change Role** from the drop-down list to open the Change Role dialog.
3. Select roles as follows:
   - Select **Administrator** only to assign full, administrative privileges for WebCenter Portal.

     Administrators have the highest privilege level and can view and modify anything in WebCenter Portal so take care when assigning the `Administrator` role.

     Some administrative tasks are exclusive to the `Administrator` role, such as editing the login page, the self-registration page, and profile gallery pages.
   - Select one or more roles from the list. At least one role must be selected.

     If the role you want is not listed, create a new role that meets your requirements.
4. Click **OK**.

Revoking Application Roles

To revoke application roles:

1. In the **Manage Existing Grants** table, scroll down to the user from whom you want to revoke roles.
2. Click the **Actions** icon:
   - Select **Change Role**, and deselect the application roles to revoke.
   - Select **Delete Role Assignments** to revoke all roles assigned to that user, and then click **Delete** to confirm.

   Access for that user is revoked immediately.

When you delete all the roles assigned to a particular user, the user is no longer listed on the **Users and Groups** page. The user remains in the identity store and still has access to WebCenter Portal through the `Authenticated-User` role.

Administration: System Pages

Use the System Pages page to revise and restore built-in system pages, at the application level.

At the application level, the settings on this page are available to the system administrator with `Application: Manage All` and `Pages: Create, Edit, and Delete Pages`.

System pages include pages dedicated to a particular service or tool, such as Documents, Events, and Lists; utility pages, such as Self Registration, Subscribe, and Unauthorized; and pages associated with built-in social networking activity, such as Activity Stream, My Profile, and User Profile. More

Customizing System Pages for All Portals

To customize a system page or system page variant:

1. Click the **Customize** link next to the system page to open it in the page editor.
2. To customize a variant of a system page for a device group, expand the system page variant icon, then click **Edit** for the device group you want to customize.
3. Edit and then save the page.

Setting System Page Properties

To edit the properties of a system page:

1. Click the **Customize** link next to a system page to open it in Composer.
2. Click the **Page Properties** icon at the top of the page to open the Page Properties dialog.
3. On the **Display Options** tab, modify settings as required:
   a. 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.

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

b. 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
```

c. 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
```

4. On the **Parameters** tab, modify existing parameters as required.

> **Note:**
>
> 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 **Edit** icon next to a value field, then select **Expression Builder** to open the editor. If you need EL assistance, an application developer can provide an EL expression.

System pages include a default page parameter: .

- `pg_pageTemplateID`: By default, specifies the system page using the default page template for the system page. To use a custom page template for the system page, enter a GUID value for the new page template.

5. To add a new parameter:
   - Click **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.

Creating a Page Variant of a System Page for Device Groups

Page variants are alternative views of an existing page for specific device groups to target specific device size and characteristics. The base page and the page variant have the same URI and security settings; however, any content changes to the base page is not reflected in the variant pages and vice versa.

To create a page variant of a system page for device groups:

1. Click the **Create Page Variant** link next to the system page for which you want to create a page variant.

> **Note:**
>
> You can create page variants for the following system pages only:
>
> - **Error Encountered**
> - **No Pages Accessible**
> - **Page Not Found**
> - **Portal Not Found**
> - **Self-Registration**
> - **Sign In**
> - **Unauthorized**
> - **Unavailable**
> - **WebCenter Portal Welcome Page**

2. In the Create Page Variant dialog that opens, select the device group for which you want to create a page variant from the **Device Group** drop-down list.

   The base page is seeded in the system. The base page is always rendered for devices belonging to the default device group.

   If a page variant exists for a device group that is also set as default, then the base page will take precedence over the page variant. By default the device group is set to **Desktop Browsers** if you open a page from your desktop browser, so you still see the base page, whether or not the **Desktop Browsers** variant is created. From other devices, you will see the page variant you select.

> **Note:**
>
> Use caution if you change the default device group—it will change the default behavior when globally displaying base pages or their page variants.

3. Click **Create**.

   A mobile icon with an expand button appears next to the page, indicating that a page variant for the page is available.

4. Click the **Expand** button to view the device group page variant.

   You can create another page variant for another device group for the same page. However, you cannot create another page variant for the same device group that already has a page variant.

5. You can do any of the following after creating a page variant:

- Click **Edit** next to the device group to edit the system page in the page editor.
- Click **Delete** next to the device group to delete the page variant. Confirm the deletion by clicking **Delete** again.
- Click **Edit Source** next to the device group to edit the source code.

Managing a Page Variant of a System Page for Device Groups

To manage a page variant of a system page:

1. Click the **Expand** icon to view the device group page variant.
2. To edit the page variant in the page editor, click **Edit**.
3. To delete the page variant, click **Delete**. Confirm the deletion by clicking **Delete** again.
4. To edit the source code, click **Edit Source**.

Removing All Page Customizations from a System Page

You can return a system page to its default, built-in state, removing all page customizations.

> **Note:**
>
> This process does not remove task flow customizations. To remove task flow customizations, you must revise the given task flow on a system page.

To remove all customizations from a system page:

1. Click the **Restore Default** link next to the system page.
2. In the resulting confirmation dialog, click **Restore**.

   All customizations are permanently removed from the selected system page. When you restore a system page to its default state, page variants are not affected if the system page has variants.

Administration: Tools and Services

Use the Tools and Services page to set options for search, mail, and people connections features (when configured). This page also enables you to register, edit, and deregister external applications and portlet producers, and also create and edit connections to target servers for deploying and propagating portals.

> **Note:**
>
> The Search Settings page varies depending on the type of search configured: Elasticsearch or Oracle Secure Enterprise Search (SES).

Search Settings for Elasticsearch

Use this page to view or modify search settings when your system is configured for Elasticsearch.
When this page is accessed through WebCenter Portal administration, changes affect the search behavior of all portals, including the Home portal. When accessed through a portal administration, changes affect only that portal.

Click the icon for Search to open the Search Settings page, which includes two tabs:

Search Settings for Elasticsearch – Search Tab

To customize search settings for Elasticsearch:

1. Click the icon for Search to open the Search Settings page.
2. On the **Search** tab, select **Enable filtering dropdown** to enable filtering the search results based on selected services.
3. Select the types of results to be included in the search result by moving them between the **Available Result Types** and **Included Result Types**.
4. Set the search scope to include search results for the Home portal only or all portals (including the Home portal).
5. Select which facets to display with search results and the order in which they appear by moving them between the **Available Facets** and **Included Facets** lists.
6. In the **Custom Attributes** section, select which custom search attributes should appear in search results and the order in which they appear by moving the attributes to the **Included Attributes** section.
7. Click **Apply**.

Search Settings for Elasticsearch – Scheduler Tab

Use the **Scheduler** tab to view and create search crawl sources, schedule a crawl to activate automatically at a set time, and manually start a crawl.

You can configure the following types of crawlers to index WebCenter Portal resources:

- Portal Crawler: This uses the Portal crawl source to crawl certain objects, such as lists, page metadata, portals, and profiles.
- Documents Crawler: This uses the Documents crawl source to crawl documents, including wikis and blogs.
- Discussions Crawler: This uses the Discussions crawl source to crawl discussion forums and announcements. This option is available only for portals upgraded from prior releases that include Discussions.

Select the task you want to perform:

Creating a Portal Crawl Source

To create a crawl source to crawl objects such as lists, page metadata, portals, and profiles:

1. Click the icon for Search to open the Search Settings page.
2. On the **Scheduler** tab, select the **Portal** crawl source and click **Edit**.
3. On the Edit Portal Crawl Source page, modify the following source parameters as desired:
   - **Maximum number of connection attempts**: Maximum number of connection attempts to access the configuration URL. Choose number from 2 to 10.
   - **Configuration URL**: URL of the RSS crawl servlet. For example: `http://wcp-host:wcp-port/rsscrawl`
4. Enter the WebCenter Portal crawl admin user credentials.
5. Click **Test** to test the connection.
6. Click **Save and Close** to save the changes.

Creating a Documents Crawl Source

If you have configured WebCenter Content, you can create a crawl source for documents, including wikis and blogs:

1. Click the icon for Search to open the Search Settings page.
2. On the **Scheduler** tab, select the **Documents** crawl source and click **Edit**.
3. On the Edit Document Crawl Source page, modify the following source parameters as desired:
   - **Maximum number of connection attempts**: Maximum number of connection attempts to access the configuration URL. Choose number from 2 to 10.
   - **Configuration URL**: URL of the Webcenter Content SESCrawlerExport component.

     For example: `http://wcc-host:wcc-port/cs/idcplg?IdcService=SES_CRAWLER_DOWNLOAD_CONFIG&source=`*`source_name`*

     The *`source_name`* must be one of the strings used in the WebCenter Content SESCrawlerExport component Source Name (`sceSourceName`) parameter.

     For example: `http://host.example.con:port/cs/idcplg?IdcService=SES_CRAWLER_DOWNLOAD_CONFIG&source=esDS`
4. Enter the WebCenter Content crawl admin user login credentials.
5. Click **Test** to test the connection.
6. Click **Save and Close** to save the changes.

Creating a Discussions Crawl Source

This option is available only for portals upgraded from prior releases that use Discussions. To create a crawl source to crawl discussion forums and announcements:

1. Click the icon for Search to open the Search Settings page.
2. On the **Scheduler** tab, select the **Discussions** crawl source and click **Edit**.

3. On the Edit Discussions Crawl Source page, modify the following source parameter as desired:
   - **Database Connection String**: `jdbc url` of the Discussions schema. The format of the string is `jdbc:oracle:thin@host:`*`port`*`:`*`servername`*.
4. Enter the Discussions crawler schema user name (for example, `Prefix_Discussions_Crawler`) and password.
5. Click **Test** to test the connection.
6. Click **Save and Close** to save the changes.

Scheduling an Incremental Crawl

By default, the crawler is set to manual, but you can specify a different frequency, such as hourly or daily:

1. Click the icon for Search to open the Search Settings page.
2. On the **Scheduler** tab, select the **Portal** crawl source and click **Schedule** to open the Schedule Portal Crawler page.
3. From the **Frequency Type** list, select the required frequency type.

Option	Description
Manual Launch	This is the default crawler frequency type.
Hourly	Select the following option: • Time Between Launches in hours
Daily	Select the following options: • Time Between Launches in days • Schedule Launching Time
Weekly	Select the following options: • Time Between Launches in weeks • Schedule Launching Time: Select the day of the week and the time from 1 to 12 AM and PM

4. Click **Save and Close**.

Enabling and Disabling a Scheduled Crawl

When a crawl is in progress, you cannot disable it. To enable and disable the schedule defined for a crawl:

1. Click the icon for Search to open the Search Settings page.
2. On the **Scheduler** tab, select the crawl source that you want to modify and click **Enable** to activate the schedule defined for the crawl or click **Disable** to stop the crawl schedule.

Manually Starting a Full Crawl

You can manually start a full crawl to crawl all items in WebCenter Portal. Start a full crawl only during non-peak times as it is time-consuming. A full crawl must be manually started and cannot be scheduled to run automatically.

To start a full crawl:

1. Click the icon for Search to open the Search Settings page.
2. On the **Scheduler** tab, select the crawl source and click **Schedule** to open the Schedule Portal Crawler page.
3. Click **Start Crawl Now**.
4. Click **Save and Close** to save the changes.

Manually Starting an Incremental Crawl

To start an incremental crawl:

1. Click the icon for Search to open the Search Settings page.
2. On the **Scheduler** tab, select the crawl source and click **Start**.

   WebCenter Portal immediately starts an incremental crawl for the selected crawl source.

Search Settings for SES

Use this page to view or modify search settings when your system is configured for Secure Enterprise Search (SES).

When this page is accessed through WebCenter Portal administration, changes affect the search behavior of all portals, including the Home portal. When accessed through a portal administration, changes affect only that portal.

> **Note:**
>
> For systems configured to use Oracle SES 11.1.2.* or non-faceted search, the Search Settings page does not show any search settings.
>
> For best performance and scalability, as well as facet support and easier configuration, the application should be configured to use Oracle SES release 11.2.2.2 or later with the faceted Search task flow. However, upgraded instances may remain with the earlier, non-faceted Search task flow.

To manage search settings:

1. Click the icon for Search to open the Search Settings page.
2. To use Oracle Secure Enterprise Search 11.2.2 with facet support, select **Use new search task flow with facet support** (default).

   Deselect this check box to use the Search - Non-Faceted Search task flow (which uses refiners instead of facets), disabling the remaining settings on this page the next time this page is accessed.
3. On the **Search** tab, specify which types of results to display in search results and what to include in the filtering drop-down:
   - Deselect **Enable filtering dropdown** to remove the filtering drop-down from the global search box.

- Select **Enable filtering dropdown** to enable users to search for the specific services selected in the **Included Result Types** column instead of searching for **Everything**.

4. Select which result types to include in the drop-down, as well as in the filter list to the left of search results, and the order in which they display by moving them between the **Available Result Types** and **Included Result Types** lists.

> **Notes:**
>
> - Only metadata of portals and pages is searched (not portal content or page content) and by default, these result types are excluded for a portal. To include the metadata of portals and pages in search results, add **Portals** and **Pages** to the **Included Result Types** list.
> - Portal managers can configure the filtering drop-down differently for the portals that they manage.

5. Set the **Search scope** to show search results for the Home portal only or all portals, including the Home portal.

6. Select which facets to display with search results and the order in which they appear by moving them between the **Available Facets** and **Included Facets** lists. Facets let users navigate indexed data without running a new search. Faceted navigation within search lets users clarify exactly what they are looking for, or even discover something new.

   You must first configure facets (including the required `Scope GUID` and `ServiceID` facets) in Oracle SES. The system administrator creates, modifies, and removes facets in Oracle SES (WebCenter Portal does not detect changes to facets until this Search Settings page is opened).

> **Note:**
>
> The search results page shows facet names following the translation specified on the Global Settings - Translate Facet Names page in the Oracle SES administration tool. The facet name is the translated name in the user locale. However, the Search Settings page shows the base facet names (that is, the non-translated names). An exception is the **Portal** facet name, which follows the translation specified in WebCenter Portal instead of Oracle SES.

7. In the **Custom Attributes** section, select which custom search attributes should appear in search results and the order in which they appear by moving the attributes to the **Included Attributes** section.

Notes:

- The search results page shows translated names specified in Oracle SES for custom attributes. The custom attribute name is the translated name in the user locale. However, the Search Settings page shows the base names (that is, the non-translated names).
- All search attributes for documents must be added to the **Metadata List** parameter in the Content Server.

8. Click **Apply**.

External Applications

Use the External Application settings page to register, edit, and delete external applications for WebCenter Portal at runtime.

Registering External Applications

To register an external application at runtime:

1. Click the icon for External Application Settings.
2. Click **Register**.
3. On the Register External Application page, click the **Help** icon for assistance.

Editing and Deleting External Applications

To modify or delete an external application at runtime:

1. Click the icon for External Application Settings.
2. Select the external application to edit or delete, then click one of the following:
   - Click **Edit** to update connection details.
   - Click **Deregister** to remove the external application.

     Take care when deleting an external application connection as users will no longer have access to that application, and any services dependent on the external application may not function correctly.

Mail Settings

System administrators are responsible for setting mail options through WebCenter Portal administration settings.

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

To enable shared mail connections:

1. Ensure you have set up a mail connection that uses an external application configured with the shared credentials, and note down the mail connection name.
2. Configure WebCenter Portal to use WebCenter Portal Mail service to send mail:

a. Click the icon for Mail Settings.

b. Under **Default Mail Client for Send Mail**, select **WebCenter Portal's Mail Service**.

c. Click **Apply**.

Portal managers can now specify the name of the shared mail connection in the portals where shared mail credentials are required.

People Connections Settings

System administrators can use this page to set application-wide defaults for People Connections features. In some cases, you can enforce the values you specify here or enable users to override these values with their own settings. You can also enable or disable users from changing their application password.

The People Connections service provides social networking tools for creating, interacting with, and tracking the activities of one's connections. Its features enable users to manage their personal profiles, access the profiles of other users, provide *ad hoc* feedback, post messages, track activities, and connect with others.

People Connections Settings: Activity Stream

Activity Stream is for publishing and tracking users' application activity. Activity Stream configuration settings specify the users and activities that are streamed, who can see a user's streamed activities, and whether liking and commenting is available on each streamed activity.

The Activity Stream configuration determines who can view a user's activities and the types of activities that are tracked.

More
To configure Activity Stream for all users:

1. Click the icon for People Connections Settings.
2. Click the **Activity Stream** tab.
3. Under **People**, select whose activities to show:
   - **Only Me**—Show only the current user's activities in his or her view of the Activity Stream.
   - **Me and My Connections**—Show the current user's activities and the activities of that user's connections in his or her view of the Activity Stream.
   - **No Personal**—Omit all activities streamed from the Home portal in the current user's view of his or her Activity Stream.
4. Under **Portals**, select to show activities from:
   - **All Portals**—All portals to which the user has access.
   - **My Portals**—All portals the user manages.
   - **No Portals**—Only the Home portal
5. Under **Tools and Service Categories**, select the services from which to publish activities.

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

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

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

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

   Table 2-1 Activity Stream Privacy Options

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

8. Expand the **Likes and Comments** node, and specify whether liking and commenting are allowed:
   - Select **Enable comments on objects in the Activity Stream** to enable users to comment on a given Activity Stream item. Deselect the check box to prevent users from commenting.
   - Select **Enable others to like objects in the Activity Stream** to enable users to like an Activity Stream item. Deselect the check box to prevent users from liking.

   > **Tip:**
   >
   > Users can like and comment on streamed items that include objects. For example, users can like or comment on "Jack posted a message." Users cannot like or comment on system messages, such as "Jack and Jill are now connected."

9. Click **Apply**.

People Connections Settings: Connections

Connections configuration involves selecting who can view another user's connections and whether users accept invitations to connect automatically.

To configure Connections:

1. Click the icon for People Connections Settings.
2. Click the **Connections** tab.
3. Select the required connection options:

Table 2-2 Connections Configuration Options

Option	Description
Grant View Access to	Classes of users to whom to grant automatic view access to a user's connections. The users you select can view and interact with another user's connections. Choose from: • **Everyone**—All users, including users who are not logged in, can see other users' connections. • **Authenticated users**—Only users who are logged in can see other users' connections. • **User's Connections**—Only the user and the user's connections can see the user's connections. • **User Only**—Only a user can see his or her own connections.
Allow Owner Override	Allow or prohibit users from overriding the administrator View access setting: • Select to allow users to override the administrative View access setting specified here using their personal preferences. • Deselect to prohibit users from overriding the administrative View access setting.
Accept Invitations Automatically	• Select to specify that, by default, all invitations to connect are accepted automatically. • Deselect to specify that, by default, a user must explicitly accept or reject invitations to connect.

4. Click **Apply**.

People Connections Settings: Profile

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

Use People Connections Settings for Profile to specify whether users are allowed to change their sign in password, which profile sections display for different types of users, whether users are allowed to update their profile details, and the profile settings that users may edit.

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

To configure Profile:

1. Click the icon for People Connections Settings.
2. Click the **Profile** tab.
3. Select the required options:

Table 2-3 Profile Configuration Options

Option	Description
Allow Password Change	Specify whether users are allowed to change their sign in password. • Select to enable users to change their application password. • Deselect to prevent users from changing their application password. This option is useful when your organization provides a single, separate application for managing user credentials and consequently prefers not to offer password management through each application.
Profile Access	Specify which profile sections to show and whether users are allowed to update their profile details. **View Settings**—Specify which users can view the associated profile section, and whether users can change these defaults in their personal Preferences. **Note**: **View Settings** for the **Summary** section control not only who can view summary details but also who can search for the user (for example, through global search, people pickers, and the searches one uses to find and invite other users to connect). For example, if **Everyone** is selected; if **None** is selected, then the user will not appear in search results. Set values for: • **Who can view this section**—Specify which types of users can view the associated profile section by default: **Everyone**—All users, including unauthenticated (public) users, can see the associated profile section in other users' profiles. **Authenticated users**—Only users who are logged in can see the associated profile section in other users' profiles. **User's Connections**—The users to whom the current user is connected can see the associated profile section in other users' profiles. This option is available for all sections except **Summary**. **User Only**—Only the user can see his or her own details in the associated profile section. **None**—The profile section is hidden from all users. • **Allow Owner Override**—Select to enable users to override the default application settings you specify here in their Preferences; deselect to disable override. Users cannot change the privacy settings on the **Summary** section through their Preferences. **Can Edit**—Select to enable users to edit the associated profile section of their own personal profiles; deselect to prohibit editing. This setting also controls whether an **Edit** link appears in the Profile task flow, but it does not affect the appearance of the **Edit** button or links on the default version of the **Profile** page. You can use the other Profile administrative settings to prohibit users from actually changing any Profile details.
Profile Attributes - Edit Settings	Specify the profile section attributes that users are allowed to edit by default. Under **Allow Update**: • Select an attribute to enable users to edit its value in their own profiles. • Deselect an attribute to prohibit users from editing it in their own profiles.

Table 2-3 (Cont.) Profile Configuration Options

Option	Description
Profile Synchronization settings	Specify profile synchronization settings: • Specify the size of the LDAP read batch for profile synchronization. • Specify whether user profile photos will be synchronized with LDAP when the cache expires.

4. Click **Apply**.

People Connections Settings: Message Board

Message Boards provide a way for users to view and post messages to their connections. Configuration settings for Message Board provide controls for who can view and post messages, who can edit and delete the messages they leave, who can delete and change the visibility of messages they receive, and whether commenting and liking are available on each message.

To configure Message Board:

1. Click the icon for People Connections Settings.
2. Click the **Message Board** tab.
3. Specify the required options:

Table 2-4 Message Board Configuration Options

Option	Description
Grant View Access to	Specify who can view Message Board messages. • **Everyone**—All users, whether logged in or not, can see users' Message Board messages. • **Authenticated Users**—Only logged in users can see users' Message Board messages. • **User's Connections**—Only the user and the user's connections can view the user's Message Board. • **User Only**—Only the user can see the messages on his or her Message Board.
Grant Post Access to	Specify who can post Message Board messages. • **Everyone**—All users, whether logged in or not, can post Message Board messages. • **Authenticated Users**—Only logged in users can post messages to Message Boards. • **User's Connections**—Only the user and the user's connections can post messages to the user's Message Board. • **User Only**—Only the user can post messages to his or her Message Board.
Allow Owner Override	Specify whether users can override these administrative defaults. • Select to enable users to edit the default settings through user preferences. • Deselect to enforce the administrator default application settings.
Enable users to act on messages they post on other Message Boards	Specify whether users are allowed to act on the messages they post. • **Edit message**—Select to enable users to edit their own Message Board posts; deselect to prohibit users from editing the messages they post. • **Delete message**—Select to enable users to delete their own Message Board posts; deselect to prohibit users from deleting the messages they post.

Table 2-4 (Cont.) Message Board Configuration Options

Option	Description
Enable users to act on messages they received from others	Specify whether users can act on messages they receive from others. • **Delete message**—Select to enable users to delete messages they receive from other users; deselect to prohibit users from deleting the messages they receive. • **Change the visibility of the message**—Select to enable users to hide or show the messages from a given user; deselect to prohibit users from hiding or showing messages.
Enable commenting on messages from Message Board	Specify whether users can comment on messages that are posted on a Message Board. • Select to permit users to comment on messages. A **Comment** link appears below each message. Users click this to enter a comment. • Deselect to prohibit commenting.
Enable liking of messages from Message Board	Specify whether to enable users to like a message. • Select to permit users to like messages. A **Like** link appears below each message. • Deselect to prohibit liking.

4. Click **Apply**.

People Connections Settings: Feedback

Feedback provides a way for users to view and post feedback for other application users. Configuration settings for Feedback provide controls for granting view and post access for feedback a user receives, granting view access for feedback a user gives, allowing users to override administrative default settings, enabling users to delete the feedback they post, and enabling a user to show or hide feedback left by others.

To configure Feedback:

1. Click the icon for People Connections Settings.
2. Click the **Feedback** tab.
3. Select the required options:

Table 2-5 Feedback Configuration Options

Option	Description
Grant View Access to	Specifies who can view the current user's Feedback • **Everyone**—All users, whether logged in or not, can see a given user's Feedback. • **Authenticated Users**—Only users who are logged in can see a given user's Feedback. • **User's Connections**—Only the user and the user's connections can see a given user's Feedback. • **User Only**—Disables other users from viewing a given user's Feedback.

Table 2-5 (Cont.) Feedback Configuration Options

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

4. Click **Apply**.

Portlet Producer

The Portlet Producer page lists the portlet producers and pagelet producers currently registered with WebCenter Portal. It also enables you to register additional producers and edit or deregister existing producers.

Registering a WSRP Portlet Producer

To register a WSRP producer in WebCenter Portal:

1. Click the icon for Portlet Producer Settings.
2. On the menu bar, click **Register**.
3. In the Register Portlet Producer page, enter connection details for the WSRP portlet producer.

For details, see WSRP Producer Connection Parameters.

4. Use the **Security** section to specify the type of security token to use for the identity propagation/assertion.

   For details, see WSRP Producer Security Connection Parameters.

   The security token with the propagated or asserted user information is represented as an XML element in the SOAP header. The security token and the SOAP message body are then digitally signed to prove the authenticity of the SOAP message origin from the WebCenter Portal application. WebCenter Portal supports six types of security token.

   - WSS 1.0 Username Token Without Password
   - WSS 1.0 Username Token With Password
   - WSS 1.0 SAML Token
   - WSS 1.0 SAML Token With Message Integrity
   - WSS 1.0 SAML Token With Message Protection
   - WSS 1.1 SAML Token With Message Protection

   SAML is an abbreviation for Security Assertion Markup Language.

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

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

   > **Note:**
   >
   > The test performs a simple server (host/port) PING test. Anything in the path after the `host:port` is ignored. To verify whether the producer is accessible, access the producer's test page in your browser. See Testing WSRP Producer Connections.

6. Click **OK**.

Registering an Oracle PDK-Java Portlet Producer

To register an Oracle PDK-Java portlet producer in WebCenter Portal:

1. Click the icon for Portlet Producer Settings.
2. On the menu bar, click **Register**.
3. In the Register Portlet Producer page, enter connection details for the Oracle PDK-Java portlet producer. For details, see Oracle PDK-Java Portlet Producer Connection Parameters.
4. Click **Test** to verify that the server details you provided are correct.

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

> **Note:**
>
> The test performs a simple server (host/port) PING test. Anything in the path after the `host:port` is ignored. To verify whether the producer is accessible, access the producer's test page in your browser. See Testing Oracle PDK-Java Producer Connections.

5. Click **OK**.

Editing WSRP Producer Registration Details

To edit WSRP portlet producer registration details in WebCenter Portal:

1. Click the icon for Portlet Producer Settings.
2. Select the portlet producer that you want to edit.
3. On the menu bar, click **Edit**.
4. Edit the producer registration properties as required

   For details, see WSRP Producer Connection Parameters and WSRP Producer Security Connection Parameters.

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

   > **Note:**
   >
   > While it is possible to edit the value of the **WSDL URL**, for example, if the producer port has changed, you can point to a different producer only if the new producer has access to the persistence store of the old producer, or if the persistence store of the old producer has been migrated to that of the new producer.

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

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

   > **Note:**
   >
   > The test performs a simple server (host/port) PING test. Anything in the path after the `host:port` is ignored. To verify whether the producer is accessible, access the producer's test page in your browser. See Testing WSRP Producer Connections.

6. Click **OK**.

Editing Oracle PDK-Java Portlet Producer Registration Details

To edit PDK-Java portlet producer registration details in WebCenter Portal:

1. Click the icon for Portlet Producer Settings.
2. Select the portlet producer that you want to edit.
3. On the menu bar, click **Edit**.
4. Edit the producer registration properties as required.

   For details, see Oracle PDK-Java Portlet Producer Connection Parameters.

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

   > **Note:**
   >
   > While it is possible to edit the value of the **URL Endpoint**, for example, if the producer port has changed, you can point to a different producer only if the new producer has access to the persistence store of the old producer, or if the persistence store of the old producer has been migrated to that of the new producer.

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

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

   > **Note:**
   >
   > The test performs a simple server (host/port) PING test. Anything in the path after the `host:port` is ignored. To verify whether the producer is accessible, access the producer's test page in your browser. See Testing Oracle PDK-Java Producer Connections.

Deregistering a WSRP Portlet Producer

To deregister a WSRP portlet producer in WebCenter Portal:

1. Click the icon for Portlet Producer Settings.
2. Select the portlet producer that you want to deregister.
3. From the menu bar, click **Deregister**.
4. In the Delete Confirmation dialog, click **Deregister** to complete the deregistration process.

Deregistering an Oracle PDK-Java Portlet Producer

To deregister an Oracle PDK-Java portlet producer in WebCenter Portal

1. Click the icon for Portlet Producer Settings.
2. Select the portlet producer that you want to deregister.

3. On the menu bar, click **Deregister**.
4. In the Delete Confirmation dialog, click **Deregister** to complete the deregistration process.

Change Role

To assign a user to a different role:

1. Select roles as follows:
   - Select **Administrator** only to assign full, administrative privileges for WebCenter Portal.

     Administrators have the highest privilege level and can view and modify anything in WebCenter Portal so take care when assigning the `Administrator` role.

     Some administrative tasks are exclusive to the `Administrator` role, such as editing the login page, the self-registration page, and profile gallery pages.
   - Select one or more roles from the list. At least one role must be selected.

     If the role you want is not listed, create a new role that meets your requirements.
2. Click **OK**.

Create Page

> **Note:**
>
> You can also select the **Copy Page** action for a personal page or a business role page and select to copy it as a business role page.

To create a new business role page:

1. In the Create Page dialog, enter a unique name for the page in the **Page Name** field, and then select a **Page Style**.

   > **See Also:**
   >
   > For an overview of built-in page styles, see Built-In Page Styles in *Building Portals with Oracle WebCenter Portal*

2. Click **Create**.

   The new page appears in the list of business role pages.

> **Note:**
>
> 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.

Create Role

Use roles to characterize groups of WebCenter Portal users to determine what they can see and do in the Home portal and control access to WebCenter Portal administration pages.

When defining application roles, use self-descriptive role names and try to keep the role policy as simple as possible. Choose as few roles as you can, while maintaining an effective policy.

Take care to assign appropriate access rights when assigning permissions for new roles. Do not allow users to perform more actions than are necessary for the role but at the same time, try not to inadvertently restrict them from activities they must perform. In some cases, users may fall into multiple roles.

To define a new application role:

1. Enter a suitable name for the role.

   Ensure the role names are self-descriptive. Make it as obvious as possible which users should belong to which roles. Role names can contain alphanumeric characters, blank spaces, and underscores.

2. (Optional) Choose a **Role Template**.

   The new role inherits permissions from the role template. You can modify these permissions in the next step.

   Choose **Administrator** to create a role that inherits full, administrative privileges. Conversely, choose **Public-User** to create a role that *typically* provides minimal privileges. Alternatively, choose a custom application role to be your template.

3. Click **OK**.

   The new role appears in the **Role** drop-down. The permissions list shows which actions users with this role can perform. Use the **Roles** drop-down to select another role.

Portal Server Connection

Before you can deploy a portal, you need to set up a connection to the target portal server.

To create a portal server connection:

1. Click **Create**.
2. In the Create Portal Server Connection page, specify the following details:
   a. **Name**: Specify the name of the connection. Note that only alphanumeric characters can be used.

b. **URL**: Specify the URL of the target portal server in the following format:

`http://`*`targetserverhost:port`*

where *`targetserverhost:port`* refer to the host name and port number of the portal server where you want to deploy your portals.

c. **Username**: Type the user name used for connecting to the target server.

d. **Password**: Type the password for the specified user name.

3. Click **Test** to make sure the connection works.
4. Click **Create**.

   Note that if the connection test fails due to the portal server being offline, the connection will still be set up, and can be used once the server is available.

Register/Edit External Application

To register an external application at runtime:

1. Click the icon for External Application settings.
2. Click **Register**.
3. Enter a unique name for the external application and a display name that application users working with this external application sees.

Table 2-6 External Application Connection - Name

Field	Description
Application Name	Enter a name for the application. The name must be unique (across all connection types) within the application. For example: `yahoo` **Note:** Once registered, you cannot edit the Application Name.
Display Name	Enter a user friendly name for the application that WebCenter Portal users will recognize. Application end-users working with this external application will see the display name you specify here. For example: `My Yahoo` If you leave this field blank, the Application Name is used.

4. Enter the login details for the external application.

Table 2-7 External Application Connection - Login Details

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

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

Table 2-8 External Application Connection - Authentication Details

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

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

Table 2-9 External Application Connection - Additional Login Fields

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

7. Optional: Specify shared and public user credentials, if required.

Table 2-10 External Application Connection - Shared User and Public User Credentials

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

8. Click **Test** to verify your connection details.
9. Click **OK** to register the application.

Set Page Access

To set access permissions for a personal page or business role page:

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.
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.
3. To grant page access permissions to selected users and roles, click **Add Access** to open the 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.

> **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 2-11 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**.

Set Page Defaults

Use the Set Page Defaults dialog to specify the default page style for a new business role or personal page.

To set page creation defaults:

1. Select a page layout from the **Page Style** drop-down list.
2. Select an option for **Enable One-Click Page Creation**:
   - **Yes**: Bypass the Create Page dialog, and create all of your pages using the specified **Page Style**.

     > **Tip:**
     >
     > When you create pages by bypassing the Create Page dialog, the new page has a generic name.

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

3

Online Help Topics for Shared Assets

Assets

Assets are the objects that define the structure, look and feel, and the content of your portals.

You can create some assets from scratch, and other assets only by making a copy of an existing asset. For example, you can create a resource catalog from scratch, but you can create a skin only by making a copy of an existing skin. Further, there are some assets, such as Content Presenter display templates, that must be created using other methods.

The permissions provided through your assigned role determine the assets you can manage, and which options are available. Menu options appear greyed out if you do not have the required permissions for a particular asset.

More

Page Templates

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides several built-in page templates. Alternatively, portal designers can create custom page templates to offer more ways to display pages on the screen. If a page template is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific page templates. Within a portal, you can copy or customize an existing page template.

> **Note:**
>
> Creating and editing a page template is a fairly complex task. While you can develop page templates in WebCenter Portal, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop page templates for portals. When fully developed, the developer can publish page templates directly to WebCenter Portal (the portal server) or to a specific portal for immediate use or for testing. Alternatively, the developer can export the page template to a file and upload the page template to WebCenter Portal later.

Every page in a portal has an associated page template that defines the structure and layout of the entire page. To ensure that all pages in a portal look and behave consistently, they all use the same page template, set as the default by the portal manager. In contrast, the *page style* defines the initial layout of the main content area and may be unique for every page.

Typical elements of a page template include:

- Header, content area (different in each page), and footer. The header and footer commonly include brand-specific elements. For example, a header usually includes a logo and possibly a slogan, and a footer usually includes contact and copyright information. The layout of the content area is defined by the page style.
- Portal navigation. For example, you might have global navigation in the header and additional navigation on the left side of the page.
- Additional links and actions. Portal-specific links and actions may include log in/log out, pop-up menus, global links (such as to send an email to the web administrator or to display a privacy statement).
- Conditional elements. For example, some elements on the page might differ depending on whether the user is public or authenticated or depending on the user's role and privileges.

A page template exposes the navigation for a portal along the top of the page, or down the side of the page:

- A *top navigation* page template exposes the portal navigation in header area. Top navigation makes effective use of the horizontal space on the page, and is recommended when there are 7 or fewer top level pages in the portal navigation. This page template design generally has a header, page and footer sections that use panelGroupLayout components, and is an ideal starting point for sites that require a flowing layout (described below).
- A *side navigation* page template exposes the portal navigation in a sidebar on the left side of the page. The vertical nature of side navigation allows for a more lengthy list of navigation items, and is recommended when there are more than 7 top level pages in the portal navigation. Choose a side navigation template for more complex navigations.

Both top navigation and side navigation page templates can have a flowing layout or a stretching layout:

- A *flowing* layout is the most typical layout. Components are arranged side by side or one below the other, displayed using their natural size. When the content of the page extends beyond the size of the browser window, the browser displays scroll bars on the page.
- A *stretching* layout may be a suitable choice when your page content fills a large area, or you want the page content to grow and shrink depending on the size of the browser window. For example, a stretching layout may be suitable when a page contains a table or graph that you want to fill up the whole content area, no matter what size it is. Another example is a page that contains an editing area, where you want the editor to be exactly as tall and wide as the space given to the content area. This layout has a region for the page content, and adds vertical and horizontal scroll bars to the region on the page when the content cannot be contained within the size of the browser window. When scroll bars are added to the page, the navigation area, page header, and page footer remain in view while the content area scrolls.

Each page template works together with a *skin* to determine the overall look and feel of the pages in your portal. While the page template controls the location and behavior of components on the page, the skin controls the visual appearance of those components, such as the colors, fonts, and various other aspects.

Each page template can define a *preferred skin* to identify the skin that works best with that page template. When the page template is selected as the default page template for a portal or as the system default, the default skin automatically updates to the page template's preferred skin.

By default, a portal inherits the page template defined for the portal template that you select when you create the portal.

> **Note:**
>
> If the portal template does not specify a page template, the portal uses the default page template specified by the system administrator.

You can optionally select a different page template for an individual portal, overriding the default page template settings.

Select icons and actions in the toolbar to work with page templates. Refer to the online help in the resulting dialogs for information and assistance.

Create New Page Template

If none of the available page templates meet your requirements, you can create your own. When you create a page template, you use an existing page template as the starting point for the new page template.

> **Note:**
>
> Creating and editing a page template is a fairly complex task. While you can develop page templates in WebCenter Portal as described here, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop page templates for portals. When fully developed, the developer can publish page templates directly to WebCenter Portal (the portal server) or to a specific portal for immediate use or for testing. Alternatively, the developer can export the page template to a file and upload the page template to WebCenter Portal later.

If you choose to create a page template in WebCenter Portal, giving you the option to later refine it in JDeveloper, you can do so at the application level or at the portal level. Application-level page templates are available for use in all portals, unless the portal has been specifically excluded. Portal-level page templates are available for use only in the portal in which they are created.

To create a page template:

1. In the Create New Page Template dialog, in the **Name** field, enter a name for the page template.

   The name is displayed in the **Assets** or **Shared Assets** page and in lists when selecting a page template. You should make the name as descriptive as possible.

2. In the **Description** field, optionally enter a description for the page template.

The description is displayed below the name in the **Assets** or **Shared Assets** page and as a tool tip when selecting a page template. You should ensure that the description helps users determine if they want to use this particular page template.

3. From the **Copy From** list, select an existing page template to use as the starting point for your new page template.

> **Tip:**
>
> You can also create a copy of an existing page template.

4. Click **Create**.

   The newly created page template is listed on the **Assets** or **Shared Assets** page. The empty check box next to the page template indicates that it is not yet published and hence is not available to other users.

   After initial creation, the new page template is identical to the page template selected from the **Copy From** list. The next step in creating a page template is to edit the layout and content to meet your requirements.

Select Start Path

To select the start path for your navigation:

1. In the Select Start Path dialog, select:
   - **Start at the Currently Selected Page Path** to use the currently selected page as the starting point of the navigation. This populates the **Start Path** property with the following EL expression:

     ```
     #{navigationContext.navigationModel['modelPath=path'].currentSelection.pretty
     Url}
     ```

     where *path* is the path to the navigation model XML file (omitting the trailing `.xml`); for example:

     ```
     #{navigationContext.navigationModel['modelPath=/oracle/webcenter/portalapp/
     navigations/myNavigation'].currentSelection.prettyUrl}
     ```

   - **Start at This Level of the Currently Selected Page Path** to use the *n*th level of the path to the currently selected page as the starting point of the navigation (where *n* is the number specified in the field next to this option). This populates the **Start Path** property with the following EL expression:

     ```
     #{navigationContext.navigationModel['modelPath=path'].currentSelection.pretty
     UrlPath[level]}
     ```

     where *path* is the path to the navigation model XML file (omitting the trailing `.xml`) and *level* is the number specified in the field.

   - **Select Page Path** to use a specific page as the starting point of the navigation. This populates the **Start Path** property with the path to the selected page.

For examples, see Selecting the Navigation Start Path.

Resource Catalogs

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides three built-in resource catalogs:

- **Default Portal Catalog**, assigned to portal pages by default, contains resources to add to pages and task flow assets in a portal.
- **Default Home Portal Catalog**, assigned to pages in the Home portal by default, contains resources to add to a personal or business role page.
- **Default Page Template Catalog**, assigned to page templates and page styles by default, contains a Navigations folder and a Portal Components folder, which provide access to resources specifically used in page templates and page styles. Note that all pages in a portal use the same page template, though there may be several page templates available as portal assets.

Alternatively, portal designers can develop custom resource catalogs. Within a portal, you can create a new resource catalog from scratch or copy an existing resource catalog into a new resource catalog. If a resource catalog is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific resource catalogs.

Resource catalogs are portal assets that expose components and connections that you can add to a portal. You can use a resource catalog to populate pages, page templates, page styles, and task flows. The items listed in a resource catalog are collectively referred to as *resources*.

The resource catalog available to you as you edit a page, page template, page style, or task flow is established by the portal administration settings, and may be a built-in resource catalog or a custom resource catalog.

For more information, see About the Built-In Resource Catalogs.

Create New Resource Catalog

If the built-in resource catalogs do not meet your requirements, you can create your own. When you create a resource catalog, you can build it from scratch or extend an existing resource catalog.

You can create resource catalogs at the application level or at the portal level. Application-level resource catalogs are available for use in all portals, unless the portal has been specifically excluded. Portal-level resource catalogs are available for use only in the portal in which they are created.

To create a resource catalog:

1. In the **Name** field, enter a name for the resource catalog.

   The name is displayed in the **Assets** or **Shared Assets** page and in lists when selecting a resource catalog. You should make the name as descriptive as possible.

2. In the **Description** field, enter a description for the resource catalog.

   The description is displayed below the name in the **Assets** or **Shared Assets** page and as a tool tip when selecting a resource catalog. You should ensure that the description helps users determine if they want to use this particular resource catalog.

3. From the **Copy From** list, select an existing resource catalog to use as the starting point for your new resource catalog, if desired. Leave blank to create a new empty resource catalog.

4. Click **Continue**.

   The newly created resource catalog is listed on the **Assets** or **Shared Assets** page.

   The empty check box in the **Available** column indicates that it is not yet published and hence is not available to other users. To publish the resource catalog, click the check box.

   After initial creation, the new resource catalog is either empty or identical to the resource catalog selected from the **Copy From** list. The next step in creating a resource catalog is to edit it to meet your requirements.

Edit Resource Catalog

You cannot edit the built-in resource catalogs, but you can create a custom resource catalog and define its structure and content as needed. The resources that you include in the resource catalog determine what users can include in their pages and page templates.

Creating a Resource Catalog Folder

To organize your catalog better, you can group similar resources together. For example, group all components together, or all resources from a particular tool or service.

To create a folder:

1. In the Edit dialog, from the **Add** menu, select **Folder**.
2. On the **Target** tab of the Edit Resource Catalog Item **-** Folder dialog, in the **Name** field, enter a name to display for the folder in the resource catalog.
3. In the **Description** field, enter a brief description of the contents of the folder.
4. Select **Visible** if you want to display the folder in the resource catalog.

   Alternatively, you can specify an EL expression to determine under which conditions the folder displays in the catalog. For example, to specify that the folder should be visible only to users with the `Portal Manager` role, use the following EL expression:

   ```
   #{WCSecurityContext.userInScopedRole['Moderator']}
   ```

5. On the **Options** tab, set the display options for the folder:

Option	Description
Small Icon URI	Enter the path of an icon to display next to the resource when it appears in the **Up** menu in the catalog. The icon should preferably be 16 x 16 pixels in size.
Tool Tip	Enter the text to display when users hover the mouse over the resource in the catalog.
New Attribute Name	Enter the name of an attribute that has been defined for the resource but is not exposed in the dialog. You can also select an attribute from the drop-down list.

Option	Description
New Attribute Value	Enter a value for the attribute specified in the **New Attribute Name** field, and click **Add**. **Tip:** You can click **Add** even without specifying a value for the attribute. You can specify the value once the field is displayed in the dialog along with the other display options.

6. On the **Parameters** tab, enter values for any parameters supported by the folder.

   You can also add custom parameters.

7. Click **OK**.
8. Click **Save and Close**.

   You can now add resources inside this folder, or move resources inside it by dragging and dropping them from the top level folder.

Creating a Custom Resource Catalog Component

The Resource Registry in WebCenter Portal provides a large repository of components that you can add to a resource catalog. However, if this is not sufficient and your business requires you to add other components, such as ADF Facelets components, custom JSF, or raw HTML, you can create a custom component and specify the XML code for the component. Using a custom component is the only way to make such components available to a page in the page editor.

1. In the Edit dialog, from the **Add** menu, select **Component**.
2. On the **Target** tab of the Edit Resource Catalog Item - Component dialog, in the **Name** field, enter a name to display for the component in the resource catalog.
3. In the **Description** field, enter a brief description of the component.
4. Select **Visible** if you want to display the component in the resource catalog.

   Alternatively, you can specify an EL expression to determine under which conditions the resource displays in the resource catalog. For example, to specify that the resource should be visible only to users with the `Portal Manager` role, use the following EL expression:

   ```
   #{WCSecurityContext.userInScopedRole['Moderator']}
   ```

5. In the **XML** text area, enter the XML code for the component.

   The following are examples of custom components:

   - `Output Text` component:

     ```
     <af:outputText xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
                      value="Weather Forecast for the Day" id="#"/>
     ```

   - Custom navigation:

     ```
     <af:forEach xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
             var="level_1_menu"
     ```

```
items="#{SiteStructureContext.defaultSiteStructure.listModel['startNode=/,
includeStartNode=false']}">
<af:outputText id="#"
               xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
               value="#{level_1_menu.title}"/>
</af:forEach>
```

- External HTML content:

```
<f:verbatim xmlns:f="http://java.sun.com/jsf/core">
  <![CDATA[
    <object width="640" height="385">
      <param name="movie" value="http://www.youtube.com/v/KO2ti-
B00gw&hl=en_US&fs=1">
      </param>
      <param name="allowFullScreen" value="true">
      </param>
      <param name="allowscriptaccess" value="always">
      </param>
      <embed src="http://www.youtube.com/v/KO2ti-B00gw&hl=en_US&fs=1"
             type="application/x-shockwave-flash" allowscriptaccess="always"
             allowfullscreen="true" width="640" height="385">
      </embed>
    </object>]]>
</f:verbatim>
```

  An alternative is to create a new task flow and add an `HTML Markup` component inside it.

6. On the **Options** tab, set the display options for the component you are adding, if applicable.

Field	Applies to	Description
Path	Links	Enter the URL to access the resource. The URL format is different depending on what you are linking to: • **Task Flow:** `taskflow://`*`Path_to_Task_Flow/Task_Flow_Definition_File_Name#Task_Flow_ID`* • **Portlet:** `portlet://`*`Producer_ID/Portlet_ID`* • **Content:** `content://`*`Content_Connection_ID/Document_ID`* If you do not know the location, click the **Select** icon to browse for available resources. **Note:** In the Select dialog, the **Select** button is active only when you select a resource that can be included in the navigation model. For example, if you expand the **Portlets** node and select a portlet producer, then the **Select** button is disabled. If you expand the portlet producer and select a portlet, then the **Select** button is enabled.

Field	Applies to	Description
Repository	Resources that require a repository connection	The name of the connection used to lookup the resource.

7. On the **Parameters** tab, enter values for any parameters supported by the component.

   You can also add custom parameters.
8. Click **OK**.
9. Click **Save and Close**.

Adding a Resource to the Resource Catalog

You can add different types of resources to a custom resource catalog from the Resource Registry.

To add a resource from the Resource Registry to a custom resource catalog:

1. In the Edit dialog, from the **Add** menu, select **Add From Library**.

   > **Tip:**
   >
   > To add a resource within a new folder, select **Folder** to create a folder first and then click **Add**.

2. In the Add Resource Catalog Item dialog, in the left panel, select a type of resource. If you know what you are looking for, you can also enter it in the **Search** field.
3. In the right panel, navigate to the resource you want to add to the resource catalog.
4. Optionally, in the **Name** field, enter a different name to use for the resource in your resource catalog. This does not change the name of the resource in the library.

   > **Note:**
   >
   > If you select multiple resources, you cannot rename them at this point. You can, however, edit them later.

5. Click **Add**.

> **Notes:**
>
> - Avoid adding a data control more than once in a resource catalog. The data control is added to the resource catalog as many times, but when you use the resource catalog to populate a page or task flow, you will not be able to add accessors, methods, or attributes from such data control instances.
> - The **Design Time** data controls folder lists all the WebCenter Portal tools and services data controls. However, adding the `ConnectionsNetworkDC` and `KudosServiceDC` data controls at runtime is not supported. Avoid adding these data controls to your page or task flow.

6. Click **Save and Close**.

Edit Resource Catalog Item

You can edit properties on a resource to set the resource name and description, the icon to be associated with the resource, and to add new properties.

To set properties on a resource:

1. On the **Target** tab, in the **Name** field, edit the name of the resource as it should appear in the resource catalog.
2. In the **Description** field, enter a brief description to display below the resource name in the resource catalog.
3. Select **Visible** if you want to display the resource in the resource catalog.

   Alternatively, you can specify an EL expression to determine under which conditions the resource displays in the catalog. For example, to specify that the resource should be visible only to users with the `Portal Manager` role, use the following EL expression:

   ```
   #{WCSecurityContext.userInScopedRole['Moderator']}
   ```
4. The remaining fields on this tab are specific to the resource type:

Field	Applies to	Description
Path	Links	Enter the URL to access the resource. The URL format is different depending on what you are linking to: • **Task Flow:** `taskflow://`*`Path_to_Task_Flow/Task_Flow_Definition_File_Name#Task_Flow_ID`* • **Portlet:** `portlet://`*`Producer_ID/Portlet_ID`* • **Content:** `content://`*`Content_Connection_ID/Document_ID`* If you do not know the location, click the **Select** icon to browse for available resources. **Note:** In the Select dialog, the **Select** button is active only when you select a resource that can be included in the navigation model. For example, if you expand the **Portlets** node and select a portlet producer, then the **Select** button is disabled. If you expand the portlet producer and select a portlet, then the **Select** button is enabled.
Repository	Resources that require a repository connection	The name of the connection used to lookup the resource.
Include Catalog	Nested Resource Catalogs	Select the resource catalog to nest within the current catalog.
Hide Top-Level Folder	Custom folders that are populated dynamically at runtime.	Select to include contents from the selected folder directly under the parent folder rather than in its own folder. .
Factory Class	Custom folders that are populated dynamically at runtime	The factory class used to create the folder. The factory classes for the folders available in the default catalog are as follows: • **Task flow:** `oracle.webcenter.portalframework.sitestructure.rc.TaskFlowResourceFactory` • **Portlet:** `oracle.webcenter.portalframework.sitestructure.rc.PortletResourceFactory` • **Content:** `oracle.webcenter.content.model.rc.ContentUrlResourceFactory` • **Data control:** `oracle.webcenter.datacomposer.internal.adapter.datacontrol.DataControlContextFactory`

5. On the **Options** tab, set display options:

Option	Description
attr.*ATTRIBUTE_NAME*	For each attribute, enter an initial value for the attribute. These are attributes defined against portlets or task flows at design time. When the task flow or portlet is consumed on a page, the attribute is exposed along with the enclosing chrome's attributes; for example, `attr.text` defines the default title for the task flow or portlet and `attr.contentStyle` defines the CSS style to be applied. An attribute is not exposed on the chrome if you do not set an initial value for it.
parameter.*PARAMETER_NAME*	For each parameter, enter an enter initial value for the parameter. These are parameters defined against portlets or task flows at design time. When the task flow or portlet is consumed on a page, the parameter is exposed along with the enclosing `Show Detail Frame` or `Movable Box` component's properties. A parameter is not exposed on the chrome if you do not set an initial value for it.
Large Icon URI	Enter the path of an icon to display next to the resource in the catalog. The icon should preferably be 32 x 32 pixels in size.
Small Icon URI	Enter the path of an icon to display next to the resource when it appears in the **Up** menu in the catalog. The icon should preferably be 16 x 16 pixels in size.
Tool Tip	Enter the text to display when users hover the mouse over the resource in the catalog.
New Attribute Name	Enter the name of an attribute that has been defined for the resource but is not exposed in the dialog. You can also select an attribute from the drop-down list.
New Attribute Value	Enter a value for the attribute specified in the **New Attribute Name** field, and click **Add**. **Tip:** You can click **Add** even without specifying a value for the attribute. You can specify the value once the field is displayed in the dialog along with the other display options.

6. Click the **Parameters** tab and define parameter values for resources that support wiring (for example, portlets and task flows). For details about supported parameters for a resource, refer to the documentation for that resource.
7. Click **OK**.
8. Click **Save and Close**.

Skins

A skin is a resource that defines colors, fonts, and other aspects of various components used on the pages of a portal. A skin changes the way the user interface appears, and not how the application functions. You can use skins to give individual portals a distinct personality or to apply specific branding, achieving the appearance that suits your organization.

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides several built-in skins, and you can create new custom skins. Alternatively, portal designers can develop custom skins to reflect a personality, or to incorporate specific branding. If a skin is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific skins. Within a portal, you can copy an existing skin.

> **Note:**
>
> Creating and editing a skin is a complex task, requiring knowledge of CSS and how the skin is used in page templates. Therefore, skins should be developed by an experienced Web Developer. Oracle recommends that developers use JDeveloper to develop skins for portals. When fully developed, the developer can publish skins directly to WebCenter Portal (the portal server) or to a specific portal for immediate use or for testing. Alternatively, the developer can export the skin to a file and upload the skin to WebCenter Portal later.

Skins are based on the Cascading Style Sheet (CSS) specification. A skin is made up of various selectors that define the CSS styles or properties of different parts of a component. You can adjust the look and feel of any component by changing its style-related properties. Some selectors, like a background or foreground color or a font style, may be global and affect all components.

Each skin works together with a page template to determine the overall look and feel of the pages in your portal. While the page template controls the location and behavior of components on the page, the skin controls the visual appearance of those components. The skin selectors in the skin correspond to the style classes in the page template, so when designing a skin, you must ensure that it is usable with the intended page template.

By default, a portal inherits its skin from the default specified for all portals by the system administrator.

Each page template can define a *preferred skin* to identify the skin that works best with that page template. When a page template is selected as the new default page template for a portal or as the system default, the default skin automatically updates to the page template's preferred skin.

You can optionally select a different skin for an individual portal, overriding the default skin setting. When you change the skin for a portal, the skin is applied to all the pages of the portal. However, the portal administration pages are not affected. They always appear with the default skin, `Alta`.

> **WARNING:**
>
> Changing the default skin to something other than the preferred skin for the selected default page template may produce unexpected results.

Select icons and actions in the toolbar to work with skins. Refer to the online help in the resulting dialogs for information and assistance.

Create New Skin

If none of the available skins meet your requirements, you can create your own. When you create a skin, you use an existing skin as the starting point for the new skin.

> **Note:**
>
> Creating and editing a skin is a complex task, requiring knowledge of CSS and how the skin is used in page templates. While you can develop skins in WebCenter Portal as described here, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop skins for portals. New skins can also be developed from scratch using JDeveloper. When fully developed, the developer can upload skins directly to WebCenter Portal (the portal server) for immediate use or for testing. Alternatively, the developer can export the skin to a file and upload the skin to WebCenter Portal later.

If you choose to create a skin in WebCenter Portal, giving you the option to later refine it in JDeveloper, you can do so at the application level or at the portal level. Application-level skins are available for use in all portals, unless the portal has been specifically excluded. Portal-level skins are available to use only in the portal in which they are created.

To create a skin:

1. In the **Name** field, enter a name for the skin.

   The name is displayed in the **Assets** or **Shared Assets** page and in lists when selecting a skin. You should make the name as descriptive as possible.

2. In the **Description** field, enter a description for the skin.

   The description is displayed below the skin name in the **Assets** or **Shared Assets** page and as a tool tip when selecting a skin. You should ensure that the description helps users determine if they want to use this particular skin.

3. From the **Copy From** list, select an existing skin to use as the starting point for your new skin.

4. Click **Create**.

Edit Skin

In a portal, you can edit a skin to meet your requirements. Note that you can not edit built-in skins; you can copy a built-in skin to create a new custom skin for a portal, then edit that copy.

> **Note:**
>
> Creating and editing a skin is a complex task, requiring knowledge of CSS and how the skin is used in page templates. Therefore, skins should be developed by an experienced Web Developer. Oracle recommends that developers use JDeveloper to modify skins for portals. New skins can also be developed from scratch using JDeveloper. When fully developed, the developer can upload skins directly to WebCenter Portal (the portal server) for immediate use or for testing. Alternatively, the developer can export the skin to a file and upload the skin to WebCenter Portal later.

More

To edit the basic appearance settings of a skin:

1. From the **Item** list, select the target area for which you want to update skin properties:
   - **Page Template** if you want to choose the background color, background image, and font for the template used on a page.
   - **Page** if you want to choose the color and image of the page background.
   - **Task Flow/Portlet** if you want to choose the background color and image of task flows and portlets on a page.
2. From the **Background Color** list, select the background color you want to use for the target area.

   When you select a background color, its RGB value appears in the text box, and the selected target area changes to that color in the **Preview** panel on the right.
3. In the **Background Image** field, enter the URI path of the image you want to use as a background image.

   > **Note:**
   >
   > You can either specify an absolute URL (where the URL should also work if entered in a browser address field), or a relative URL that points to an image located somewhere in WebCenter Portal. To store an image in WebCenter Portal, you must upload the required file, then obtain the image's URL using the **Get Link** action.
4. You can choose to repeat the background image horizontally, vertically, or both. Depending on your requirement, select:
   - **Repeat Horizontally**—Displays the background image aligned horizontally at the top of the page, with the image repeated across the horizontal bar.
   - **Repeat Vertically**—Displays the background image aligned vertically on the left side of the page, with the image repeated across the vertical bar.

   Select **Repeat Horizontally** and **Repeat Vertically** to repeat the selected image across the entire target area.

5. From the **Font Family** list, select the font you want to use for the Page Template area.

   The **Font Family** list is displayed only when **Page Template** is selected in the **Item** list.

6. Click **Save and Close**.

Page Styles

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides several built-in page styles, and you can create new custom page styles. If a page style is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific page styles.

> **Note:**
>
> Creating and editing a page style is a fairly complex task. While you can develop page styles in WebCenter Portal, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop page styles for portals. When fully developed, the developer can publish page styles directly to WebCenter Portal (the portal server) or to a specific portal for immediate use or for testing. Alternatively, the developer can export the page styles to a file and upload the page template to WebCenter Portal later.

A page style defines the initial layout of the main *content area* of a newly created page, and may also dictate the type of content that the page supports. For example, the Wiki page style provides an instant wiki; a Blank page style has few restrictions on the types of content users can add to the pages that are based on it.

When users create a page, they are provided with selection of page styles to use.

> **Note:**
>
> If you create the initial pages for a new portal in the Create Portal wizard, there is no opportunity to select a page style for the pages. If the portal template includes a page style called Default Page Style, then that is the page style used for all pages created in this way. Otherwise, the built-in Blank page style is applied to the pages. It is not possible to change a page style for a page after creating the page.

The initial layout and content are copied from the page style to the main content area of a newly created page.

Select icons and actions in the toolbar to work with page styles. Refer to the online help in the resulting dialogs for information and assistance.

Content Presenter

When you define a Content Presenter task flow, you must select a Content Presenter display template. The template defines how the selected content renders on the portal page.

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides several built-in Content Presenter display templates, and a developer can create custom display templates in JDeveloper. If a Content Presenter display template is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific display templates.

A Content Presenter display template can handle single content items, multiple content items, or a combination of the two. For example, a multiple content item template might render tabs for each item and then call a single item template to render the details of a selected item.

> **Note:**
>
> You cannot create or edit Content Presenter display templates in WebCenter Portal; they must be developed in JDeveloper and published to WebCenter Portal as a shared asset or as an asset for a specific portal.

Select icons and actions in the toolbar to work with Content Presenter display templates. Refer to the online help in the resulting dialogs for information and assistance.

Task Flow Styles

A task flow style provides a starting point for creating a new task flow.

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides the two built-in task flow styles shown in the table below, and you can create new custom task flow styles. If a task flow style is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific task flow styles.

You cannot directly edit the built-in task flows styles. However, you can create custom task flow styles by copying an existing style and then editing its source code.

Name	Description
Blank	A one-column task flow with one layout box into which you can add content, including additional layout components. Switching this task flow style is allowed.
Stretch	Maximizes the task flow to take up all available space. Task flows based on this style cannot be switched.

Select icons and actions in the toolbar to work with task flow styles. Refer to the online help in the resulting dialogs for information and assistance.

Layouts

A layout defines how content is organized on a page. When you create a new page, you select a page style for the page. Every page style is associated with a default layout, which is inherited by the new page. You can modify the layout for a page or page style in the page editor.

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides several built-in layouts, and you can create new custom layouts. If a layout is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific layouts.

> **Note:**
>
> Creating and editing a layout is a fairly complex task. While you can develop layouts in WebCenter Portal, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop layouts for portals. When fully developed, the developer can publish layouts directly to WebCenter Portal (the portal server) or to a specific portal for immediate use or for testing. Alternatively, the developer can export the layouts to a file and upload the page template to WebCenter Portal later.

You cannot directly edit any of the built-in layouts. However, you can create custom layouts by copying an existing layout and then editing it in the page editor. You can also download custom layouts, modify them in Oracle JDeveloper for additional customization, and upload them back into WebCenter Portal.

Select icons and actions in the toolbar to work with layouts. Refer to the online help in the resulting dialogs for information and assistance.

Pagelets

Pagelets are subcomponents of a web page accessed through Pagelet Producer that can be injected into any proxied application. Any application on a Pagelet Producer resource that returns markup can be registered as a pagelet, which can then be displayed in WebCenter Portal, or any web application.

A pagelet is a reusable user interface component similar to a portlet. While portlets were designed specifically for portals, pagelets are designed to run on any web page. Any HTML fragment can be a pagelet. Pagelet developers can create pagelets that are parameterized and configurable, dynamically interact with other pagelets, and respond to user input using Asynchronous Javascript and XML (AJAX) patterns.

Select icons and actions in the toolbar to work with pagelets. Refer to the online help in the resulting dialogs for information and assistance.

Create New Pagelet

Use the Create New Pagelet dialog to open the Pagelet Producer Console, where you can create and manage pagelets and pagelet resources for use in WebCenter Portal.

Element	Description
Connection Name	Leave **Ensemble** set as the connection name.
Continue	Click to open the Pagelet Producer Console.
Cancel	Click to return to the Shared Assets page.

For more information, see:

- Managing the Pagelet Producer in *Administering Oracle WebCenter Portal*
- Creating Pagelet Producer Objects in *Developing for Oracle WebCenter Portal*
- Working with Pagelets in *Building Portals with Oracle WebCenter Portal*

Task Flows

Task flows are containers in which you can add components such as data controls, portlets, content, and other task flows. Task flows provide the advantage of being reusable, so that the same task flow can be consumed on multiple portal pages. You can create your own custom task flow, and add components to the task flow.

Data retrieved from a web service by a data control can be rendered on a portal page in a custom task flow. You can select how to present the data, appropriate to the specific data control. For example, the data can be shown as a table, graph, form, button, or label. You can enable users to control the data displayed by a data control by including a parameter form along with the data presentation. You can also wire data control parameters to task flow parameters so that the data control retrieves data based on the values specified for the task flow parameters. Users can change the value of the task flow parameters in the page editor to request the corresponding data from the data control.

Select icons and actions in the toolbar to work with task flows. Refer to the online help in the resulting dialogs for information and assistance.

Create New Task Flow

WebCenter Portal provides many built-in task flows, available through the resource catalog in the page editor. You can also create custom task flows as portal assets, which you can add to your portal pages to provide presentations of the data retrieved by web service data controls, along with other components such as portlets, content, and other task flows.

To create a task flow:

1. In the **Name** field, enter a name for the task flow.

   The name is displayed in the resource catalog.
2. (Optional) In the **Description** field, enter a meaningful description for the task flow.

   The description is displayed in the resource catalog.
3. From the **Task Flow Style** drop-down list, select the task flow style to use for the task flow.
4. Click **Create**.

The newly created task flow is listed on the **Assets** or **Shared Assets** page. The empty check box in the **Available** column indicates that the task flow is not yet published and hence is not available for users to add to their pages. To publish the task flow, select the check box.

Create Form

The **Form** option is displayed only for data control accessors that return a collection of objects that can be displayed as a form element.

When you add a data control to a task flow as a form, you have two options:

- **Read-only Form**—Add the data control as a read-only form. The form displays data based on your specification, but the data cannot be edited.
- **Form**—Currently editable forms are not supported.

To present data as a form:

1. On the Type page of the Create Form wizard, select **Read-only Form**.
2. Select **Include Navigation Controls** to display **First**, **Previous**, **Next**, and **Last** buttons on the form. Navigation controls are helpful when multiple records are retrieved from the data source.

   > **Note:**
   >
   > Navigation controls may not work properly if the data control provides bind parameters.

3. Click **Next**.
4. On the Items page, by default all the accessor attributes are selected to display in the form. If there are any accessor attributes that you do not want to display in the form, select them in the **Selected Items** list and move them to the **Available Items** list.

   > **Note:**
   >
   > If an item has a scalar value, you cannot add the item to the form after initial creation.

5. Use the arrow icons next to the **Selected Items** list to determine the order in which the attributes are displayed as fields in the form.
6. Click **Next**.
7. On the Fields page, for each field in the form, specify display options as follows:
   - **Label**—Specify text to use as a label for the selected field.
   - **Form Component**—Select **Read Only Text** to display the field as read-only text.
8. If the data control has associated parameters that you want to expose on a parameter form, click **Next**.

a. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

   Any parameters you select in this way are displayed in a parameter form above the table, form, or graph that you are adding. Users can specify a value and click a button to refresh the data according to the values they specified.

b. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

   The initial value displayed in this field is specified when the data control was created. You can override this initial value to control the initial display of data.

c. In the **Submit Button Label** field, enter the text that you want to be displayed on the button that users click to submit values on the parameter form.

9. Click **Create**.

Create Graph

The **Graph** option is displayed only for data control accessors that return a collection of objects that can be displayed as a graph. You can display data as a bar, pie, line, or an area chart.

To present data as a graph:

1. On the Type page of the Create Graph wizard, select the desired type of graph: **Area**, **Bar**, **Line**, or **Pie**, then click **Next**.
2. On the **Sub-Type** page, select a subtype of the type of graph you selected, then click **Next**.

   For example, you can display a bar graph as a **Bar**, **Dual-Y Bar**, **Split Dual-Y Bar**, **Percent**, **Stacked Bar**, **Dual-Y Stacked Bar**, **Split Dual-Y Stacked Bar**, or **Floating Stacked Bar** graph.
3. On the Layout page, select your desired layout of graph elements, such as the title, legend, and footnote, then click **Next**.
4. On the Placement page, select how you want each of the available accessor attributes to be used in the graph, then click **Next**.

   For example, select which accessor attribute to use to determine the values for the x-axis and the bars in a bar graph. Select **<none>** if you do not want to use an accessor attribute in the graph.
5. On the Format page, enter the text to use for each graph element, such as the title, legend, and footnote.
6. If the data control has associated parameters that you want to expose on a parameter form, click **Next**.

   a. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

      Any parameters you select in this way are displayed in a parameter form above the table, form, or graph that you are adding. Users can specify a value and click a button to refresh the data according to the values they specified.

   b. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

      The initial value displayed in this field is specified when the data control was created. You can override this initial value to control the initial display of data.

   c. In the **Submit Button Label** field, enter the text that you want to be displayed on the button that users click to submit values on the parameter form.

7. Click **Create**.

Create Table

The **Table** option is displayed only for data control accessors that return a collection of objects that can be displayed in the columns of a table.

When you add a data control to a task flow as a table, you have two options:

- **Read-only Table**—Add the data control as a read-only table. The content in the table cannot be edited.
- **Table**—Editable tables are not currently supported.

To present data as a table:

1. On the Type page of the Create Table wizard, select **Read-only Table**.
2. (Optional) In the Behavior section, select one or more of the following options to enable customization of the table:
   - **Row Selection**—Enables selection of a row on which the user can perform any operation.

     When you enable row selection in a table and select a row, internally, the column values of the selected row are added into a row selection bean. The column values are stored in the following EL format:

     ```
     #{dataComposerViewContext.dataSelection.COLUMN_NAME}
     ```

     You can use this format to reference the table columns from elsewhere in the task flow. Typically, this is useful in task flows where data presentations are wired in a master-detail relationship.

     > **Note:**
     >
     > Row selection is not supported if the data control contains bind parameters.

   - **Filtering**—Displays a text field above each column in the table. Users can specify a filter criteria in these text fields to display only those rows that match the criteria.
   - **Sorting**—Displays **Up** and **Down** arrows in each column header that users can click to sort the table in ascending or descending order by that column.
3. Click **Next**.
4. On the Items page, by default all the accessor attributes are selected to display in the table. If there are any accessor attributes that you do not want to display in the table, select them in the **Selected Items** list and move them to the **Available Items** list.

> **Note:**
>
> If an item has a scalar value, you cannot add the item to the table after initial creation.

5. Use the arrow icons next to the **Selected Items** list to determine the order in which the attributes are displayed as columns in the table.
6. Click **Next**.
7. On the Columns page, for each column in the table, specify display options as follows:
   - **Column Header**—Specify a name to use as a header for the selected column.
   - **Display As**—Select an output format for the column:
     – **Output Text**—Display data records as styled read-only text.
     – **Output Formatted**—Display data records as read-only text with limited formatting.
     – **Hyperlink**—Display data in the selected column as a link, for example, when connecting to an employee database, you can display employee names as hyperlinks so that, when users click a link, it takes them to the employees profile page.
   - **Align**—Select whether the data in the table cells must be aligned to the **center**, **end**, **left**, **right**, or **start**.
   - **URL**—Create dynamic URLs based on the values coming from the data control. Specify the URL along with the EL value that must be appended to the URL. The URL field is enabled only if you selected **Hyperlink** in the **Display As** list.

     For example, if you are adding a WebCenter Portal service data control as a table that lists the portals of which the current user is a member, you can enter `/spaces/#{row.item}` in the **URL** field to display portal names as hyperlinks. Clicking a portal name in the table opens the portal.
   - **Open in New Window**—Select whether to open the URL in a separate window. This check box is available only if you selected **Hyperlink** in the **Display As** list.
8. If the data control has associated parameters that you want to expose on a parameter form, click **Next**.
   a. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

      Any parameters you select in this way are displayed in a parameter form above the table, form, or graph that you are adding. Users can specify a value and click a button to refresh the data according to the values they specified.
   b. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

      The initial value displayed in this field is specified when the data control was created. You can override this initial value to control the initial display of data.
   c. In the **Submit Button Label** field, enter the text that you want to be displayed on the button that users click to submit values on the parameter form.

9. Click **Create**.

Task Flow Properties

Use the Task Flow Properties dialog to create task flow parameters.

Use task flow parameters to pass values from the task flow to components on the task flow. This way, the components display data based on the task flow parameters. When you wire task flow parameters to parameters on its child components, you provide users the ability to decide what data they want to view in the child components.

Consider the example of a task flow that contains a data control. You can create task flow parameters and bind them to the data control parameters. When you pass values from the task flow to the data control, the data control displays records based on the task flow parameter values. As end users can edit the task flow's parameters in the page editor, they can control what is displayed in the data control.

To define a task flow parameter:

1. Enter a **Name**, **Type**, and **Storage** value for the task flow parameter.

   The **Storage** value identifies the scope for the parameter. It specifies the location for storing the parameter value. Out of the box, you are provided with four storage options, as described in the following table. However, you can specify any custom storage location by providing the EL value.

   Table 3-1 Storage Values

Name	Description
`pageFlowScope`	The value is available to all instances of the task flow on the page.
`viewScope`	The value is available only to the selected instance, for the current user.
`applicationScope`	The value is available to all instances of the task flow within the application or across applications.
`sessionScope`	The value is available only to the current user, for the current session.

2. Make a note of the value in the **Storage** field.
3. Click **OK**.

Data Visualizations

WebCenter Portal can retrieve data from a REST or SQL *data source* using a *business object*, simplifying the complexities of application integration. The retrieved data can be rendered on a portal page in a *data visualization* using a *visualization template*. For example, the data can be presented in one of the built-in visualization templates, or a developer can build a custom visualization template in JDeveloper.

Out-of-the-box, no data visualizations exist. Data visualizations can be created only at the portal level (as a portal asset), not at the application level (as a shared asset).

Select icons and actions in the toolbar to work with data visualizations. Refer to the online help in the resulting dialogs for information and assistance.

Visualization Templates

WebCenter Portal can retrieve data from a REST or SQL *data source* using a *business object*, simplifying the complexities of application integration. The retrieved data can be rendered on a portal page in a *data visualization* using a *visualization template*. For example, the data can be presented in one of the built-in visualization templates, or a developer can build a custom visualization template in JDeveloper.

WebCenter Portal provides several built-in visualization templates that you can use immediately, or a developer can create custom display templates in JDeveloper.

If a custom visualization template is a shared asset (available to all portals), it is shown on the **Shared Assets** page and on the **Assets** page of all portals along with portal-specific templates. You can not edit or manage the built-in visualization templates, so they are not exposed on the **Shared Assets** or portal **Assets** page.

Select icons and actions in the toolbar to work with visualization templates. Refer to the online help in the resulting dialogs for information and assistance.

Data Controls

A *web service data control* is essentially a bridge that makes data from a source available to a portal.

Data retrieved from a web service by a data control can be rendered on a portal page in a custom task flow. You can select how to present the data, appropriate to the specific data control. For example, the data can be shown as a table, graph, form, button, or label. You can enable users to control the data displayed by a data control by including a parameter form along with the data presentation. You can also wire data control parameters to task flow parameters so that the data control retrieves data based on the values specified for the task flow parameters. Users can change the value of the task flow parameters in the page editor to request the corresponding data from the data control.

More

Select icons and actions in the toolbar to work with data controls. Refer to the online help in the resulting dialogs for information and assistance.

Create New Data Control

A web service data control retrieves data from a web service that is accessed using standard protocols, such as SOAP and HTTP.

To create a web service data control:

1. In the **Name** field, enter a name for the data control.

   This name is displayed in the resource catalog.

2. In the **Description** field, enter a brief description of the data control.

   This description is displayed in the resource catalog.

3. From the **Data Control Type** drop-down list, select **Web Service** and then click **Continue** to open the Create New Data Control wizard.

Refer to the online help in the wizard for information and assistance.

Create New/Edit Data Control wizard

Use the Create New (or Edit) Data Control wizard to create (or edit) a data control that retrieves data from a web service that is accessed using standard protocols, such as SOAP and HTTP..

To create or edit a web service data control:

1. In the **WSDL URL** field, enter the location of the web service's WSDL file, for example:

   ```
   http://www.example.com/exampleservice/example.asmx?WSDL
   ```

2. If the web service is on the other side of a firewall from your portal, use the **Host** and **Port** fields to configure proxy authentication.

   To ensure a secure connection to the web service, you must first configure your application to use proxy authentication.

   > **Tip:**
   >
   > - If a central WebCenter Portal proxy (or RSS proxy) is already configured, then the proxy fields are automatically populated with that proxy host name and port number. You can modify the proxy details or clear the fields if you do not want to configure the proxy.
   >
   >   Changing the WebCenter Portal central proxy does not change the proxy settings against the web service data control. However, changing the web service data control proxy setting changes the WebCenter Portal central proxy setting.
   > - If a Web Logic Domain proxy is already configured, and if you choose not to set a proxy while creating or editing the web service data control, then the Web Logic Domain proxy is used as the default setting.

3. If you are connecting to a secured web service, then enter the **Username** and **Password** to access the web service endpoint.

   > **Tip:**
   >
   > If access to the WSDL itself is secured, then you cannot connect to the web service from the **Create New Data Control** page. To work around this limitation, access the WSDL in a browser by specifying the user name and password, download the WSDL page, save it locally as a `.wsdl` document, then specify the path to this document in the **WSDL URL** field.

4. Click **Show Methods** to establish a connection to the web service using the specified WSDL and display the methods available for the web service.
5. From the **Service** drop-down list, select the service to use for the data control.
6. From the **Port** drop-down list, select one of the available ports.

The **Methods** field displays the methods available for the specified web service.

All methods under the selected port are added to the data control. These methods are later available for selection in the resource catalog.

7. If the web service is secured using OWSM, use the fields in the Oracle Web Service Manager Security Policies section to specify the policies to use, as described in the following table.

Table 3-2 OWSM Security Information

Name	Description
MTOM	The MOTM (message transmission optimization mechanism) policy you want to use.
Reliability	The reliability policy you want to use.
Addressing	The addressing policy you want to use.
Security	Any additional security policies you want to apply.

For example, if your web service is secured using a policy named `mycompany/wss_username_token_service_policy`, populate the **Security** field with the client policy, which is `mycompany/wss_username_token_service_policy`.

8. You can override properties on the **Security** policy that you specified in the previous step. Use the **Add Property** and **Remove Property** buttons to add or remove entries in the Override OWSM Policy Properties table.

> **Tip:**
>
> Override properties are defined by the policy. Therefore, to perform this step, you must know the policy being used and the properties that you can override.

For example, if you specified a **Security** policy, `mycompany/wss_username_token_client_policy`, and the policy has a `csf-key` property, then in the override section, click **Add Property** to add a value for `csf-key`. Note that this key must exist in the configured keystore.

9. To set values for a method's parameters, select the method and click **Next**.

A web service may expose scalar and complex parameters that control the data displayed by the data control.

For each parameter:

> **Tip:**
>
> For complex parameters, you must first expand the parameter to display the scalar values that make up the parameter.

a. In the **Display Name** field, enter a user-friendly name for the parameter.

This name is displayed to users when they consume the data control in a task flow.

b. In the **Tooltip Text** field, enter a brief description of the parameter.

   This provides users with assistance in determining the purpose of the parameter.

c. Select **Show to User** to display the parameter to users when they consume the data control in a task flow.

> **Note:**
>
> You can specify values for exposed parameters only while consuming the data control in a task flow.

10. Click **Create**.

Business Objects

WebCenter Portal can retrieve data from a REST or SQL *data source* using a *business object*, simplifying the complexities of application integration. The retrieved data can be rendered on a portal page in a *data visualization* using a *visualization template*. For example, the data can be presented in one of the built-in visualization templates, or a developer can build a custom visualization template in JDeveloper.

The main function of a business object is to simplify the source of data to present that data on a portal page. When the data source is not complex, a business object is automatically created by WebCenter Portal when a data source is selected in the Define Data Visualization wizard. For an automatically-created business object, all the attributes and methods for the data source are added to the business object. In this case, the display name and description of each attribute and method are not available for configuration. Typically, advanced users create business objects manually as a portal asset, with a limited set of attributes that are relevant for building data visualizations. Business objects can be created only at the portal level (as a portal asset), not at the application level (as a shared asset).

A business object can expose multiple scalar attributes as well as collection attributes. For REST, it can support multiple methods such as `GET`, `PUT`, `POST`, and `DELETE`, based on support from the underlying REST data source. Each business object has a reference to the corresponding data service, which in turn has a reference to the underlying data control that provides the actual model to access the back-end data source.

Out-of-the-box, no business objects exist. Business objects can be created only at the portal level (as a portal asset), not at the application level (as a shared asset).

Select icons and actions in the toolbar to work with business objects. Refer to the online help in the resulting dialogs for information and assistance.

Create New/Edit Business Object

To create or edit a business object:

1. In the **Name** field, enter a name for the business object.

The name is displayed in lists when selecting a business object.

> **Note:**
>
> A business object name cannot include the reserved words `Business Object`.

2. (Optional) In the **Description** field, enter a description for the business object.

   The description is displayed below the name in the **Assets** page. Ensure that the description helps users determine if they want to use this particular business object.

3. On the **Data Sources** tab, define the data source to retrieve the data for the business object:

   > **Note:**
   >
   > If you want to select an existing REST data source, but know that the underlying data has changed, you can exit the wizard and go to the **Assets** page of the portal to edit the data source, where you can select **Refresh Schema** to refresh the data source and business object with changes such as added, deleted, or renamed attributes. For more significant structural changes, you will need to re-create the data source, and any data visualizations where it is used.

   a. From the **Type** list, select the type of data source from which the business object will retrieve data (**REST** or **SQL**).

      The generated list shows all data sources that are portal assets of the selected type.

   b. From the generated list of data sources, select the required data source.

   c. From the **Method** list, select the method to be used to retrieve the data (for example, `GET`).

   d. In the generated list of methods, click the **Expand** icon on a method to view the attributes associated with the selected data source, then click the check boxes to select each attribute required by the business object. Click the **UnSelect Children** icon to deselect all check boxes.

4. On the **Configuration** tab:

   a. Click the **Edit** icon next to a method or attributes to modify a name or description for the Source retrieved from the data source.

   b. Click the **Delete** icon next to a method or attribute to remove it from the data to be retrieved by the business object.

5. On the **Parameters** tab, if parameters are present, click **Edit** to modify the name and/or value of a parameter.

   Parameters listed are those retrieved from the data source. For example, if you create a SQL data source using a query with bind variables, then all bind variables are exposed as parameters. Similarly, for a REST data source, parameters are specified in the Resource URL (for example, `http://example.com/stocks?`

`symbol=ORCL`, where `symbol` is a parameter). Parameter names in a business object are formed using the syntax *`paramName_method`*. For example, using the REST data source example above, the default business object parameter name will be `symbol_GET`. You can change the name of the parameter as desired.

6. On the **Preview** tab, click **Test** to preview the data retrieved from the data source based on your selections.
7. Click **Save**.

   The newly created business object is listed on the **Assets** page. By default, the check box in the **Available** column is selected, indicating that the business object is published and available to users to bind to a data visualization.

REST Data Sources

Out-of-the-box, no REST data sources exist. You can create a REST data source at the application level or at the portal level. Application-level REST data sources are available for use in all portals, unless the portal has been specifically excluded. Portal-level REST data sources are available for use only in the portal in which they are created.

Select icons and actions in the toolbar to work with REST data sources. Refer to the online help in the resulting dialogs for information and assistance.

Create New/Edit REST Data Source

To create or edit a REST data source:

1. Enter a **Name** and optional **Description** for the data source.
2. Enter a valid **Resource Path** URL against which the REST data source will be created, then click **Test** to confirm the resource path is valid and that it returns data. For example, the resource path `http://dev.markitondemand.com/Api/v2/Quote?symbol=AAPL` provides stock quotes.

   > **Note:**
   >
   > The **Resource Path** must support at least the `GET` method, along with any other method (`PUT`, `POST`, `DELETE`).

3. In the list of **Parameters** populated based on the resource path provided, remove or add parameters as needed.

   > **Note:**
   >
   > If you modify the **Resource Path** URL, the list of parameters will be refreshed, and you may need to respecify the required data source parameters.

4. Select a **Data Source Return Type** that specifies data type returned by the **Resource Path** URL. A URL can return data in either **XML** format or **JSON** format.

5. Select or deselect **Use Portal Proxy** and **Use Authentication** as required. For an external REST URL, select **Use Portal Proxy**.
6. Select or deselect **Enable Caching** as required, and enter values for **Time To Live (ms)** and **Max Weight**.
7. From the **Methods** list, select the method to assign to the REST data source: `GET`, `PUT`, `POST`, or `DELETE`.
8. In the list of **Parameters** populated based on the resource path provided, remove or add parameters as needed.
9. Type payload values in the **Request Payload** and **Response Payload** fields as required. **Tip**: Enter the Resource Path URL in a browser to see what data is returned.

> **Note:**
>
> While the **Resource Path** URL can be the same for all methods (`GET`, `PUT`, `POST`, `DELETE`), the **Request Payload** and **Response Payload** can be different for each method. You will need to provide separate payload values for every method that you specify.

An example of XML for **Request Payload** may look similar to:


```
<opportunity>
<city>DOCUMENT</city>
<comment>Default</comment>
<country>US</country>
<createdBy>LHUGHES</createdBy>
<creationDate>2015-10-01T00:00:00-08:00</creationDate>
<currencyCode>USD</currencyCode>
<customerInfo>
<contactEmail>david@abccorp.com</contactEmail>
<contactName>David</contactName>
<contactPhone>9987656781</contactPhone>
<customerPhone>9987656781</customerPhone>
</customerInfo>
<formattedAddress>559 Cooper St, SEATTLE, WASHINGTON 98102</formattedAddress>
<locationId>300100000393851</locationId>
<opportunityId>300100029659792</opportunityId>
<opportunityName>OpptyForABCCorp</opportunityName>
<opportunityNumber>CDRM_23685</opportunityNumber>
<postalCode>98102</postalCode>
<primaryOrganizationId>201</primaryOrganizationId>
<primaryRevenueId>300100029659793</primaryRevenueId>
<products>
<productName>Server - Class III</productName>
<quantity>10</quantity>
<totalPrice>8000</totalPrice>
<unitPrice>800</unitPrice>
</products>
<products>
<productName>Pro Server</productName>
<quantity>15</quantity>
<totalPrice>11250</totalPrice>
<unitPrice>750</unitPrice>
</products>
```

```
<revenue>8000</revenue>
<salesStage>01 - Qualification</salesStage>
<targetPartyId>100000015802569</targetPartyId><targetPartyName>Designs Cooper</
targetPartyName>
</opportunity>
```

10. If you selected **Use Authentication**:
    - Click **Next**.
    - On the **Auth** page, select existing credentials, or click **Add Credentials** to create a new credential (if you have been granted the required permission to create a new credential).
    - On the **Credentials** page, select from the **Select Security Type** list:
      – **Basic Authentication** support is provided via the External Application Service of WebCenter Portal. The user name and password for the REST service are stored in the OPSS Credential Store using the External Application Service. When a data visualization is rendered at runtime, WebCenter Portal retrieves these credentials to present the data on the page.
      – **OAuth** support is provided by OWSM integrated with REST Data Control. ADF REST Data Control supports only OAuth 2.0 using IDM OAuth Servers. External REST services that are protected using a non-IDM solution are not supported.
      – **Taleo Token Generator** authentication is provided by a custom security provider to propagate security at runtime. If authentication is successful, a Taleo token is issued. That token must be passed to each subsequent resource request to retrieve data.
    - Under **Configuration**, define or edit the login information, depending on the security type:
      – For **Basic Authentication**, enter the **Login** user name, and **Password**.
      – For **OAuth**, enter the **Login** user name, and **Password** corresponding to the Client ID and Password configured in OAuth server, and enter the **Token Generator URL** of the OAuth Server.
      – For **Taleo Token Generator**, enter the **Login** user name, and **Password**, and enter the **Login URL** and **Org Code** to access the Taleo end point. A user must be authenticated using user name, password, and organization code (company ID) on a defined login URL.
11. Click **Save**.

    The newly created data source is listed on the **Assets** or **Shared Assets** page.

    The empty check box in the **Available** column indicates that it is not yet published and hence is not available to other users. To publish the data source, click the check box.

SQL Data Sources

Out-of-the-box, no SQL data souces exist. You can create a SQL data source at the application level or at the portal level. Application-level SQL data sources are available for use in all portals, unless the portal has been specifically excluded. Portal-level SQL data sources are available for use only in the portal in which they are created.

The default SQL style for all database connections is `Oracle`. If the data source is a Microsoft SQL Server database, then the system administrator must perform the following tasks:

- Manually override the SQL style with one that supports the SQL Server database. To do this, set the Java system property `jbo.SQLBuilder` to `SQLServer`. When Oracle WebLogic Server is started with this configuration, it supports the SQL style specified.

  Set the `jbo.SQLBuilder` property in any of the following ways:

  – Open the `*DomainHome*/bin/setDomainEnv.sh` file and add `-Djbo.SQLBuilder=SQLServer` to the `JAVA_OPTIONS` line.

  – Edit the managed server start script in a text editor and add `-Djbo.SQLBuilder=SQLServer` to the `JAVA_OPTIONS` line.

  – In the WebLogic Server Administration Console, navigate to the `WC_Spaces` managed server, click the **Server Start** tab and specify the system property in the **Arguments** text area.

- Specify `Java` as a `typemap` entry using the `jbo.TypeMapEntries` property as follows:

  ```
  -Djbo.TypeMapEntries="Java"
  ```

Select icons and actions in the toolbar to work with SQL data sources. Refer to the online help in the resulting dialogs for information and assistance.

Create New/Edit SQL Data Source

To create or edit a SQL data source:

1. In the wizard, enter a **Name** and optional **Description** for the data source.
2. Under **Configuration**:
   - In the **JDBC Data Source** field, enter a JNDI name of JDBC data source.
   - In the **Password** field, enter the JDBC data source password.
3. Enter a **SQL Statement** to query the SQL data source. For example:

   ```
   SELECT * FROM Persons WHERE City LIKE 'sa%'
   ```

   You can use `:*bind-name*` to refer to bind variables in the SQL statement. Bind variables are useful in controlling the data displayed, such as in the following example:

   ```
   SELECT ename, empno, mgr, deptno FROM emp WHERE job IN (:job) ORDER BY empno ASC
   ```

   This query returns details of all employees with a particular job role, for example, sales managers. In this query, `:job` defines the parameter `job`, which maps to the `job` column in the `emp` database table. The query returns data based on the `job` value. You can add as many bind variables as required. You can also use the same variable multiple times in the query.

> **Notes:**
>
> - Avoid using SQL reserved words and keywords for parameter names in the query. The use of reserved words will cause the query to fail. For more information, see the topic titled "Oracle SQL Reserved Words and Keywords" in the *Oracle Database SQL Language Reference* in the Oracle Database documentation library.
> - If you are using a SQL Server database, then you may get an error if the query contains a column with the `NCHAR` or `NVARCHAR` data type. If the SQL data control fails to execute a query containing `NCHAR` and `NVARCHAR`, it will not be added to the Data Controls folder in the resource catalog. To work around this limitation, you must modify the query using the `CONVERT` function. For example:
>
> ```
> SELECT CONVERT(VARCHAR(20), col1) col1, CONVERT(VARCHAR(20), col2)
> col2 FROM table1
> ```

4. To allow this SQL data source to be updated, select **Updatable**. The underlying table must have a primary key defined on the table for this feature to work and updateable query should be based on the single table.
5. Click **Test** to confirm whether required entries are complete and valid.
6. Click **Save**.

Copy Asset/Delete Asset/Upload Asset/Download Asset/Upload Icon

Copying an Asset

You can create copies of most assets, including the built-in assets. This is useful for when you want to:

- Create a backup of an asset.
- Update an asset while keeping the original in use.
- Use a built-in asset as the starting point for creating a new asset. You cannot edit built-in assets, but you can create a copy to use as a starting point for further refinement.

When you create a copy of an asset, the copy is initially hidden regardless of the status of the original asset.

> **Note:**
>
> You cannot create copies of Content Presenter display templates.

To copy an asset:

1. In the Copy dialog, in the **Display Name** field, enter a name for the copy.
2. In the **Description** field, optionally enter a description for the new asset.
3. Click **OK**.

Deleting an Asset

When an asset is no longer required, you may want to remove it. You cannot delete built-in assets.

> **Note:**
>
> Before you delete an asset, you must ensure that the asset is not in use. With the exception of page layouts, if you mark an asset for deletion, it is deleted even if it is use. For page layouts, a message notifies you that the layout is in use and cannot be deleted.

To delete an asset:

1. In the Delete dialog, click **OK**.

Uploading an Asset

> **Note:**
>
> You cannot download an asset from one portal, then upload that same asset to another portal. In other words, migrating assets from one portal to another is not supported. To use an asset across multiple portals, the asset must be created as a shared asset.

When you upload an asset to WebCenter Portal:

- Existing assets with the same internal ID are overwritten.
- Portal assets are uploaded back only into their original portal. You cannot upload a portal asset into a different portal.
- Assets must be in an archive file format on your local file system or a remote server.

To upload an asset:

1. In the Upload dialog, select:
   - **Look on My Computer** to upload an archive file from your local file system. Click **Choose File** to locate the file.
   - **Look on WebCenter Portal Server** to upload an archive file from a remote server file system. In the field below, enter the location on the server where the file is located.
2. Click **Upload**.

3. If the asset already exists in the portal, click **Yes** to confirm that you want to replace the asset with the contents of the archive file.
4. Click **OK** in the resulting success dialog.

> **Note:**
>
> Artifacts used or referenced by assets, such as icons and images, are not included in the archive when an asset is exported. When you upload the asset, you must manage and move dependent artifacts manually. We recommend that you use a folder structure on your content server specifically for asset artifacts so that content is easy to identify and move, if required.
>
> If you are managing legacy assets that store artifacts in MDS, Oracle recommends that you relocate dependent artifacts to your content server. However, if you do need to move artifacts stored in MDS, you can use the MDS WLST commands `exportMetadata` and `importMetadata`.

Downloading an Asset

> **Note:**
>
> You cannot download an asset from one portal, then upload that same asset to another portal. In other words, migrating assets from one portal to another is not supported. To use an asset across multiple portals, the asset must be created as a shared asset.

When you download an asset, its configuration is saved into an archive file. You can save the archive file either to your local file system or a remote server file system.

To download an asset:

1. In the Download dialog, in the **Archive File Name** field, enter a name for the archive file. The archive file must have the `.aar` extension.
2. Select:
   - **Save to My Computer** to save the archive file to your local file system. When you click the **Download** button you are prompted for the location on the file system where you want to save the file.
   - **Save to WebCenter Portal Server** to save the archive file to the portal server file system. The `.aar` archive file is saved to the default path *`DOMAIN_HOME`*`/WC_Archives`, where *`DOMAIN_HOME`* refers to the domain location where WebCenter Portal is installed.
3. Click **Download**.
4. If you selected to save the archive file to your local file system, you are prompted to specify the location where you want to save the file.
5. After downloading the asset, you can then import it into the IDE of your choice, such as JDeveloper.

> **Note:**
>
> Artifacts used or referenced by assets, such as icons and images, are not included in the archive when an asset is downloaded. You must manage and move dependent artifacts manually. Oracle recommends that you use a folder structure on your content server specifically for asset artifacts so that content is easy to identify and move, if required.
>
> If you are managing legacy assets that store artifacts in MDS, you can relocate dependent artifacts to your content server. However, if you do need to move artifacts stored in MDS, you can use the MDS WLST commands `exportMetadata` and `importMetadata`.

Uploading an Icon

Upload Icon—You can upload an icon to display in the Define Data Visualization wizard to represent the custom visualization template. The icon image file must be of file type GIF, PNG, or JPG, and should be no larger than 150K and 200x143 pixels for best results.

Edit Properties

Every asset has associated properties that define its display, availability, and attributes.

Use the Edit Properties dialog to view and edit the properties associated with assets:

Table 3-3 Asset Properties

Property	Description
Display Name	The display name of the asset. Editable in the Edit Properties dialog.
Description	The description of the asset. Editable in the Edit Properties dialog.
Icon URI	The URI of the icon that is associated with the asset. Specify either an absolute URL, or a relative URL that points to an image located somewhere on the portal server. Currently, the only asset that can be associated with an icon is a page style. Editable in the Edit Properties dialog.
Category	The category to which the asset belongs. For example, all page styles associated with Sales could belong to a Sales category. Editable in the Edit Properties dialog.
Asset Type	The type of the asset. For example, `pageStyle` or `taskFlow`.
Internal ID	The unique internal identification number assigned to the asset.
Content Directory	The path where dependent objects of the asset, such as images, JavaScripts, style sheets, and HTML files, are stored on the portal server.
JSPx File	The path to the JSF (`.jspx`) file for the asset.

Table 3-3 (Cont.) Asset Properties

Property	Description
Page Definition	The path where the page definition XML file of the asset is stored on the portal server. Page definitions are used for page templates, page styles, task flow styles, and task flows.
Metadata File	The path where metadata files, if any, of the asset are stored on the portal server.
Created By	The name of the user who created the asset.
Date Created	The date and time when the asset was created.
Modified By	The name of the user who last edited the asset.
Date Modified	The date and time when the asset was last edited.
Locked By	The name of the user who most recently locked the asset.
Date Locked	The date and time when the asset was most recently locked.
Exclude From Home Portal	(Shared assets only) Specifies whether the asset is available in the Home portal. Editable in the Edit Properties dialog.
Exclude From Portal(s)	(Shared assets only) Specifies in which portals the asset is available or excluded. Editable in the Edit Properties dialog.
Attributes	Attributes that determine the behavior of the asset. For example, `editPageAfterCreation` is a custom attribute of the page style asset and controls whether a newly created page of that style opens in Edit or View mode. It takes a value of `true` or `false`. When you associate this attribute with a particular page style, every time a user creates a page based on the selected style, the attribute value is considered and the page behaves accordingly. Editable in the Edit Properties dialog.

Link to New Asset or Link to Existing Asset

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.

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.
- The gold **Links** icon indicates that links are present in the Links dialog.

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 3-4 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.

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.

Shared Assets

Assets are the objects that define the structure, look and feel, and the content of your portals.

Assets are available at the application level (shared assets) and at the portal level (portal assets). At both these levels, the assets available and their functionality are the same. The difference between shared assets and portal assets is that of scope:

- **Shared assets** are available for use in all portals, unless a portal has been specifically excluded.
- Portal **assets** are available for use only in the portal in which they are created.

When you create and publish a shared asset, it automatically becomes available to all portals. However, you can edit the properties of the shared asset to restrict its availability to selected portals.

If a shared asset is available for use in a portal, it is listed on the **Assets** page for that portal. The **Shared** icon next to the asset's name indicates that it is a shared asset. Shared assets can be edited only at the application level from the **Shared Assets** page.

Page Templates

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides several built-in page templates. Alternatively, portal designers can create custom page templates to offer more ways to display pages on the screen. If a page template is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific page templates. Within a portal, you can copy or customize an existing page template.

> **Note:**
>
> Creating and editing a page template is a fairly complex task. While you can develop page templates in WebCenter Portal, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop page templates for portals. When fully developed, the developer can publish page templates directly to WebCenter Portal (the portal server) or to a specific portal for immediate use or for testing. Alternatively, the developer can export the page template to a file and upload the page template to WebCenter Portal later.

Every page in a portal has an associated page template that defines the structure and layout of the entire page. To ensure that all pages in a portal look and behave consistently, they all use the same page template, set as the default by the portal manager. In contrast, the *page style* defines the initial layout of the main content area and may be unique for every page.

Typical elements of a page template include:

- Header, content area (different in each page), and footer. The header and footer commonly include brand-specific elements. For example, a header usually includes a logo and possibly a slogan, and a footer usually includes contact and copyright information. The layout of the content area is defined by the page style.
- Portal navigation. For example, you might have global navigation in the header and additional navigation on the left side of the page.
- Additional links and actions. Portal-specific links and actions may include log in/log out, pop-up menus, global links (such as to send an email to the web administrator or to display a privacy statement).
- Conditional elements. For example, some elements on the page might differ depending on whether the user is public or authenticated or depending on the user's role and privileges.

A page template exposes the navigation for a portal along the top of the page, or down the side of the page:

- A *top navigation* page template exposes the portal navigation in header area. Top navigation makes effective use of the horizontal space on the page, and is recommended when there are 7 or fewer top level pages in the portal navigation. This page template design generally has a header, page and footer sections that use panelGroupLayout components, and is an ideal starting point for sites that require a flowing layout (described below).
- A *side navigation* page template exposes the portal navigation in a sidebar on the left side of the page. The vertical nature of side navigation allows for a more lengthy list of navigation items, and is recommended when there are more than 7 top level pages in the portal navigation. Choose a side navigation template for more complex navigations.

Both top navigation and side navigation page templates can have a flowing layout or a stretching layout:

- A *flowing* layout is the most typical layout. Components are arranged side by side or one below the other, displayed using their natural size. When the content of the page extends beyond the size of the browser window, the browser displays scroll bars on the page.
- A *stretching* layout may be a suitable choice when your page content fills a large area, or you want the page content to grow and shrink depending on the size of the browser window. For example, a stretching layout may be suitable when a page contains a table or graph that you want to fill up the whole content area, no matter what size it is. Another example is a page that contains an editing area, where you want the editor to be exactly as tall and wide as the space given to the content area. This layout has a region for the page content, and adds vertical and horizontal scroll bars to the region on the page when the content cannot be contained within the size of the browser window. When scroll bars are added to the page, the navigation area, page header, and page footer remain in view while the content area scrolls.

Each page template works together with a *skin* to determine the overall look and feel of the pages in your portal. While the page template controls the location and behavior of components on the page, the skin controls the visual appearance of those components, such as the colors, fonts, and various other aspects.

Each page template can define a *preferred skin* to identify the skin that works best with that page template. When the page template is selected as the default page template for a portal or as the system default, the default skin automatically updates to the page template's preferred skin.

By default, a portal inherits the page template defined for the portal template that you select when you create the portal.

> **Note:**
>
> If the portal template does not specify a page template, the portal uses the default page template specified by the system administrator.

You can optionally select a different page template for an individual portal, overriding the default page template settings.

Select icons and actions in the toolbar to work with page templates. Refer to the online help in the resulting dialogs for information and assistance.

Create New Page Template

If none of the available page templates meet your requirements, you can create your own. When you create a page template, you use an existing page template as the starting point for the new page template.

> **Note:**
>
> Creating and editing a page template is a fairly complex task. While you can develop page templates in WebCenter Portal as described here, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop page templates for portals. When fully developed, the developer can publish page templates directly to WebCenter Portal (the portal server) or to a specific portal for immediate use or for testing. Alternatively, the developer can export the page template to a file and upload the page template to WebCenter Portal later.

If you choose to create a page template in WebCenter Portal, giving you the option to later refine it in JDeveloper, you can do so at the application level or at the portal level. Application-level page templates are available for use in all portals, unless the portal has been specifically excluded. Portal-level page templates are available for use only in the portal in which they are created.

To create a page template:

1. In the Create New Page Template dialog, in the **Name** field, enter a name for the page template.

   The name is displayed in the **Assets** or **Shared Assets** page and in lists when selecting a page template. You should make the name as descriptive as possible.

2. In the **Description** field, optionally enter a description for the page template.

   The description is displayed below the name in the **Assets** or **Shared Assets** page and as a tool tip when selecting a page template. You should ensure that the description helps users determine if they want to use this particular page template.

3. From the **Copy From** list, select an existing page template to use as the starting point for your new page template.

   > **Tip:**
   >
   > You can also create a copy of an existing page template.

4. Click **Create**.

   The newly created page template is listed on the **Assets** or **Shared Assets** page. The empty check box next to the page template indicates that it is not yet published and hence is not available to other users.

   After initial creation, the new page template is identical to the page template selected from the **Copy From** list. The next step in creating a page template is to edit the layout and content to meet your requirements.

Select Start Path

To select the start path for your navigation:

1. In the Select Start Path dialog, select:
   - **Start at the Currently Selected Page Path** to use the currently selected page as the starting point of the navigation. This populates the **Start Path** property with the following EL expression:

     ```
     #{navigationContext.navigationModel['modelPath=path'].currentSelection.pretty
     Url}
     ```

     where *path* is the path to the navigation model XML file (omitting the trailing `.xml`); for example:

     ```
     #{navigationContext.navigationModel['modelPath=/oracle/webcenter/portalapp/
     navigations/myNavigation'].currentSelection.prettyUrl}
     ```

   - **Start at This Level of the Currently Selected Page Path** to use the *n*th level of the path to the currently selected page as the starting point of the navigation (where *n* is the number specified in the field next to this option). This populates the **Start Path** property with the following EL expression:

     ```
     #{navigationContext.navigationModel['modelPath=path'].currentSelection.pretty
     UrlPath[level]}
     ```

     where *path* is the path to the navigation model XML file (omitting the trailing `.xml`) and *level* is the number specified in the field.

   - **Select Page Path** to use a specific page as the starting point of the navigation. This populates the **Start Path** property with the path to the selected page.

For examples, see Selecting the Navigation Start Path.

Resource Catalogs

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides three built-in resource catalogs:

- **Default Portal Catalog**, assigned to portal pages by default, contains resources to add to pages and task flow assets in a portal.
- **Default Home Portal Catalog**, assigned to pages in the Home portal by default, contains resources to add to a personal or business role page.
- **Default Page Template Catalog**, assigned to page templates and page styles by default, contains a Navigations folder and a Portal Components folder, which provide access to resources specifically used in page templates and page styles. Note that all pages in a portal use the same page template, though there may be several page templates available as portal assets.

Alternatively, portal designers can develop custom resource catalogs. Within a portal, you can create a new resource catalog from scratch or copy an existing resource catalog into a new resource catalog. If a resource catalog is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific resource catalogs.

Resource catalogs are portal assets that expose components and connections that you can add to a portal. You can use a resource catalog to populate pages, page templates, page styles, and task flows. The items listed in a resource catalog are collectively referred to as *resources*.

The resource catalog available to you as you edit a page, page template, page style, or task flow is established by the portal administration settings, and may be a built-in resource catalog or a custom resource catalog.

For more information, see About the Built-In Resource Catalogs.

Create New Resource Catalog

If the built-in resource catalogs do not meet your requirements, you can create your own. When you create a resource catalog, you can build it from scratch or extend an existing resource catalog.

You can create resource catalogs at the application level or at the portal level. Application-level resource catalogs are available for use in all portals, unless the portal has been specifically excluded. Portal-level resource catalogs are available for use only in the portal in which they are created.

To create a resource catalog:

1. In the **Name** field, enter a name for the resource catalog.

   The name is displayed in the **Assets** or **Shared Assets** page and in lists when selecting a resource catalog. You should make the name as descriptive as possible.

2. In the **Description** field, enter a description for the resource catalog.

   The description is displayed below the name in the **Assets** or **Shared Assets** page and as a tool tip when selecting a resource catalog. You should ensure that the description helps users determine if they want to use this particular resource catalog.

3. From the **Copy From** list, select an existing resource catalog to use as the starting point for your new resource catalog, if desired. Leave blank to create a new empty resource catalog.

4. Click **Continue**.

   The newly created resource catalog is listed on the **Assets** or **Shared Assets** page.

   The empty check box in the **Available** column indicates that it is not yet published and hence is not available to other users. To publish the resource catalog, click the check box.

   After initial creation, the new resource catalog is either empty or identical to the resource catalog selected from the **Copy From** list. The next step in creating a resource catalog is to edit it to meet your requirements.

Edit Resource Catalog

You cannot edit the built-in resource catalogs, but you can create a custom resource catalog and define its structure and content as needed. The resources that you include in the resource catalog determine what users can include in their pages and page templates.

Creating a Resource Catalog Folder

To organize your catalog better, you can group similar resources together. For example, group all components together, or all resources from a particular tool or service.

To create a folder:

1. In the Edit dialog, from the **Add** menu, select **Folder**.
2. On the **Target** tab of the Edit Resource Catalog Item - Folder dialog, in the **Name** field, enter a name to display for the folder in the resource catalog.
3. In the **Description** field, enter a brief description of the contents of the folder.
4. Select **Visible** if you want to display the folder in the resource catalog.

   Alternatively, you can specify an EL expression to determine under which conditions the folder displays in the catalog. For example, to specify that the folder should be visible only to users with the `Portal Manager` role, use the following EL expression:

   ```
   #{WCSecurityContext.userInScopedRole['Moderator']}
   ```

5. On the **Options** tab, set the display options for the folder:

Option	Description
Small Icon URI	Enter the path of an icon to display next to the resource when it appears in the **Up** menu in the catalog. The icon should preferably be 16 x 16 pixels in size.
Tool Tip	Enter the text to display when users hover the mouse over the resource in the catalog.
New Attribute Name	Enter the name of an attribute that has been defined for the resource but is not exposed in the dialog. You can also select an attribute from the drop-down list.
New Attribute Value	Enter a value for the attribute specified in the **New Attribute Name** field, and click **Add**. **Tip:** You can click **Add** even without specifying a value for the attribute. You can specify the value once the field is displayed in the dialog along with the other display options.

6. On the **Parameters** tab, enter values for any parameters supported by the folder.

   You can also add custom parameters.

7. Click **OK**.
8. Click **Save and Close**.

   You can now add resources inside this folder, or move resources inside it by dragging and dropping them from the top level folder.

Creating a Custom Resource Catalog Component

The Resource Registry in WebCenter Portal provides a large repository of components that you can add to a resource catalog. However, if this is not sufficient and your business requires you to add other components, such as ADF Facelets components, custom JSF, or raw HTML, you can create a custom component and specify the XML code for the component. Using a custom component is the only way to make such components available to a page in the page editor.

1. In the Edit dialog, from the **Add** menu, select **Component**.
2. On the **Target** tab of the Edit Resource Catalog Item - Component dialog, in the **Name** field, enter a name to display for the component in the resource catalog.
3. In the **Description** field, enter a brief description of the component.
4. Select **Visible** if you want to display the component in the resource catalog.

   Alternatively, you can specify an EL expression to determine under which conditions the resource displays in the resource catalog. For example, to specify that the resource should be visible only to users with the `Portal Manager` role, use the following EL expression:

   ```
   #{WCSecurityContext.userInScopedRole['Moderator']}
   ```

5. In the **XML** text area, enter the XML code for the component.

   The following are examples of custom components:

   - `Output Text` component:

     ```
     <af:outputText xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
                      value="Weather Forecast for the Day" id="#"/>
     ```

   - Custom navigation:

     ```
     <af:forEach xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
                 var="level_1_menu"

     items="#{SiteStructureContext.defaultSiteStructure.listModel['startNode=/,
     includeStartNode=false']}">
     <af:outputText id="#"
                    xmlns:af="http://xmlns.oracle.com/adf/faces/rich"
                    value="#{level_1_menu.title}"/>
     </af:forEach>
     ```

   - External HTML content:

     ```
     <f:verbatim xmlns:f="http://java.sun.com/jsf/core">
       <![CDATA[
         <object width="640" height="385">
           <param name="movie" value="http://www.youtube.com/v/KO2ti-
     B00gw&hl=en_US&fs=1">
           </param>
           <param name="allowFullScreen" value="true">
           </param>
           <param name="allowscriptaccess" value="always">
           </param>
           <embed src="http://www.youtube.com/v/KO2ti-B00gw&hl=en_US&fs=1"
                  type="application/x-shockwave-flash" allowscriptaccess="always"
                  allowfullscreen="true" width="640" height="385">
           </embed>
     ```

```
    </object>]]>
</f:verbatim>
```

An alternative is to create a new task flow and add an `HTML Markup` component inside it.

6. On the **Options** tab, set the display options for the component you are adding, if applicable.

Field	Applies to	Description
Path	Links	Enter the URL to access the resource. The URL format is different depending on what you are linking to: • **Task Flow:** `taskflow://`*`Path_to_Task_Flow/Task_Flow_Definition_File_Name#Task_Flow_ID`* • **Portlet:** `portlet://`*`Producer_ID/Portlet_ID`* • **Content:** `content://`*`Content_Connection_ID/Document_ID`* If you do not know the location, click the **Select** icon to browse for available resources. **Note:** In the Select dialog, the **Select** button is active only when you select a resource that can be included in the navigation model. For example, if you expand the **Portlets** node and select a portlet producer, then the **Select** button is disabled. If you expand the portlet producer and select a portlet, then the **Select** button is enabled.
Repository	Resources that require a repository connection	The name of the connection used to lookup the resource.

7. On the **Parameters** tab, enter values for any parameters supported by the component.

   You can also add custom parameters.

8. Click **OK**.

9. Click **Save and Close**.

Adding a Resource to the Resource Catalog

You can add different types of resources to a custom resource catalog from the Resource Registry.

To add a resource from the Resource Registry to a custom resource catalog:

1. In the Edit dialog, from the **Add** menu, select **Add From Library**.

> **Tip:**
>
> To add a resource within a new folder, select **Folder** to create a folder first and then click **Add**.

2. In the Add Resource Catalog Item dialog, in the left panel, select a type of resource. If you know what you are looking for, you can also enter it in the **Search** field.
3. In the right panel, navigate to the resource you want to add to the resource catalog.
4. Optionally, in the **Name** field, enter a different name to use for the resource in your resource catalog. This does not change the name of the resource in the library.

> **Note:**
>
> If you select multiple resources, you cannot rename them at this point. You can, however, edit them later.

5. Click **Add**.

> **Notes:**
>
> - Avoid adding a data control more than once in a resource catalog. The data control is added to the resource catalog as many times, but when you use the resource catalog to populate a page or task flow, you will not be able to add accessors, methods, or attributes from such data control instances.
> - The **Design Time** data controls folder lists all the WebCenter Portal tools and services data controls. However, adding the `ConnectionsNetworkDC` and `KudosServiceDC` data controls at runtime is not supported. Avoid adding these data controls to your page or task flow.

6. Click **Save and Close**.

Edit Resource Catalog Item

You can edit properties on a resource to set the resource name and description, the icon to be associated with the resource, and to add new properties.

To set properties on a resource:

1. On the **Target** tab, in the **Name** field, edit the name of the resource as it should appear in the resource catalog.
2. In the **Description** field, enter a brief description to display below the resource name in the resource catalog.
3. Select **Visible** if you want to display the resource in the resource catalog.

Alternatively, you can specify an EL expression to determine under which conditions the resource displays in the catalog. For example, to specify that the resource should be visible only to users with the `Portal Manager` role, use the following EL expression:

```
#{WCSecurityContext.userInScopedRole['Moderator']}
```

4. The remaining fields on this tab are specific to the resource type:

Field	Applies to	Description
Path	Links	Enter the URL to access the resource. The URL format is different depending on what you are linking to: • **Task Flow:** `taskflow://`*`Path_to_Task_Flow/Task_Flow_Definition_File_Name#Task_Flow_ID`* • **Portlet:** `portlet://`*`Producer_ID/Portlet_ID`* • **Content:** `content://`*`Content_Connection_ID/Document_ID`* If you do not know the location, click the **Select** icon to browse for available resources. **Note:** In the Select dialog, the **Select** button is active only when you select a resource that can be included in the navigation model. For example, if you expand the **Portlets** node and select a portlet producer, then the **Select** button is disabled. If you expand the portlet producer and select a portlet, then the **Select** button is enabled.
Repository	Resources that require a repository connection	The name of the connection used to lookup the resource.
Include Catalog	Nested Resource Catalogs	Select the resource catalog to nest within the current catalog.
Hide Top-Level Folder	Custom folders that are populated dynamically at runtime.	Select to include contents from the selected folder directly under the parent folder rather than in its own folder. .

Field	Applies to	Description
Factory Class	Custom folders that are populated dynamically at runtime	The factory class used to create the folder. The factory classes for the folders available in the default catalog are as follows: • **Task flow:** `oracle.webcenter.portalframework.sitestructure.rc.TaskFlowResourceFactory` • **Portlet:** `oracle.webcenter.portalframework.sitestructure.rc.PortletResourceFactory` • **Content:** `oracle.webcenter.content.model.rc.ContentUrlResourceFactory` • **Data control:** `oracle.webcenter.datacomposer.internal.adapter.datacontrol.DataControlContextFactory`

5. On the **Options** tab, set display options:

Option	Description
attr.*ATTRIBUTE_NAME*	For each attribute, enter an initial value for the attribute. These are attributes defined against portlets or task flows at design time. When the task flow or portlet is consumed on a page, the attribute is exposed along with the enclosing chrome's attributes; for example, `attr.text` defines the default title for the task flow or portlet and `attr.contentStyle` defines the CSS style to be applied. An attribute is not exposed on the chrome if you do not set an initial value for it.
parameter.*PARAMETER_NAME*	For each parameter, enter an enter initial value for the parameter. These are parameters defined against portlets or task flows at design time. When the task flow or portlet is consumed on a page, the parameter is exposed along with the enclosing `Show Detail Frame` or `Movable Box` component's properties. A parameter is not exposed on the chrome if you do not set an initial value for it.
Large Icon URI	Enter the path of an icon to display next to the resource in the catalog. The icon should preferably be 32 x 32 pixels in size.
Small Icon URI	Enter the path of an icon to display next to the resource when it appears in the **Up** menu in the catalog. The icon should preferably be 16 x 16 pixels in size.
Tool Tip	Enter the text to display when users hover the mouse over the resource in the catalog.
New Attribute Name	Enter the name of an attribute that has been defined for the resource but is not exposed in the dialog. You can also select an attribute from the drop-down list.

Option	Description
New Attribute Value	Enter a value for the attribute specified in the **New Attribute Name** field, and click **Add**. **Tip:** You can click **Add** even without specifying a value for the attribute. You can specify the value once the field is displayed in the dialog along with the other display options.

6. Click the **Parameters** tab and define parameter values for resources that support wiring (for example, portlets and task flows). For details about supported parameters for a resource, refer to the documentation for that resource.
7. Click **OK**.
8. Click **Save and Close**.

Skins

A skin is a resource that defines colors, fonts, and other aspects of various components used on the pages of a portal. A skin changes the way the user interface appears, and not how the application functions. You can use skins to give individual portals a distinct personality or to apply specific branding, achieving the appearance that suits your organization.

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides several built-in skins, and you can create new custom skins. Alternatively, portal designers can develop custom skins to reflect a personality, or to incorporate specific branding. If a skin is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific skins. Within a portal, you can copy an existing skin.

Note:

Creating and editing a skin is a complex task, requiring knowledge of CSS and how the skin is used in page templates. Therefore, skins should be developed by an experienced Web Developer. Oracle recommends that developers use JDeveloper to develop skins for portals. When fully developed, the developer can publish skins directly to WebCenter Portal (the portal server) or to a specific portal for immediate use or for testing. Alternatively, the developer can export the skin to a file and upload the skin to WebCenter Portal later.

Skins are based on the Cascading Style Sheet (CSS) specification. A skin is made up of various selectors that define the CSS styles or properties of different parts of a component. You can adjust the look and feel of any component by changing its style-related properties. Some selectors, like a background or foreground color or a font style, may be global and affect all components.

Each skin works together with a page template to determine the overall look and feel of the pages in your portal. While the page template controls the location and behavior of components on the page, the skin controls the visual appearance of those components. The skin selectors in the skin correspond to the style classes in the page template, so when designing a skin, you must ensure that it is usable with the intended page template.

By default, a portal inherits its skin from the default specified for all portals by the system administrator.

Each page template can define a *preferred skin* to identify the skin that works best with that page template. When a page template is selected as the new default page template for a portal or as the system default, the default skin automatically updates to the page template's preferred skin.

You can optionally select a different skin for an individual portal, overriding the default skin setting. When you change the skin for a portal, the skin is applied to all the pages of the portal. However, the portal administration pages are not affected. They always appear with the default skin, `Alta`.

> **WARNING:**
>
> Changing the default skin to something other than the preferred skin for the selected default page template may produce unexpected results.

Select icons and actions in the toolbar to work with skins. Refer to the online help in the resulting dialogs for information and assistance.

Create New Skin

If none of the available skins meet your requirements, you can create your own. When you create a skin, you use an existing skin as the starting point for the new skin.

> **Note:**
>
> Creating and editing a skin is a complex task, requiring knowledge of CSS and how the skin is used in page templates. While you can develop skins in WebCenter Portal as described here, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop skins for portals. New skins can also be developed from scratch using JDeveloper. When fully developed, the developer can upload skins directly to WebCenter Portal (the portal server) for immediate use or for testing. Alternatively, the developer can export the skin to a file and upload the skin to WebCenter Portal later.

If you choose to create a skin in WebCenter Portal, giving you the option to later refine it in JDeveloper, you can do so at the application level or at the portal level. Application-level skins are available for use in all portals, unless the portal has been specifically excluded. Portal-level skins are available to use only in the portal in which they are created.

To create a skin:

1. In the **Name** field, enter a name for the skin.

   The name is displayed in the **Assets** or **Shared Assets** page and in lists when selecting a skin. You should make the name as descriptive as possible.

2. In the **Description** field, enter a description for the skin.

   The description is displayed below the skin name in the **Assets** or **Shared Assets** page and as a tool tip when selecting a skin. You should ensure that the description helps users determine if they want to use this particular skin.

3. From the **Copy From** list, select an existing skin to use as the starting point for your new skin.

4. Click **Create**.

Edit Skin

In a portal, you can edit a skin to meet your requirements. Note that you can not edit built-in skins; you can copy a built-in skin to create a new custom skin for a portal, then edit that copy.

> **Note:**
>
> Creating and editing a skin is a complex task, requiring knowledge of CSS and how the skin is used in page templates. Therefore, skins should be developed by an experienced Web Developer. Oracle recommends that developers use JDeveloper to modify skins for portals. New skins can also be developed from scratch using JDeveloper. When fully developed, the developer can upload skins directly to WebCenter Portal (the portal server) for immediate use or for testing. Alternatively, the developer can export the skin to a file and upload the skin to WebCenter Portal later.

More

To edit the basic appearance settings of a skin:

1. From the **Item** list, select the target area for which you want to update skin properties:

   - **Page Template** if you want to choose the background color, background image, and font for the template used on a page.
   - **Page** if you want to choose the color and image of the page background.
   - **Task Flow/Portlet** if you want to choose the background color and image of task flows and portlets on a page.

2. From the **Background Color** list, select the background color you want to use for the target area.

   When you select a background color, its RGB value appears in the text box, and the selected target area changes to that color in the **Preview** panel on the right.

3. In the **Background Image** field, enter the URI path of the image you want to use as a background image.

> **Note:**
>
> You can either specify an absolute URL (where the URL should also work if entered in a browser address field), or a relative URL that points to an image located somewhere in WebCenter Portal. To store an image in WebCenter Portal, you must upload the required file, then obtain the image's URL using the **Get Link** action.

4. You can choose to repeat the background image horizontally, vertically, or both. Depending on your requirement, select:
   - **Repeat Horizontally**—Displays the background image aligned horizontally at the top of the page, with the image repeated across the horizontal bar.
   - **Repeat Vertically**—Displays the background image aligned vertically on the left side of the page, with the image repeated across the vertical bar.

   Select **Repeat Horizontally** and **Repeat Vertically** to repeat the selected image across the entire target area.
5. From the **Font Family** list, select the font you want to use for the Page Template area.

   The **Font Family** list is displayed only when **Page Template** is selected in the **Item** list.
6. Click **Save and Close**.

Page Styles

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides several built-in page styles, and you can create new custom page styles. If a page style is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific page styles.

> **Note:**
>
> Creating and editing a page style is a fairly complex task. While you can develop page styles in WebCenter Portal, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop page styles for portals. When fully developed, the developer can publish page styles directly to WebCenter Portal (the portal server) or to a specific portal for immediate use or for testing. Alternatively, the developer can export the page styles to a file and upload the page template to WebCenter Portal later.

A page style defines the initial layout of the main *content area* of a newly created page, and may also dictate the type of content that the page supports. For example, the Wiki page style provides an instant wiki; a Blank page style has few restrictions on the types of content users can add to the pages that are based on it.

When users create a page, they are provided with selection of page styles to use.

> **Note:**
>
> If you create the initial pages for a new portal in the Create Portal wizard, there is no opportunity to select a page style for the pages. If the portal template includes a page style called Default Page Style, then that is the page style used for all pages created in this way. Otherwise, the built-in Blank page style is applied to the pages. It is not possible to change a page style for a page after creating the page.

The initial layout and content are copied from the page style to the main content area of a newly created page.

Select icons and actions in the toolbar to work with page styles. Refer to the online help in the resulting dialogs for information and assistance.

Content Presenter

When you define a Content Presenter task flow, you must select a Content Presenter display template. The template defines how the selected content renders on the portal page.

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides several built-in Content Presenter display templates, and a developer can create custom display templates in JDeveloper. If a Content Presenter display template is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific display templates.

A Content Presenter display template can handle single content items, multiple content items, or a combination of the two. For example, a multiple content item template might render tabs for each item and then call a single item template to render the details of a selected item.

> **Note:**
>
> You cannot create or edit Content Presenter display templates in WebCenter Portal; they must be developed in JDeveloper and published to WebCenter Portal as a shared asset or as an asset for a specific portal.

Select icons and actions in the toolbar to work with Content Presenter display templates. Refer to the online help in the resulting dialogs for information and assistance.

Task Flow Styles

A task flow style provides a starting point for creating a new task flow.

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides the two built-in task flow styles shown in the table below, and you can create new custom task flow styles. If a task flow style is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific task flow styles.

You cannot directly edit the built-in task flows styles. However, you can create custom task flow styles by copying an existing style and then editing its source code.

Name	Description
Blank	A one-column task flow with one layout box into which you can add content, including additional layout components. Switching this task flow style is allowed.
Stretch	Maximizes the task flow to take up all available space. Task flows based on this style cannot be switched.

Select icons and actions in the toolbar to work with task flow styles. Refer to the online help in the resulting dialogs for information and assistance.

Layouts

A layout defines how content is organized on a page. When you create a new page, you select a page style for the page. Every page style is associated with a default layout, which is inherited by the new page. You can modify the layout for a page or page style in the page editor.

On the **Assets** and **Shared Assets** pages, WebCenter Portal provides several built-in layouts, and you can create new custom layouts. If a layout is a shared asset (available to all portals), it is shown on the **Assets** page of all portals along with portal-specific layouts.

> **Note:**
>
> Creating and editing a layout is a fairly complex task. While you can develop layouts in WebCenter Portal, the editing capabilities are limited. Oracle recommends that developers use JDeveloper to develop layouts for portals. When fully developed, the developer can publish layouts directly to WebCenter Portal (the portal server) or to a specific portal for immediate use or for testing. Alternatively, the developer can export the layouts to a file and upload the page template to WebCenter Portal later.

You cannot directly edit any of the built-in layouts. However, you can create custom layouts by copying an existing layout and then editing it in the page editor. You can also download custom layouts, modify them in Oracle JDeveloper for additional customization, and upload them back into WebCenter Portal.

Select icons and actions in the toolbar to work with layouts. Refer to the online help in the resulting dialogs for information and assistance.

Pagelets

Pagelets are subcomponents of a web page accessed through Pagelet Producer that can be injected into any proxied application. Any application on a Pagelet Producer resource that returns markup can be registered as a pagelet, which can then be displayed in WebCenter Portal, or any web application.

A pagelet is a reusable user interface component similar to a portlet. While portlets were designed specifically for portals, pagelets are designed to run on any web page. Any HTML fragment can be a pagelet. Pagelet developers can create pagelets that are parameterized and configurable, dynamically interact with other pagelets, and respond to user input using Asynchronous Javascript and XML (AJAX) patterns.

Select icons and actions in the toolbar to work with pagelets. Refer to the online help in the resulting dialogs for information and assistance.

Create New Pagelet

Use the Create New Pagelet dialog to open the Pagelet Producer Console, where you can create and manage pagelets and pagelet resources for use in WebCenter Portal.

Element	Description
Connection Name	Leave **Ensemble** set as the connection name.
Continue	Click to open the Pagelet Producer Console.
Cancel	Click to return to the Shared Assets page.

For more information, see:

- Managing the Pagelet Producer in *Administering Oracle WebCenter Portal*
- Creating Pagelet Producer Objects in *Developing for Oracle WebCenter Portal*
- Working with Pagelets in *Building Portals with Oracle WebCenter Portal*

Task Flows

Task flows are containers in which you can add components such as data controls, portlets, content, and other task flows. Task flows provide the advantage of being reusable, so that the same task flow can be consumed on multiple portal pages. You can create your own custom task flow, and add components to the task flow.

Data retrieved from a web service by a data control can be rendered on a portal page in a custom task flow. You can select how to present the data, appropriate to the specific data control. For example, the data can be shown as a table, graph, form, button, or label. You can enable users to control the data displayed by a data control by including a parameter form along with the data presentation. You can also wire data control parameters to task flow parameters so that the data control retrieves data based on the values specified for the task flow parameters. Users can change the value of the task flow parameters in the page editor to request the corresponding data from the data control.

Select icons and actions in the toolbar to work with task flows. Refer to the online help in the resulting dialogs for information and assistance.

Create New Task Flow

WebCenter Portal provides many built-in task flows, available through the resource catalog in the page editor. You can also create custom task flows as portal assets, which you can add to your portal pages to provide presentations of the data retrieved by web service data controls, along with other components such as portlets, content, and other task flows.

To create a task flow:

1. In the **Name** field, enter a name for the task flow.

   The name is displayed in the resource catalog.

2. (Optional) In the **Description** field, enter a meaningful description for the task flow.

   The description is displayed in the resource catalog.

3. From the **Task Flow Style** drop-down list, select the task flow style to use for the task flow.
4. Click **Create**.

   The newly created task flow is listed on the **Assets** or **Shared Assets** page. The empty check box in the **Available** column indicates that the task flow is not yet published and hence is not available for users to add to their pages. To publish the task flow, select the check box.

Create Form

The **Form** option is displayed only for data control accessors that return a collection of objects that can be displayed as a form element.

When you add a data control to a task flow as a form, you have two options:

- **Read-only Form**—Add the data control as a read-only form. The form displays data based on your specification, but the data cannot be edited.
- **Form**—Currently editable forms are not supported.

To present data as a form:

1. On the Type page of the Create Form wizard, select **Read-only Form**.
2. Select **Include Navigation Controls** to display **First**, **Previous**, **Next**, and **Last** buttons on the form. Navigation controls are helpful when multiple records are retrieved from the data source.

   > **Note:**
   >
   > Navigation controls may not work properly if the data control provides bind parameters.

3. Click **Next**.
4. On the Items page, by default all the accessor attributes are selected to display in the form. If there are any accessor attributes that you do not want to display in the form, select them in the **Selected Items** list and move them to the **Available Items** list.

> **Note:**
>
> If an item has a scalar value, you cannot add the item to the form after initial creation.

5. Use the arrow icons next to the **Selected Items** list to determine the order in which the attributes are displayed as fields in the form.
6. Click **Next**.
7. On the Fields page, for each field in the form, specify display options as follows:
   - **Label**—Specify text to use as a label for the selected field.
   - **Form Component**—Select **Read Only Text** to display the field as read-only text.
8. If the data control has associated parameters that you want to expose on a parameter form, click **Next**.
   a. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

      Any parameters you select in this way are displayed in a parameter form above the table, form, or graph that you are adding. Users can specify a value and click a button to refresh the data according to the values they specified.

   b. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

      The initial value displayed in this field is specified when the data control was created. You can override this initial value to control the initial display of data.

   c. In the **Submit Button Label** field, enter the text that you want to be displayed on the button that users click to submit values on the parameter form.
9. Click **Create**.

Create Graph

The **Graph** option is displayed only for data control accessors that return a collection of objects that can be displayed as a graph. You can display data as a bar, pie, line, or an area chart.

To present data as a graph:

1. On the Type page of the Create Graph wizard, select the desired type of graph: **Area**, **Bar**, **Line**, or **Pie**, then click **Next**.
2. On the **Sub-Type** page, select a subtype of the type of graph you selected, then click **Next**.

   For example, you can display a bar graph as a **Bar**, **Dual-Y Bar**, **Split Dual-Y Bar**, **Percent**, **Stacked Bar**, **Dual-Y Stacked Bar**, **Split Dual-Y Stacked Bar**, or **Floating Stacked Bar** graph.
3. On the Layout page, select your desired layout of graph elements, such as the title, legend, and footnote, then click **Next**.
4. On the Placement page, select how you want each of the available accessor attributes to be used in the graph, then click **Next**.

For example, select which accessor attribute to use to determine the values for the x-axis and the bars in a bar graph. Select **<none>** if you do not want to use an accessor attribute in the graph.

5. On the Format page, enter the text to use for each graph element, such as the title, legend, and footnote.
6. If the data control has associated parameters that you want to expose on a parameter form, click **Next**.
   a. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

      Any parameters you select in this way are displayed in a parameter form above the table, form, or graph that you are adding. Users can specify a value and click a button to refresh the data according to the values they specified.
   b. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

      The initial value displayed in this field is specified when the data control was created. You can override this initial value to control the initial display of data.
   c. In the **Submit Button Label** field, enter the text that you want to be displayed on the button that users click to submit values on the parameter form.
7. Click **Create**.

Create Table

The **Table** option is displayed only for data control accessors that return a collection of objects that can be displayed in the columns of a table.

When you add a data control to a task flow as a table, you have two options:

- **Read-only Table**—Add the data control as a read-only table. The content in the table cannot be edited.
- **Table**—Editable tables are not currently supported.

To present data as a table:

1. On the Type page of the Create Table wizard, select **Read-only Table**.
2. (Optional) In the Behavior section, select one or more of the following options to enable customization of the table:
   - **Row Selection**—Enables selection of a row on which the user can perform any operation.

     When you enable row selection in a table and select a row, internally, the column values of the selected row are added into a row selection bean. The column values are stored in the following EL format:

     ```
     #{dataComposerViewContext.dataSelection.COLUMN_NAME}
     ```

     You can use this format to reference the table columns from elsewhere in the task flow. Typically, this is useful in task flows where data presentations are wired in a master-detail relationship.

> **Note:**
>
> Row selection is not supported if the data control contains bind parameters.

- **Filtering**—Displays a text field above each column in the table. Users can specify a filter criteria in these text fields to display only those rows that match the criteria.
- **Sorting**—Displays **Up** and **Down** arrows in each column header that users can click to sort the table in ascending or descending order by that column.

3. Click **Next**.
4. On the Items page, by default all the accessor attributes are selected to display in the table. If there are any accessor attributes that you do not want to display in the table, select them in the **Selected Items** list and move them to the **Available Items** list.

   > **Note:**
   >
   > If an item has a scalar value, you cannot add the item to the table after initial creation.

5. Use the arrow icons next to the **Selected Items** list to determine the order in which the attributes are displayed as columns in the table.
6. Click **Next**.
7. On the Columns page, for each column in the table, specify display options as follows:
   - **Column Header**—Specify a name to use as a header for the selected column.
   - **Display As**—Select an output format for the column:
     - **Output Text**—Display data records as styled read-only text.
     - **Output Formatted**—Display data records as read-only text with limited formatting.
     - **Hyperlink**—Display data in the selected column as a link, for example, when connecting to an employee database, you can display employee names as hyperlinks so that, when users click a link, it takes them to the employees profile page.
   - **Align**—Select whether the data in the table cells must be aligned to the **center**, **end**, **left**, **right**, or **start**.
   - **URL**—Create dynamic URLs based on the values coming from the data control. Specify the URL along with the EL value that must be appended to the URL. The URL field is enabled only if you selected **Hyperlink** in the **Display As** list.

     For example, if you are adding a WebCenter Portal service data control as a table that lists the portals of which the current user is a member, you can enter `/spaces/#{row.item}` in the **URL** field to display portal names as hyperlinks. Clicking a portal name in the table opens the portal.

- **Open in New Window**—Select whether to open the URL in a separate window. This check box is available only if you selected **Hyperlink** in the **Display As** list.

8. If the data control has associated parameters that you want to expose on a parameter form, click **Next**.
   a. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

      Any parameters you select in this way are displayed in a parameter form above the table, form, or graph that you are adding. Users can specify a value and click a button to refresh the data according to the values they specified.
   b. On the Visualization Parameter page, select the check box next to the parameter for which you want users to be able to provide their own values.

      The initial value displayed in this field is specified when the data control was created. You can override this initial value to control the initial display of data.
   c. In the **Submit Button Label** field, enter the text that you want to be displayed on the button that users click to submit values on the parameter form.
9. Click **Create**.

Task Flow Properties

Use the Task Flow Properties dialog to create task flow parameters.

Use task flow parameters to pass values from the task flow to components on the task flow. This way, the components display data based on the task flow parameters. When you wire task flow parameters to parameters on its child components, you provide users the ability to decide what data they want to view in the child components.

Consider the example of a task flow that contains a data control. You can create task flow parameters and bind them to the data control parameters. When you pass values from the task flow to the data control, the data control displays records based on the task flow parameter values. As end users can edit the task flow's parameters in the page editor, they can control what is displayed in the data control.

To define a task flow parameter:

1. Enter a **Name**, **Type**, and **Storage** value for the task flow parameter.

   The **Storage** value identifies the scope for the parameter. It specifies the location for storing the parameter value. Out of the box, you are provided with four storage options, as described in the following table. However, you can specify any custom storage location by providing the EL value.

   Table 3-5 Storage Values

Name	Description
`pageFlowScope`	The value is available to all instances of the task flow on the page.
`viewScope`	The value is available only to the selected instance, for the current user.

Table 3-5 (Cont.) Storage Values

Name	Description
`applicationScope`	The value is available to all instances of the task flow within the application or across applications.
`sessionScope`	The value is available only to the current user, for the current session.

2. Make a note of the value in the **Storage** field.
3. Click **OK**.

Data Visualizations

WebCenter Portal can retrieve data from a REST or SQL *data source* using a *business object*, simplifying the complexities of application integration. The retrieved data can be rendered on a portal page in a *data visualization* using a *visualization template*. For example, the data can be presented in one of the built-in visualization templates, or a developer can build a custom visualization template in JDeveloper.

Out-of-the-box, no data visualizations exist. Data visualizations can be created only at the portal level (as a portal asset), not at the application level (as a shared asset).

Select icons and actions in the toolbar to work with data visualizations. Refer to the online help in the resulting dialogs for information and assistance.

Visualization Templates

WebCenter Portal can retrieve data from a REST or SQL *data source* using a *business object*, simplifying the complexities of application integration. The retrieved data can be rendered on a portal page in a *data visualization* using a *visualization template*. For example, the data can be presented in one of the built-in visualization templates, or a developer can build a custom visualization template in JDeveloper.

WebCenter Portal provides several built-in visualization templates that you can use immediately, or a developer can create custom display templates in JDeveloper.

If a custom visualization template is a shared asset (available to all portals), it is shown on the **Shared Assets** page and on the **Assets** page of all portals along with portal-specific templates. You can not edit or manage the built-in visualization templates, so they are not exposed on the **Shared Assets** or portal **Assets** page.

Select icons and actions in the toolbar to work with visualization templates. Refer to the online help in the resulting dialogs for information and assistance.

Data Controls

A *web service data control* is essentially a bridge that makes data from a source available to a portal.

Data retrieved from a web service by a data control can be rendered on a portal page in a custom task flow. You can select how to present the data, appropriate to the specific data control. For example, the data can be shown as a table, graph, form, button, or label. You can enable users to control the data displayed by a data control by including a parameter form along with the data presentation. You can also wire data control parameters to task flow parameters so that the data control retrieves data based on the values specified for the task flow parameters. Users can change the value of the task flow parameters in the page editor to request the corresponding data from the data control.

More

Select icons and actions in the toolbar to work with data controls. Refer to the online help in the resulting dialogs for information and assistance.

Create New Data Control

A web service data control retrieves data from a web service that is accessed using standard protocols, such as SOAP and HTTP.

To create a web service data control:

1. In the **Name** field, enter a name for the data control.

   This name is displayed in the resource catalog.

2. In the **Description** field, enter a brief description of the data control.

   This description is displayed in the resource catalog.

3. From the **Data Control Type** drop-down list, select **Web Service** and then click **Continue** to open the Create New Data Control wizard.

Refer to the online help in the wizard for information and assistance.

Create New/Edit Data Control wizard

Use the Create New (or Edit) Data Control wizard to create (or edit) a data control that retrieves data from a web service that is accessed using standard protocols, such as SOAP and HTTP..

To create or edit a web service data control:

1. In the **WSDL URL** field, enter the location of the web service's WSDL file, for example:

   ```
   http://www.example.com/exampleservice/example.asmx?WSDL
   ```

2. If the web service is on the other side of a firewall from your portal, use the **Host** and **Port** fields to configure proxy authentication.

   To ensure a secure connection to the web service, you must first configure your application to use proxy authentication.

> **Tip:**
>
> - If a central WebCenter Portal proxy (or RSS proxy) is already configured, then the proxy fields are automatically populated with that proxy host name and port number. You can modify the proxy details or clear the fields if you do not want to configure the proxy.
>
>   Changing the WebCenter Portal central proxy does not change the proxy settings against the web service data control. However, changing the web service data control proxy setting changes the WebCenter Portal central proxy setting.
> - If a Web Logic Domain proxy is already configured, and if you choose not to set a proxy while creating or editing the web service data control, then the Web Logic Domain proxy is used as the default setting.

3. If you are connecting to a secured web service, then enter the **Username** and **Password** to access the web service endpoint.

> **Tip:**
>
> If access to the WSDL itself is secured, then you cannot connect to the web service from the **Create New Data Control** page. To work around this limitation, access the WSDL in a browser by specifying the user name and password, download the WSDL page, save it locally as a `.wsdl` document, then specify the path to this document in the **WSDL URL** field.

4. Click **Show Methods** to establish a connection to the web service using the specified WSDL and display the methods available for the web service.
5. From the **Service** drop-down list, select the service to use for the data control.
6. From the **Port** drop-down list, select one of the available ports.

   The **Methods** field displays the methods available for the specified web service.

   All methods under the selected port are added to the data control. These methods are later available for selection in the resource catalog.
7. If the web service is secured using OWSM, use the fields in the Oracle Web Service Manager Security Policies section to specify the policies to use, as described in the following table.

Table 3-6 OWSM Security Information

Name	Description
MTOM	The MOTM (message transmission optimization mechanism) policy you want to use.
Reliability	The reliability policy you want to use.
Addressing	The addressing policy you want to use.

Table 3-6 (Cont.) OWSM Security Information

Name	Description
Security	Any additional security policies you want to apply.

For example, if your web service is secured using a policy named `mycompany/wss_username_token_service_policy`, populate the **Security** field with the client policy, which is `mycompany/wss_username_token_service_policy`.

8. You can override properties on the **Security** policy that you specified in the previous step. Use the **Add Property** and **Remove Property** buttons to add or remove entries in the Override OWSM Policy Properties table.

   > **Tip:**
   >
   > Override properties are defined by the policy. Therefore, to perform this step, you must know the policy being used and the properties that you can override.

   For example, if you specified a **Security** policy, `mycompany/wss_username_token_client_policy`, and the policy has a `csf-key` property, then in the override section, click **Add Property** to add a value for `csf-key`. Note that this key must exist in the configured keystore.

9. To set values for a method's parameters, select the method and click **Next**.

   A web service may expose scalar and complex parameters that control the data displayed by the data control.

   For each parameter:

   > **Tip:**
   >
   > For complex parameters, you must first expand the parameter to display the scalar values that make up the parameter.

   a. In the **Display Name** field, enter a user-friendly name for the parameter.

      This name is displayed to users when they consume the data control in a task flow.

   b. In the **Tooltip Text** field, enter a brief description of the parameter.

      This provides users with assistance in determining the purpose of the parameter.

   c. Select **Show to User** to display the parameter to users when they consume the data control in a task flow.

> **Note:**
>
> You can specify values for exposed parameters only while consuming the data control in a task flow.

10. Click **Create**.

Business Objects

WebCenter Portal can retrieve data from a REST or SQL *data source* using a *business object*, simplifying the complexities of application integration. The retrieved data can be rendered on a portal page in a *data visualization* using a *visualization template*. For example, the data can be presented in one of the built-in visualization templates, or a developer can build a custom visualization template in JDeveloper.

The main function of a business object is to simplify the source of data to present that data on a portal page. When the data source is not complex, a business object is automatically created by WebCenter Portal when a data source is selected in the Define Data Visualization wizard. For an automatically-created business object, all the attributes and methods for the data source are added to the business object. In this case, the display name and description of each attribute and method are not available for configuration. Typically, advanced users create business objects manually as a portal asset, with a limited set of attributes that are relevant for building data visualizations. Business objects can be created only at the portal level (as a portal asset), not at the application level (as a shared asset).

A business object can expose multiple scalar attributes as well as collection attributes. For REST, it can support multiple methods such as `GET`, `PUT`, `POST`, and `DELETE`, based on support from the underlying REST data source. Each business object has a reference to the corresponding data service, which in turn has a reference to the underlying data control that provides the actual model to access the back-end data source.

Out-of-the-box, no business objects exist. Business objects can be created only at the portal level (as a portal asset), not at the application level (as a shared asset).

Select icons and actions in the toolbar to work with business objects. Refer to the online help in the resulting dialogs for information and assistance.

Create New/Edit Business Object

To create or edit a business object:

1. In the **Name** field, enter a name for the business object.

   The name is displayed in lists when selecting a business object.

   > **Note:**
   >
   > A business object name cannot include the reserved words `Business Object`.

2. (Optional) In the **Description** field, enter a description for the business object.

The description is displayed below the name in the **Assets** page. Ensure that the description helps users determine if they want to use this particular business object.

3. On the **Data Sources** tab, define the data source to retrieve the data for the business object:

> **Note:**
>
> If you want to select an existing REST data source, but know that the underlying data has changed, you can exit the wizard and go to the **Assets** page of the portal to edit the data source, where you can select **Refresh Schema** to refresh the data source and business object with changes such as added, deleted, or renamed attributes. For more significant structural changes, you will need to re-create the data source, and any data visualizations where it is used.

   a. From the **Type** list, select the type of data source from which the business object will retrieve data (**REST** or **SQL**).

      The generated list shows all data sources that are portal assets of the selected type.

   b. From the generated list of data sources, select the required data source.

   c. From the **Method** list, select the method to be used to retrieve the data (for example, `GET`).

   d. In the generated list of methods, click the **Expand** icon on a method to view the attributes associated with the selected data source, then click the check boxes to select each attribute required by the business object. Click the **UnSelect Children** icon to deselect all check boxes.

4. On the **Configuration** tab:

   a. Click the **Edit** icon next to a method or attributes to modify a name or description for the Source retrieved from the data source.

   b. Click the **Delete** icon next to a method or attribute to remove it from the data to be retrieved by the business object.

5. On the **Parameters** tab, if parameters are present, click **Edit** to modify the name and/or value of a parameter.

   Parameters listed are those retrieved from the data source. For example, if you create a SQL data source using a query with bind variables, then all bind variables are exposed as parameters. Similarly, for a REST data source, parameters are specified in the Resource URL (for example, `http://example.com/stocks?symbol=ORCL`, where `symbol` is a parameter). Parameter names in a business object are formed using the syntax *`paramName_method`*. For example, using the REST data source example above, the default business object parameter name will be `symbol_GET`. You can change the name of the parameter as desired.

6. On the **Preview** tab, click **Test** to preview the data retrieved from the data source based on your selections.

7. Click **Save**.

The newly created business object is listed on the **Assets** page. By default, the check box in the **Available** column is selected, indicating that the business object is published and available to users to bind to a data visualization.

REST Data Sources

Out-of-the-box, no REST data sources exist. You can create a REST data source at the application level or at the portal level. Application-level REST data sources are available for use in all portals, unless the portal has been specifically excluded. Portal-level REST data sources are available for use only in the portal in which they are created.

Select icons and actions in the toolbar to work with REST data sources. Refer to the online help in the resulting dialogs for information and assistance.

Create New/Edit REST Data Source

To create or edit a REST data source:

1. Enter a **Name** and optional **Description** for the data source.
2. Enter a valid **Resource Path** URL against which the REST data source will be created, then click **Test** to confirm the resource path is valid and that it returns data. For example, the resource path `http://dev.markitondemand.com/Api/v2/Quote?symbol=AAPL` provides stock quotes.

   > **Note:**
   >
   > The **Resource Path** must support at least the `GET` method, along with any other method (`PUT`, `POST`, `DELETE`).

3. In the list of **Parameters** populated based on the resource path provided, remove or add parameters as needed.

   > **Note:**
   >
   > If you modify the **Resource Path** URL, the list of parameters will be refreshed, and you may need to respecify the required data source parameters.

4. Select a **Data Source Return Type** that specifies data type returned by the **Resource Path** URL. A URL can return data in either **XML** format or **JSON** format.
5. Select or deselect **Use Portal Proxy** and **Use Authentication** as required. For an external REST URL, select **Use Portal Proxy**.
6. Select or deselect **Enable Caching** as required, and enter values for **Time To Live (ms)** and **Max Weight**.
7. From the **Methods** list, select the method to assign to the REST data source: `GET`, `PUT`, `POST`, or `DELETE`.
8. In the list of **Parameters** populated based on the resource path provided, remove or add parameters as needed.

9. Type payload values in the **Request Payload** and **Response Payload** fields as required. **Tip**: Enter the Resource Path URL in a browser to see what data is returned.

> **Note:**
>
> While the **Resource Path** URL can be the same for all methods (`GET`, `PUT`, `POST`, `DELETE`), the **Request Payload** and **Response Payload** can be different for each method. You will need to provide separate payload values for every method that you specify.

An example of XML for **Request Payload** may look similar to:


```
<opportunity>
<city>DOCUMENT</city>
<comment>Default</comment>
<country>US</country>
<createdBy>LHUGHES</createdBy>
<creationDate>2015-10-01T00:00:00-08:00</creationDate>
<currencyCode>USD</currencyCode>
<customerInfo>
<contactEmail>david@abccorp.com</contactEmail>
<contactName>David</contactName>
<contactPhone>9987656781</contactPhone>
<customerPhone>9987656781</customerPhone>
</customerInfo>
<formattedAddress>559 Cooper St, SEATTLE, WASHINGTON 98102</formattedAddress>
<locationId>300100000393851</locationId>
<opportunityId>300100029659792</opportunityId>
<opportunityName>OpptyForABCCorp</opportunityName>
<opportunityNumber>CDRM_23685</opportunityNumber>
<postalCode>98102</postalCode>
<primaryOrganizationId>201</primaryOrganizationId>
<primaryRevenueId>300100029659793</primaryRevenueId>
<products>
<productName>Server - Class III</productName>
<quantity>10</quantity>
<totalPrice>8000</totalPrice>
<unitPrice>800</unitPrice>
</products>
<products>
<productName>Pro Server</productName>
<quantity>15</quantity>
<totalPrice>11250</totalPrice>
<unitPrice>750</unitPrice>
</products>
<revenue>8000</revenue>
<salesStage>01 - Qualification</salesStage>
<targetPartyId>100000015802569</targetPartyId><targetPartyName>Designs Cooper</
targetPartyName>
</opportunity>
```


10. If you selected **Use Authentication**:

    - Click **Next**.

- On the **Auth** page, select existing credentials, or click **Add Credentials** to create a new credential (if you have been granted the required permission to create a new credential).
- On the **Credentials** page, select from the **Select Security Type** list:
  - **Basic Authentication** support is provided via the External Application Service of WebCenter Portal. The user name and password for the REST service are stored in the OPSS Credential Store using the External Application Service. When a data visualization is rendered at runtime, WebCenter Portal retrieves these credentials to present the data on the page.
  - **OAuth** support is provided by OWSM integrated with REST Data Control. ADF REST Data Control supports only OAuth 2.0 using IDM OAuth Servers. External REST services that are protected using a non-IDM solution are not supported.
  - **Taleo Token Generator** authentication is provided by a custom security provider to propagate security at runtime. If authentication is successful, a Taleo token is issued. That token must be passed to each subsequent resource request to retrieve data.
- Under **Configuration**, define or edit the login information, depending on the security type:
  - For **Basic Authentication**, enter the **Login** user name, and **Password**.
  - For **OAuth**, enter the **Login** user name, and **Password** corresponding to the Client ID and Password configured in OAuth server, and enter the **Token Generator URL** of the OAuth Server.
  - For **Taleo Token Generator**, enter the **Login** user name, and **Password**, and enter the **Login URL** and **Org Code** to access the Taleo end point. A user must be authenticated using user name, password, and organization code (company ID) on a defined login URL.

11. Click **Save**.

    The newly created data source is listed on the **Assets** or **Shared Assets** page.

    The empty check box in the **Available** column indicates that it is not yet published and hence is not available to other users. To publish the data source, click the check box.

SQL Data Sources

Out-of-the-box, no SQL data souces exist. You can create a SQL data source at the application level or at the portal level. Application-level SQL data sources are available for use in all portals, unless the portal has been specifically excluded. Portal-level SQL data sources are available for use only in the portal in which they are created.

The default SQL style for all database connections is `Oracle`. If the data source is a Microsoft SQL Server database, then the system administrator must perform the following tasks:

- Manually override the SQL style with one that supports the SQL Server database. To do this, set the Java system property `jbo.SQLBuilder` to `SQLServer`. When Oracle WebLogic Server is started with this configuration, it supports the SQL style specified.

Set the `jbo.SQLBuilder` property in any of the following ways:

– Open the *`DomainHome`*`/bin/setDomainEnv.sh` file and add `-Djbo.SQLBuilder=SQLServer` to the `JAVA_OPTIONS` line.

– Edit the managed server start script in a text editor and add `-Djbo.SQLBuilder=SQLServer` to the `JAVA_OPTIONS` line.

– In the WebLogic Server Administration Console, navigate to the `WC_Spaces` managed server, click the **Server Start** tab and specify the system property in the **Arguments** text area.

- Specify `Java` as a `typemap` entry using the `jbo.TypeMapEntries` property as follows:

  ```
  -Djbo.TypeMapEntries="Java"
  ```

Select icons and actions in the toolbar to work with SQL data sources. Refer to the online help in the resulting dialogs for information and assistance.

Create New/Edit SQL Data Source

To create or edit a SQL data source:

1. In the wizard, enter a **Name** and optional **Description** for the data source.
2. Under **Configuration**:
   - In the **JDBC Data Source** field, enter a JNDI name of JDBC data source.
   - In the **Password** field, enter the JDBC data source password.
3. Enter a **SQL Statement** to query the SQL data source. For example:

   ```
   SELECT * FROM Persons WHERE City LIKE 'sa%'
   ```

   You can use `:`*`bind-name`* to refer to bind variables in the SQL statement. Bind variables are useful in controlling the data displayed, such as in the following example:

   ```
   SELECT ename, empno, mgr, deptno FROM emp WHERE job IN (:job) ORDER BY empno ASC
   ```

   This query returns details of all employees with a particular job role, for example, sales managers. In this query, `:job` defines the parameter `job`, which maps to the `job` column in the `emp` database table. The query returns data based on the `job` value. You can add as many bind variables as required. You can also use the same variable multiple times in the query.

> **Notes:**
>
> - Avoid using SQL reserved words and keywords for parameter names in the query. The use of reserved words will cause the query to fail. For more information, see the topic titled "Oracle SQL Reserved Words and Keywords" in the *Oracle Database SQL Language Reference* in the Oracle Database documentation library.
> - If you are using a SQL Server database, then you may get an error if the query contains a column with the `NCHAR` or `NVARCHAR` data type. If the SQL data control fails to execute a query containing `NCHAR` and `NVARCHAR`, it will not be added to the Data Controls folder in the resource catalog. To work around this limitation, you must modify the query using the `CONVERT` function. For example:
>
> ```
> SELECT CONVERT(VARCHAR(20), col1) col1, CONVERT(VARCHAR(20), col2)
> col2 FROM table1
> ```

4. To allow this SQL data source to be updated, select **Updatable**. The underlying table must have a primary key defined on the table for this feature to work and updateable query should be based on the single table.
5. Click **Test** to confirm whether required entries are complete and valid.
6. Click **Save**.

Security Settings

You can define and manage access permissions for a specific asset. By default, asset access is controlled by application-level permissions. After you define asset-specific permissions, the permissions defined at the application or portal level no longer apply.

To set security for an asset:

1. In the Security Settings dialog, select **Use Custom Permissions** to define who can access the selected asset and what level of access they have. When you select this option, the other controls in the dialog become available.
2. Specify the user or group to whom you want to grant access.
   - Click **Add Users** to search for and select individual users available in your identity store.
   - Click **Add Groups** to search for and select groups of users available in your identity store.
3. For each user or group selected, specify the level of access you want to grant. Select:
   - **Manage** to grant full access on the asset. Such users can perform tasks such as edit, delete, grant access, show or hide, and so on.
   - **Update** to grant the permission to edit the asset. Such users can edit the asset, but they cannot delete it.
4. If you want to revoke access from any user or group, select that entity and click **Delete Access**.

5. To revoke all custom permissions granted on the asset, select **Use Portal Security Settings**.
6. Click **OK**.

Show Properties

Each asset has an associated Show Properties dialog that summarizes useful information about it. You cannot edit the properties displayed in the Show Properties dialog of an asset.

Review the properties for the selected asset:

Table 3-7 Asset Properties

Property	Description
Display Name	The display name of the asset. Editable in the Edit Properties dialog.
Description	The description of the asset. Editable in the Edit Properties dialog.
Icon URI	The URI of the icon that is associated with the asset. Specify either an absolute URL, or a relative URL that points to an image located somewhere on the portal server. Currently, the only asset that can be associated with an icon is a page style. Editable in the Edit Properties dialog.
Category	The category to which the asset belongs. For example, all page styles associated with Sales could belong to a Sales category. Editable in the Edit Properties dialog.
Asset Type	The type of the asset. For example, `pageStyle` or `taskFlow`.
Internal ID	The unique internal identification number assigned to the asset.
Content Directory	The path where dependent objects of the asset, such as images, JavaScripts, style sheets, and HTML files, are stored on the portal server.
JSPx File	The path to the JSF (`.jspx`) file for the asset.
Page Definition	The path where the page definition XML file of the asset is stored on the portal server. Page definitions are used for page templates, page styles, task flow styles, and task flows.
Metadata File	The path where metadata files, if any, of the asset are stored on the portal server.
Created By	The name of the user who created the asset.
Date Created	The date and time when the asset was created.
Modified By	The name of the user who last edited the asset.
Date Modified	The date and time when the asset was last edited.
Locked By	The name of the user who most recently locked the asset.
Date Locked	The date and time when the asset was most recently locked.

Table 3-7 (Cont.) Asset Properties

Property	Description
Exclude From Home Portal	(Shared assets only) Specifies whether the asset is available in the Home portal. Editable in the Edit Properties dialog.
Exclude From Portal(s)	(Shared assets only) Specifies in which portals the asset is available or excluded. Editable in the Edit Properties dialog.
Attributes	Attributes that determine the behavior of the asset. For example, `editPageAfterCreation` is a custom attribute of the page style asset and controls whether a newly created page of that style opens in Edit or View mode. It takes a value of `true` or `false`. When you associate this attribute with a particular page style, every time a user creates a page based on the selected style, the attribute value is considered and the page behaves accordingly. Editable in the Edit Properties dialog.

4

Online Help Topics for Content

Add Link

To add a hyperlink to rich text:

1. In the Add Link dialog, from the **Link Type** drop-down 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.
   - **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.
   - **Content Cloud** to link to an item in the Oracle Content and Experience Cloud content repository.

     The **Digital Assets** tab shows the items published in the collection configured for WebCenter Portal Cloud Service. Select the item you want to be displayed when the link is clicked, or use the Find option to search for the item.

     The **Documents** tab lists all the folders in Oracle Content and Experience Cloud to which you have access. Navigate to the folder that contains the item you want to be displayed when the link is clicked. Use the **All** menu to view all the items or only the ones that are owned by you, shared with you, or marked as a favorite.
2. 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.

3. From the **Target** drop-down 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.

Configure Content Manager

You can configure the Content Manager task flow to present a customized view to users, rather than the default view listing folders and files from the current portal's root folder.

To configure the Content Manager task flow to display a customized, pinned content view:

1. In the Configure Content Manager dialog, select options to define the Content Manager view:

Element	Description
Access selection area options	Click to select options to define the Content Manager view: Search, Browse, Favorites, Clipboard, and Home.
Search	Click to open the Searching Documents page where you can search for documents, and filter and sort the results to define the default view of the selected instance of the Content Manager task flow. You can choose to view the search results as lists, thumbnails, or tables and specify the number of items displayed per page.
Browse	Click to open the Libraries page where you can search for libraries and filter the results to define the default view of the selected instance of the Content Manager task flow. While setting the default view, you can create a new library, sort and refresh the result list, choose to view the results as lists, thumbnails, or tables, and specify the number of items displayed per page.
Favorites	Click to open the Favorites page to set the default view to the display the items marked as favorites. Favorites are listed in the order selected, with the most recent favorite at the top of the list. You can refresh the result list and choose to view the results as lists, thumbnails, or tables. You can also specify the number of items to be displayed per page.
Clipboard	Click to open the Rendition Clipboard page, which lists any renditions added to the clipboard. You can specify the number of items to be displayed per page.
Home	Click to view contents of the enterprise library of the current portal.

> **Note:**
>
> When you create a portal, the portal's enterprise library is attributed to the user who created the Content Server connection. While defining the custom view for the Content Manager task flow, the `Created By You` filter will not show the libraries that you created as a portal manager through portal provisioning or portal creation. This filter will continue to show the folders or files you created, and the enterprise libraries that you created directly instead of those created implicitly through portal provisioning.

2. Click **Save** to save the current view as the default view for your Content Manager task flow instance. Every time users access the page containing this instance of the task flow, the selected view will be displayed.

   You can navigate to the view mode of the page to see the pinned view.

Searching Documents

Use the Searching Documents page to locate and work with documents in the repository to which you have access.

The page is arranged in the following sections:

- Search and User Options Area
- Document List
- Actions Area
- Item and Page Information Area

Search and User Options Area

Element	Description
Search box (unlabeled)	In general, the search box provides search and filter options for locating documents, folders, and libraries. When browsing a library or folder, a system filter is applied that displays only the items within the selected library and folder. You can add filters or additional search terms to the search box to further refine the search. How?
▼ Filter	Display a list of pre-defined filters you can use to limit search results. For example, you can select one or more filter options to display only those documents that you either authored, follow, have checked out, or have marked as favorites. You can select a content type of Digital Media, for example, to limit the search results to documents that contain images or video. You can select a security group of Public to limit the search to documents that are available to all users. You can add more than one filter and combine filters with specific search text that you enter. To remove a filter from the search box, click the **Delete Filter** icon ✕ next to the filter. Click the **More Filters** icon « to show any applied filters not shown in the search box. When you add or remove a filter, you immediately initiate the search represented in the search box.
Immediate Results (unlabeled pop-up box)	When you enter text in the search box, a list of item names that contain the text is displayed below the search box. The list divides the results into documents, libraries, and folders categories. For documents, select a specific document name to display the document. Select a specific folder or library to display the contents of that folder or library. Click one of the category names (Documents, Libraries, or Folders), to search for items in that category that match the specified text. Immediate results use a "fuzzy" match (rather than an exact match) to match any portion of the name only. Other document information is not included in the search.
If you enter search text...	If you enter search text, the text is compared to indexed metadata such as owner and title as well as the full-text of each document if Oracle WebCenter Content is configured to index full-text. Unlike immediate search results, the text you enter must match an entire word rather than any portion of the word. You can use the ? wildcard to match any single character or the * wildcard to match any number of characters. More

Element	Description
Search for documents	To initiate a text search, press Enter or click the **Search for documents** icon. Search results contain documents only. Libraries, folders, and shortcuts are excluded.
Workflow Notification	Click to see the list of pending documents for you to review.
Clipboard	Click to open the Rendition Clipboard page with a list of any renditions you have added to the clipboard. A file can have multiple versions in different formats called renditions. All of the renditions for a particular file are listed under the Document Properties - Summary page for the document.
Notifications	Click to open the Content In Workflow and see a list of documents that are currently in one or more workflow steps in which you are assigned an action. The number of documents assigned to you is shown next to the icon. This icon is displayed only if you have workflow assignments.
Searching Documents menu	Click ▼ to access this menu.
Create New Saved Search	Choose **Create New Saved Search** from the menu to save the search criteria currently displayed in the Search box to a specified library or folder. To run the search again, locate and double-click the saved search in the folder hierarchy in the side bar or in a folder search results list. If you run a saved search, this menu includes the **Update Saved Search <search_name>** option. If you modify the search, you can choose this option to overwrite the original saved search with the changes you have made.
Upload	Add one or more documents to the content server. How? When you upload a document, you provide information about the document using a selected profile. A profile determines what information fields are presented. Documents that you upload while browsing the document list for a particular library or folder are added to that library or folder. Documents that you upload while viewing the document list generated by a search of the entire content server are outside the context of a particular folder or library and are added to the content server as unfiled documents. More
Select	To perform actions on one or more documents, click the selection box associated with a document or use the **All** or **None** options from the **Select** menu. The actions you can perform on the selected documents are displayed as icons next to the **Select** menu or in the **More** menu. Actions available for a single document are available from its context menu, viewable by right-clicking any blank area in the row or cell associated with the document.
Sort By	Sort the document list by the selected value in the selected order.
View	Use the options in the View menu to change the way documents are displayed: List, Thumbnail, or Tabular. The view you choose is saved and used for all document lists until you change the view. More
Refresh	Click the **Refresh** icon to reload the page with any updates.

Document List

Element	Description
Documents	Documents are listed according to the selected **Sort By** and **View** options.
List view	Each document is displayed in a separate row that contains a thumbnail image of the document content next to basic information about the document, including favorite status, file name, author, release date, and comments. This is the default view. Click on any empty space in the row to display additional metadata for the associated document. Click the thumbnail or title to display the Document Page with detailed information about the document. Click the **Download** icon to download the associated document. Click the **Favorite** icon to change the favorite status. A solid blue icon marks an item as a favorite.
Thumbnail view	The documents are displayed in a grid from left to right and from top to bottom. Each cell in the grid contains a thumbnail image of the document content, favorite status, and file name. Click the thumbnail or title to display the Document Page with detailed information about the document. To download the file itself, click the check box to select the file and choose **Download** from the **More** menu. Click the **Properties** icon to display basic information about the document. Click the **Favorite** icon to change the favorite status. A solid blue icon marks an item as a favorite.
Tabular view	Each document is displayed in a separate row with columns that include icons for favorite status and document type, the file name, comments, and author. Click the thumbnail or file name to display the Document Page with detailed information about the document. To download the file itself, click the check box to select the file and choose **Download** from the **More** menu. Click the **Favorite** icon to change the favorite status. A solid blue icon marks an item as a favorite.

Actions Area

Element	Description
Actions	You can apply the following actions to a single selected item unless otherwise noted. Options can vary based on selection and user privilege. Only those actions that you can use are shown in the user interface. The complete list of actions is included here. You can also perform most of these actions from the Document Page when you click a document from the document list.
Check In New Revision	Click to open the Check In New Revision window to select and check in a new revision of the selected document. How?
Get Link	Click to open a window with links to view or download the selected item. Right-click the link to see a menu of options for copying or saving the link information.
Move	Click to open the Move (Folders and Files) window to specify a destination for the associated document or shortcut. This option is not available for unfiled documents.

Element	Description
Copy	Click to open the Copy - Choose Destination window to specify a destination for a copy of the associated document or shortcut. This option is not available for unfiled documents. For more information about resolving naming conflicts, see Copy - Naming Conflict Options.
Delete	Click to delete the selected item or items, if you have the privileges to do so. You are prompted to confirm the action. This action cannot be undone. Deleted documents are expired in the repository.
Check Out/ Cancel Check Out	Click to lock the document so that no other user can revise it. Only one user at a time can check out a file, but multiple users can continue to view the released document even when it is checked out. After checking out a document, you must either check in a new revision or undo the check-out before the document can be revised again. You must have Write permission to the document to check it out or check in a revision. To undo a check-out, you must either be the one who checked out the document or have Administrator permission for the document.
Check Out and Edit	Click to check out the document and attempts to open the file in the associated application. This option is available only for supported office documents with extensions such as .doc, .xls, .ppt, and so on. This option is not available if you are using the Safari web browser or operating systems other than Microsoft Windows. You must have Write permission to the document to check it out or check in a revision. To undo a check-out, you must either be the one who checked out the document or have Administrator permission for the document.
Download	Click to open a download window to open or save a local copy of the selected document. The document is not checked out and is simply a copy of the document that you can use locally.
View Web Rendition	Click to open a web-viewable version of the document, if available, in a separate browser window. If your system does not have conversion features installed, or if a particular file type cannot be converted, the native file format is used. To view the web-viewable rendition of a content item in a browser, you must have the appropriate helper application or web browser plug-in installed. For example, to view the PDF version of a content item, you must have the Adobe Acrobat plug-in.
View Dynamic Conversion	Click to open an HTML-formatted version of the document, if available, in a separate browser window.
Add to Rendition Clipboard	Click to add renditions of documents to the Rendition Clipboard.
Follow	Click to add the item to the list of items that are monitored for changes. Documents that you follow show a check mark in this menu. When a new revision of an item you follow is checked in, you are notified by email. To quickly see a list of items you are following, perform a search with the **Followed By You** filter. How?
Create Shortcut	Click to open the Create Shortcut window to specify the name and folder location of a shortcut to the selected item.
Rename	Click to open the Rename Document window to rename the associated document or shortcut. You must have write permission to rename a document or shortcut.
File/Unfile Document	Click to add the current document to a library or remove it from the current library. Documents not associated with a library are considered "unfiled" documents.

Element	Description
Upload Similar Document	Click to open the Upload Similar Document window to upload a document with similar characteristics to the current document. Metadata values for the current document are used as default values for the newly uploaded document where possible.
Propagate Metadata	Click to open the Propagate Metadata window for applying selected metadata values to the folders and documents in the library.
Properties	Click to open the Document Page where you can view properties for the associated document.
Sort By	Click to sort the document list by the selected value in the selected order.
View	Select from the menu to change the way documents are displayed: List, Thumbnail, or Tabular. The view you choose is saved and used for all document lists until you change the view. More
 Refresh	Click to reload the page with any updates.

Item and Page Information Area

Element	Description
Item Count	Displays the number of items in the list.
Previous	Click to show the previous page. This action is not available if you are viewing the first or only page.
Page	Click a page number to show that page. The current page is highlighted.
Next	Click to show the next page. This action is not available if you are viewing the last or only page.
Items per Page	Select the number of items to show on a single page. The default is 25. The value you specify is saved and used for all document lists until you change the value.

Favorites

Use 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.

Note:

When you mark a document as a favorite, you mark the document, not a particular revision, even though you may be viewing a particular revision when you mark the document as a favorite.

The Favorites page has the same areas as on the Searching Documents page. Following are the differences for the Favorites page.

Actions Area

Actions available for favorites are Get Link, Rename Favorites, and Properties. These are available from the context menu of an individual favorite.

Element	Description
Rename Favorite	Open the Rename Favorite window to specify a new name for the associated favorite.

Favorites List

Element	Description
Favorites	Favorites are listed in the order selected, with the most recent favorite at the top of the list. To remove a favorite from the list, deselect the **Favorite** icon . You can have any number of items selected as favorites, but only the first 100 are displayed.

Libraries

Use the Libraries page to view and work with the libraries to which you have access. To upload documents to a specific library or folder, navigate to the library and folder and then upload the document. Doing so applies the correct metadata to a document and organizes it in Oracle WebCenter Content so that you and others can find it.

The Libraries page has the same areas as on the Searching Documentpage. Following are the differences for the Libraries page.

Actions Area

Actions available for System Libraries are Get Link, Create Shortcut, and Delete. Additional actions for Enterprise Libraries are Follow and Propagate Metadata. You can also open the Library Properties window for both types of Library.

Use caution when deleting libraries or folders. When you delete a library or folder, all items within the library or folder are also deleted, including subfolders. All documents are expired in the repository.

Element	Description
Create Library	Create a new library to store documents. How?

Libraries List

Element	Description
Libraries	Libraries are listed in alphabetical order according to the type of view you select. To perform actions on one or more libraries, click the selection box associated with a library. The options you can perform on the selected library or libraries are displayed next to the Select menu. To view a context menu of actions for a single library, right-click any blank area in the row or cell associated with the library. There are two types of libraries, each with a distinct icon:
System Library	System Libraries are created and managed by Oracle WebCenter Content to organize documents that are in a system process, such as checked-out or expired documents. You cannot upload documents to a system library.
Enterprise Library	Enterprise Libraries are created by individuals to provide flexible security and comprehensive document management used by an entire organization. You can allow access to individual folders and documents in an enterprise library

Rendition Clipboard

The Rendition Clipboard lists any renditions you have added to the clipboard. A file can have multiple versions in different formats called renditions. All of the renditions for a particular file are listed under the Document Properties - Summary page for the document.

The Rendition Clipboard page has the same areas as on the Searching Documents page. Following are the differences for the Rendition Clipboard page.

Search and User Options Area

Element	Description
Search	In general, the search box provides search and filter options for locating documents, folders, and libraries. The Rendition Clipboard applies a system filter that displays only the items that you have added to the clipboard. You cannot add filters to the search box, but you can specify search text to further refine the search.
Upload	This option is not available on the Rendition Clipboard.

Rendition List

Element	Description
Renditions	Files are listed in alphanumeric order by file name. Each file groups the file revisions (if any) and associated renditions currently available on the clipboard. To select one or more renditions, click the box next to the rendition name. The action icons update to show the actions you can perform. To view a web-viewable rendition, click the **Web-Viewable** rendition name. To download any other rendition, click the rendition name. If the renditions currently listed on the clipboard are not renditions of the most current version, a link is provided to the most current version of the document.

Actions Area

Element	Description
Select	To perform actions on one or more renditions, click the selection box associated with a rendition or use the **Select All** or **Select None** options from this menu. The options you can perform on the selected item or items are displayed next to the Select menu.
Actions	
Empty	Remove all renditions from the clipboard.
Remove Renditions From Clipboard	Remove the currently selected renditions from the clipboard.
Download Renditions	Download the selected renditions. One or more renditions are combined in a single file named `Bundle.zip` by default. Within the .zip archive, each rendition is named with the following convention: <name> (<rendition_name>) [<id> <revision>].<extension> For example, the web-viewable rendition of the file `Flag.gif` is downloaded with a name similar to the following: `Flag_(Web) [abc00123 Revision-1].gif`

Content Presenter Configuration

Use the Content Presenter Configuration dialog to select the content to display in the Content Presenter task flow, and to select the template to use to display that content.

In the summary panel on the left, a check mark ( ) alongside an item indicates that the required information is complete and valid. Items that are not complete or valid display an empty box ( ).

Selecting a Single Content Item

You can display a single item from your Content Server (including a Site Studio contributor data file) in a Content Presenter task flow

To select a specific item:

1. Click **Select Content** or the **Content** tab.
2. On the **Content** tab, from the **Content Source** list, select **Single Content Item**.
3. Click **Browse** to locate the content item in the content repository.

> **Note:**
>
> Content Server exposes a content item in the **Select Document** dialog only after it has a revision status of Released. The revision status of a new content item changes from Done to Released after it has reached its specified release date (specified by the `dInDate` property). Content items that do not have Released status will not appear in the **Select Document** dialog. You can find the status of a content item in Content Server on the Content Information Page, as described in Revision Status in *Using Oracle WebCenter Content*.

   If WebCenter Portal is connected to multiple Content Server repositories, the browse tree shows the parent folder for the current user, or for the current portal, in the repository that is specified as the primary connection. To access other connected repositories, click the navigation list icon in the toolbar to expose the **VCR** parent node. Click **VCR** to show all connected content repositories.

> **Notes:**
>
> - iFraming is supported only for the default Content Server connection. Therefore, you cannot select a non-default Content Server connection if the Content Presenter task flow will use iFrames to display content.
> - If the content repository includes an invalid type configuration, then no content displays when you click **Browse**. Instead, an error message reports `Unable to retrieve content type information`.

4. Select the item that you want to display and click **Select**.

Selecting the Contents of a Folder

You can display the contents of a folder from Content Server in a Content Presenter task flow. The contents of the folder are displayed in the order stored in the folder.

To select a folder:

1. Click **Select Content** or the **Content** tab.
2. On the **Content** tab, from the **Content Source** list, select **Contents Under a Folder**.
3. Click **Browse** to locate the folder in the content repository.

> **Tip:**
>
> To select the folder as the content source, click in the folder row, not on the folder name (clicking the folder name opens the folder).

If WebCenter Portal is connected to multiple Content Server repositories, the browse tree shows the parent folder for the current user, or for the current portal, in the repository that is specified as the primary connection. To access other connected repositories, click the navigation list icon in the toolbar to expose the **VCR** parent node. Click **VCR** to show all connected content repositories.

> **Notes:**
>
> - iFraming is supported only for the default Content Server connection. Therefore, you cannot select a non-default Content Server connection if the Content Presenter task flow will use iFrames to display content.
> - If the content repository includes an invalid type configuration, then no content displays when you click **Browse**. Instead, an error message reports `Unable to retrieve content type information`.

4. Select the folder whose contents you want to display and click **Select**.

Selecting Content Based on the Results of a Query

You can display content in a Content Presenter task flow based on a query conducted against the Content Server repository.

All query criteria are optional. If you leave all options empty, all documents in the Content Server repository will be returned by the search.

> **Note:**
>
> To select content based on the results of a query against the connected repository, full-text search must be enabled in WebCenter Content Server through OracleTextSearch.

To specify a content query:

1. Click **Select Content** or the **Content** tab.
2. On the **Content** tab, from the **Content Source** list, select **Results of a Query**.
3. In the **File Name** field, enter the name of a file in the Content Server repository that you want to display in the Content Presenter task flow.

   You can use `*` as a wild card character to retrieve multiple files.

   For example, `*.jpg`.

4. In the **Keywords** field, enter any words or phrases that might be present in the content of the documents.
5. From the **Content Types** list, select:
   - **All Content Types** to retrieve content items regardless of the content type.
   - The name of a content type profile or Site Studio region template definition defined in Content Server.

   A content type profile specifies properties that define a specific type of content, for example, a press release; news flash; or image. The content type **IDC:GlobalProfile** is the name of a default content type profile defined in Content Server that can be applied if no other content type profiles are defined.
6. In the **Limit Results** field, enter the maximum number of content items to be returned by the query.

   The default is `100`.
7. To retrieve content items based on creation date:
   a. From the **Created** list, select:
      - **is** to search for content items created on the specified date
      - **is after** to search for content items created after the specified date
      - **is before** to search for content items created before the specified date
      - **is between** to search for content items created between the two specified dates

   b. In the corresponding date field(s), enter a date.
8. To retrieve content items based on when they were last edited, select:
   a. From the Last Modified list, select
      - **is** to search for content items last modified on the specified date
      - **is after** to search for content items last modified after the specified date
      - **is before** to search for content items last modified before the specified date
      - **is between** to search for content items last modified between the two specified dates

   b. In the corresponding date field(s), enter a date.
9. To retrieve content items based on who first uploaded them, in the **Created By** field, enter the user name.
10. To retrieve content items based on who last edited them, in the **Last Modified By** field, enter the user name.
11. If you selected a specific content type in the **Content Type** list you can also:
    a. Define **Additional Query Filters** to refine the query based on one or more specific property settings

       Click **Add** and select from the available properties.

    b. Specify a **Sort Order** based on the properties available for the content type.

       From the **Sort On** list, select the property to sort by, then select whether to sort in **ascending** or **descending** order.

If **Content Type** is set to **IDC:Global Profile**, then **Additional Query Filters** is not available.

12. Click **Preview Results** to see the results of the query.

    Based on the results shown in the preview, you can accept or modify your search criteria.

> **Note:**
>
> If the content repository includes an invalid type configuration, then no content displays when you click **Preview Results**. Instead, an error message reports `Unable to retrieve content type information`.

Selecting a List of Content Items

You can create a list of content items to display in a Content Presenter task flow.

To browse or search for any number of items to add to a list, and delete or reorder the items before adding the list to a page in a Content Presenter display template:

1. Click **Select Content** or the **Content** tab.
2. On the **Content** tab, from the **Content Source** list, select **List of Items**.
3. Under **Select Items to Display**, click **Add** to browse or search for any number of items to add to the list.
4. In the Select One or More Content Items dialog, select multiple content items using Ctrl+click or Shift+click.

> **Note:**
>
> Content Server exposes a content item in the **Select One or More Content Items** dialog only after it has a revision status of Released. The revision status of a new content item changes from Done to Released after it has reached its specified release date (specified by the `dInDate` property). Content items that do not have Released status will not appear in the **Select One or More Content Items** dialog. You can find the status of a content item in Content Server on the Content Information Page, as described in Revision Status in *Using Oracle WebCenter Content*.

If WebCenter Portal is connected to multiple Content Server repositories, the browse tree shows the parent folder for the current user, or for the current portal, in the repository that is specified as the primary connection. To access other connected repositories, click the navigation list icon in the toolbar to expose the **VCR** parent node. Click **VCR** to show all connected content repositories.

> **Note:**
>
> - iFraming is supported only for the default Content Server connection. Therefore, you cannot select a non-default Content Server connection if the Content Presenter task flow will use iFrames to display content.
> - If the content repository includes an invalid type configuration, then no content displays when you click **Browse**. Instead, an error message reports `Unable to retrieve content type information`.

5. When you have selected all the items that you want to display, click **Select**.

   You can add more items to the list later by clicking **Add** again.

6. Use the arrow buttons to rearrange the order of the items in the list.

   The order you use when creating the list is the order in which they are presented at runtime.

Creating or Editing Site Studio Content

You can create and edit Site Studio contributor data files from within the Content Presenter Configuration dialog.

To create or edit Oracle Site Studio content in a seamless interface within Oracle WebCenter Portal, WebCenter Portal must be connected to a Content Server repository, with the `webContextRoot` parameter set to the Content Server path, for example `/cs`.

Without this configuration, it is still possible to create or edit Site Studio content from within Content Presenter, but the create and edit actions launch new browser windows (or tabs) rather than opening within the Content Presenter task flow.

To create or edit Oracle Site Studio content in the Content Presenter Configuration dialog:

1. Click **Select Content** or the **Content** tab.
2. On the **Content** tab, click **Create Web Content**.

   The Oracle Site Studio Choose Region Content pane opens.

3. In the Choose Region Content pane, select a Site Studio region definition on which the content you want to create or edit is based.

> **Note:**
>
> - To create or edit Oracle Site Studio content, at least one region definition must have been previously created in the Site Studio application.
> - To create articles for the Articles View and Full Article View templates, select the **Article (RD_ARTICLE)** region definition.

4. Click **Next**.

   The Choose content file pane opens.

5. In the Choose content file pane, select one of the following:

   - **New Contributor data file** to open the Check-in content pane, where you can specify the standard document properties for the new Site Studio contributor data file that you want to check in to Content Server.
   - **Existing file from server** to open Content Server, showing Site Studio contributor data files that are based on the selected region definition.

6. Make note of the file name, then click **Next**.

   The Check-in Confirmation pane opens.

7. In the Check-in Confirmation pane, select one of the following:

   - **Edit content item now** to open the Site Studio Contributor editor, where you can edit the content item.

     You start editing when you click **Finish**.

   - **Exit without editing** to make no changes to the file.

8. Click **Finish** to return to the Content Presenter Configuration dialog.

   - If you have configured the `webContextRoot` parameter, as described in the note at the top of this section, the Site Studio contributor data file you selected is shown auto-selected in the Content Presenter Configuration dialog.
   - If `webContextRoot` parameter is not configured, you can now select the Site Studio contributor data file on the Content page.

9. In the Content Presenter Configuration dialog, click **Save**.

Selecting a Display Template

By default, WebCenter Portal selects an appropriate Content Presenter display template based on the type of content selected. You can change the default template as required.

> **Note:**
>
> Although Site Studio region templates are supported, it is recommended that for Site Studio contributor data files, you use Content Presenter display templates that use region definitions instead. Site Studio region templates display the details of the contributor data file rather than the contributed content. For information about Site Studio region templates, refer to the Oracle WebCenter Content documentation library.

To change the display template for the selected content:

1. Click **Select Template** or the **Template** tab.
2. If the **Content Source** selected on the **Content** tab is a multiple content item source (**Contents Under a Folder**, **Results of a Query**, or **List of Items**), from the **Template Category** list, select:

- **Default Templates** to select one of the built-in Content Presenter display templates.
- **Site Studio Templates** to select a Content Presenter display template that uses region definitions to display Site Studio contributor data files.

  Although Site Studio region templates are supported, they display the details of the contributor data files rather than the contributed content. It is strongly recommended that for Site Studio contributor data files, you use Content Presenter display templates that use region definitions instead.
- ***Custom Template Category*** to select a custom Content Presenter display template, if any exist. There may be multiple custom template categories listed.

  Custom Content Presenter display templates are created in Oracle JDeveloper and published to WebCenter Portal.

3. From the **Template** list, select the Content Presenter display template that you want to use.

   The templates that are available for selection in the **Template** list are those that are identified by Content Presenter as suitable for displaying the selected content item source type. If you select a **Single Content Item**, only those templates that display single items are listed. If you select a multiple content item source (**Contents Under a Folder**, **Results of a Query**, or **List of Items**), only those templates that display multiple items (and are of the selected **Template Category**) are listed.

   The **Template** list includes built-in display templates, custom display templates (created in JDeveloper and published to WebCenter Portal), and Site Studio region templates.

> **Note:**
>
> Choose templates appropriate to the type of content. Site Studio region templates should be used for Site Studio defined Contributor Data Files (CDF). Using non-Site Studio templates will display the details of the CDF file, rather than the content; using Site Studio templates for non-Site Studio content will simply not display. To identify the Site Studio region templates, hover your mouse pointer over the templates in the list to display hint text identifying the Site Studio region templates.

Previewing Content in the Content Presenter Configuration Dialog

You can get an idea of how your selected content will look using the selected display template before exiting the Content Presenter Configuration dialog.

To preview content in the Content Presenter Configuration dialog:

In the Content Presenter Configuration dialog, click **Preview** or the **Preview** tab.

The appearance of the content on the **Preview** tab is dependent on whether the selected display template uses a stretch or flow layout. While the final view of the task flow can be configured to use either a stretch layout or a flow layout, the **Preview** tab only uses a flow layout. As a result, the preview of content using templates that were designed for a stretch layout displays unstretched at a fixed default size. This is the normal behavior of stretchable content when displayed in non-stretching flow layout. To allow stretchable content to stretch to its full size and fill the task flow space entirely, click the **View Actions** icon in the task flow toolbar, and select **Display Options**. In the **Advanced** tab of the Display Options dialog, from the **Stretch Content** list, select **true**.

> **Note:**
>
> Content Presenter does not support non-ASCII characters in files that are encoded using the non-UTF-8 character encoding. When users preview such files in Content Presenter, non-ASCII characters appear garbled.

Embed Image

Use the Embed Image dialog to include an existing or newly uploaded image in your wiki or blog.

Element	Description
Select Image	Click to open the Link to Existing dialog, where you can select an image that exists in the connected content repository to embed in your wiki or blog.
Upload Image	Click to open the Link to New dialog, where you can drag or browse to an image on your local file system to upload to the connected content repository and embed in your wiki or blog.

Edit 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 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. In the **Image** tab of the Edit Image dialog, from the **Image Location** drop-down 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.
   - **Content Cloud** to select an image from the Oracle Content and Experience Cloud content repository.

The **Digital Assets** tab shows the images published in the collection configured for WebCenter Portal. Select the image you want to add to your portal page, or use the Find option to search for the image.

The **Documents** tab lists all the folders in Oracle Content and Experience Cloud to which you have access. Navigate to the folder that contains the image you want to add and then select the image. Use the **All** menu to view all the items or only the ones that are owned by you, shared with you, or marked as a favorite.

> **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.

2. 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.

3. Click **OK** to preview the image.

Documents

The **Documents** page in a portal and in the Home portal exposes Content Manager, which offers an easy and intuitive user interface with sophisticated searching capabilities for managing libraries, folders, and 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.

- 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.
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.

Element	Description
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.

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.

- 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.

5 Online Help Topics for Favorites

Add To 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.

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. In the **Name** field in the Add to Favorites dialog, enter a display name for the favorite.

   > **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.

3. 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.

4. 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.

5. 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.

6. Click **OK** to add the favorite to the **Favorites** menu and the Manage Favorites page.

Add To Favorites

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. In the Add To Favorites dialog, in the **Name** field enter a display name for the favorite.

3. In the **Web Address** field, paste the URL you copied in step 1, or enter a URL manually.

4. To enable the sharing of this favorite in other users' search results, select **Shared**.

5. Click **OK**.

   The new favorite appears in the Manage Favorites page and in the **Favorites** menu.

Create Folder

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.

To add a favorites folder:

1. In the **Folder Name** field, enter a name for the new folder.
2. 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.

Edit Favorite

To edit a favorite or favorite folder:

1. Edit values as desired:

Table 5-1 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.
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.

Table 5-1 (Cont.) Values for Edit Favorite and Edit Folder Dialogs

Label	Applies To	Value

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.

2. Click **OK** to save your changes.

Edit Folder

To edit a favorite or favorite folder:

1. Edit values as desired:

Table 5-2 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.
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.

Table 5-2 (Cont.) Values for Edit Favorite and Edit Folder Dialogs

Label	Applies To	Value
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.

2. Click **OK** to save your changes.

Manage Favorites

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.

Element	Description
	Click to add a folder to your Favorites list. Your new folder appears in the Manage Favorites page, on the **Favorites** menu, and on the folder dropdown list when you create a new favorite. Select a folder and click  to create a favorite within the folder. To add a subfolder within a folder, select the folder and click .
	Click to add a favorite to your Favorites list. Your new favorite appears in the **Favorites** menu. If you want the new favorite link to be placed in a folder other than the default **Favorites** folder, then first select the target folder.
	Select a favorite or folder, and then click to edit favorite or folder properties.
	Select a favorite or folder, and then click  to delete it. The deleted folder or favorite is removed from the Manage Favorites page and the **Favorites** menu.

Element	Description
|	Select a favorite or folder, and then click or to rearrange the position of the favorite or folder in the **Favorites** menu. Click to move a selected folder or favorite further up or down the list of folders and favorites. This also affects the order in which the favorite or folder appears on the **Favorites** menu. **Note:** moves a folder only within its parent folder. To move a favorite or a folder out of its parent folder, drag and drop it to the desired location.
	Enter a search term, and then click to locate a favorite or folder. Clear the field and click again to remove the filter and restore all current favorites and folders to view.
	Click to refresh the list of favorites.
Name	The display name of the favorite or folder.
Location	The web address of the favorite. Folders do not have locations.

6 Online Help Topics for Pages

Access

By default, the pages you create in a portal are viewable by all portal members. In the Home portal, the personal pages you create are accessible only to you and the system administrator. You can modify the access for a portal or personal page.

There may be pages you want to expose to many users, but certain components on the page to only a select set of users—or even only one user. For example, imagine that you have created a portal for all sales people. The portal's home page includes two Events task flow instances: one for all sales people and one for sales managers only. You can secure the second Events instance so that only those users assigned the custom role `sales_manager` can see it.

By default, a component on a portal page is visible to all users who have access to the page. You can set the component's Access properties to show or hide the component, or specify more granular visibility by role or user, or by using an EL expression.

Any component that has associated Access properties can be secured in this way. Those components that do not have associated Access properties can be placed inside a component that does (such as a Box component), and in this way be secured.

To set the access (visibility) for a component on a page:

1. Select a **Visibility** option:
   - **Show component** (default) to specify that the component is always visible to all users.
   - **Hide component** to specify that the component is not shown when the page is viewed. However, the component is shown when editing the page in the portal editor, so that you can modify its Access settings.
   - **Customize by role or user** to select specific roles and users who can access the component. When this option is selected, the current user is given Visible access to the component by default.
   - **Customize using EL** to enter Expression Language (EL) that must evaluate to true for the component to be visible.
2. If you select **Customize by role or user,** click **Add Access**, then:
   - Select **Add Users** or **Add Groups** to search for and select individual users or groups of users available in your identity store.
   - Select **Add Roles** to search for and select defined roles.
   - Select **Add Authenticated Role** to change component access for all authenticated users (that is, to users who are logged in to WebCenter Portal).

     This selection adds the role `authenticated-role` under **Role or User**, with access to the component by default.

- Select **Add Anonymous** to change component access for all public users (that is, users who are not logged in to WebCenter Portal).

  This selection adds the role `anonymous-role` under **Role or User** with access to the component by default.

  > **Note:**
  >
  > To grant component access to the `anonymous-role` (that is, to enable users who are not logged in to access the portal) the portal must be public. The portal cannot be private or hidden.

- To remove component visibility, select the user, group, or role in the **Role or User** list, then click **Delete Access**.

3. If you select **Customize using EL**, enter Expression Language (EL) that must evaluate to true for the component to be visible.

   For example:

   - To expose a component only to members of a particular scope who are assigned a particular role in that scope, enter:

     ```
     #{WCSecurityContext.userInScopedRole['role']}
     ```

     where *`role`* is a role name, such as `sales_manager`.

     The scope is implicitly resolved to be the current scope:

     – If you use this EL in the *Home portal*, it resolves to Home portal GUID and roles defined at the application level.

     – If you use this EL in a *portal* scope, it resolves to roles defined for the portal.

   - To expose a component only to members of a group, enter:

     ```
     #{WCSecurityContext.userInGroup['group_name']}
     ```

   - To expose a component only to a specific user, enter:

     ```
     #{WCSecurityContext.currentUser['user_name']}
     ```

4. Save your changes.

Add to Catalog

The resource catalog assigned to pages in a portal contains many task flows that you can add to a page (for example, task flows for all tools and services such as analytics, documents, and so on).

After you have added a task flow to a page, you can modify the properties of the task flow, then save the task flow with those customizations to the resource catalog as a new task flow. This means that you can reuse the customized task flow in other locations in your portal without having to modify the property settings for each instance. This saves time, and ensures consistency.

Once added to the resource catalog, the task flow can be selected in the resource catalog by any user who has permissions to edit pages in the portal.

To add a task flow to the resource catalog assigned to pages in a portal:

1. Enter a name for the custom task flow in the resource catalog. A name that duplicates an already existing task flow name is allowable.
2. Optionally, enter a description.
3. From the **Folder** list, select the folder where you want the custom task flow to appear in the resource catalog.
4. Click **Add to Catalog**.

> **Note:**
>
> Only changes to the properties of a task flow are saved in the new task flow added to the resource catalog. Changes to the content of the task flow remain unique to the task flow instance and are not included when saving the task flow to the resource catalog as a new task flow.

Child Components

Use the Child Components tab to rearrange, show, and hide the child components of the current component. This tab is available in Structure view to all components that enclose other components, such as the Box and Movable Box layout components.

Select or deselect the check box to show or hide a child component, and use the arrow icons to rearrange the order of the child components.

Content Style

Style and Content Style properties can be used to fine-tune your portal's look and feel at the component level:

- Style properties apply to the `ShowDetailFrame` container of the component instance, overriding any styles specified for the component through the component's parent container, the page, and the application.
- Content Style properties apply to the content within the `ShowDetailFrame` container of the component instance, overriding any styles specified for Style properties, the page, and the application.

For example, in a Movable Box component, Style settings control the look and feel of the Movable Box; Content Style settings control the look and feel of the components contained within the Movable Box. This look and feel may, in turn, be overridden by the Style settings set on those individual components.

Note, however, that Content Style properties set for a container, such as a Movable Box, may not take effect if the component inside the container overrides the container Content Style properties by a means other than the component's own Content Style properties. For example, the background color set for a Movable Box that contains a task flow may not take effect if, at design time, instead of being set to inherit from the container, the task flow background color was set with a hard-coded value.

Additionally, the Style and Content Style settings may or may not be exposed depending on whether or not the component elements (such as the skin) support modifications to these settings. Thus, while you can set Style and Content Style properties for a component, these settings may not take effect due to other settings that apply to the component.

For descriptions of the properties you can set, see Style and Content Style Properties.

Create Navigation Item

You can add several different item types to a portal's navigation. Mostly, portal navigation provides links to portal pages, but it can also include documents, external web sites, portlets, and task flows.

You can specify various properties and display options for non-page navigation items (including page *links*) to determine their appearance and behavior when the portal navigation is rendered. The options available depend on the type of item.

To set properties for a non-page portal navigation item:

1. Select the item in the left navigation pane.
2. On the **Target** tab, enter or modify properties for the item.

> **Tip:**
>
> Click the ▾ icon next to a property field to select and open the Expression Language (EL) Editor.

Table 6-1 Properties for Specific Portal Navigation Items

Property	Applies to	Description
ID	All item types	Enter a unique ID for the item. This property is automatically populated with a generated ID, for example, `newcontentlink`. but as it is used to create the URL to access the node in the portal navigation, you may want to change it to something more descriptive. The ID must be unique within the portal navigation. The first character must be either an uppercase or lowercase letter or the underscore character (_). Subsequent characters can be any alphanumeric character or a dash (-), period (.), or underscore (_). If the item is at the top level of the portal navigation, the ID must not be `wc_navtitle` or `wcnav_externalId`. These IDs are reserved.
Name	All item types	Enter a name to display for the item in the portal navigation.
Description	All item types	Enter a brief description of the item.

Table 6-1 (Cont.) Properties for Specific Portal Navigation Items

Property	Applies to	Description
Visible	All item types	Select to display a node for this item when the portal navigation is displayed on a page. Alternatively, you can specify an EL expression to determine under which conditions the item is included in the navigation. For example, to specify that the item should be visible only to users with the `Manager` role, use the following EL expression: `#{WCSecurityContext.userInScopedRole[Manager]}`
Path	Content Item Link Page Link	Enter an external URL, or click the search icon to select a target resource to include in the portal navigation. **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.* **Note:** In the Select dialog, the **Select** button becomes active only when you select an item that can be included in the portal navigation.
Content Presenter Template	Content Item	Select the Content Presenter display template to use to render the document when it is selected in the navigation.
Hide Top-Level Folder	Content Query Pages Query	Select to display the results of the query or reference directly rather than displaying them under a folder.
Page Template	Content Item Link Page Link Pages Query	Select the page template to use to display the item when it is selected in the portal navigation. Select **[system default]** to use the portal or application default page template.
Query String	Content Query	Enter the query criteria to identify the content to include in the portal navigation, for example: `SELECT * FROM cmis:document WHERE cmis:name LIKE 'Foo%'`

Table 6-1 (Cont.) Properties for Specific Portal Navigation Items

Property	Applies to	Description
Find Pages in	Pages Query	Select: • **Home Portal** to include the Home portal and all its pages in the portal navigation. • **Portal** to add the Home page of a specific portal and all its other pages to the portal navigation. Leave blank to specify the current portal, enter the name of a different portal, or click the **Select Portal** icon to select from all available portals. In the Select Portal dialog, you can filter the list of portals to those that you have joined, those that you moderate, or those that are public. • **Path** to add a specific page and all its subpages to the portal navigation. Enter the path of the page, or click the **Select Page** icon to select from all available pages.
Page Style	Pages Query	Select the style of page to include in the portal navigation. For example, select **Wiki** to add only pages that use the Wiki page style to the portal navigation. Select **[system default]** to display all pages, regardless of style.
Excluded Page Styles	Pages Query	Enter the paths of one or more page styles, separated by commas or spaces, to exclude from the page query. For example: `/oracle/webcenter/siteresources/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/pageStyle/gsr1b60e8a7_2e23_48ff_9571_31ede592de1a/TemplateWiki.jspx, /oracle/webcenter/siteresources/scopedMD/s8bba98ff_4cbb_40b8_beee_296c916a23ed/pageStyle/gsr1b60e8a7_2e23_48ff_9571_31ede592de1b/TemplateBlog.jspx` **Tip:** You can find the path of a page style by selecting it on the **Assets** page and choosing **Show Properties** from the the **Actions** menu.

Table 6-1 (Cont.) Properties for Specific Portal Navigation Items

Property	Applies to	Description
Visibility	Pages Query	Select: • **Show all items** to expose in the portal navigation every page in the results of the query, regardless of their individual Visibility property setting. • **Show only visible items** to filter the results of the query to expose in the portal navigation only those pages whose individual Visibility property is selected. • **Show all but visible items** to filter the results to the query to expose in the portal navigation only those pages whose individual Visibility property is deselected.

3. On the **Options** tab, set the navigation display options for the item.

Table 6-2 Navigation Item Display Options

Option	Description
Access Key	Enter a key mnemonic (single character) that can be used to access the navigation item without using the mouse.
Icon URI	Enter a path and file name of an image to use to represent the item in the portal navigation.
Search Keywords	Enter keywords to facilitate searching of the navigation item.
Tool Tip	Enter brief descriptive text to display when users hover the mouse over the item in the portal navigation.

External ID	Enter an ID to enable a direct reference to the item from a static link in the page.
	Navigation items with this attribute defined can be accessed using `/faces/wcnav_externalId/`*`externalId`* from an `af:goLink component` in a page or by using `/wcnav_externalId/`*`externalId`* from an External Link navigation item in the portal navigation. The alternative is to access the node by its hierarchy, which is faster, but may change as the application develops.
	Tip: To directly access a node for a particular portal, you must specify the portal by setting the `wc.contextURL` parameter, for example:
	`/faces/wcnav_externalId/myNavigationItem?`
	`wc.contextURL=/spaces/myProjectSpace`
	Depending on where you are using the link, you may need to encode the URL parameters, for example, if the **External ID** contains spaces or special characters, such as `%2Fspaces` `%2FmyProjectSpace`.

Open Link in	Select where to display the item when it is selected. The options available depend on the type of navigation item. **Note:** Popups are not supported for pages.

Table 6-2 (Cont.) Navigation Item Display Options

Option	Description
Redirect	*For External Link navigation items only* Select to redirect the URL specified for the external link. If you do not select this option, then the URL is rendered within the current page template.
New Attribute Name	Enter the name of an attribute that has been defined for the item but not exposed in the dialog. You can also select an attribute from the drop-down list. You can also create your own attributes that can then be referenced in page templates to render the item.
New Attribute Value	Enter a value for the attribute specified in the **New Attribute Name** field, and click **Add**. **Tip:** To delete an attribute, clear the attribute value and click **Save**.

4. On the **Parameters** tab, enter values for any parameters supported by the item, or add new parameters by entering values in the **New Parameter Name** and **New Parameter Value** fields.

> **Tip:**
>
> To delete a parameter, clear the parameter value and click **Save**.

Create Page

When page drafts are enabled in the portal administration settings, a new page created in the portal editor is initially a page draft and not immediately available when viewing the portal. When users with `Edit Page` or `Contribute Page Content` permission view the page in the portal editor, they will see the latest updates in the page draft. Users without either of these permissions will only ever see the most recently published page. When you or other approvers are satisfied with the page updates, you can publish the page.

To create a new page or subpage when editing a portal:

1. Click the page style you want to use for your new page. Right and left arrows may be shown to scroll through the available page styles.

   Use the search field to search for page styles by name, description, or keywords.

2. In the fields under **Review Page Information**, enter a page name and, optionally, a description and keywords for the page. Enter any keywords related to the content of the page to make it more easily discoverable in search results. Separate keywords with a space or comma.

   The name that you enter here displays at the top of the page and other places where pages are available for selection, such as in the page navigation for the portal. The page name and description are searchable and appear in search results. Keywords are used for search only.

> **Notes:**
>
> - There are no restrictions on the characters you can use in page names.
> - If you enter a name that duplicates an existing page name, WebCenter Portal automatically adds a numeric suffix to the page name and creates the new page with the modified name. For example, if `MyPage` exists, and you try to create a new page named `MyPage`, WebCenter Portal renames the new page `MyPage1`.
> - You can give a page the same name as any system pages (for example, `Activity Stream`, `Documents`).
> - While there are restrictions on naming files (including wiki documents), there are no naming restrictions for wiki 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. Optionally, modify the URL for the page from the default shown.
4. To view or modify existing default parameter settings, click **Page Settings** to open the **Settings** page.

   > **Note:**
   >
   > This page appears only if the selected page style includes page parameters. Such parameters are useful for establishing page settings during page creation, rather than editing the page later. Parameters may be used to show or hide areas of a page, set styles or settings for the page, set a product ID, and so on.

   Optionally modify the default values of the built-in page parameters, then click **Back to Create Page**.
5. To view or modify existing default security settings, click **Set Permissions** to open the **Access** page.

   Optionally, modify the access to the page, then click **Back to Create Page**.

> **Note:**
>
> You can override the page security to create a page that does not take the permissions from the portal roles, but instead allows custom scenarios to be set up where you can control who can see the page, who can edit it, who can create subpages, and so on. If you do not set security in the Create Page wizard at this time, you can set it later in the portal editor.

6. Click **Create Page**.

Create Page

When viewing a portal, you can create a new page that is immediately added to the portal navigation and is visible to others who view the portal. After creating the page, users with appropriate permissions can edit or manage the page as required.

When page drafts are enabled in the portal administration settings, updates to the page are saved as a page draft and are not immediately available when viewing the portal. When users with `Edit Page` or `Contribute Page Content` permission view the page in the portal editor, they will see the latest updates in the page draft. Users without either of these permissions will only ever see the most recently published page. When you or other approvers are satisfied with the page updates, you can publish the page.

To create a new page while viewing a portal:

1. On the **Select a Style** page, explore the page styles available to you to use as the basis for your new page, then click **Use This** beneath the style you want to use.

   The Page Information page opens.

2. Enter a page title and, optionally, a description and keywords for the page. Enter any keywords related to the content of the page to make it more easily discoverable in search results. Separate keywords with a space or comma.

   The title that you enter here displays at the top of the page and other places where pages are available for selection, such as in the page navigation for the portal. The page name and description are searchable and appear in search results. Keywords are used for search only.

> **Note:**
>
> - There are no restrictions on the characters you can use in page names.
> - If you enter a name that duplicates an existing page name, WebCenter Portal automatically adds a numeric suffix to the page name and creates the new page with the modified name. For example, if `MyPage` exists, and you try to create a new page named `MyPage`, WebCenter Portal renames the new page `MyPage1`.
> - You can give a page the same name as any system pages (for example, `Activity Stream`, `Documents`).
> - While there are restrictions on naming files (including wiki documents), there are no naming restrictions for wiki 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. Click **Create** to create the page with existing default parameter and security settings, or click **Next** to open the **Settings** page

   > **Note:**
   >
   > This page appears only if the selected page style includes page parameters. Such parameters are useful for establishing page settings during page creation, rather than editing the page later. Parameters may be used to show or hide areas of a page, set styles or settings for the page, set a product ID, and so on.

   Optionally modify the default values of the built-in page parameters.
4. Click **Create** to create the page with existing default security settings, or click **Next** to open the **Access** page.

   Optionally, modify the access to the page. For more information, see Setting Page Security.

> **Note:**
>
> You can override the page security to create a page that does not take the permissions from the portal roles, but instead allows custom scenarios to be set up where you can control who can see the page, who can edit it, who can create subpages, and so on. If you do not set security in the Create Page wizard at this time, you can set it later in the portal editor.

5. Click **Create**.

Create Page Variant

Page variants are alternative views of an existing page for device groups to target specific device size and characteristics, when the base page does not display well on the device. The base page and the page variant have the same URL, security, parameters, and so on.

> **Note:**
>
> The built-in page templates Mosaic and Unicorn are designed to be responsive to automatically adjust to the display device. Therefore, pages that use these templates do not need device-specific settings or page variants.
>
> If your portal pages use a non-responsive page template, the display on different devices may exhibit formatting issues, such as overlapping text.

Page variants can be created for the Home page and user-created pages in a portal in the portal editor. Like portal pages, when page drafts are enabled in the portal administration settings, a new page variant is initially a page draft and not immediately available when viewing the portal. Users with appropriate permissions can edit or manage the page variant draft as required, then publish the page variant to add it to the portal navigation and make it available to others who view the portal.

Any changes you make to the *content* of the base page are not reflected in its page variant(s), and vice versa. However, any changes to the page information, security, or parameters of base page are reflected in its page variant(s). Page variants do not include the **Summary, Security, Parameters,** and **Advanced** tabs that allow you to edit this information.

To create a page variant for a device group:

1. Select the **Device Group** and **Page Content and Style**:
   - To copy the content and style from the base page, select the **Copy Base Page Content and Style** check box.
   - To create a page variant with different content and style than the base page, deselect the check box, and select the required page style.
2. Click **Create**.

The new page variant is created and the base page exposes it in the portal navigation. Notice the breadcrumbs at the top show the parent page and page variant.

Note that you can modify the page variant in both preview mode and edit mode. For example, you can add components to the page variant by clicking **Add Content** when viewing the page.

3. To list only those pages for a particular device group, click Desktop in the page editor, and select the device group for which you want to view.
4. Select, edit, and manage page variants as you would any other page.

Display Options

Component display options control a range of display-related behaviors on a given component instance. Typically, display options settings affect the display elements surrounding component content (that is, its *chrome*). Chrome includes the header, the **Actions** menu, **Expand** and **Collapse** icons, and so on. For example, use the display options on a task flow component to hide or show a header and enable or disable menus and other options on the header.

Though it is not obvious in the page editor, the `showDetailFrame` component is usually wrapped around task flows. Consequently, the Display Options dialog for task flows, and any other component wrapped in a `showDetailFrame`, share the same Display Options properties.

The Display Options dialog for several components is divided into two subtabs: **Basic** and **Advanced**. This provides a means of separating an otherwise long list of display options into more manageable and relevant groups.

> **Note:**
>
> While Display Options are available for all components, the settings may not have an effect on some components.

The following table lists and describes the Display Options properties that generally apply to most components. Where there are variations, they are noted in the tables covering the specific components.

Table 6-3 Display Options Properties

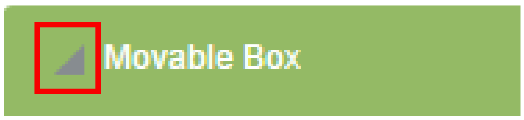
Property	Description
`Allow Minimize`	Select whether to show the minimize action on the component header (that is, a **Collapse** icon on the component chrome). • Select the check box to show the **Collapse** icon. • Deselect the check box to omit the **Collapse** icon. The minimize action collapses the component like a window shade, leaving only its header on view.  When a component is minimized, the icon toggles to an **Expand** icon, which you can use to restore the full component to view.
`Allow Move`	Select whether to enable users to move the component on the page. Choose from: • **enabled**—Component can be moved using the Move options (**Move Up**, **Move Down**, **Move Left**, and **Move Right**) on the component Actions menu. The Move options that show depend on the orientation of the parent container (horizontal or vertical). Move options are context sensitive. For example, in a vertically-oriented parent container if there are no components above the current task flow the **Move Up** option does not appear on the **Actions** menu. • **drag and drop only**—Component can be moved using drag and drop only. • **disabled**—Component cannot be moved.
`Allow Remove`	Select whether to show the **Remove** icon on the component header (that is, the component chrome) when the page is in *view mode*. Choose from: • Select the check box to show the **Remove** icon on the component header in view mode. • Deselect the check box to omit the **Remove** icon in view mode.  Note that after you select to remove a component in this way in page view mode, you can restore the component only by editing the page and adding another component instance. As a page author, you may not wish to allow end users to remove a component when viewing the page. Users authorized to edit the page can remove the component in the page editor.

Table 6-3 (Cont.) Display Options Properties

Property	Description
`Allow Resize`	Select whether to show a window resizer on a component instance. The window resizer enables you to increase the component height. • Select the check box to show the Resize option on the component. • Deselect the check box to omit the Resize option.  Note: Selecting this property fixes the height of a `showDetailFrame` component, so the content will have a scrollbar or white space to fill the area depending on whether the content is larger or smaller than the resized `showDetailFrame` component. Deselecting `Allow Resize` is recommended to allow the content flow, so when there is more content the `showDetailFrame` component is bigger.
`Chrome Style`	Select to specify a shade for the component background. Enter: • `light`—Light is transparent; the prevailing background color shows through • `medium`—Medium draws an light line below the header area. • `dark`—A graduated shade moving from the bottom of the header area to the top of the component from transparent to dark. • `coreDefault`—A graduated shade slightly lighter than dark
`Display Header`	Select this check box to show a header on the component instance. 
`Display Shadow`	Select to render a shadow behind the component instance.
`Font`	Specify the font to use for text appearing in the component header. Enter one or more fonts. Separate multiple values with a comma (,), for example `arial,helvetica,sans serif`. Enclose font names that contain spaces in single quotation marks, for example `'Times New Roman'`. The browser tries to use the first value, and uses other values in turn, depending on which font is available to the local system.
`Font Color`	Select a color for the text appearing in the component header. Select a color using one of the following techniques: • Select a color by clicking it. • Enter the color's RGB equivalent in the **Font Color** field. Enter RGB values in the format `RRGGBB` or `#RRGGBB` or `r,g,b` • Create a custom color by clicking **Custom Color** in the picker and selecting a color and a saturation level using the selector and the slider provided.

Table 6-3 (Cont.) Display Options Properties

Property	Description
`Font Size`	Specify the size of text appearing in the component header. Enter a value using one of the following types of values: • `length`–Sets the font size to a fixed size. For example, enter: `14px`, `1.5em`, and so on • `xx-small`, `x-small`, or `small` • `medium`–The default • `large`, `x-large`, or `xx-large` • `smaller`–Sets the font size to a size smaller than the parent element. • `larger`–Sets the font size to a size larger than the parent element. • `%`–Sets the current font size to a percentage of the font size of the parent element. For example, enter: `75%`
`Font Style`	Select an option for applying a font style to the text in a component header. Choose from: • **Bold** • *Italic* • Underline • Strikethrough
`Short Desc`	Provide tooltip text for the component instance. When users roll their mouse pointers over the component instance, the text you enter here pops up.
`Show Actions`	Select whether to enable users to move the component on the page. Choose from: • **On Hover**—Show actions only when users hover their mouse pointers over the component header. • **Always** (default)—Always show actions on the component header. • **Never**—Never show actions on the component header.
`Stretch Content`	Select whether to stretch the component content. • `auto` (default): The content stretches to fill the container. • `true`: Stretch the content to fill the container, so that the container shows only one component at a time • `false`: Do not stretch the content
`Text`	Enter text to appear in the component header. If you select to hide the header, the value you enter here is ignored.

To set the display options for a component on a page:

1. Enter display options values on the **Basic** and **Advanced** tabs, or click the ▾ icon next to a field to select and open the Expression Language (EL) Editor. The editor provides a means of entering custom values, such as text strings and Expression Language (EL) expressions.

> **Note:**
>
> When you enter EL in the generic Display Options dialog, the entry is automatically validated. If the EL syntax is invalid, an error appears and the value is neither applied nor saved. .
>
> EL validation is not performed on non-generic display options.

For display option descriptions, refer to the table above or refer to component-specific display options:

- gridCell Component Display Options
- gridRow Components Display Options
- HTML Markup Component Display Options
- Hyperlink Component Display Options
- Movable Box Component Display Options
- OmniPortlet Properties
- panelGridLayout Display Options
- panelGroupLayout Display Options
- panelStretchLayout Display Options
- panelTabbed Display Options
- showDetailFrame Display Options
- sidebarItem Display Options
- spacer Display Options
- WebCenter Portal Components Display Options
- Web Page Component Display Options

2. Save your changes.

Define Data Visualization

For examples that illustrate the steps in this procedure, see Configuring a Data Visualization.

After you add a data visualization to a page, you can configure the data visualization to present the data retrieved from a data source in a visualization template.

> **Note:**
>
> If changes are made to a custom visualization template or the structure of data retrieved from the data source that is selected in a data visualization, you will need to configure a new data visualization to successfully generate the results of the changes on the page.

To configure a new or existing data visualization:

1. On the **Data Source** page, select an existing SQL or REST data source and go to the next step, or create a new REST data source with limited options as follows:

> **Note:**
>
> - The Define Data Visualization wizard supports basic REST data source creation and editing. If you require a REST data source with more options, see Creating a REST Data Source. After creating the data source, you can select it in the Define Data Visualization wizard.
> - If you want to select an existing REST data source, but know that the underlying data has changed, you can exit the wizard and go to the **Assets** page of the portal to edit the data source, where you can select **Refresh Schema** to refresh the data source and associated business object with changes such as added, deleted, or renamed attributes. For more significant structural changes, you will need to re-create the data source, and any data visualizations where it is used.

a. Click the icons in the row for an existing data source to **Copy** or **Edit** the data source, or click **Add Data Source** to create a new REST data source.

b. In the Data Source wizard, on the **Source** page, enter a **Name** and optional **Description** for the REST data source.

c. Enter a valid **Resource Path** URL against which the REST data source will be created, then click **Test** to confirm the resource path is valid and that it returns data. For example, the resource path `http://dev.markitondemand.com/Api/v2/Quote?symbol=AAPL` provides stock quotes.

> **Note:**
>
> The **Resource Path** must support at least the `GET` method, along with any other method (`PUT`, `POST`, `DELETE`).

d. In the list of **Parameters** populated based on the resource path provided, remove or add parameters as needed.

> **Note:**
>
> If you modify the **Resource Path** URL, the list of parameters will be refreshed, and you may need to respecify the required data source parameters.

e. Select a **Data Source Return Type** that specifies data type returned by the **Resource Path** URL. A URL can return data in either **XML** format or **JSON** format.

f. Select or deselect **Use Portal Proxy** and **Use Authentication** as required. For an external URL, select **Use Portal Proxy**.

g. Click **Next**.

h. If you selected **Use Authentication**:

- On the **Authentication** page, select existing credentials, or click **Add Credentials** to create a new credential (if you have been granted the required permission to create a new credential).
- On the **Credentials** page, select from the **Select Security Type** list:
  - **Basic Authentication** support is provided through the External Application Service of WebCenter Portal. The username and password for the REST service are stored in the OPSS Credential Store using the External Application Service. When a data visualization is rendered at runtime, WebCenter Portal retrieves these credentials to present the data on the page.
  - **OAuth** support is provided by OWSM integrated with REST Data Control. ADF REST Data Control supports only OAuth 2.0 using IDM OAuth Servers. External REST services that are protected using a non-IDM solution are not supported.
  - **Taleo Token Generator** authentication is provided by a custom security provider to propagate security at runtime. If authentication is successful, a Taleo token is issued. That token must be passed to each subsequent resource request to retrieve data.
- Under **Configuration**, define or edit the login information, depending on the security type:
  - For **Basic Authentication**, enter the **Login** user name, and **Password**.
  - For **OAuth**, enter the **Login** user name, and **Password** corresponding to the Client ID and Password configured in OAuth server, and enter the **Token Generator URL** of the OAuth Server.
  - For **Taleo Token Generator**, enter the **Login** user name, and **Password**, and enter the **Login URL** and **Org Code** to access the Taleo end point. A user must be authenticated using user name, password, and organization code (company ID) on a defined login URL.

2. Click **Next** to display the **Template** page.
3. On the **Template** page:
   a. Select a visualization template (presentation type) to present the data retrieved from the data source.

      The templates shown are those that are appropriate for the currently selected data source. When you provide the Resource Path URL, WebCenter Portal creates the data source based on the data returned by the URL. If the URL returns only a single record at this time (possibly due to parameter values or limited data currently available), then WebCenter Portal creates the data source with the assumption that a single record will *always* be returned. In this case, the wizard shows only the Form template for selection, since this template is appropriate for presenting a single data record. It does not show the Table or List templates for selection, because these templates are appropriate for repeating records of data. If you know that the data retrieved by the data source may be repeating and you want to select the List or Table templates, then the Resource Path URL that you specify must return repeating data at the time that the data source is created. Alternatively, you can create a data source on the **Assets** page, and provide a Response Payload that contains repeating data. Then, if you select that data source here, the wizard will present all appropriate templates for selection, including List and Table.

> **Note:**
>
> If you select a custom visualization template that was just published while you are in the page editor configuring the data visualization, you may encounter an error. To achieve expected results, do not enter the page editor until after the custom visualization template is published.

b. Click **Next** to display the **Options** page for the selected template, showing two tabs: **Settings** and **Parameters**.

4. On the **Settings** tab, select and set elements to add to the visualization of the retrieved data on the page, dependent on the template you selected.
5. For templates that define an **Output Format** for retrieved data, click the current output format (such as **General**) for a data item to open the Format Column dialog.

   Specify the format for the data item as required, selecting **General**, **Currency**, **Percentage**, **Number**, **Link**.

   > **Notes:**
   >
   > - For **Link**, the URL must be either a full URL (beginning with `http://`) or a URL relative to the portal's web address.
   > - In a Table visualization, filtering on a column is not supported. If the SQL query selects data from a database column that includes a timestamp, you must convert the database column to date format in the SQL query when you create the SQL data source as in the following example:
   >
   >   ```
   >   TO_DATE(TO_CHAR(date_timestamp_column,'MM/dd/yyyy'),'MM/dd/yyyy')
   >   ```

6. On the **Parameters** tab, define:
   - **Visualization Parameters** to get input from other components to the page
   - **Data Source Parameters** to retrieve the data from the data source

   Using this tab, you can pass a visualization parameter value to a data source parameter. This creates the master-detail relationship where one visualization can pass values to another visualization, and then this value is passed to a data source through data source parameters to make a back data query. You have the option to create or delete visualization parameters. New data visualizations do not have any parameters.
7. Click **Save**.

   The new data visualization is added to the page, displaying the data retrieved from the selected data source in the selected visualization template.

Expression Editor

The Expression Editor is a simple Expression Language (EL) editor. Use the Expression Editor when you want to formulate a dynamic computation for an otherwise unknown property value, such as the current user or the current page mode.

In the Expression Editor, you can select either:

- **Choose a value**, then select predefined values from the drop-down lists.

  The values are categorized according to the type of information an expression returns. Select a category from the first menu, and then select the type of value you want returned from the second menu.

  For example, rather than entering `#{pageDocBean.createdBy}`, you can click **Choose a value**, then select `Page Info` and then `Created By`.

- **Type a value or expression**, then enter your own value or an EL expression for the associated property. Use the following formats to enter values:
  - a literal number: `#{123}`
  - a literal string: `#{'string'}`
  - a literal Boolean: `#{true}`
  - a Java Bean called to return a value: `#{generalSettings.preferredTimeStyle}`

  Click the **Test** button to validate your EL syntax and evaluate the expression. Any non-EL value type you enter, such as plain text, HTML tags, or junk characters, is not validated. Validation checks the EL syntax and evaluates the expression. Expression values vary according to the context in which they are executed, so the resulting value of this test will likely differ from the value returned during actual use.

Other CSS Property

The `Other CSS` property allows you to apply CSS styles that are not covered by other properties. Use standard CSS syntax, separating multiple entries with a semicolon (`;`). Use the `Style Class` property to specify the CSS style class to use for the component.

For example:

```
background: #00FF00 url(http://www.google.com/intl/en_ALL/images/logo.gif) no-repeat
fixed top; font-size: xx-small
```

> **Note:**
>
> Some CSS styles are not supported by popular browsers. Moreover, some styles are specific to one browser and may not work correctly in another browser

One example application of the `Other CSS` property is to provide a variety of borders on task flows, portlets, and some web development components.

For descriptions of the properties you can set, see Examples of Other CSS Values in *Building Portals with Oracle WebCenter Portal*

Page Information

Return to Portal Editor

Use the Page Information tabs to manage portal pages and other items in the portal navigation, including viewing and modifying page information, adding and deleting parameters, viewing page source code, establishing page security, and specifying additional navigation options.

Renaming a Page

If you created or have permissions to manage a portal page, you can rename the page.

Be aware that renaming a page affects all members in the portal as this action alters the page itself, not only your view. Renaming a page changes the display name for the page and the page navigation item. It does *not* change the page URL; any pretty URLs using the old name remain valid.

Even when page drafts are enabled, renaming a page takes effect immediately on the published page, regardless of whether or not the page has a pending draft. In other words, you do not need to publish the page draft before the new page name can be seen by page viewers.

To rename a page that you created or have permissions to manage:

1. On the **Summary** tab, enter a new page name in the **Name** field.

   The page display name and the page navigation item display the new name.

Entering or Changing a Page Description

If you created or have permissions to manage a page, you can change the description of the page. The new description is shown at the top of the page information settings.

Even when page drafts are enabled, changing a page description takes effect immediately on the published page, regardless of whether or not the page has a pending draft. In other words, you do not need to publish the page draft before the new page description can be seen by page viewers.

To enter or change the description for a page that you created or have permissions to manage:

1. On the **Summary** tab, enter or modify the text in the **Description** field. The new description is shown at the top of the page information settings.

Showing or Hiding a Page in the Portal Navigation

If you created or have permissions to manage a portal page, you can control whether or not that page is shown in the portal navigation. A page is added to the portal navigation when it is first published. If you hide a page, it is removed from the portal navigation for all portal viewers, but is still available in the portal editor to edit and manage.

To show or hide a page in the portal navigation for all viewers:

1. On the **Summary** tab, select the **Visibility** check box to display the page, or deselect the check box to hide the page in the navigation for the portal.

> **Note:**
>
> You cannot deselect the **Visibility** check box if the page is the only page or the only visible top level page in the portal.

   To enter an Expression Language (EL) expression that determines whether or not the page displays in the navigation, click the ▾ icon on the right, then select **Expression Builder** to open the Expression Language editor, and then enter an EL expression. If the expression evaluates to `false`, the page is not visible in the navigation. Otherwise, the page is visible in the navigation.

Setting Page Behavior for a Specific Page When No Page Variant Exists

Page variants are alternative views of an existing page for specific device groups to target specific device size and characteristics. The base page and the page variant have the same URL, security, parameters, and so on.

When using a device (such as smart phones, tablets, and desktop browsers) in a device group that does not have a page variant defined, *and* the device group is not the default device group for the portal, the page fallback setting determines how to render the page when it is viewed on that device. This behavior is set for all pages in a portal in the portal administration, but you can override the portal-level setting for an individual page, as described here.

This setting is honored based on the following rules:

- If the request is from a device in the default device group for the portal, then the default (base) page will be displayed no matter what is set for **Page Fallback**. The default setting always overrides the **Page Fallback** setting.

> **Note:**
>
> This means that even if there is a page variant for the device group, the default (base) page will be displayed.

- If the request is from a device that is *not* in the default device group for the portal, then:
  – If there is a page variant for that device group, the page variant is displayed on the device.
  – If *no* page variant exists for the device group, then the **Page Fallback** setting is used by the device:

To set the fallback behavior for a page when displayed on a device in a device group that does not have a page variant defined, *and* the device group is not the default device group for the portal:

1. On the **Summary** tab, under **Devices**, select the required **Page Fallback** setting:
   - **Use portal setting** to use the portal-level default setting specified on the **Settings** page in the portal administration.
   - **Display default page** to display the original base page on the device.
   - **Display no page** to display the Page Not Available page on the device.

Adding or Modifying Page Parameters

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.

Even when page drafts are enabled, changing page parameters takes effect immediately on the published page, regardless of whether or not the page has a pending draft. In other words, you do not need to publish the page draft before the effect of new page parameters can be seen by page viewers.

> **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. On the **Parameters** tab, modify existing parameters as required or add new parameters by entering values in the **New Parameter Name** and **New Parameter Value** fields.

   > **Note:**
   >
   > A parameter name must start with an alphabet or underscore (_) character only and can contain only alphanumeric and underscore characters

   The Parameters and Display Options dialogs 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 property, then select **Expression Builder** to open the editor.
2. Click **Add** to add the new page parameter name/value pair to the page.

Viewing and Modifying Page Source Code

The Source tab for a selected page enables you to view, search, and edit the source code for the page. If there is draft for the current page, the source is for the draft. If there is no page draft, then the source is for the published page.

Even when page drafts are enabled, changing page source code takes effect immediately on the published page, regardless of whether or not the page has a pending draft. In other words, you do not need to publish the page draft before the effect of page source code changes can be seen by page viewers.

You can view and modify the source code for a page on two tabs:

- The **Page** tab shows the underlying JSF (`.jspx`) file that defines the page layout and style.
- The **PageDef** tab shows the `.xml` file that defines the parameter definitions and task flow and data control bindings for the page.

To view the source code for a page:

1. On the **Source** tab, click **Page** or **PageDef** at the bottom of the pane to view and modify page or page definition source code, respectively.
2. To save your changes, click **Save**.

> **Note:**
>
> To save any changes you make on the **Source** tab, you must click **Save**. If you navigate to another tab without clicking **Save**, the changes made on the **Source** tab are lost.

Setting Page Security

By default, the pages you create in a portal are viewable by all portal members. In the Home portal, the personal pages you create are accessible only to you and the system administrator.

You can use page access settings to enable others to work with your portal pages and personal pages, and to remove that access. When you grant `Create` permission on a page, those granted this permission can create subpages.

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

Even when page drafts are enabled, changing page security takes effect immediately on the published page, regardless of whether or not the page has a pending draft. In other words, you do not need to publish the page draft before the effect of new page security is implemented.

You may want to open a page to many users, but limit the exposure of a particular page component. To accomplish this, you can set the component's Access properties to hide the component, or specify more granular visibility by role or user, or by using an EL expression.

To specify security settings for a page:

1. On the **Security** tab, select the **Access Method**:
   - (Default) To specify that the page should inherit access settings from the permissions established for the portal, or for the parent page (if a subpage), select **Inherit Parent Security**.
   - To customize access on the current page, select **Override Security**, and continue with the next steps.

   > **Note:**
   >
   > If custom page permissions are specified for roles or individual users in a portal that is later used to create a new portal template, then only the custom page permissions specified for the *roles* (not individual users) are included in the portal template (and subsequently in a portal that is created using the portal template).

2. To modify the access permissions to users or roles listed under **Role or User**, select or deselect the **Access** check boxes, described in the following table.

   > **Note:**
   >
   > To grant page access to the `Public-User` role (that is, to enable users who are not logged in to access the portal) the portal must be public. The portal cannot be private or hidden.

Table 6-4 Page Access Privileges

Access	User, Group, or Role Permissions
Grant	Grant other users, groups, or roles access to the page and any subpages.
Publish	Publish page drafts to make page updates available to portal viewers. When this permission is granted, Delete and Edit are automatically granted. If you revoke Publish permission, Delete and Edit are not automatically revoked, and therefore must be explicitly revoked as required.
Create	Create subpages of the current page.
Delete	Delete the page and any subpages.
Edit	Edit the page and any subpages using the page editor. This includes adding, rearranging, and deleting content; renaming the page; and changing page properties.

Table 6-4 (Cont.) Page Access Privileges

Access	User, Group, or Role Permissions
Contribute	Contribute text, images, and video to the page using contribution mode. Edit and delete any content contributed to the page. Changes made in contribution mode do not create a page draft; changes are visible immediately in the portal. **Note:** Do not grant users this permission if you want to enforce page drafts for all page edits, including content publishing.
View	View the page and any subpages.

3. To grant page access permissions to selected users, groups, and application roles, click **Add Users**, **Add Groups**, or **Add Roles** to open the corresponding search dialog.
4. In the **Search** field, enter a search term or the name of the user, group, or role for whom you want to enable access, and click the **Search** icon.

> **Note:**
>
> In the Add Roles dialog for pages in a portal, you can add any custom roles that have been created for the portal.

5. Select a user, group, or role by clicking in its row.

> **Note:**
>
> When you select a user name, the permissions you set are granted to that specific user. When you select a group or role, the permissions you set are granted to all users who are members of that group or who are assigned that role.

6. Click **OK** to confirm your selections, and populate the **Security** tab with the selected users, group, or roles.
7. To grant page access permissions to all authenticated users (that is, to users who are logged in to WebCenter Portal), click **Add Authenticated Role for Logged in User Access**.

   The role `authenticated-role` is added under **Role or User** with default **View** access to the page.
8. To grant page access permissions to all public users (that is, users who are not logged in to WebCenter Portal) click **Add Anonymous Role for Public Access**.

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

> **Note:**
>
> To grant page access to the `anonymous-role` (that is, to enable users who are not logged in to access the portal) the portal must be public. The portal cannot be private or hidden.

9. On the **Security** tab, set the **Access** permissions as desired for each user, group, or role.

> **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.

10. If you wish to remove access to the page, select the user, group, or role from which to revoke page access, and click **Delete Access**.
11. To save your changes, click **Save**.

Setting Navigation Properties and Display Options for a Page

You can specify various properties and display options for page navigation items to determine their appearance and behavior when the portal navigation is rendered.

Even when page drafts are enabled, changing page properties takes effect immediately on the published page, regardless of whether or not the page has a pending draft. In other words, you do not need to publish the page draft before the effect of new properties are implemented.

To set navigation properties or display options for a page navigation item:

1. On the **Advanced** tab, specify information about the page on the **Target** pane, then click **Save**.

Table 6-5 Page Navigation Item Settings: Target Pane

Field	Description
ID	Automatically populated with a generated ID. This ID is used to create the URL to access the page in the portal navigation. The ID must be unique within the portal navigation. The first character must be either an uppercase or lowercase letter or the underscore character (_). Subsequent characters can be any alphanumeric character or a dash (-), period (.), or underscore (_). If the page is at the top level of the portal navigation, the ID must not be `wc_navtitle` or `wcnav_externalId`; these IDs are reserved.
Path	The path to the page. This value is not editable for a page created in the current portal. When adding a page link, you can enter the path to the page, or click the **Select** icon to browse the content repository for the page.

Table 6-5 (Cont.) Page Navigation Item Settings: Target Pane

Field	Description
Page Template	A drop-down list selection that specifies the page template to use to display the page when it is selected in the navigation. Select **[system default]** to use the portal or application default page template.

2. Set page navigation options on the **Options** pane, then click **Save**.

Table 6-6 Page Navigation Item Settings: Options Pane

Field	Description
Access Key	A keyboard mnemonic (single character) that can be used to access the navigation item without using the mouse.
Icon URI	The path and file name of an image to use to represent the page navigation item.
Search Keywords	Keywords to facilitate searching for the page navigation item.
Tool Tip	Brief descriptive text to display when users hover the mouse over the page navigation item.
External ID	An ID to enable a direct reference to the page navigation item from a static link in a page. Navigation items with this attribute defined can be accessed using `/faces/wcnav_externalId/`*`externalId`* from an `af:goLink` component in a page or using `/wcnav_externalId/`*`externalId`* from an External Link navigation item. The alternative is to access the node by its hierarchy, which is faster, but may change as the application develops.
Open Link In	A drop-down list selection that specifies the container in which to display the navigation item. **Note**: Opening a link in a popup is not valid for pages and large navigation items, but is useful for external links.
New Attribute Name	The name of an attribute that has been defined for the page but not exposed on the **Advanced** tab. You can also select an attribute from the drop-down list.
New Attribute Value	An optional value for the attribute specified in the **New Attribute Name** field. Enter a value and click **Add**, or click **Add** without specifying a value to provide the value once the field is displayed on the **Options** tab.

Tip:

An Expression Editor is available for entering custom values using Expression Language (EL) expression, allowing the values to be determined dynamically based on certain criteria. Click the ▾ icon next to a property, then select **Expression Builder** to open the editor.

Page Editor

Return to Portal Editor

This topic describes the page editor for portal pages. For help with the page editor for a page template, system page, or task flow, see:

- Page Editor: Design View for editing a task flow.
- Page Editor: Structure View for editing a page template, system page, or task flow.

Use the page editor to build or revise page layout and content. The page editor provides a WYSIWYG rendering of the page and its content, where controls are directly selectable on each component to move, delete, or perform custom actions on the component.

When editing a page, the page content is editable, but the page template "container" for the page is not editable. Your edits are not immediately available when viewing the portal. This means that you can refine your changes to a page in draft mode in one or more sessions. When you are satisfied with your page edits, and are ready to make the page available to others who view the portal, you can publish the page.

To add components to the page, you use the resource catalog, which you can show and hide on the right side of the page.

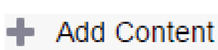
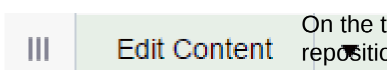
Element	Description
Desktop	Select a device to display a preview of the page on that device. Even if you are building a portal for a desktop browser, this gives you an idea of what the portal might look like on other devices.
Change Layout	Change the page layout to a built-in or custom layout that is defined as an asset at either the portal or application level.
Show Catalog/Hide Catalog	Show or hide the Resource Catalog. When you *hide* the inline resource catalog, click **Add Content** in any layout container on the page to show the resource catalog and select a component to add in that layout container. When you *show* the inline resource catalog, click a component in the resource catalog to add the component to the page.
Add Content	Display the resource catalog, which lists the layout components, task flows, and portlets that you can add to the current layout container.

Element	Description
 Component toolbar	On the toolbar for a component, click and drag the **Move** icon to reposition the component on the page, click **Edit Content** to edit a content publishing component (Image, Text, or Styled Text), or select an action from the **View Actions** menu: • Select a component properties category to display the associated properties dialog. Components, such as task flows and portlets, and UI components, such as buttons, boxes, and images, carry a set of properties that control their appearance and behavior. • Select **Delete** to delete the component from the page. You can delete a component only if it is a direct child of a Box component. Therefore, this action is enabled only when such a component is selected. When you delete a component, all of its child components are also deleted from the page. • Select a component-specific custom action, if available.

Page Editor: Design View

Use Design view of the page editor to build or revise a task flow asset. Design view provides a WYSIWYG rendering of the task flow and its content, where controls are directly selectable on each component to move, delete, or perform custom actions on the component.

To add components to the task flow, you use the resource catalog, which you can show and hide on the right side of the page.

Element	Description
Show Catalog/Hide Catalog	Click to show or hide the resource catalog. When you *hide* the inline resource catalog, click **Add Content** in any layout container to show the resource catalog and select a component to add in that layout container. When you *show* the inline resource catalog, click a component in the resource catalog to add the component to the task flow.
	Click to display the resource catalog, which lists the layout components, task flows, and portlets that you can add to the current layout container.
 Component toolbar	On the toolbar for a component, click and drag the **Move** icon to reposition the component on the page, click **Edit Content** to edit a content publishing component (Image, Text, or Styled Text), or select an action from the **View Actions** menu: • Select a component properties category to display the associated properties dialog. Components, such as task flows and portlets, and UI components, such as buttons, boxes, and images, carry a set of properties that control their appearance and behavior. • Select **Delete** to delete the component from the page. You can delete a component only if it is a direct child of a Box component. Therefore, this action is enabled only when such a component is selected. When you delete a component, all of its child components are also deleted from the page. • Select a component-specific custom action, if available.

Page Editor: Structure View

In Structure view, you have access to page layout components in a tree structure, which enables you to fine-tune the design of page templates, system pages, and tasks flows, and select and modify components that are not exposed in the resource catalog.

Component selection is indicated by a dark blue outline. A light blue outline is drawn when the mouse hovers around a component that can be selected for editing, and your mouse cursor changes to a magnifying glass. When you select a component in the structure pane, it is automatically selected on the page. Similarly, if you select a component on the page, it is automatically selected in the structure pane.

> **Note:**
>
> You can edit core ADF Faces components, task flows, and declarative components only in Structure view of the page.

Structure View: Adding a Component

To add a component in Structure view:

1. In the hierarchical list of page components, select the component in which to place content.

   > **Tip:**
   >
   > You can also select a component by clicking it in the WYSIWYG section of the page. A selected component is outlined in blue.

2. Click the **Add content into the selected component** icon to open the resource catalog.
3. In the resource catalog, navigate to the component you want to add by clicking **Open** next to folders to drill down to related components, or search for it, then click the **Add** link next to it. The resource catalog dialog does not support drag-and-drop.
4. Click **Save** to save your changes.

Structure View: Setting Component Properties

To set properties of a component on a page in Structure view:

1. Select the component by clicking it in the WYSIWYG pane, or clicking its entry in the hierarchical list pane.
2. Click the **Show the properties of *component name*** icon above the hierarchical list pane.
3. In the Component Properties dialog, edit component properties as desired. Click the **Help** icon on each tab for property descriptions.

4. Click **OK** to close the Component Properties dialog.

Page Properties: Display Options

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

To change page display options:

1. 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.

     Click **OK** to enter the color value in the **Background Color** field.
2. 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
   ```
3. 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
   ```
4. Click **OK** to save your changes and apply them to the page.

Page Properties: Layout

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. 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.
2. Click **OK** to apply the selected layout to the current page.

Page Properties: Parameters

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.

> **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. On the **Parameters** tab, modify existing parameters as required.

   > **Note:**
   >
   > 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 **Edit** icon next to a value field, then select **Expression Builder** to open the editor. If you need EL assistance, an application developer can provide an EL expression.

   System pages include a default page parameter: .

   - `pg_pageTemplateID`: By default, specifies the system page using the default page template for the system page. To use a custom page template for the system page, enter a GUID value for the new page template.

2. To add a new parameter:
   - Click **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.

Page Properties: Security

To set access security for a personal page

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.

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.

3. To grant page access permissions to selected users and roles, click **Add Access** to open the 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.

   > **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 6-7 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**.

Parameters

Component parameters vary from component to component. For example, on some components they provide the opportunity to specify the source and range of task flow content; on other components they present read-only, application-generated identifiers that are used in maintaining a task flow instance's association with its customizations.

When there are no producer components on the page, the Parameters dialog displays only parameter names and values. When there is at least one producer component on the page, and the current component is a consumer component, a parameter can bind to either a specified value or to an event. When bound to an event, additional settings are required to specify event details.

Setting Component Parameters

To set the parameters for a component on a page:

1. Enter parameter values, or click the ▾ icon next to a parameter field to select and open the Expression Language (EL) Editor. The editor provides a means of entering an expression when a value is discoverable, but otherwise unknown; for example, when you want a parameter value to be the name of the current user or the current application skin.

   For parameter descriptions, click the link for the task flow or component you are editing:

   - Activity Stream Task Flow Parameters
   - Analytics Task Flow Parameters
   - Connections Task Flow Parameters
   - Content Manager Task Flow Parameters
   - Content Presenter Task Flow Parameters
   - Events Task Flow Parameters
   - Image Component Parameters
   - List Viewer Task Flow Parameters
   - Mail Task Flow Parameters
   - Message Board and Feedback Task Flow Parameters
   - Navigation Breadcrumb Task Flow Parameters
   - Navigation Menu Task Flow Parameters

- Navigation Tree Task Flow Parameters
- Notifications Task Flow Parameters
- OmniPortlet Properties
- Portal Browser Task Flow Parameters
- Portal Members Task Flow Parameters
- Profile Task Flow Parameters
- Profile Gallery Task Flow Parameters
- Profile Snapshot Task Flow Parameters
- Publisher Task Flow Parameters
- RSS Task Flow Parameters
- Search Task Flow Parameters
- Styled Text Component Parameters
- Subscription Preferences (Notifications) Task Flow Parameters
- Tags Task Flow Parameters
- Text Component Parameters

2. Save your changes.

Wiring Events to Component Parameters

An event defined on a producer component has associated payload values that can be used to set the parameter values in consumer task flow or portlet components. As soon as the event is triggered, the associated parameter values are dynamically passed to the consumer task flow or portlet and can be exposed as needed.

More

To wire an event (in a producer component) to a parameter in a consumer task flow or portlet:

1. If the consumer task flow or portlet is not already on the page, add it.
2. Click the **View Actions menu** icon on the consumer task flow or portlet, and select **Parameters**.
3. In the Parameters dialog, the settings you see are available only when there is a producer and consumer task flow on the page. For each parameter defined for the consumer task flow or portlet that you want to wire to an event:
   a. Click the **Value** field icon and select **Event**.
   b. Click the **Event** list, and select the event that is associated with the payload value that you want to pass to the parameter. The **Event** list shows all of the events that are defined for all components on the page.
   c. To specify that the consumer task flow or portlet "listens" for the event from only one producer component, click the **from** list and select the associated producer component. Otherwise, leave **from** with the default value of `Any Component` to allow the parameter to be set when any producer component on the page triggers the specified event.

   d. Click the **payload** list, and select an event payload value. This selection becomes the input value for the associated parameter, passed dynamically when the event triggers.

   For example, the event of selecting a row in a Data Visualization task flow (producer) triggers a `DPRowSelection` event that updates a consumer task flow. In this case, the consumer task flow is a pie chart, which refreshes with data associated with the selected row.

4. Click **OK** and **Save**.
5. Test your wiring by triggering the event and observing the results in the consumer task flow or portlet.

Consuming Page Parameters

You can configure a task flow component to consume page parameters.

> **Note:**
>
> Before you can take the steps outlined in this section, you must create a page parameter and provide it with a value.

To consume a page parameter (wiring a task flow to a page parameter):

1. In the Parameters dialog, click the ▾ icon next to the property that takes the parameter value, then select **Expression Builder** to open the Expression Editor.
2. Select **Choose a value**.
3. Under **Choose a value**, select **Page Parameter** from the first list, and the name of the relevant page parameter from the second.
4. Click **OK** to exit the Expression Editor.
5. Click **OK** to save your changes and exit the Parameters dialog.

   The task flow is refreshed, now displaying the result of the value passed through the page parameter.
6. Click **Save**.

Publish Pages

Page drafts can be enabled or disabled in the portal administration settings. When page drafts are enabled, you can refine your page updates before making them available to others who view the portal. When you or other approvers are satisfied with the page updates, you can publish the page.

> **Note:**
>
> To publish a page, you must be a portal manager or member with the portal-level permission of either:
>
> - Standard permissions: `Basic Services: Edit Page Access, Structure, and Content`
> - Advanced permissions: `Pages: Publish Pages` and `Pages: Delete Pages`

To publish a page after editing it:

1. In the Publish Pages pane, click the check box in the header to select or deselect all pages, or select individual pages you want to publish. The pages are sorted by last modified.
2. Click **Publish**, then click **OK** in the confirmation prompt.
3. To delete a page draft, select it and click the **Delete** icon. Even if a page has never been published, deleting the page draft does not delete the page itself. The base page remains hidden from others when viewing the portal, but is visible in the portal editor to edit and manage.
4. Click **View Portal** to verify that the published page(s) are shown in the portal navigation and display the latest edits.

Refresh from Page Style

If the page style used by a page is updated after the page is created and populated, you can refresh the page to reflect the page style updates, without affecting the existing content of the page.

Even when page drafts are enabled, refreshing the page style takes effect immediately on the published page, regardless of whether or not the page has a pending draft. In other words, you do not need to publish the page draft before the effect of the new page style can be seen by page viewers.

When changes to the page style enclose page content, WebCenter Portal preserves the content. For example, if a page style uses a three column layout, then is modified to use a two column layout, the page content in the deleted layout column moves to the first column on the page.

To refresh a page to show changes made to its page style:

1. In the Refresh from Page Style dialog, click **OK** to refresh the page with the changes made to its page style.

Resource Catalog

Resource catalogs are portal assets that expose components and connections that you can add to a portal. You can use a resource catalog to populate pages, page templates, page styles, and task flows. The items listed in a resource catalog are collectively referred to as *resources*.

The resource catalog available to you as you edit a page, page template, page style, or task flow is established by the portal administration settings, and may be a built-in resource catalog or a custom resource catalog.

WebCenter Portal includes three built-in resource catalogs:

- Default Portal Catalog
- Default Home Portal Catalog
- Default Page Template Catalog

The Resource Registry is a central repository of all the resources available to WebCenter Portal. It contains all the resources that you can add to custom resource catalogs. In addition to including the built-in resources, the Resource Registry is also updated dynamically to include new resources, such as task flows, application integration components and portlets when they are created in WebCenter Portal or deployed as shared libraries from Oracle JDeveloper. As a result, a resource that is created and published in WebCenter Portal is available for consumption right away.

For a description of the resources that may be available to you in the current resource catalog, see About the Built-in Resource Catalogs and About the Resource Registry.

Save Page As Page Style

By default, the pages you create in a portal are viewable by all portal members. In the Home portal, the personal pages you create are accessible only to you and the system administrator. You can modify the access for a portal or personal page.

There may be pages you want to expose to many users, but certain components on the page to only a select set of users—or even only one user. For example, imagine that you have created a portal for all sales people. The portal's home page includes two Events task flow instances: one for all sales people and one for sales managers only. You can secure the second Events instance so that only those users assigned the custom role `sales_manager` can see it.

By default, a component on a portal page is visible to all users who have access to the page. You can set the component's Access properties to show or hide the component, or specify more granular visibility by role or user, or by using an EL expression.

Any component that has associated Access properties can be secured in this way. Those components that do not have associated Access properties can be placed inside a component that does (such as a Box component), and in this way be secured.

To set the access (visibility) for a component on a page:

1. Select a **Visibility** option:
   - **Show component** (default) to specify that the component is always visible to all users.
   - **Hide component** to specify that the component is not shown when the page is viewed. However, the component is shown when editing the page in the portal editor, so that you can modify its Access settings.
   - **Customize by role or user** to select specific roles and users who can access the component. When this option is selected, the current user is given Visible access to the component by default.

- **Customize using EL** to enter Expression Language (EL) that must evaluate to true for the component to be visible.

2. If you select **Customize by role or user,** click **Add Access**, then:
   - Select **Add Users** or **Add Groups** to search for and select individual users or groups of users available in your identity store.
   - Select **Add Roles** to search for and select defined roles.
   - Select **Add Authenticated Role** to change component access for all authenticated users (that is, to users who are logged in to WebCenter Portal).

     This selection adds the role `authenticated-role` under **Role or User**, with access to the component by default.
   - Select **Add Anonymous** to change component access for all public users (that is, users who are not logged in to WebCenter Portal).

     This selection adds the role `anonymous-role` under **Role or User** with access to the component by default.

     > **Note:**
     >
     > To grant component access to the `anonymous-role` (that is, to enable users who are not logged in to access the portal) the portal must be public. The portal cannot be private or hidden.
   - To remove component visibility, select the user, group, or role in the **Role or User** list, then click **Delete Access**.
3. If you select **Customize using EL**, enter Expression Language (EL) that must evaluate to true for the component to be visible.

   For example:
   - To expose a component only to members of a particular scope who are assigned a particular role in that scope, enter:

     ```
     #{WCSecurityContext.userInScopedRole['role']}
     ```

     where *`role`* is a role name, such as `sales_manager`.

     The scope is implicitly resolved to be the current scope:
     – If you use this EL in the *Home portal*, it resolves to Home portal GUID and roles defined at the application level.
     – If you use this EL in a *portal* scope, it resolves to roles defined for the portal.
   - To expose a component only to members of a group, enter:

     ```
     #{WCSecurityContext.userInGroup['group_name']}
     ```
   - To expose a component only to a specific user, enter:

     ```
     #{WCSecurityContext.currentUser['user_name']}
     ```
4. Save your changes.

Style

Style and Content Style properties can be used to fine-tune your portal's look and feel at the component level:

- Style properties apply to the `ShowDetailFrame` container of the component instance, overriding any styles specified for the component through the component's parent container, the page, and the application.
- Content Style properties apply to the content within the `ShowDetailFrame` container of the component instance, overriding any styles specified for Style properties, the page, and the application.

For example, in a Movable Box component, Style settings control the look and feel of the Movable Box; Content Style settings control the look and feel of the components contained within the Movable Box. This look and feel may, in turn, be overridden by the Style settings set on those individual components.

Additionally, the Style and Content Style settings may or may not be exposed depending on whether or not the component elements (such as the skin) support modifications to these settings. Thus, while you can set Style and Content Style properties for a component, these settings may not take effect due to other settings that apply to the component.

For descriptions of the properties you can set, see Style and Content Style Properties in *Building Portals with Oracle WebCenter Portal*.

7 Online Help Topics for Portal Templates

Create Portal Template

You cannot modify the built-in portal template, but any user with `Portal Templates: Create Portal Templates` permission can create new portal templates for use by all users to create portals. This permission is granted to the `Authenticated User` role by default.

To create a new portal template, you start by creating a portal based on an existing template, and customize it according to your requirements. Then, you can create a new portal template based on the customized portal that you have developed. During the creation of a portal template, you can select to inherit the documents, lists, member information, roles, or pages from the source portal. The security settings, including Advanced Permissions (if applicable), for the source portal are also copied by the template.

Users with the default permissions of the `Application Specialist` role (or any user with `Portal Templates: Manage All` permission) can publish any portal template for others to use; otherwise, it remains private and hidden from others.

> **Note:**
>
> The `Portal Creator` role does not have default permissions to create or manage portal templates.

To create a portal template:

1. In the **Setup** step, enter a suitable **Portal Template Name** and (optionally) **Description**. Enter a name that describes the portal template and other WebCenter Portal users will recognize. You can later rename the template as desired.

   Portal template names can contain only alphanumeric characters and underscores (spaces and special characters, such as `&` and `#`, are not allowed). The maximum allowable length is 200 characters. The following reserved keywords are not allowed as the full portal template name in either upper or lower case, or a combination of both—`admin`, `builder`, `group`, `groups`, `home`, `last`, `page`, `pages`, `my portals`, `my spaces`, `portal`, `portals`, `space`, `spaces`, `system`, `webcenter`, `webcenter administration`, `WebCenter Portal`, `webcenter portals`, `webcenter space`, `webcenter spaces`. These reserved words are allowable as part of a longer name (for example, `Sales Group`).

> **Note:**
>
> WebCenter Portal removes any unsupported special characters (such as `-`) and character spaces in the display name specified here to derive the initial *internal* name for the portal template. For example, a display name `My Mega-Template` generates the internal name `MyMegaTemplate`.

2. From the **Category** list, select a category under which to list the portal template when creating a portal, or leave as **<None>** if no category is suitable, then click **Next**.

   In the portal creation wizard, the portal template will be listed under the selected category heading, or under **More...** if you do not select a category.

3. In the **Portals** step, select a portal from the list (which displays portals that you created or have permissions to manage) to use as the basis for your new portal template, then click **Next**.

4. In the **Content** step, select the services that contain data that you want the portal template to inherit from the parent portal.

> **Note:**
>
> - The security settings of all pages in the new portal template default to **Inherit Parent Security** so that the pages in all portals created from the portal template initially inherit access settings from the permissions established for the portal.
> - List definitions are always copied; checking **Lists** in this step specifies that you want to copy the list data, too.
> - By default, all portal assets are copied. If you do not want your template to inherit all portal assets, you can later edit the portal template to remove individual assets (such as task flows or data controls) that you do not want to include.
> - If you select **Members Info**, the **Roles Info** option is also selected. By selecting **Members Info**, you are copying the portal members *and* custom roles from the portal you selected as the basis for the new template into the new template that you are creating.
> - If you select **Roles Info** and do not select **Members Info**, you are copying *only* the roles into your new template. Only the custom roles that are included in the portal you selected as the basis for the new template are copied into the new template.
> - If Advanced Permissions has been specified in the portal that is used to create a new portal template and you select both **Members Info** (and by default **Roles Info**) or only **Roles Info** when creating the portal template, then the specified advanced permissions are included in the portal template (and subsequently in a portal that is created using the template).
> - If custom page permissions are specified for roles or individual users in a portal that is later used to create a new portal template, then only the custom page permissions specified for the *roles* (not individual users) are included in the portal template (and subsequently in a portal that is created using the portal template).

5. Click **Create**.
   - The new portal template displays on your **Portal Templates** page in the Home portal and on the **Portal Templates** page in WebCenter Portal administration.
   - By default, the template is private, which means that other users will not see it on their **Portal Templates** page in the Home portal, and it is not available for selection when they create a new portal.
   - Users granted the `Portal Templates: Manage All` permission can manage all portal templates and make them public.

Export Portal Templates

Use the Export Portal Templates dialog to monitor the progress of your portal template export to a portal archive (`.par` file):

1. When the export process is complete, specify a location for the export archive (`.par`). Select one of:

- **Download**. Saves the export `.par` file to your local file system.

  Your browser downloads and save the archive locally. The actual download location depends on your browser set up.

- **Save to Server**. Saves the export `.par` file to a server location. For example, `/tmp`. Ensure that there are write permissions on the server directory that you specify.

  After clicking **Save to Server**, enter the **Server Location** and then click **Save**.

2. Click **Close**.

Export Portal Templates Pane

With the default permissions of the `Application Specialist` role, or the `Portal Templates: Manage All` permission, you can export portal templates from WebCenter Portal to a portal archive (`.par` file) and deploy them on another portal server. Built-in templates cannot be exported.

While export and import utilities are primarily used to move information between WebCenter Portal instances, the portal template export feature is also useful as a backup service, and for sharing and exchanging templates with others.

Portal templates can contain pages, documents, lists, and security information such as custom roles and member details.

When you export a portal template, all this information is packaged in a portal data file (`.pdr`). The PDR file contains a metadata archive (`.mar` file) and a single XML file containing security policy information for the template. The export process packages up one or more template `.pdr` files to an archive that you can save to your local file system or to a remote server file system.

As template data is included in the portal template archive, you do not need to manually migrate any template data to the target server.

Templates that use document tools (files, folders, wikis, blogs) automatically own a content folder on WebCenter Portal's back-end content repository. When you use WebCenter Portal to export portal templates, the content stored in this folder is automatically included in the portal template archive (`.pdr`) for easy deployment to another target server. The folder is added to a **.zip** file located at: `transport.mar\oracle\webcenter\lifecycle\importexport\data\oracle-webcenter-doclib\docsexport.zip`

> **Note:**
>
> Portal template archives do not include web content or pages referenced by the portal template that is stored at any other location, for example, information displayed through Content Presenter that is not stored in the portal template's content folder. Only the folder assigned to the portal template on WebCenter Portal's back-end content repository is included with the portal template archive.

You can save export archives to your local file system or to a remote server file system.

To export one or more portals templates from WebCenter Portal:

1. If you want to exclude a portal template, click its **Delete** icon.
2. Change the name of the portal archive (with the file extension `.par`) or accept the default name.

   The default file name for the portal archive includes a random number to ensure uniqueness: `webcenter_`*`random_number`*`.par`
3. Click **Export**.

> **Note:**
>
> - Including content folders increases the size of the portal template archive. If you are exporting a large number of portal templates or large content folders, take care that your archive does not exceed the maximum upload size for files (2 GB by default). If necessary, you can ask your system administrator to increase this setting.
> - If you are managing legacy portal templates with assets that store artifacts in MDS, Oracle recommends that you relocate all dependent artifacts from MDS to your content repository. If you choose not to move artifacts stored in MDS, you can use MDS WLST commands `exportMetadata/importMetadata` to move the MDS content another time. For example:
>
> ```
> exportMetadata(application='webcenter', server='WC_Portal',
> toLocation='/tmp/content', docs='/oracle/webcenter/siteresources/
> scopedMD/shared/**')
> ```
>
> ```
> importMetadata(application='webcenter', server='WC_Portal',
> fromLocation='/tmp/content', docs='/oracle/webcenter/
> siteresources/scopedMD/shared/**')Notes
> ```

4. Monitor progress in the Export Portal Templates dialog.
5. When the export process is complete, specify a location for the export archive (`.par`). Select one of:
   - **Download**. Saves the export `.par` file to your local file system.

     Your browser downloads and save the archive locally. The actual download location depends on your browser set up.
   - **Save to Server**. Saves the export `.par` file to a server location. For example, `/tmp`. Ensure that there are write permissions on the server directory that you specify.

     After clicking **Save to Server**, enter the **Server Location** and then click **Save**.
6. Click **Close**.

The export archive (`.par`) is saved to the specified location.

Import Portal Templates

Use the Import Portal Templates dialog to monitor the progress of your portal template import from a portal archive (`.par` file). If a portal template already exists, then it is deleted and replaced. If a portal template does not exist, then it is created.

Import Portal Templates Pane

With the default permissions of the `Application Specialist` role, or the `Portal Templates: Manage All` permission, you can import portal templates from a portal archive (`.par` file) into WebCenter Portal.

On import, *all* portal templates included in the archive are re-created. If a portal template exists, then it is deleted and replaced. If a portal template does not exist, then it is created.

Newly imported portal templates are not immediately available for general use. You must publish the imported templates to make them available to everyone.

Portal templates that use document services (files, folders, wikis, blogs) automatically own a content folder on WebCenter Portal's back-end content repository. The content folder is included in the portal template archive in a `.zip` file located at: `transport.mar\oracle\webcenter\lifecycle\importexport\data\oracle-webcenter-doclib\docsexport.zip`

> **Note:**
>
> Portal template archives do not include web content/pages referenced by the portal template that is stored outside the template's content folder, for example, information displayed through Content Presenter that is not stored in the template's content folder. Similarly, template archives do not include shared assets. You must migrate all dependent content to the target so it is accessible to the imported template. If you do not move all dependent content to the target server it will be missing when you import the portal template.

To import one or more portal templates from a `.par` file:

1. Specify the location of your portal template archive (`.par` file):
   - **Look On My Computer**. Click in the input field or click **Browse** to open the File Upload dialog and navigate to the `.par` file on your local file system.
   - **Look On WebCenter Portal Server**. Enter the path on the server where WebCenter Portal is deployed, including the archive file name. For example, `/tmp/MyPortalTemplateExport.par`. You can specify any shared location that is accessible from WebCenter Portal.
2. Click **Browse Archive** to review the content available for import.

   The names of all the WebCenter Portal templates in the specified archive display in the table. The **Type** column indicates when there is a conflict between the portal templates in the archive and those which exist on the target:
   - **New** - A portal template with this name does not exist on the target. On import a new template is created.
   - **Replace** - A portal template with this name and the same GUID exists on the target. The existing template is deleted on import and replaced with the version in the archive.

- **Conflict** - A portal template with this name exists on the target but the template on the target has a different GUID to the template you are trying to import. Or similarly, this template has the same GUID as one of the templates in the target but the template names do not match.

  If the import process detects a conflict between the portal templates you are trying to import and those which exist on the target, you must resolve the issue. For example, if the conflict is due to matching names but different GUIDs you could either change the name of the source portal template and create a new export archive, or rename the conflicting portal template in the target application and import the same archive.

3. Click **Import**.
4. If you are replacing an existing portal template, click **Yes** to confirm the overwrite.

   Any content in the portal template archive will be included in the import. An information message displays when all templates import successfully.
5. Monitor progress in the Import Portal Templates dialog. When the import is complete, click **Close**.
6. To publish the portal template to make it available to all WebCenter Portal users, select the template name, click the **Actions** menu, and select **Make Public**.

   The template is published and displays on the **Portal Templates** page in the Home portal for all users.

Portal Templates (in Home Portal)

Use the **Portal Templates** page in either the Home portal or WebCenter Portal administration to manage the portal templates available to you. With the `Portal Templates: Create Portal Templates` permission can create, rename, set access to, and delete your own portal templates. This permission does not allow you to import, export, or publish portal templates.

With the default permissions of the `Application Specialist` role, or the `Portal Templates: Manage All` permission, you can create, rename, set access to, delete, publish, hide, and import or export portal templates.

Portal Templates: Creating a New Template

You cannot modify the built-in portal template, but any user with `Portal Templates: Create Portal Templates` permission can create new portal templates for use by all users to create portals. This permission is granted to the `Authenticated User` role by default.

To create a new portal template, you start by creating a portal based on an existing template, and customize it according to your requirements. Then, you can create a new portal template based on the customized portal that you have developed. During the creation of a portal template, you can select to inherit the documents, lists, member information, roles, or pages from the source portal. The security settings, including Advanced Permissions (if applicable), for the source portal are also copied by the template.

Users with the default permissions of the `Application Specialist` role (or any user with `Portal Templates: Manage All` permission) can publish any portal template for others to use; otherwise, it remains private and hidden from others.

> **Note:**
>
> The `Portal Creator` role does not have default permissions to create or manage portal templates.

To create a portal template:

1. Click **Create** to open the Create dialog.

   > **Note:**
   >
   > There must be at least one portal available to use as the basis for the new portal template. Otherwise, **Create** is not active.

2. In the Create Portal Template dialog, click the **Help** icon for assistance.

Portal Templates: Viewing Information About a Template

> **Note:**
>
> The `Portal Creator` role does not have default permissions to view or manage portal templates.

To view information about a portal template:

1. Click in the row of the portal template that you want to learn about, then from the **Actions** menu, select **About Portal Template**.

   The About Portal Template dialog opens.

2. Explore the information in the About Portal Template dialog:
   - **Name**: Internal name of the portal template displayed in the portal URL. You cannot change the internal name of a portal template.
   - **Display Name**: Display name of the portal template. This name displays in places where the templates are available for selection, such as the Create a Portal dialog and the **Portal Templates** page. You cannot change the display name of the built-inportal template. To change the display name of a custom portal template that you create, see Renaming a Portal Template.
   - **Internal ID**: ID of the portal template, which other applications may use to reference this portal template.
   - **Description**: A description of the portal template, specified when creating the portal template. You cannot modify the description of a portal template unless you rename the template, where you can enter a new description in the Rename dialog.
   - **Created By**: User name of the portal template creator.
   - **Date Created**: Date and time that the portal template was created.

Portal Templates: Renaming a Template

To rename a portal template:

1. Click in the row of the portal template.
2. From the **Actions** menu, select **Rename Portal Template Display Name** to open the Rename Portal Template Display Name dialog.
3. In the **Display Name** field, enter a new name for the portal template.
4. Optionally, enter a **Description**.
5. Click **OK**.

Portal Templates: Setting Access to a Template

You can grant specific users and groups read-only or manage access to a portal template that you have permissions to manage.

To set up access to a portal template:

1. Click in the row of the portal template.
2. From the **Actions** menu, select **Set Template Access** to open the .Set Template Access dialog
3. In the Set Template Access dialog:
   - Click **Add Users** to open the Search Users dialog where you can select from a list of users or search for a user name.
   - Click **Add Groups** to open the Search Groups dialog where you can search for a user group.
4. For each user or user group listed in the Set Template Access dialog, specify which level of access to grant (one permission per user or user group):
   - Select the **View** check box to grant read-only access to the portal template.
   - Select the **Manage** check box to grant full access to rename, set access to, delete publish or hide the portal template.
5. Click **OK**.

Portal Templates: Publishing or Hiding a Template

When you create a portal template, it is private by default. This means that only you as the template creator can see the template on your personal **Portal Templates** page in the Home portal. To make the template available to users, you must publish it.

> **Note:**
>
> To publish or hide a portal template, you need the default permissions of the `Application Specialist` role, or the `Portal Templates: Manage All` permission. Note that the `Portal Creator` role does not have this permission by default. Users with the `Portal Templates: Create Portal Templates` permission can create, rename, set access to, and delete their own portal templates, but cannot publish a template.

To publish or hide portal templates:

1. Click in the row of the portal template to publish or hide.
2. From the **Actions** menu, select:
   - **Make Public** to publish the template to all WebCenter Portal users.
   - **Remove Public Access** to remove the template from the portal templates list in the Home portal for all users, except for the template creator and those users who have specifically been granted **View** or **Manage** access in the Set Template Access dialog.
3. In the confirmation prompt, confirm your selection.

   > **Note:**
   >
   > If another user is in the process of creating a new portal, and you remove public access from the portal template selected for the portal before the user has completed creating the portal, the template becomes invalid for the portal and the user receives an error.

Portal Templates: Deleting a Template

Deleting a portal template does not affect the portals that were created using the portal template.

> **Note:**
>
> The built-in portal template cannot be deleted. However, users with the default permissions of the `Application Specialist` role, or the `Portal Templates: Manage All` permission, can hide the built-in portal template from everyone's view .

Deleting a portal template does not affect the portals that were created using the portal template.

To delete a portal template when it is no longer required:

1. Click in the row of the portal template.
2. From the **Actions** menu, select **Delete Portal Template**.

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

Portal Templates (in WebCenter Portal Administration)

Use the **Portal Templates** page in WebCenter Portal administration to manage every portal template in WebCenter Portal. With the default permissions of the `Application Specialist` role, or the `Portal Templates: Manage All` permission, you can create, rename, set access to, delete, publish, hide, and import or export portal templates.

Users with the `Portal Templates: Create Portal Templates` permission can create, rename, set access to, and delete their own portal templates on the **Portal Templates** page in either the Home portal or WebCenter Portal administration. This permission does not allow users to import, export, or publish portal templates.

Portal Templates: Importing and Exporting Templates

To import a portal template:

1. Click **Import** in the toolbar.
2. In the Import Portal Templates pane, click the **Help** icon for assistance.

To export a portal template:

1. Select the portal template to export by highlighting the row in the table.

   Ctrl+click rows to select more than one template.
2. In the Export Portal Templates pane, click the **Help** icon for assistance.

Portal Templates: Creating a New Template

You cannot modify the built-in portal template, but any user with `Portal Templates: Create Portal Templates` permission can create new portal templates for use by all users to create portals. This permission is granted to the `Authenticated User` role by default.

To create a new portal template, you start by creating a portal based on an existing template, and customize it according to your requirements. Then, you can create a new portal template based on the customized portal that you have developed. During the creation of a portal template, you can select to inherit the documents, lists, member information, roles, or pages from the source portal. The security settings, including Advanced Permissions (if applicable), for the source portal are also copied by the template.

Users with the default permissions of the `Application Specialist` role (or any user with `Portal Templates: Manage All` permission) can publish any portal template for others to use; otherwise, it remains private and hidden from others.

> **Note:**
>
> The `Portal Creator` role does not have default permissions to create or manage portal templates.

To create a portal template:

1. Click **Create** to open the Create dialog.

   > **Note:**
   >
   > There must be at least one portal available to use as the basis for the new portal template. Otherwise, **Create** is not active.

2. In the Create Portal Template dialog, click the **Help** icon for assistance.

Portal Templates: Viewing Information About a Template

> **Note:**
>
> The `Portal Creator` role does not have default permissions to view or manage portal templates.

To view information about a portal template:

1. Click in the row of the portal template that you want to learn about, then from the **Actions** menu, select **About Portal Template**.

   The About Portal Template dialog opens.

2. Explore the information in the About Portal Template dialog:
   - **Name**: Internal name of the portal template displayed in the portal URL. You cannot change the internal name of a portal template.
   - **Display Name**: Display name of the portal template. This name displays in places where the templates are available for selection, such as the Create a Portal dialog and the **Portal Templates** page. You cannot change the display name of the built-inportal template. To change the display name of a custom portal template that you create, see Renaming a Portal Template.
   - **Internal ID**: ID of the portal template, which other applications may use to reference this portal template.
   - **Description**: A description of the portal template, specified when creating the portal template. You cannot modify the description of a portal template unless you rename the template, where you can enter a new description in the Rename dialog.
   - **Created By**: User name of the portal template creator.
   - **Date Created**: Date and time that the portal template was created.

Portal Templates: Renaming a Template

To rename a portal template:

1. Click in the row of the portal template.
2. From the **Actions** menu, select **Rename Portal Template Display Name** to open the Rename Portal Template Display Name dialog.

3. In the **Display Name** field, enter a new name for the portal template.
4. Optionally, enter a **Description**.
5. Click **OK**.

Portal Templates: Setting Access to a Template

You can grant specific users and groups read-only or manage access to a portal template that you have permissions to manage.

To set up access to a portal template:

1. Click in the row of the portal template.
2. From the **Actions** menu, select **Set Template Access** to open the .Set Template Access dialog
3. In the Set Template Access dialog:
   - Click **Add Users** to open the Search Users dialog where you can select from a list of users or search for a user name.
   - Click **Add Groups** to open the Search Groups dialog where you can search for a user group.
4. For each user or user group listed in the Set Template Access dialog, specify which level of access to grant (one permission per user or user group):
   - Select the **View** check box to grant read-only access to the portal template.
   - Select the **Manage** check box to grant full access to rename, set access to, delete publish or hide the portal template.
5. Click **OK**.

Portal Templates: Publishing or Hiding a Template

When you create a portal template, it is private by default. This means that only you as the template creator can see the template on your personal **Portal Templates** page in the Home portal. To make the template available to users, you must publish it.

> **Note:**
>
> To publish or hide a portal template, you need the default permissions of the `Application Specialist` role, or the `Portal Templates: Manage All` permission. Note that the `Portal Creator` role does not have this permission by default. Users with the `Portal Templates: Create Portal Templates` permission can create, rename, set access to, and delete their own portal templates, but cannot publish a template.

To publish or hide portal templates:

1. Click in the row of the portal template to publish or hide.
2. From the **Actions** menu, select:
   - **Make Public** to publish the template to all WebCenter Portal users.

- **Remove Public Access** to remove the template from the portal templates list in the Home portal for all users, except for the template creator and those users who have specifically been granted **View** or **Manage** access in the Set Template Access dialog.

3. In the confirmation prompt, confirm your selection.

> **Note:**
>
> If another user is in the process of creating a new portal, and you remove public access from the portal template selected for the portal before the user has completed creating the portal, the template becomes invalid for the portal and the user receives an error.

Portal Templates: Deleting a Template

Deleting a portal template does not affect the portals that were created using the portal template.

> **Note:**
>
> The built-in portal template cannot be deleted. However, users with the default permissions of the `Application Specialist` role, or the `Portal Templates: Manage All` permission, can hide the built-in portal template from everyone's view .

Deleting a portal template does not affect the portals that were created using the portal template.

To delete a portal template when it is no longer required:

1. Click in the row of the portal template.
2. From the **Actions** menu, select **Delete Portal Template**.
3. In the confirmation prompt, click **Delete**.

8

Online Help Topics for Portals

About Portal

- **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.

Activities

Use the Activities page to post messages, share content, and view and interact with the content others have posted in the Home portal and other portals.

Reposting Streamed Items

To repost a streamed item:

1. Go to the item you want to share, click **Share**, then click **This activity**.
2. In the resulting Share dialog, optionally, enter a message to accompany the 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:
   - 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.

     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**.
2. Address, write, and send the message as you would any other email.

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. Click in the Publisher text area, and enter a message.
2. If you are viewing Publisher from the Home portal, select an option from the **Share with** menu:
3. 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.

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.

  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. Optionally, click in the text area and enter the message you want to accompany the file.
2. Next to **Attach**, click **File** to open the field for attaching a file.
3. Click **Select files** to navigate to and select the file you want to share.
4. If you are viewing Publisher from the Home portal, select an option from the **Share with** menu.
5. 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. Optionally, click in the text area and enter the message you want to accompany the link.
2. Next to **Attach**, click **Link** to open field for entering a URL.
3. Enter the URL you want to share, and click **Attach**.
4. If you are viewing Publisher from the Home portal, select an option from the **Share with** menu.
5. 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.

Add Attribute

Every portal includes built-in attributes such as name, description, date created, icon, and so on. In addition to these built-in attributes, you can add custom attributes that are unique to the portal and its characteristics to specify additional portal information (metadata). Custom attributes are propagated throughout the portal.

In addition to portal-specific attributes, system administrators can add and manage global attributes in WebCenter Portal Administration. Global attributes are available for use by any portal.

A custom attribute is simply a name value pair (such as `customerId=400`, `orderId=11`, or `userName=Smith`).

More

To add a new custom attribute:

1. Enter a unique **Name** for the attribute. Valid names start with an alphabetic character and contain only alphanumeric characters
2. Enter a **Value** for the custom attribute. The value you type is treated as a string value. A value is optional for global attributes.
3. Click **Add** to save the custom attribute.

Administration: Portals

Use the **Portals** page in WebCenter Portal Administration to edit and administer all portals. The tasks available to you are dependent on your role or permissions.

- System administrators (or users with `Portal Server-Manage Configuration` permission) can manage any portal, and also import and export portals.
- Portal managers (or members with portal-level `Manage Security and Configuration` or `Manage Configuration` permission) can manage portal settings, but cannot import and export portals.
- To import a portal, click **Import** in the toolbar. In the Import Portals dialog, click the Help icon for assistance.
- To export one or more portals, select the portal(s), then click **Export** in the toolbar. In the Export Portals dialog, click the Help icon for assistance.
- To share the link to a portal, highlight the portal's row, then click the **Actions** icon and select **Share Link**. In the Share dialog, click the Help icon for assistance.
- To close a portal that is no longer being used, highlight the portal's row, then click the **Actions** icon and select **Close**.
- To reactivate a portal that is closed, highlight the portal's row, then click the **Actions** icon and select **Activate**.
- To take any portal temporarily offline for maintenance, highlight the portal's row, then click the **Actions** icon and select **Take Offline**.
- To bring any portal back online, highlight the portal's row, then click the **Actions** icon and select **Bring Online**.
- To remove a portal permanently from WebCenter Portal, highlight the portal's row, then click the **Actions** icon and select **Delete**. More
- To view portal deployment history, click **Portal Deployments**. In the Portal Deployments screen, click the Help icon for assistance.
- To create a new portal, click **Create Portal**. In the Create Portal wizard, click the Help icon for assistance.

Analytics

The *Analytics console* displays metrics for the entire WebCenter Portal application. It is available to system administrators with the `Manage Configuration` permission.

The console consists of four pages, grouping several different reports:

- **Summary Metrics** – portal traffic, page views, and login metrics:
  - **Traffic** provides a summarized view of common events in WebCenter Portal. Use the Traffic view to track application-wide events, such as portal views,

page views, portlet views, logins, number of searches, wiki views, blog views, and document views.

  – **Pages** tracks the number of page hits and unique users who have visited any portal page. Use this for a quick view of the most visited pages (top pages) and/or the least visited pages (bottom pages).
  – **Logins** reports the number of times users log in to WebCenter Portal. Use this view to see the total number of WebCenter Portal logins and/or the number of times unique users logged-in to WebCenter Portal.
- **Portal Metrics** – portal usage and response times
  – **Traffic** shows usage information for individual portals. Usage information includes the number of page hits, number of unique users, and the number of unique visits (multiple consecutive page views within the same portal during the same WebCenter Portal session is treated as one visit). Use this task flow to quickly see the most popular portals (top), and the least popular portals (bottom).
  – **Response Time** displays page performance information—average, minimum, or maximum response time—for individual portals over any time period you specify. Use this view to quickly see the slowest portals (bottom), and the fastest portals (top).
- **Portlet Metrics** – portlet usage and response times:
  – **Traffic** displays portlet usage information—the number of portlet hits (the number of times a portlet is displayed) and number of unique users that access a portlet. Use this view to quickly see the most popular portlets (top), and the least popular portlets (bottom).
  – **Instances Traffic** displays usage information—the number of portlet hits (the number of times a portlet is displayed) and number of unique users that access a portlet—for individual portlet instances. If the same portlet displays on several different pages, each placement is considered as a portlet instance. Use this view to quickly see the most popular portlet instances (top), and the least popular portlet instances (bottom).
  – **Response Time** displays performance information—average, minimum, and maximum response time—for individual portlets. Use this view to quickly see the slowest portlets (bottom), the fastest portlets (top), and compare performance data. Portlet response times are important because there is often a direct link between page performance and the slowest portlets. When troubleshooting poor performance within a portal, it is important to identify the worst performing portlets.
  – **Instances Response Time** displays performance information—average, minimum, and maximum response time—for individual portlet instances. If the same portlet displays on several different pages, each placement is considered as a portlet instance. Use this view to quickly see the slowest portlet instances (bottom), the fastest portlet instances (top), and compare performance data.
- **Service Metrics** – search usage, documents, wikis, blogs:
  – **Search Metrics** tracks searches performed within WebCenter Portal. Use this view to quickly see the most popular (top) and least popular (bottom) search phrases.
  – **Document Metrics** tracks how often a document is accessed. Use this view to quickly see the most popular (top) and least popular (bottom) documents.

Documents in the Home Portal are included in this report. If you have two different documents with the same name, they are treated as two separate documents. The metrics includes the parent folder for context.

– **Wiki Metrics** tracks how often wikis are accessed within WebCenter Portal. Use this view to quickly see the most popular (top) and least popular (bottom) wikis.

– **Blog Metrics** tracks how often blogs are accessed within WebCenter Portal. Use this view to quickly see the most popular (top) and least popular (bottom) blogs.

Change Membership

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.

To change your portal role:

1. 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**.

2. Click **OK**.

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

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

4. 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.

Create Portal Wizard

> **WARNING:**
>
> - If you are using Internet Explorer, turn off Compatibility Mode before trying to use WebCenter Portal to create a new 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 doesn't function properly if you try to view WebCenter Portal in multiple browser tabs or windows simultaneously.

To create a new portal:

1. **Select a Portal Template**. Explore the portal templates available to you to use as the basis for your new portal. There is one built-in portal template, named **Portal**.

   > **Note:**
   >
   > - A custom portal template may include preseeded data, such as documents, lists, member information (including roles), pages, or assets. When you select such a template, the new portal includes all the preseeded data.
   > - If the template you select is made private by another user after you select it, but before you have completed creating the portal, the template becomes invalid for your use and an error occurs.

2. Select a portal template to display its details in the portal specification screen.

   To browse and select a different portal template, click the left and right arrows to scroll through available templates, or click **Template Gallery** to return to the full gallery display of all portal templates.

3. **Title and Description**. Modify the default portal title if desired and, optionally, enter a description and keywords for the portal.

The title that you enter here is the *display name* that displays at the top of the portal and other places where portals are available for selection, such as the **Portals** menu and portal browser. Portal titles can contain alphanumeric characters, underscores, spaces, multibyte characters, and special characters such as `&` and `#`. The maximum allowable length is 200 characters. The following reserved keywords are not allowed as the full portal name either in upper or lowercase, or a combination of both—`admin`, `builder`, `group`, `groups`, `home`, `last`, `page`, `pages`, `my portals`, `my spaces`, `portal`, `portals`, `space`, `spaces`, `system`, `webcenter`, `webcenter administration`, `WebCenter Portal`, `webcenter portals`, `webcenter space`, `webcenter spaces`. These reserved words are allowable as part of a longer name (for example, `Sales Group`).

> **Note:**
>
> WebCenter Portal removes any unsupported special characters (such as `-`) and character spaces in the display name specified here to derive the initial *internal name* for the portal. For example, the Title `My Mega-Portal` generates the internal name `MyMegaPortal`. The URL to this portal is `http://host:port/webcenter/portal/MyMegaPortal`.

4. **Keywords**. Enter any keywords related to the content of the portal to make it more easily discoverable in search results. Keywords are individual words. To enter multiple keywords at once, separate them with a space. Press Enter to save your keywords.

   To remove an existing keyword, click the **Delete** icon on the keyword.

5. **URL**. Modify the default URL for the portal if desired. The internal name of the portal is derived from this field.

6. Choose an access level for the portal:

   - **Public** (default): Anyone can visit the portal, whether they are a registered WebCenter Portal user or not. When this setting is selected, the `Public-User` role in the portal is automatically granted `View Pages and Content` permission in the portal, which allows public users to view pages, lists, events, links, and notes. To allow public users to view documents, you need to grant these permissions. Public users do not have edit, create, or manage permissions in the portal.
   - **Private**: To access the portal, membership is required (either through invitation or self-registration if enabled). The portal will be shown in the list of available portals in the portal browser and will appear in search results.

     > **Note:**
     >
     > The `Administrator` role provides a user with administrative permissions in a private portal (such as managing membership), but does not allow access to a private portal's page contents.

   - **Hidden**: To access the portal, membership is required (through invitation). The portal will *not* be shown in the list of available portals in the portal browser and will *not* appear in search results.

     Members can access the portal through direct URL.

> **Note:**
>
> Hidden portals can be viewed through WebCenter Portal administration on the **All Portals** page by users with the permission `Portal Server-Manage Configuration` or `Portals-Manage Security and Configuration`, such as a system administrator. While these users can manage the portal (change settings and membership), they cannot see the portal pages and content unless they are a portal member.

> **Note:**
>
> The selected access level overrides the access level specified by the portal template that you selected. For example, if you select a portal template that specifies **Public** access, then select an access level of **Private** for the new portal, the portal is private. No public metadata is copied from the portal template, and public users have no access to the portal. Similarly, when you select a portal template that is **Private** or **Hidden**, then select **Public** for the new portal, public users can visit the portal.

7. **Pages**. Click to view the page tree for the new portal.

> **Note:**
>
> By default, all new portals have a Home page. The built-in Blank page style is applied to the Home page. It is not possible to change a page style for a page after creating the page, but you can create a new Home page in the portal editor to replace the default Home page, selecting a new page style. The portal template you select may also include additional built-in system pages, which you will see listed under **Pages**.

8. If shown, use the **Add More Pages** input area to create pages for the new portal. Pages created in this way are immediately available in your portal upon creation.
9. Click **Create Portal**.
10. To view and work with your new portal in the portal browser, click the **Back to Portals** icon at the top left of the window.

    By default, your new portal displays in the portal browser as a color tile, overlaid with the portal name and an acronym depicting the first two letters of the portal name. The color is randomly assigned.

Create Role

Before creating a new role, be sure to confirm that the `Viewer` or `Participant` roles cannot meet the role requirements.

To create a new role for a portal:

1. In the portal administration, click **Security** in the left navigation pane, then click the **Roles** subtab.
2. To define a new role for this portal, click the **Create Role** drop-down and select **Custom Role** to open the Create Role dialog.
3. Enter a suitable **Role Name**.

   Names can contain alphanumeric characters, blank spaces, hyphens, and underscores. Make sure that role names are self-descriptive to make it as obvious as possible which member should belong to which roles.

   > **Note:**
   >
   > You cannot use the name `moderator` or `Moderator` for a custom role. Even though the default role of `Moderator` was renamed in an earlier release to `Portal Manager`, the name `moderator` or `Moderator` is still reserved for internal use.

4. Enter a **Description** for the role.
5. Optionally, select a **Role Template**.

   The new role inherits permissions from the role template. You can modify these permissions in the next step. If you do not select a role template, the new role is created with no permissions.

   - Choose **Portal Manager** to create a role that inherits full administrative privileges for the portal.
   - Choose **Public-User** or **Authenticated-User** to create a role that inherits permissions inherent in these two roles. The authenticated user role inherits all permissions of the public user role in a portal.

     If you have created other roles, for example, `Viewer`, `Participant`, or `Delegated Manager`, or another custom role, you will see those role templates as well.

   > **Note:**
   >
   > - The `Portal Manager` role permission `Manage Security and Configuration` cannot be modified. Use caution in assigning this role to members because it contains full administrative privileges in the portal.
   > - The permissions inherent in the two seeded role templates allow users to view portal content. You can subsequently edit permissions for the user roles.

6. Click **OK**.

   The new role appears as a row in the table on the **Roles** page.
7. To modify permissions for the role, click **Edit Permissions**, and then select or deselect each permission check box.

Deploy

> **Note:**
>
> Deploying a portal is primarily a system administrator task; however, you can assign the `Portal Server: Deploy` permission to another custom role. It is recommended that you create a custom role and assign this permission to the custom role in order to restrict the user roles that can deploy portals.
>
> Only the Portal Manager (or Delegated Manager) of the portal can deploy the portal, and in addition, must be in a role that has the `Portal Server: Deploy` permission.

To deploy a portal using WebCenter Portal:

1. From the **Server Name** list under **Target Portal Server**, select the portal server connection you want to use to deploy your portal.
2. In the **Comments** box, specify comments, if any, about portal deployment.
3. In the Options section, select the deployment options:
   - **Include Portal Content**: Select to specify that the portal content stored on Content Server must be included in portal deployment on the target server. This option is available only if the content repository is WebCenter Content Server.
   - **Include Shared Assets**: Deploys the shared assets used by the portal. Clear the check box if you do not want to deploy shared assets.
   - **Include Shared Libraries**: Deploys the shared libraries used by the portal. Clear the check box if you do not want to deploy shared libraries. If you include shared libraries in portal deployment, you must restart the target server after deploying the portal for the shared library changes to be picked up.

   If this is the first time the portal is being deployed, the **Redeploy instead of propagating changes** check box appears disabled. Expanding the **Change Details** section displays a message that the portal is being deployed (for the first time) and hence all the data will be carried over to the target server. When you propagate a portal, this section displays the changes made to the portal since the last deployment.
4. Click **Deploy**.

   The Deploy Portals dialog displays the progress and status of portal deployment. While the portal is being deployed, you can choose to close the dialog and continue to work on the portal if required.
5. Click **Close**.

   Once a portal is deployed, you can view its deployment history and status.
6. Restart the target server where the portal is deployed if you included shared libraries in portal deployment.

Device Settings

Enterprise portal users access portals from a range of devices, from smart phones to tablets to desktop browsers. Device settings and related features control exactly how your portal pages render on different devices. Device settings can be configured only at the application level and not at the portal level. Application-level device settings apply to all portals. As a portal manager, you can view the device settings that apply to your portal.

System administrators can add support for a new type of device or device group or change the way portal pages render on certain devices.

> **Note:**
>
> The built-in page templates Mosaic and Unicorn are designed to be responsive to automatically adjust to the display device. Therefore, pages that use these templates do not need device-specific settings or page variants.
>
> If your portal pages use a non-responsive page template, the display on different devices may exhibit formatting issues, such as overlapping text.

To filter the device groups for a portal:

- In the **Filter** field, enter a string containing full or partial device group name, display name, or description. Then, click the **Filter** arrow icon to list the device groups matching the filter in name or description.

Export Portals

With `Portal Server-Manage All` or `Manage Configuration` permission, you can export portals to an archive using WebCenter Portal Administration, saving the portal archive to a local file system or to a remote server file system.

> **Note:**
>
> You can export portal templates too, but this is a separate process. You cannot export portals and portal templates into a single archive.

To export one or more portals:

1. Enter a name for the **Portal Archive** with the file extension `.par` or accept the default name.

   The default filename for the portal archive includes a random number to ensure uniqueness: `webcenter_`*`random_number`*`.par`

2. Select **Include Portal Content** to export each portal's content folder. This option is available only when the content repository is WebCenter Content Server.

A folder is automatically created in WebCenter Portal's content repository for portals that use document services to create, manage, and store portal documents (files, folders, wikis, blogs). Only content that is stored in this folder can be exported with the portal. The export does not, for example, include web content/ pages displayed through Content Presenter since this information is not stored in the portal's content folder.

> **Note:**
>
> - Including content folders increases the size of the portal archive. If you are exporting a large number of portals or large content folders, make sure that your portal archive size does not exceed the maximum upload limit of 2 GB.
> - If you are managing legacy portals with assets that store artifacts in MDS, Oracle recommends that you relocate all dependent artifacts from MDS to your content server. If you choose not to move artifacts stored in MDS and do not include MDS content within the asset archive, you can use MDS WLST commands `exportMetadata`/ `importMetadata` to move the MDS content another time. For example:
>
> ```
> exportMetadata(application='webcenter', server='WC_Portal',
>  toLocation='/tmp/content',
>  docs='/oracle/webcenter/siteresources/scopedMD/shared/**')
>
> importMetadata(application='webcenter', server='WC_Portal',
>  fromLocation='/tmp/content',
>  docs='/oracle/webcenter/siteresources/scopedMD/shared/**')
> ```

3. Select **Include Shared Assets** to export the shared assets used in the portal.
4. Click **Export**.

   Progress information displays during the export process.
5. Specify a location for the export archive (`.par` file) when the export process is complete.

   Select either of the following:

   - **Download** - Saves the export `.par` file to your local file system.

     Your browser downloads and saves the archive locally. The actual download location depends on your browser settings.

     Some browsers have settings that restrict the size of downloads. If your export archive is large and does not download, check your browser settings.
   - **Save to Server** - Saves the export `.par` file to a server location. The .par file is saved to the default path *`DOMAIN_HOME`*`/WC_Archives`, where *`DOMAIN_HOME`* refers to the domain location where WebCenter Portal is installed.

     When the file is saved, click **OK** to close the Information dialog.
6. Click **Close**.

General

The **General** page in portal administration allows you to modify general settings for a portal, such as the title (display name) and description, the internal name, and to perform general actions on a portal, such as closing an inactive portal, taking a portal offline to perform maintenance tasks, adding RSS feeds, or deleting the portal.

Changing the Title of a Portal

A portal title displays at the top of the portal and other places where portals are available for selection, such as the **Portals** page. In prior releases, the title was referred to as the *display name*.

> **Note:**
>
> Changing the title does not affect the internal name and URL for the portal.

To change the title (display name) of a portal:

1. On the **General** page, under **Portal Information**, modify the **Title** as desired.

   The title that you enter here is the *display name* that displays at the top of the portal and other places where portals are available for selection, such as the **Portals** menu and the **Portals** page. Portal titles can contain alphanumeric characters, underscores, spaces, multibyte characters, and special characters such as `&` and `#`. The maximum allowable length is 200 characters. The following reserved keywords are not allowed as the full portal name either in upper or lowercase, or a combination of both—`admin`, `builder`, `group`, `groups`, `home`, `last`, `page`, `pages`, `my portals`, `my spaces`, `portal`, `portals`, `space`, `spaces`, `system`, `webcenter`, `webcenter administration`, `WebCenter Portal`, `webcenter portals`, `webcenter space`, `webcenter spaces`. These reserved words are allowable as part of a longer name (for example, `Sales Group`).

   > **Note:**
   >
   > WebCenter Portal removes any unsupported special characters (such as `-`) and character spaces in the display name specified here to derive the initial *internal name* for the portal. For example, the Title `My Mega-Portal` generates the internal name `MyMegaPortal`. The URL to this portal is `http://host:port/webcenter/portal/MyMegaPortal`.

2. Click **Save**.

Modifying the Acronym for a Portal

When a portal displays as a color tile in the portal browser, it is overlaid with a portal acronym, which is useful to quickly identify a portal in the portal browser, in combination its tile color and name.

When a portal is created, WebCenter Portal generates an acronym for the portal as follows:

- If the portal's display name is three or more words, the acronym is the first letter of the first three words, capitalized. For example, the acronym for a portal named `My XYZ company` is `MXC`.
- If the portal's display name is two words, the acronym is the first letter of each word, capitalized. For example, the acronym for a portal named `Team 999` is `T9`.
- If the portal's display name is one word and the length of word is two or more letters, the acronym is the first two letters of the word, capitalized. For example, the acronym for a portal named `Philatelists` is `PH`.
- If the portal's display name is only one letter, the acronym is that letter, capitalized.
- The same acronym for multiple portals is allowable.

The acronym is shown only when the portal displays as a color tile in the portal browser. If the portal displays a logo instead of a color tile, the acronym is not shown.

To change the acronym for a portal:

1. On the **General** page, under **Portal Information**, modify the **Acronym** as desired.

   > **Note:**
   >
   > The following limitations apply to portal acronyms:
   >
   > - No more than 5 alphanumeric characters, uppercase or lowercase.
   > - The following reserved keywords are not allowed as the acronym name either in upper or lowercase, or a combination of both—`admin`, `group`, `home`, `last`, `page`, `pages`, `space`.

2. Click **Save**.

Modifying the Description for a Portal

A portal description appears in the listing of the portal on the **Portals** page.

To change the description for a portal:

1. On the **General** page, under **Portal Information**, modify the **Description** as desired.
2. Click **Save**.

Modifying the Color for a Portal

By default, a portal is shown in the portal browser as a color tile, overlaid with an acronym and portal name.

The default color is inherited from the portal template selected during portal creation. On the portal administration **Settings** page, you can specify whether the portal tile should display a color or logo in the portal browser.

To change the color used to display a portal in the portal browser:

1. On the **General** page, under **Portal Information**, click **Choose Color** to select a new color for the portal tile in the portal browser.
2. Click **Save**.

Modifying the Keywords for a Portal

Keywords are useful to make a portal more easily discoverable in search results. You can specify keywords for a portal when you create the portal or add, change, and delete them later, as described here.

To add, change, or delete keywords for a portal:

1. On the **General** page, under **Portal Information**, modify the **Keywords** as desired. Separate keywords with a space.
2. Click **Save**.

Changing the Internal Name (and URL) of a Portal

If necessary for some purpose, you can change the internal name of a portal. It is important to note that when you change the internal name, you are also changing the pretty URL that other people use to navigate to the portal. The format of a portal pretty URL is as follows:

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

For example: `http://mycompany:8888/webcenter/portal/philatelists`.

This means that when you change the internal name of a portal, existing bookmarks to the portal URL will no longer work. You can change the portal title; that is, the display name for the portal.

To change the internal name of a portal:

1. On the **General** page in portal administration, under **Portal Details**, click **Rename** next to the portal name.
2. In the Rename Portal dialog, enter a new internal name for the portal, then click **Rename**.

   > **Note:**
   >
   > Use only alphanumeric characters for the internal name for a portal.

   The pretty URL that can be entered in a browser to directly access the portal uses the new internal name:

   `http://host:port/webcenter/portal/newInternalPortalName`

Closing or Activating a Portal

By default, a portal is active. You can close a portal that is no longer being actively used. Closing a portal archives its content. When you close a portal, it is removed from everyone's **Portals** menu and displays in the portal browser only when a user selects **Closed** from the **Show** list.

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 displaying closed portals on the **Portals** page, or by pretty URL (`http://host:port/webcenter/portal/closedPortalName`).

When a portal is closed, any activities performed in the portal are no longer reflected in the Activity Stream in the Home portal. Only the Home page of the closed portal shows activity in the portal.

To close down a portal temporarily, take the portal offline instead.

To close a portal, on the **General** page in portal administration, under **Status**, deselect the **Active** check box.

To reactivate the portal, select the **Active** check box.

Taking a Portal Offline or Online

By default, a portal is online. You can take a portal temporarily offline for maintenance. For example, if you notice inappropriate content, you can take a portal offline to modify its content, then bring it back online. Only the system administrator or portal members with `Manage Configuration` permission can access a portal that is offline, or bring it back online. Other members see the Portal Unavailable page.

To take a portal offline:

- On the **General** page in portal administration, under **Status**, deselect the **Online** check box.

To bring the portal back online, select the **Online** check box.

Enabling or Disabling RSS News Feeds for a Portal

Portal members can find out what is happening in a portal through RSS news feeds. By default, RSS news feeds are disabled. When you enable RSS news feeds within the context of a portal, members can watch for revisions to lists.

To allow members access to portal information through RSS feeds:

- On the **General** page in portal administration, under **Status**, select the **Publish RSS** check box.

To disable RSS feeds for this portal, deselect the **Publish RSS** check box.

Deleting a Portal

When a portal has been closed or inactive for some time and is no longer needed, you can remove it permanently from WebCenter Portal. A portal manager or member with `Manage Security and Configuration` permission can delete the portal. Deleting a portal is permanent; it cannot be restored after it is deleted.

When you delete a portal:

- All pages associated within the portal are deleted.
- Links, lists, notes, tags, and events associated with the portal are deleted.
- Portal roles and membership details are deleted.

- The portal mail distribution list that is automatically created byWebCenter Portal is deleted. However, distribution lists that are customized by the portal manager are not deleted.
- Content managed by external services, such as content repositories, mail, and so on, is removed.

To delete a portal:

1. On the **General** page in portal administration, under **Actions**, select the **Delete this Portal**.
2. In the confirmation prompt, click **Delete** to confirm or **Cancel** to preserve the portal.

If the delete process fails for any reason, the portal is not removed from your **Portals** tab. This sometimes happens when a back-end server cannot be contacted. If you click **Delete** again, the portal is removed.

Import Portals

With `Portal Server-Manage All` or `Manage Configuration` permission, you can import portals from a portal archive through WebCenter Portal Administration.

To import one or more portals from a `.par` file:

1. Specify the location of your portal archive (`.par` file). Select one of:
   - **Look on My Computer** - Enter the location in the text box. Alternatively, click **Browse** to locate the directory on your local file system where the `.par` file is stored.
   - **Look on WebCenter Portal Server -** Enter the path on the server where WebCenter Portal is deployed, including the archive filename, in the text box. For example, `/tmp/MyPortalExport.par`. You can specify any shared location accessible from WebCenter Portal.
2. Click **Browse Archive** to review the content available for import.

   The names of all the portals in the specified archive display in the table. The **Type** column indicates when there is a difference between the portals in the archive and those that exist on the target:

   - **New** - A portal with this name does not exist on the target. On import, a new portal is created.
   - **Replace** - A portal with this name and the same GUID exists on the target. The existing portal is deleted on import and replaced with the version in the portal archive.
   - **Conflict** - A portal with this name exists on the target but the portal on the target has a different GUID to the portal you are trying to import. Or similarly, this portal has the same GUID as one of the portals in the target but the portal names do not match.

     If the import process detects a conflict between the portals you are trying to import and those which exist on the target, you must resolve the issue. For example, if the conflict is due to matching names but different GUIDs you could either change the name of the source portal and create a new export archive, or rename the conflicting portal in the target application and import the same archive.

3. Set import options as required.

Field	Description
Include Shared Assets	Select to import shared assets, like skin and page templates, used in the portal.
Include Portal Content	(This option is displayed only if the content repository is WebCenter Content Server and the archive specified includes a content folder for one or more portals.) Select to import all content folders included in the archive. Folders that exist on the target are overwritten on import. Deselect this option to exclude portal content folders (if any). This option is useful when migrating between stage and production environments where test content is no longer required. **Note:** Portal archives that contain large content folders may exceed the maximum upload size for files (2 GB by default). Oracle recommends that you use the `importWebCenterPortals` WLST command to import any portal archive that exceeds the current upload size.

4. Click **Import**.
   - If you try to import portals that exist in the target WebCenter Portal application, the **Confirm Replace Portal** dialog displays. You must confirm whether you want to overwrite the existing portals.

     To delete existing portals and replace them with imported versions, click **Yes**. Click **No** to cancel the import process.
   - If the import process detects a conflict between the portals you are trying to import and those which exist on the target, a message displays to help you resolve the issue. For example, conflict messages display if a portal on the target application has the same name but a different GUID to a portal you are trying to import. In this instance you could change the name of the source portal and create a new export archive, or rename the conflicting portal in the target application and import the same archive.
   - If the portal archive exceeds the maximum upload size for files (2 GB by default) you cannot import the portals. Oracle recommends that you use the `importWebCenterPortals` WLST command to import any portal archive that exceeds the current upload size.

> **Note:**
>
> - If you are working with legacy portals with assets that store artifacts in MDS, Oracle recommends that you relocate all dependent artifacts from MDS to your content server. If you choose not to move artifacts stored in MDS and do not include MDS content within the asset archive, you can use MDS WLST commands `exportMetadata`/ `importMetadata` to move the MDS content another time. For example:
>
> ```
> exportMetadata(application='webcenter', server='WC_Portal',
>  toLocation='/tmp/content',
>  docs='/oracle/webcenter/siteresources/scopedMD/shared/**')
>
> importMetadata(application='webcenter', server='WC_Portal',
>  fromLocation='/tmp/content',
>  docs='/oracle/webcenter/siteresources/scopedMD/shared/**')
> ```

5. In the information message, click **Yes** to confirm that you want to import the portals.

   An information message displays when all portals import successfully.

6. Click **Close**.

Membership Options

As a portal manager, you can limit access to a portal by invitation only, or allow users to join themselves, without an invitation, through self-service.

Additionally, you may allow users to join a portal or change their portal membership without approval, or require approval for certain roles. When membership requests require approval, new members do not automatically gain access when they subscribe to a portal. Instead, the portal manager receives a subscription notification to accept or reject.

To manage self-service for a portal:

1. Under **Invite Options**, select **Enable Invite Portals Users** to allow portal managers (or members with `Manage Membership` permission) to invite other WebCenter Portal users to join the portal. Deselect this option to disallow invitations to join the portal.

   > **Tip:**
   >
   > The **Enable Invite Portals Users** check box displays only when WebCenter Portal workflows are configured.

2. Under **Membership Self-Service**:

   - To prevent non-members from joining the portal through self-service or requesting changes to their current membership, select **Do Not Allow Self-Service Membership or Self-Service Membership Change**.

- To allow non-members to join a portal and members to request changes to their current membership, select **Allow Self-Service Membership or Self-Service Membership Change (All Roles Available)**.

  > **Note:**
  >
  > If you select this option, make sure that the portal is discoverable so that other people can see the portal on their **Portals** page and through searches .

  When you select this option:

  – Any WebCenter Portal user can join the portal.

  – After joining the portal, members can change their roles in the portal, or cancel their membership

  If a portal manager is required to approve before the request is granted, select **Portal Manager Approval Required**.

  > **Tip:**
  >
  > The **Portal Manager Approval Required** check box displays only when WebCenter Portal workflows are configured.

- To specify which roles users see on Request Membership and Change Membership pages, select **Allow Self-Service Membership or Self-Service Membership Change (Selected Roles Available)** to display a table showing all the roles available.

  – Select **Enable** to offer the role on the Request Membership and Change Membership pages. Deselect **Enable** to hide a role.

  – Select **Approval Required** to specify that portal manager approval is required before the request is granted. The request is sent to the portal manager's worklist (if a SOA connection to Oracle BPM Worklist is configured) to approve or reject (if the portal has multiple managers, all managers receive the request; only one manager is required to process the request). Deselect **Approval Required** to allow the change without portal manager's approval.

    > **Tip:**
    >
    > The **Approval Required** check box displays only when WebCenter Portal workflows are configured.

3. Click **Save**.

When you add or invite someone to your portal, they receive a message through the Mail service (if configured) and through their worklist (if the SOA connection to Oracle BPM Worklist is configured). Before you start recruiting new members, take some time to compose suitable greetings and messages for the following scenarios:

- Adding an existing user as a member of your portal.
- Inviting an existing user to join your portal.
- Inviting someone to register with WebCenter Portal and join your portal.

To compose messages sent out to new members:

1. Under **Membership Notification Messages**, enter messages in the appropriate sections:
   - **Add Member Message** - Enter a short message to include in membership notifications. Use the message text to welcome new members and introduce your portal.
   - **Invite Member Message** - Enter a short message to include in membership invitations to users who are registered with WebCenter Portal. Use the message text to describe the portal and how it might be of use to them. Membership invitations display in a user's worklist (if the SOA server is configured to use Oracle BPM Worklist) and the invitation includes an **Accept** button that the invited party must click to accept the membership invitation. If the SOA server is configured to send worklist notifications by mail, invited users receive the notification in both their Oracle BPM Worklist and mail.

     > **Tip:**
     >
     > This section displays only when WebCenter Portal workflows and SOA server are configured.

   - **Invite Non-Registered Users Message** - Enter a short message to include in membership invitations to people who are not registered WebCenter Portal users. Use the message text to describe the portal and how it might be of use to them. Membership invitations are sent by mail using the Mail service. The invitation includes a secure URL that the invited party must click to accept the membership invitation. Unregistered users will then be prompted to register with WebCenter Portal before gaining access to your portal.
2. Click **Save**.

Personalize Pages

Use the Personalize Pages page to manage your personal view of pages in the Home portal.

- To create a new personal page, click **Create Page**. This action either opens the Create Page dialog or immediately creates a new personal page with preset defaults specified in the Set Page Defaults dialog.
- To select a default page style for new personal pages and to enable or disable one-click creation, click **Set Page Defaults**. For further assistance, click the Help icon in the Set Page Defaults dialog.
- Select or deselect the **Show Page** check box to show or hide a page in your view of the Home portal.
- To manage a page, click its **Actions** icon, and select any of the actions available to you, depending on your permissions.

Portal Browser

Use the *portal browser* to create a new portal, access administration settings, and work with the portals that are available to you. Your role and permissions determine the actions you can perform.

To create a new portal, click **Create Portal**. More

To navigate to WebCenter Portal Administration for all portals, click the **Administration** tile. More

To navigate to the Home portal, click the **Home Portal** tile. More

To work with the portals available to you:

1. Optionally, select from the **Show** list at the top of the portal browser:
   - **All Portals** to show all portals available to you, both public and private. Portals defined as *hidden* when created are not shown.
   - **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`*).
2. 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.
3. 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.

4. 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).

Portal Editor

Use the portal editor to:

- Create pages, subpages, and other navigation items in the current portal, adding them to the portal navigation.
- Edit pages in the Page Editor to revise the layout and content of portal pages, and wire parameters, pages, task flows, and portlets to each other.
- Manage portal pages and other items in the portal navigation on the Page Information tabs, including viewing and modifying page information, adding and deleting parameters, viewing page source code, establishing page security, and specifying additional navigation options.

Element	Description
Back to All Portals	Return to the portal browser.
Pages	Show or hide the pages navigation pane.
2 Drafts	Open the Publish Pages dialog to publish page drafts for others to view.
Security	Open portal administration security settings, where you can set access level, define roles and permissions, and manage membership.
General	Open the portal administration general settings, where you can modify the title (name) and description, and perform general actions on the portal, such as closing the portal, adding RSS feeds, or deleting the portal.
Settings	Open the portal administration settings where you can define the look and feel of the portal.
Assets	Open the portal administration assets settings, where you can manage portal assets such as page templates, resource catalogs, skins, and more.
Device Settings	Open the portal administration device settings, where you can manage devices and device groups in a device-enabled portal.

Element	Description
Tools and Services	Open the portal administration tools and services settings, where you can enable and disable tools and services operating in the portal, such as Documents, Events, and Lists.
Deploy	(`Portal Server: Deploy` permission only) Open the portal administration deployment page, where you can deploy the portal to a target server. Note that you will only this icon if you have a role that has `Portal Server: Deploy` permissions.
Name or description field	Enter a string to filter the selection list by navigation items whose name or description matches the string.
Show/Hide Catalog	Open or close the resource catalog.
Navigation Pane	Add, move, and manage pages and other items in the portal navigation. • Click a page name to either display the page in the Page Editor or display the page Page Information. • Click non-page item names to displays the item Page Information. • Click the **Actions** icon for any item, and select available actions:
Page Information or Edit	(Pages only) Depending on the current view, click: • **Page Information** to view page Page Information on the Summary, Parameters, Source, Security, and Advanced tabs. • **Edit** to open the page in the Page Editor.
Add	Select from the menu any of the following items to add to the portal navigation: • **New Page** to add a new page, specifying a page style and title. • **New Subpage** to add a new subpage of the currently selected page, specifying a page style and title. • **New Page Variant** to add a variant of the currently selected page that displays for device groups. • **Page Link** to add an existing page. • **Content Item** to add a document. • **Content Query** to add a collection of documents that meet specific query criteria. • **Link** to add a link to a web page, portal page, portlet, task flow, or external application. • **Pages Query** to add a list of pages. • **Portal Query** to add a link to another portal on the Portal Server. • **Folder** to add a folder to the portal navigation. • **Separator** to add a separator to the portal navigation.
Save As Page Style	Save the page as a new page style or to replace an existing custom page style.
Refresh from Page Style	Refresh the page to show changes made to its page style.

Profile

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.
- A brief list of your connections on the main **Profile** page, and a detailed view of your connections on the **Connections** tab.
- A view of the documents and folders in the Public folder of your personal document library on the **Documents** tab.

> **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.
- 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.

More

Security

The **Security** page in portal administration allows you to set security on the portal, such as access level, defining roles and permissions, and managing membership.

Changing the Access to a Portal

Access to a portal is defined when the portal is created. This access can be changed to make the portal more visible or less visible.

To change the access to a portal:

1. In the portal administration, click **Security** in the left navigation pane, then click the **Access** subtab and select how you want the portal to be exposed:
   - **Public**: Anyone can visit the portal, whether they are a registered WebCenter Portal user or not. When this setting is selected, the `Public-User` role in the portal is automatically granted `View Pages and Content` permission in the portal, which allows public users to view pages, lists, events, links, and notes. To allow public users to view documents, you need to grant these permissions. Public users do not have edit, create, or manage permissions in the portal.
   - **Private**: To access the portal, membership is required (either through invitation or self-registration if enabled). The portal will be shown in the list of available portals in the portal browser and will appear in search results.

     > **Note:**
     >
     > The `Administrator` role provides a user with administrative permissions in a private portal (such as managing membership), but does not allow access to a private portal's page contents.

   - **Hidden**: To access the portal, membership is required (through invitation). The portal will *not* be shown in the list of available portals in the portal browser and will *not* appear in search results. Members can access the portal through direct URL.

     > **Note:**
     >
     > Hidden portals can be viewed through WebCenter Portal administration on the **All Portals** page by users with the permission `Portal Server-Manage Configuration` or `Portals-Manage Security and Configuration`, such as a system administrator. While these users can manage the portal (change settings and membership), they cannot see the portal pages and content unless they are a portal member.

2. Click **Save**.

Creating a Custom Role for a Portal

Before creating a new role, be sure to confirm that the `Viewer` or `Participant` roles cannot meet the role requirements.

See Creating Viewer and Participant Roles for a Portal for permissions associated with these two roles.

To create a new role for a portal:

1. In the portal administration, click **Security** in the left navigation pane, then click the **Roles** subtab.
2. To define a new role for this portal, click the **Create Role** drop-down and select **Custom Role** to open the Create Role dialog.
3. Click the Help icon in the Create Role dialog for assistance.

4. To modify permissions for the role, click **Edit Permissions**, and then select or deselect each permission check box.

Creating a Delegated Manager Role for a Portal

Portal managers can assign the `Delegated Manager` role for the portal to another member. The `Delegated Manager` role is a seeded role, but is not created by default when the portal is created. The `Portal Manager` has to explicitly create the role for a portal, as described in this section.

> **Note:**
>
> The `Delegated Manager` role assumes all the permissions inherent in the `Portal Manager` role, with the following two exceptions:
>
> - The `Delegated Manager` role has only `Manage Configuration` permissions in portal administration (this means that even though the `Delegated Manager` role includes all of the portal administration permissions, this role cannot access portal security, including roles and members).
> - The `Delegated Manager` cannot delete the portal.

To create a Delegated Manager role:

1. In the portal administration, click **Security** in the left navigation pane, then click the **Roles** subtab.
2. Click the **Create Role** drop-down and select **Delegated Manager**.

   The `Delegated Manager` role is created and appears as a row in the table.
3. To modify permissions for the role, select the row and click **Edit Permissions**, and then select or deselect each permission check box.

Creating Viewer and Participant Roles for a Portal

The `Viewer` and `Participant` roles, like the `Delegated Manager` role, are not created automatically when a portal is created, even though they are seeded roles. The `Portal Manager` has to create the roles of `Viewer` and `Participant` for a portal using the Create Role drop-down.

Assign the `Viewer` role to members who are primarily going to view content in a portal, and assign the `Participant` role to members who will be modifying content in a portal.

To create a Viewer or Participant role:

1. In the portal administration, click **Security** in the left navigation pane, then click the **Roles** subtab.
2. To create a `Viewer` or `Participant` role for this portal, click the **Create Role** drop-down and select either **Viewer** or **Participant** depending on the role you want to create.

   The role you select is created and appears as a row in the Roles table.

3. To modify permissions for the role, select the appropriate row and click **Edit Permissions**, and then select or deselect each permission check box.

Using Advanced Permissions

Advanced permissions are detailed permissions that give you more flexibility over role assignments, but can become complex to manage and maintain. For example, you can set create, edit, view, and delete permissions for individual tools and assets, rather than setting the same permission for all tools or all asset types.

If advanced permissions are specified in a portal and the portal is used to create a custom template, the selected advanced permissions will be included in portals built from the custom template (provided **Members Info** or **Roles Info** is selected during template creation).

> **Note:**
>
> If you switch to using advanced permissions, you cannot revert to standard permissions.

To use advanced permissions:

1. In the portal administration, click **Security** in the left navigation pane, then click the **Roles** subtab.
2. Click **Advanced Permissions**.

   A warning message displays.
3. Click **OK** to continue.

   Notice that the Advanced Permissions link is no longer available.
4. Click **Edit Permissions** again, and in the Edit Permissions dialog, select or deselect the check boxes to enable or disable permissions for a role.

   > **Note:**
   >
   > If you are working with a portal that was imported from a previous version of WebCenter Portal, you may see different permissions. Such permissions are only provided for migration purposes and do not apply to any new portals that you create with this release.
5. Click **Save**.

Adding Registered Users and Groups to a Portal

As a portal manager, you can add any user currently registered with WebCenter Portal as a member of your portal. When the SOA server and WebCenter Portal workflows are configured, added users receive notification in their activity stream and through a mail message (if the SOA server is configured to send mail).

To add a member to your portal:

1. In the portal administration, click **Security** in the left navigation pane, then click the **Members** subtab.
2. (Optional) On the **Members** page, click **Options** to edit the greeting messages sent to new members. Click **Save** to close the Membership Options dialog.
3. Select one of:
   - **Add People** to add one or more individual users as members of the portal.
   - **Add Groups** to add multiple users belonging to a named user group in the identity store. Subsequent changes or updates to the group are automatically reflected in the portal.
4. If you know the exact name of the person or group, enter the name in the input field, separating multiple names with a comma.
5. Select one or more user names from the list.
6. From the **Select Role** list, select a role for the selected members or groups.
7. Click **Add**.

Inviting a Registered User to Join a Portal

As a portal manager, you can invite anyone who is currently registered with WebCenter Portal to become a member of your portal. Invited users receive notification through the mail messages (if SOA server is configured to send mail) and through their worklist (if the SOA server is configured to use Oracle BPM Worklist).

> **Tip:**
>
> **Invite People** is available when WebCenter Portal workflows are configured *and* a portal manager has selected **Enable Invite Portals Users** in the Membership Options dialog.

To invite someone to become a member of your portal:

1. In the portal administration, click **Security** in the left navigation pane, then click the **Members** subtab.
2. (Optional) On the **Members** page, click **Options** to edit the greeting message sent to invited members, then click **Save** to close the Membership Options dialog.
3. Click **Invite People**, then select **Invite Registered Users** to invite individual users to become a member of the portal.
4. If you know the exact name of the user, enter the name in the box provided, separating multiple names with a comma.
5. Select one or more user names from the list.
6. Select a role for the invited members. If the role you want is not listed, create a role that meets your requirements.
7. Click **Invite**.

Inviting a Non-Registered User to Join a Portal

If your system administrator has allowed non-registered people to self-register, portal managers can invite anyone with a valid mail address to join the portal. Prospective members receive an invitation by mail (if SOA server is configured to send mail), inviting them to join the portal. Upon accepting the invitation, non-registered users are prompted to register with WebCenter Portal before gaining access to the portal.

> **Note:**
>
> **Invite People** is available when WebCenter Portal workflows are configured *and* the portal manager has selected **Enable Invite Portals Users** in the Membership Options dialog. **Invite Non-Registered Users** is available only when the system administrator has enabled **Allow Self-Registration Through Invitations** and **Allow Public Users to Self-Register** at the application level.

To invite someone outside the WebCenter Portal community to join your portal:

1. In the portal administration, click **Security** in the left navigation pane, then click the **Members** subtab.
2. On the **Members** page, click **Options** to edit the greeting message that is sent to people who are not yet registered WebCenter Portal users, then click **Save** to close the Membership Options dialog.
3. Click **Invite People**, then select **Invite Non-Registered Users**.
4. Enter the **Email Address(es)** for one or more prospective members, separated by commas.
5. Select a **Role** for the prospective members. If the role you want is not listed, create a role that meets your requirements.
6. Click **Invite**.

Revoking Membership to a Portal

Portal managers can revoke user membership for a portal at any time.

To revoke membership:

1. In the portal administration, click **Security** in the left navigation pane, then click the **Members** tab.
2. On the **Members** page, select one or more users or groups (Ctrl+click to select multiple members), then click **Remove**.
3. In the Remove Members dialog, click **Remove** to confirm.

Assigning or Changing Member Role Assignments in a Portal

A portal manager can change a member's role at any time, or assign more than one role to a member or group. Users are notified of membership changes through their

BPM worklist (if the SOA server is configured to use Oracle BPM Worklist) or by email (if configured).

> **Note:**
>
> You can assign more than one role to a member or group. If you want a member or group to have the permissions inherent in two or more roles, you can assign the appropriate roles to the member. The ability to assign multiple roles to a member or group eliminates the need to create new roles in such instances.

To assign or change a member's current role in a portal:

1. In the portal administration, click **Security** in the left navigation pane, then click the **Members** subtab.
2. On the **Members** page, select one or more members (Ctrl+click to select multiple members), and then click **Assign Roles**.

   The Assign Roles dialog shows the current roles available in the portal.
3. In the **Assign Roles** dialog, select one or more roles to assign or click to deselect the current roles assignment.
   - If you are not sure which roles to select, click the **Roles** tab to determine the range of actions that current roles allow.
   - If the existing roles do not meet your requirements, consider creating a new role.
4. Click **OK**.

   The Roles column next to the member's name shows the roles to which the member is assigned.

Settings

The **Settings** page in portal administration allows you to change the appearance of your portal and its pages through setting the page template, skin, footer, copyright and privacy statements, language, attributes, icon, and logo. This page also allows you to define the resource catalogs that contain the components you can add to pages, page templates, page styles, and task flow assets. You also use this page to specify the behavior when the page is displayed on another device.

More

- To enable page drafts, so that portal page changes are available only after the page is published, select the **Enable** check box. More
- To select a different page template for the portal, select from the **Page Template** drop-down List. More
- To select a different skin for the portal, select from the **Skin** drop-down list. More
- To select a different resource catalog for pages or page templates, select from the **Resource Catalog** drop-down lists. More

- To display of hide a page footer ofthe portal, which can display copyright and a link to the Privacy Statements, select or deselect the **Footer** check box.
- To customize the copyright statement and privacy URL to display in the footer, enter values in the **Copyright** and **Privacy URL** fields.
- To set the language in which the user interface elements such as labels and screen text in the portal will always render, regardless of other language settings, select the language from the **Default Language** drop-down list. Click **Customize** to filter the list to display a subset of languages.
- To specify the page behavior when using a device (such as a tablet) when no page variant exists for the device group to which that device belongs, and the device group is not the default device group for the portal, select a **Page Fallback** setting:
  - **Display default page** to display the original base page on the device.
  - **Display no page** to display the Page Not Available page on the device.
- To add a new attribute, click **Add Attribute**. Click the Help icon in the Add Attribute dialog for assistance.
- To change the portal icon, logo, or preview image, click **Change** next to the element that you want to change.
- To change the display of the portal in the portal browser from a color tile to its logo, select **Show portal logo instead of color tile**.

Share

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. Optionally, enter a comment to appear with the link.
2. 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.
3. Click **Publish**.

Tag Center

The Tag Center is a dynamically-generated page that displays all the tags you and other users have applied to portal pages.

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.

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.

Tag This Page

On any page where you see the **Tags** icon, you can associate tags with the page.

To tag a portal page:

1. In the **Add Tags** field, enter one or more tags, separated with a space. Use underscores or hyphens in multi-word tag entries.
2. 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.
3. Click **Save** to apply the tag(s) to the page and close the dialog.

Tools and Services

WebCenter Portal offers tools and services that allow portal members to collaborate and communicate. 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 a portal.

Some tools and services are provided out-of-the-box and others require additional configuration. More

Enabling and Disabling Tools and Services Available to a Portal

To enable or disable a tool or service in your portal:

1. To enable a tool you want to use in the portal, select the check box next to it.

   > **Note:**
   >
   > If the back-end server is not configured by your system administrator and an active connection is not present between the application and WebCenter Portal, the tool or service will not be available in the portal.

2. Click **OK** to dismiss the warning about giving users the appropriate permissions to work with a tool.

   Notice that **Disabled** updates to **Enabled** next to the tool and the configuration fields for that tool or service appear.

3. Optionally, configure selected tools and services as required.
4. To disable a tool, deselect the check box next to the appropriate tool.

   Notice that **Enabled** reverts to **Disabled**.

   > **Note:**
   >
   > Unlike the other tools and services, if Mail is configured by the system administrator, the Mail service cannot be disabled by the portal manager.

5. Grant appropriate permissions for each member role on the **Roles** page to allow portal members to access the enabled services.

Creating and Managing Portal Event Categories

Portal event categories let users group certain events together (for example, team meetings, personal appointments, customer meetings, and so on).

Categories can have any name and an optional color associated with it. If a color is selected, events belonging to the category are displayed in that color on the **Events** page or in an Events task flow.

To create and manage event categories in a portal:

1. On the **Tools and Services** page, select **Events**.
2. Click **OK** to dismiss the message about giving portal users permissions.
3. To create a new portal event category, click **Create** .
4. In the Create Category dialog, enter a **Category Name**, and select a color for the event category, then click **Yes**.

   The category to which an event belongs also displays when a user hovers the mouse pointer over the event on the Events page or in an Events task flow. Users can also filter the Events page or an Events task flow to display events belonging to one or more specific categories.

5. To edit or delete a portal event category, select the category, then click either **Edit** or **Delete**.

Configuring the Mail Distribution List for a Portal

Mail distribution lists provide an efficient mechanism for portal communication. WebCenter Portal creates a default distribution list for each portal when the Mail Server is Microsoft Exchange and Microsoft Active Directory Server (ADS) is installed, with the active directory connection details (LDAP) provided in the mail server connection settings.

More

Instead of using the default distribution list, you can modify the distribution list for portal mail, as follows:

1. On the **Tools and Services** page, select **Mail**.
2. (Optional) To change the current portal mail distribution list:
   - Click the **Search for Distribution Lists** icon to search and select the name of the new **Distribution List**.

   If the **Distribution List** field is left blank, the compose mail dialog will not include a distribution list in the **To** field.
3. Select **Keep the DL synchronized with portal users** to synchronize the specified distribution list with the portal membership.

   Selecting this option automatically updates the custom distribution list by deleting mail addresses of members who cancel membership in the portal, and adding mail addresses of new members.
4. For **Send Mail Options**, select any combination of the check boxes:
   - Select **Include the distribution list** to populate the **To** field of the compose mail dialog with the value specified in **Distribution List** (either the default portal mail distribution list, or a custom distribution list you specify).
   - Select **Include all members and groups that have associated mail addresses** to populate the **To** field of the compose mail dialog with the mail addresses of all portal members and groups that have associated mail addresses.
   - When groups defined for the portal do not have associated mail addresses, select **Include all members in groups that do not have associated mail addresses** to populate the **To** field of the compose mail dialog with the mail addresses of all portal members with an associated mail address from every group in the portal (without an associated mail address).
5. Click **Save**.

Elasticsearch: Configuring the Search Scope with Elasticsearch

To set the search scope in WebCenter Portal:

1. On the **Tools and Services** page, select **Search**.

The right pane shows the search option that has been configured for WebCenter Portal. Your search environment varies depending on the type of search configured.

2. Select the desired **Search Scope** to show results from either the current portal only or from all portals (including the Home portal).
3. Click **Save**.

Oracle SES: Reverting to Searching Without Facet Support

With Oracle SES release 11.2.2.2, search includes facet support. However, you can revert to using the non-faceted search task flows.

> **Tip:**
>
> Although you can revert to using search without facet support, Oracle does not recommend doing so. For the best performance and scalability, use Oracle SES release 11.2.2.2 with facet support.

To revert to non-faceted search:

1. On the **Tools and Services** page, select **Search**.
2. If selected, deselect the **Use new search task flow with facet support** check box to have this portal use the Search - Non-Faceted Search task flow (which uses refiners instead of facets).
3. Click **Apply**.

   The next time this page is accessed, the remaining settings on this page are grayed-out, and you must configure search settings with Search - Non-Faceted Search task flow parameters.

> **Tip:**
>
> For best performance and scalability, as well as facet support and easier configuration using the Search - Faceted Search task flow is recommended.

Oracle SES: Configuring the Filtering Dropdown In Faceted Search

The Result Types and Filtering section lets you choose which types of results to display in search results and what, if anything, to include in the filtering drop-down. Filtering allows users to narrow their search results using a filter list in the search results or in the global search box.

To configure the filtering selections:

1. On the **Tools and Services** page, select **Search**.
2. Make sure that the **Use new search task flow with facet support** check box is selected.
3. Clear the **Enable filtering drop-down** check box to remove the filtering drop-down from the global search box.

4. Select which result types to include in the drop-down, as well as in the filter list to the left of search results and the order in which they display, by moving them back and forth between the **Available Result Types** and **Included** lists.

> **Note:**
>
> Only metadata of portals and pages is searched (not portal content or page content), and by default, these result types are excluded for a portal. To include the metadata of portals and pages in search results, add **Portals** and **Pages** to the **Included** list.

5. Click **Save**.

Oracle SES: Configuring Search Scope with Facet Support

Faceted search allows you to find information by applying multiple filters, such as search by author, portal, or last modified date. In WebCenter Portal, you can configure the search scope to use facet support.

To configure search scope to use facet support:

1. On the **Tools and Services** page, select **Search**.
2. Make sure that the **Use new search task flow with facet support** check box is selected.
3. Select the search scope to show results from either the current portal or from all portals, including the Home portal.
4. Click **Save**.

Oracle SES: Configuring Facets

Faceted search allows you to find information by applying multiple filters, for example, search by author, portal, or last modified date. In WebCenter Portal, you can configure the search scope to use facet support.

The **Facets** section lets you choose which facets to display with search results for this portal. Facets let users navigate indexed data without running a new search. Faceted navigation within search lets users clarify exactly what they are looking for, or even discover something new.

To configure facets:

1. On the **Tools and Services** page, select **Search**.
2. Make sure that the **Use new search task flow with facet support** check box is selected.
3. View the **Available Facets** column.

> **Note:**
>
> The system administrator must first configure facets (including the required `Scope GUID` and `ServiceID` facets) in Oracle SES. The system administrator creates, modifies, and removes facets in Oracle SES. (WebCenter Portal does not detect changes to facets until the Search administration page is open.). If the **Available Facets** column is empty, the system administrator has not configured facets.

4. Change the order in which the facets display by moving them back and forth between the **Available Facets** and **Included** lists. For example, if you move **Portal** to the **Available Facets** list, then the Portal facet does not appear on the search results page.
5. Click **Save**.

Oracle SES: Enriching Search Results Using Custom Attributes

In the **Custom Attributes** section, you can select which custom search attributes should appear in search results and the order in which they appear. When the **Tools and Services - Search** administration page is opened, WebCenter Portal makes a call to Oracle SES to fetch available *custom* (as opposed to *standard*) attributes.

To enrich search results using custom attributes:

1. On the **Tools and Services** page, select **Search**.
2. Make sure that the **Use new search task flow with facet support** check box is selected.
3. Select from the list of **Available Attributes** and move them to the **Included** column so that they appear in search results and use the up/down arrow keys to specify the order in which they should appear.

> **Note:**
>
> - If you had search attributes configured in a previous WebCenter Portal release (configured with Search task flow parameters), then after upgrading you must set these custom attributes again in Oracle SES and on the Search administration page. The new Search - Faceted Search task flow supports custom attributes set on the Search administration page (not task flow parameters).
> - The search results page shows the translated names for custom attributes as specified in Global Settings - Translate Search Attribute Names in the Oracle SES administration tool. The custom attribute name is the translated name in the user locale. However, the Search administration page shows the base names (that is, the non-translated names) for custom attributes.
> - Attributes must be added to the **Metadata List** parameter in the Content Server.

4. Click **Save**.

WebCenter Portal Impersonation

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. 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.

2. 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.

   The impersonator can now conduct an impersonation session during the allotted time.

3. 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.

9

Online Help Topics for Preferences

General Preferences

Use the General preferences page to configure your personal view of WebCenter Portal. Set your preferred language, date and time formats, time zone, and other application-wide preferences.

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:

- 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.

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:

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

Table 9-1 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`
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.

Applying Accessibility Options

To apply accessibility options to the application UI:

- 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:

- 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.

Impersonation Preferences

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").

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. 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.
2. 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.

   The impersonator can now conduct an impersonation session during the allotted time.
3. 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

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. 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.

   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.

2. 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.

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

Mail Preferences

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. 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.

2. 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.

3. Click **OK** to save your changes and exit Preferences.
4. Log out of WebCenter Portal.
5. 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 or using the login link where you see mail.

My Accounts Preferences

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

3. 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.

4. Click **Apply**.

Messaging Preferences

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.

To configure and manage messaging channels and filters:

1. 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.

2. 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.

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. On the the **Messaging Channels** tab, click the **Create** icon to open the Add Channel dialog.
2. In the **Name** field, enter a display name for the channel.

   For example, enter `MyPhone`.
3. 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
4. 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`.

5. 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.
6. Click **OK** to save your changes and exit the 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. On the **Messaging Filters** tab, click the **Create** icon to open a filter-creation page.
2. In the **Filter Name** field, enter a display name for the filter.
3. Optionally, enter a filter description in the **Description** field.
4. 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
5. 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 the second table below 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.

6. From the second **Add Filter Condition** list, select an operator for the condition.

   See the table below for an alphabetical list of operators that are relevant to the attributes `Subject`, `From`, `Date`, and `Time`.

7. Click the **Click to add new filter condition** icon.
8. 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
9. 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.

10. 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.

The following table provides an alphabetical list of operators that are relevant to the attributes `Subject`, `From`, `Date`, and `Time` and describes the values they require.

Table 9-2 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

Table 9-2 (Cont.) Operators Relevant to Subject, From, Date, and Time

Operator	Value[1]	Attributes
`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
`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.

The following table 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 9-3 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.

Table 9-3 (Cont.) Standard Notification Message Subjects

Standardized Notification Subject	Example Filter Conditions
`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`
`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.

Password Preferences

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

To change your WebCenter Portal password:

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

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

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

People Connections Preferences

Configuration settings for People Connections start with application-wide settings. Setting default values on the Preferences page affects just your view of People Connections features. People Connections preferences encompass activity stream, connections, profile, message boards, and feedback:

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.

To set Activity Stream preferences:

1. On the **People** page, click the **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.

2. 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.

3. 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.

4. 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.

5. 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.
6. Click **Save**.

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

3. 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.
4. Click **Save**.

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.

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. On the **People** page, click the **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.

2. Click **Save**.

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. On the **People** page, click the **Message Board** tab.
2. Set your preferences for the Message Board:

Table 9-4 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.

3. Click **Save**.

Setting Message Board 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. On the **People** page, click the **Feedback** tab.
2. Set your preferences for Feedback:

Table 9-5 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.

3. Click **Save**.

Presence Preferences

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.

To enable network presence:

1. On the **Presence** page, enter the IM address for the presence status and a display name.
2. 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.

Subscriptions Preferences

Use the **Subscriptions** preferences page to identify the types of application activities that will trigger a notification and manage current subscriptions.

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.

To set application-level subscriptions:

1. On the **Subscriptions** page, click the **General Subscriptions** tab.
2. Select the actions that should trigger a notification.

   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.
3. Click **Save**.

Viewing and Cancelling Portal- and Object-Level Subscriptions

To view and cancel portal- and object-level subscriptions:

1. On the **Subscriptions** page, click the **Current Subscriptions** tab.
2. Use the **View** menu to control the display order of columns and to hide or show individual columns.
3. To cancel or unsubscribe from a portal- or object-level subscription, select the subscription, and click **Unsubscribe**, then click **Unsubscribe** again in the Unsubscribe Notification Subscription dialog.
4. Click **Save**.

Search Preferences

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. 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.
2. 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.

10 Online Help Topics for Tools and Services

Create/Edit Column

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. In the **Name** field, provide a name for this column.
2. 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

Data Type	Description	Comments
`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]
`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

Data Type	Description	Comments
`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.

3. 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

Column Detail	Description	Associated Data Type(s)
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

4. Click **OK** to save your changes and exit the dialog.
5. Click **Close** to exit List Edit mode.

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.

Create Event

You can schedule portal events and personal events. When you schedule a personal event, the details are pushed to your Microsoft Exchange calendar.

To schedule an event:

1. In the **Title** field, enter a brief descriptive title for the event.

   For example, `Project Update`.

2. In the **Location** field, enter the location of the event.

   For example, `Conference Room 5`.

3. 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).

4. 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.

5. 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.

6. 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.

7. (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.

8. (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.

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.

9. 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.

10. 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.

11. Click **Create** to add the event to the calendar.

Create 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. In the Create List dialog, enter a name for the list in the **Name** field.
2. 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.

3. For **Create From**, select to create the list using a predefined **Template** or from an **Excel Spreadsheet**.
4. 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.

   > **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.

5. Click **OK**.

   The new list appears in the **Lists** panel on the **Lists** page.

Edit Event

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. Revise the event details.

   See Create Event for information about the different options available in the dialog.
2. Click **Update** to save your changes.

Edit List

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.

Edit List: Renaming and Revising a Description

To rename a list and revise a list description:

1. Click **Edit** to the right of the **Name** field to open a dialog for revising the list name and description.
2. Revise the list name, and enter or revise the description.
3. Click **OK** to close the dialog and save your changes.

Edit List: Adding a Column

To add columns to a list:

1. Under **Columns**, click **Create** to open the Create Column dialog.
2. Click **Help** in the Create Column dialog for assistance.

Edit List: Revising 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.

To revise list column details:

1. Under **Columns**, select the list column you want to revise and click **Edit** .

2. Edit column details as needed, then **OK** to save your changes and close the dialog.
3. Click **Close** to exit edit list mode.

Edit List: Rearranging Columns

You can rearrange list columns in the list structure, affecting all instances of a list, by clicking rearrange icons or by dragging and dropping.

To rearrange columns on *all* instances of a list:

1. In the **Columns** section, click an icon under the **Reorder** column to move a column higher or lower in the order of columns.

   > **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.
2. Click **Close** to exit list edit mode.

Edit List: Deleting a Column

To delete a list column:

1. Select a column, and click **Delete**.
2. In the resulting confirmation dialog, click **Delete** to complete the deletion.
3. Click **Close** to exit list edit mode.

Event Preferences

Use the Event Preferences dialog to:

- 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.

More

Events Console

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.

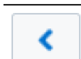
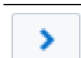
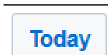
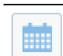
Using the Calendar Interface

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.

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.

Icon	Description
	Click to display events from the previous day, week, or month.
	Click to display events from the next day, week, month.
	Click to display events for the current date (today).
	Click to display events for a specific date.
	Click to display events one day at a time.
	Click to display events for the whole week.
	Click to display events for the whole month.
	Click to display a list of upcoming events for the current day, week, month, or a specified number of days as identified in the Event Preferences dialog.
	Click to open the Event Preferences dialog to specify calendar times, secondary time zones, and configure the list view.
	Select one or more event categories by which to filter the events in the calendar.
	Click to refresh the page with any recent changes.

Lists Console

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.

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.

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.

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.

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.

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.

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.

Lists additionally provide RSS feeds for all lists and for individual lists.

Lists Console: Creating a 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. Click the **Create a new list** icon
2. In the Create List dialog, click the **Help** icon for assistance.

Lists Console: Importing a List

After you have created or revised list data and saved it in an Excel format, you can import it using controls available in both the List Viewer task flow and on the **Lists** page. To import list data, you must have, minimally, `Edit` permission on the page that contains the list.

To import an exported list:

1. Select the list you want to export, and select **Actions**, then **Import**.
2. In the Import from Excel dialog, click **Browse** and navigate to the relevant spreadsheet.

   > **Note:**
   >
   > The spreadsheet must have the same columns as the list.

   The file must be in Excel 1997-2003 (`*.xls`) or 2007 format (`*.xlsx`).
3. Click **Import**.

   If the spreadsheet was not created from an export of the list, a warning is given. Click **Import** to proceed if you choose.

   List data is validated on import. If any rows contain validation errors, such errors are presented in a dialog and the import is terminated. You can correct validation errors in the spreadsheet and import again.

Lists Console: Exporting a List

When you can view a list, you can export the list to a Microsoft Excel file. Exporting enables you to use your Excel skills to easily add to and revise list data. Controls for exporting lists are available in both the List Viewer task flow and on the **Lists** page.

To export a list:

1. Select the list you want to export, and select **Actions**, then **Export**.
2. In the Export to Excel dialog, select a format for the output file.
3. Follow the prompts to save the exported file to your local file system.

   The list is saved in the Excel format you selected. The file name is the list name, with underscores in place of character spaces. For example, `my list` becomes `my_list.xlsx` or `my_list.xls`.

Lists Console: 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. In the **Lists** panel, select the list you want to copy.
2. Click the **Copy List** icon.

   A copy of the list becomes available for selection in the **Lists** panel.
3. Rename the list and edit the list structure.

Lists Console: Editing a List

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.

1. Select a list in the **Lists** panel, and click the **Edit list** icon.
2. In the Edit List dialog, click the **Help** icon for assistance.

Lists Console: 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.

More.

Lists Console: Customizing a List

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.

More.

Lists Console: Linking from a List

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.

More.

Lists Console: Mailing a Link to a List

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**.

   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.

Lists Console: Obtaining List News Feeds

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.

More

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.

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 into your portal, with the list content displayed.

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 feeds 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.