Oracle® Fusion Middleware
Building Portals with Oracle WebCenter Portal

12*c* (12.2.1.4.0)

ORACLE®

Oracle Fusion Middleware Building Portals with Oracle WebCenter Portal, 12*c* (12.2.1.4.0)

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Preface

This guide explains how to use Oracle WebCenter Portal to build portals. It provides instructions for tasks such as creating, customizing, and administering portals; working with portal templates; creating and editing portal pages and the content they expose; defining the assets and tools available to portals; and defining security through membership, roles, and permissions.

Topics:

- Audience
- Documentation Accessibility
- Related Documents
- Conventions

Audience

This guide is intended for application specialists and advanced knowledge workers who build and manage portals. For a complete description of these roles and other WebCenter Portal personas, refer to Who's Who.

Documentation Accessibility

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

Access to Oracle Support

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

Related Documents

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

Conventions

The following text conventions are used in this document:

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

Who's Who

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

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

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

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

This guide is aimed at the *application specialist* and advanced *knowledge worker* personas.

Knowledge Worker

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

At the application level, Karen has permissions such as those granted to the default `Authenticated-User` role, which may be customized for the specific needs of the organization. At the portal level, the portal manager will likely assign Karen a role that includes `View Pages` and `Customize Pages` permissions.

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

Knowledge Worker Tasks in WebCenter Portal

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

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

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

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

- Joining a team or project portal

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

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

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

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

Application Specialist

Ari is an *application specialist* who works in WebCenter Portal to create and administer portals, their structure (hierarchy of pages, navigation, security), and their content

(components on a page, layout, behavior, and so on). In a typical project, Ari coordinates the efforts of Karen (knowledge worker), Wendy (web developer), and Dave (developer).

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

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

Application Specialist Tasks in WebCenter Portal

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

- Planning and creating new portals

- Editing and administering the portals he owns

- Creating and building portal pages using the page editor and the resource catalog to add and configure page components

- Creating and managing portal assets, tools, and services

- Managing shared assets and portal templates across all portals

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

Web Developer

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

Web Developer Tasks in WebCenter Portal

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

- Developing a corporate portal look and feel

- Designing new page templates

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

Developer

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

Developer Tasks

Tasks that are typical of a developer like Dave include:

- Developing custom assets such page templates and resource catalogs for portals in WebCenter Portal

- Developing Java portlets

- Developing and deploying task flows, managed beans, and other custom components

- Developing custom personalization components

- Maintaining the source control system

- Maintaining a build system

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

System Administrator

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

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

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

System Administrator Tasks

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

- Uses WebCenter Portal administration to administer all portals (including import and export of portals) and security site-wide

- Uses WebCenter Portal administration to manage site-wide system pages, business role pages, and personal pages

- Leads security, taxonomy, metadata, workflow, governance

- Uses the management console for administrative functions

- Executes command line utilities for administrative functions

- Installs and configures production versions of developers' efforts

- Performs patching of the production versions and the operating system

- Creates clones and backups of the production versions

- Performs restores of production versions

- Monitors the operating system for issues with the production version

- Deploys and redeploys applications

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

Part I

Getting Started

This part of *Building Portals with Oracle WebCenter Portal* provides information about creating a new portal, creating and managing the templates that can be used as the basis for a new portal, and publishing the portal for others to use.

- Introduction to Building Portals with WebCenter Portal
- Creating and Building a New Portal
- Working with Portal Templates
- Publishing a Portal

1

Introduction to Building Portals with WebCenter Portal

Before building a portal, become familiar with the basic concepts of WebCenter Portal and the tasks involved in building a portal.

Topics:

- About This Guide
- Where Do I Start?
- Building Portals Concepts
- Building Portals Tasks

About This Guide

This guide is aimed at the application specialist or an advanced knowledge worker, who uses WebCenter Portal to create, edit, and administer portals. It provides instructions for tasks such as creating, customizing, and administering portals; managing and developing portal templates; creating and editing portal pages and the content they expose; defining the assets and tools available to portals; setting portal and page security through membership, roles, and permissions; and more

Where Do I Start?

If you already have a concept of what you want your portal to look like and the content you want to include in it, you probably want to dive in and create your portal without reading a lot of background conceptual information. To help get you started quickly, this chapter provides a brief overview of the basic concepts that are necessary knowledge before you begin. Read Building Portals Concepts, then review Building Portals Tasks for an overview of the range of tasks available to you in the development of a portal.

When you feel you have an understanding of the basic concepts and tasks available to you, go to Creating and Building a New Portal to follow the steps to use the portal creation wizard to create your new portal.

When your initial portal is created, you will probably have questions about where to go next to build out the portal you envision. While this guide contains all the information you need, you will find a summary to guide you in What's Next?

Building Portals Concepts

This section introduces the concepts involved in building portals to give you a general overview before you begin to build a portal with WebCenter Portal:

- What Is a Portal?
- What Is the Home Portal?

- [What Is Portal Composer?](#)
- [What Is a Portal Template?](#)
- [What Is the Portal Server?](#)
- [What Are Pages?](#)
- [What Are Portal Components?](#)
- [What Are Portal Assets?](#)
- [What Are Portal Tools and Services?](#)

> **Note:**
>
> For a general overview of WebCenter Portal, and how to work in a portal after it is built, see *Using Portals in Oracle WebCenter Portal*, which provides information for the knowledge worker who wants to contribute content, share data, collaborate with co-workers, and view profiles.

What Is a Portal?

A *portal* is an online gateway to a wide variety of purposes. It offers secure access to data, content, business applications, and services from multiple back-end sources in a web browser that is easy to navigate and use. A portal can provide tools to connect employees within an organization, actively sharing both profile and project information across teams; another portal may be directed towards customers, allowing them to explore and purchase products. Some portals are focus areas for small teams, others are loaded with functionality for use by thousands of users.

Much of a portal's inherent value lies in the way it aggregates data, content, business applications, and services into a unified user experience, whether viewed in a browser, smart phone, or tablet. Figure 1-1 depicts several sources of information, exposed to a user on a single page in a portal.

Figure 1-1   Integrating Multiple Sources of Information

WebCenter Portal provides all the tools you need to quickly create a robust portal through an intuitive user interface and a selection of out-of-the-box portal templates (see What Is a Portal Template?) to help you get started with built-in functionality appropriate for the portal you want to create. After creating a portal, you can easily develop it by adding pages, components, and more. You can customize the look and feel of a portal, define security and membership in the portal, and continually add new features and functionality as the needs and demands of your portal change.

When you publish your portal, it is available for others to access through a URL allowing them to perform actions in the portal as allowable by their permissions. A user may have defined permissions given to their assigned role, or may be granted ad hoc permissions to certain areas of the portal, such as editing permissions on a particular page in the portal. Portal users may be unaware that the data, content, and applications surfaced in a portal often come from entirely different back-end sources. Furthermore, through portal-driven events, these aggregated components can interact with each other within the browser. To the user, everything is presented in a seamless, integrated interface.

Portals falls into two basic categories:

- *Intranet portals* are used for collaboration, employee self-service, and company communication.

- *Extranet portals* are used by customers and partners for self-service and support.

What kind of portal do you want to build? Let's look at some of the basic requirements for these kinds of portals in more detail.

Internal Company Portals (Intranet)

Intranet portals allow users within an organization to collaborate, access critical information, and obtain self-service securely.

There are many applications for an intranet portal, such as:

- A self-service portal that enables employees to update time cards, request vacation, complete performance appraisals, and view benefit information.

- Company-wide information that are made available to all users of the portal.

- Collaborative team workspaces, as described in Team Collaboration Portals.

Team Collaboration Portals

A team collaboration portal is typically used by a group within a company who wish to share and collaborate on documents and other information.

You can make a team portal publicly available to users within the company or restricted to authorized users only, typically the members of the team or other invited individuals. Typical purposes for team collaboration portals include:

- Collaboration around a specific project.

- Training content for all employees.

- Post, view, and edit documents.

- Track activities, so users can see when a document was added or changed, among other activities.

Key features of team collaboration portals include:

- Team portals do not require any IT effort for creating, provisioning, and maintaining them. They are maintained primarily by knowledge workers and application specialists.

- Portal users can share documents and use social components like activity streams, wikis, blogs, and so on.

- The system administrator delegates administration rights so that team leaders and other individuals can manage their own team portals, reducing the cost to the IT department and enabling them to serve large numbers of users with minimal support overhead.

External Portals (Extranet)

Extranet portals extend outside the organization and provides services targeted to customers and vendors.

Some extranet use cases include:

- Allowing authorized users to log in and access the portal's features. For example, vendors might access the site to learn about bidding opportunities or status. Customers can purchase products, view billing histories, or request support.

- Delivering custom features to the portal as portlets, business mashups, or task flows.

- Presenting a consistent look and feel to users and emphasize corporate branding. Customer-specific branding may be required.

What Is the Home Portal?

The *Home portal* is the area where users have access to their profile, available portals, portal templates, and documents, and can customize certain elements of their own view of the Home portal. Users can create their own *personal pages* in the Home

portal, and system administrators can expose *system pages* and *business role pages* to selected audiences. A system administrator may also choose to hide the Home portal from view by modifying the security settings on user roles.

For more information, see Exploring WebCenter Portal in *Using Portals in Oracle WebCenter Portal*.

What Is Portal Composer?

Portal Composer comprises the portal creating, editing, and administration areas of WebCenter Portal. In Portal Composer, you can create a portal, edit a portal in the portal editor, add and edit the pages of a portal in the page editor, and administer a single portal as the portal creator. The system administrator has access to the Portal Composer administration area (also referred to as *WebCenter Portal Administration*) that allows for administering all portals.

All aspects of using Portal Composer to build, edit, and administer a portal are covered by the chapters in this guide, *Building Portals with Oracle WebCenter Portal*. For application-level administration tasks performed by the system administrator in Portal Composer to apply settings to all portals, see the chapters in Administering Portals in WebCenter Portal in *Administering Oracle WebCenter Portal*.

What Is a Portal Template?

A *portal template* is the starting point for building a new portal. When you first create a new portal, you select a portal template on which to base the new portal. The portal template can be the built-in template provided with WebCenter Portal, or a custom template developed for a specific use. Subsequently, you can modify and customize the portal to add more features to those initially provided by the template.

For more information, see Working with Portal Templates.

What Is the Portal Server?

In terms of developing portals, the portal server allows portal creators to publish portals available for others to use.

For more information, see Publishing a Portal.

What Are Pages?

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

The out-of-the-box pages in WebCenter Portal are:

- *System pages*, which offer a ready-to-use set of customizable, utilitarian pages, such as the **Login** page and the **Self Registration** page. Additionally, the tools offered by WebCenter Portal each have an associated system page to provide a user interface to the tool (called a *tool console*), such as the Document page. System pages are prepopulated with relevant input fields and boilerplate text. System administrators can customize system pages to reflect a company brand, provide useful hints, or provide additional functionality (such as task flows and portlets). Once customized, a system page displays the customizations along with an updated WebCenter Portal look and feel. Before customization, WebCenter Portal displays the generic version of the system page

with the look and feel used in prior releases of WebCenter Portal. For more information, see Customizing System Pages in *Administering Oracle WebCenter Portal*.

- *Business role page*s, which can be populated with information of relevance to a particular business role, such as salesperson, accountant, or marketing associate, and then pushed into the Home portal views of all users who are assigned that role. Business role pages are customizable only by the system administrator at the application level, as described in Managing Business Role Pages in *Administering Oracle WebCenter Portal*.

No matter how you structure your portal, there is always a need for new pages in addition to those that are available out-of-the-box. You can create new pages to meet the needs of your portal:

- Custom *business role page*s, created by the system administrator to add to those provided out-of-the-box. For information about creating new business role pages, see Managing Business Role Page in *Administering Oracle WebCenter Portal*.

- *Personal pages*, which you can create for your own exclusive use in the Home portal. By default, personal pages can be seen in the Home portal only by the user who created them, but users can also allow other users to see their personal pages. For more information about personal pages, see Creating and Managing Personal Pages in *Using Portals in Oracle WebCenter Portal*. While individuals are primarily responsible for managing the content of their personal pages, a system administrator has the authority to administer all personal pages in WebCenter Portal administration, as described in Managing Personal Pages in *Administering Oracle WebCenter Portal*.

- *Portal pages*, which can be created by anyone with permissions to create pages in a portal, and may serve different purposes:

  – Pages created by the portal manager, designed to contribute to the knowledge base of the portal, and typically made available to all members of the portal.

  – Pages created by a portal member, selectively exposed in the portal either for their own use, or shared with other selected portal members. While such portal pages may not be exposed to all portal members, a portal manager has the authority to administer all portal pages.

  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 (see Setting the Default Page Template). When you create a portal page, you choose a *page style* for the initial content and layout of the page (see Creating a Page or Subpage When Editing a Portal). In other words, all pages in a portal use the same page template, but pages can have different page styles for their content areas. Once you create a page and select its page style, you cannot change the page style. If the portal template includes a page style called Default Page Style, then that is the page style used for the Home page and all pages created in the Create Portal wizard. Otherwise, the built-in Blank page style is applied to the pages. Page templates and page styles are portal *assets* (see What Are Portal Assets?).

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

  For more information, see Working with Portal Pages.

What Are Portal Components?

As you develop a portal, you will add elements to the pages of your portal. These elements are many and varied, and are collectively referred to as *portal components*. Portal components include task flows, portlets, content containers, and other types of resources such as images and links.

For more information, see:

- Working with Resource Catalog Components on a Page
- Working with Web Development Components on a Page
- Working with Layout Components

What Are Portal Assets?

Assets are the objects that define the structure, look and feel, and the content of portals. A portal manager or member with appropriate permissions manages the assets available to an individual portal, and the application specialist manages shared assets, which are available to all portals.

For more information about assets available to individual portals, see Creating, Editing, and Managing Portal Assets. For information specific to shared assets, see Working with Shared Assets.

What Are Portal Tools and Services?

WebCenter Portal offers many 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.

Tools and services can be exposed on their own page (*console*) in a portal with a separately addressable URL, or as one of many components on a page. Tools and services available for use in your portals include: documents, portal events, lists, search, tags, instant messaging and presence, links, mail, notes, and notifications.

For more information, see Introduction to Portal Tools and Services.

Building Portals Tasks

This section introduces the tasks involved in building portals to give you a general overview before you begin to build a portal. These tasks are described step-by-step in the chapters of this guide:

- Creating and Publishing a New Portal
- Editing, Administering, and Customizing a Portal
- Creating, Editing, and Managing Portal Pages
- Creating, Editing, and Managing Portal Assets
- Managing Portal Security and Membership
- Adding and Managing Portal Content

- Adding and Managing Portal Tools and Services
- Managing Portal Templates and Shared Assets for All Portals
- Changing the Look and Language in a Portal

Creating and Publishing a New Portal

The basics of developing a new portal begin with creating the portal using a portal template for the initial design and layout, and publishing the portal for others to use.

For more information, see Creating and Building a New Portal.

Editing, Administering, and Customizing a Portal

After creating a portal, the tasks associated with building and maintaining the portal include editing the portal to add content, administering the portal settings and security, and managing device groups to display the portal on various devices.

For more information, see Working with a Portal.

Creating, Editing, and Managing Portal Pages

The portal pages that you create, populate, and manage present the substance of what users see in a portal.

For more information, see Working with Portal Pages.

Creating, Editing, and Managing Portal Assets

WebCenter Portal includes a variety of assets that you can use to define the structure, look and feel, and content of your portals.

For more information, see Working with Portal Assets.

Managing Portal Security and Membership

Portal managers are responsible for managing the roles, permissions, and members in a portal, which provide the security for the portal.

For more information, see Working with Portal Roles, Permissions, and Members.

Adding and Managing Portal Content

One of the most important portal requirements is content integration. Portal creators and managers need to add and update content, manage content creation, workflows, archiving, and so on.

A *content repository* stores content such as documents and images. Typically, a connection to a back-end content repository (Content Server) is configured when WebCenter Portal is installed. Once this connection is available, portal manager can enable the Documents tool in their portals. They can then add document components to portal pages, and end users can work with the documents in the portal.

Working with content in a portal includes using Content Presenter to present content in custom or built-in display templates, adding and configuring Content Manager to work

with documents, establishing workflow on documents, and enabling wiki and blog functionality in a portal.

For more information, see Working with Content in a Portal.

Adding and Managing Portal Tools and Services

WebCenter Portal offers many 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.

For more information, see Working with WebCenter Portal Tools and Services .

Managing Portal Templates and Shared Assets for All Portals

Resources that are available to all portals are administered by the application specialist. These resources include portal templates and shared assets.

For more information, see Managing Shared Resources for All Portals.

Changing the Look and Language in a Portal

Portals can be extended to offer portal members and end users design and language choices.

For more information, see Enhancing Portals Through Design and Language.

2

Creating and Building a New Portal

Use the portal creation wizard to create a new portal, then add and edit portal pages, and publish them for portal users.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you need the application-level permission `Create Portals`. This permission is given by default to the following roles: `Administrator`, `Application Specialist`, `Authenticated-User`, and `Portal Creator`. After you create a portal, you are given the `Portal Manager` role in the portal. You can create pages in a portal if you are the portal manager or member with `Basic Services: Edit Page Access, Structure and Content` permission in the portal.
>
> See About Roles and Permissions for a Portal.

Topics:

- About Creating a New Portal
- Creating a New Portal
- Creating Pages When Creating a New Portal
- What's Next?

About Creating a New Portal

When you create a new portal, you select a portal template to provide a starting point for your portal. You can use a built-in portal template, or create your own custom portal templates using an existing portal as the basis for the template. After creation, portals can be customized, including the navigation controls, the color scheme, and the look and feel of any task flow or portlet, all from within the browser.

When you create a portal, you become the default *portal manager*, and assigned the `Portal Manager` role. In this role, you have the `Manage Security and Configuration` permission in the portal, which provides full control over the portal presentation and content, as well as administrative responsibilities. When a new portal is created, WebCenter Portal creates default portal roles with default permissions. The portal manager assigns portal members to these roles and modifies the default permissions as required, or creates new custom roles.

> **Note:**
>
> As a portal creator, you always have the `Manage Security and Configuration` permission in the portal. You retain this permission even if your default `Portal Manager` role is changed to one with fewer permissions, or if your custom role is modified to alter your permissions.

If a tool is enabled in a portal template, then that tool will be enabled in any portal based on that template. When a tool is enabled in a portal in this way at the time it is created, WebCenter Portal handles any necessary configuration with the back-end server at first use, not at portal creation. This is known as "lazy provisioning" and speeds the successful creation of a new portal by deferring the provisioning of tools until they are first used. When you manually enable tools in a portal, WebCenter Portal immediately handles any necessary configuration with the back-end server.

> **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.

Creating a New Portal

> **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. Open the portal creation wizard in either of the following ways:
   - In the portal browser, click **Create Portal**.

Figure 2-1   Portal Browser
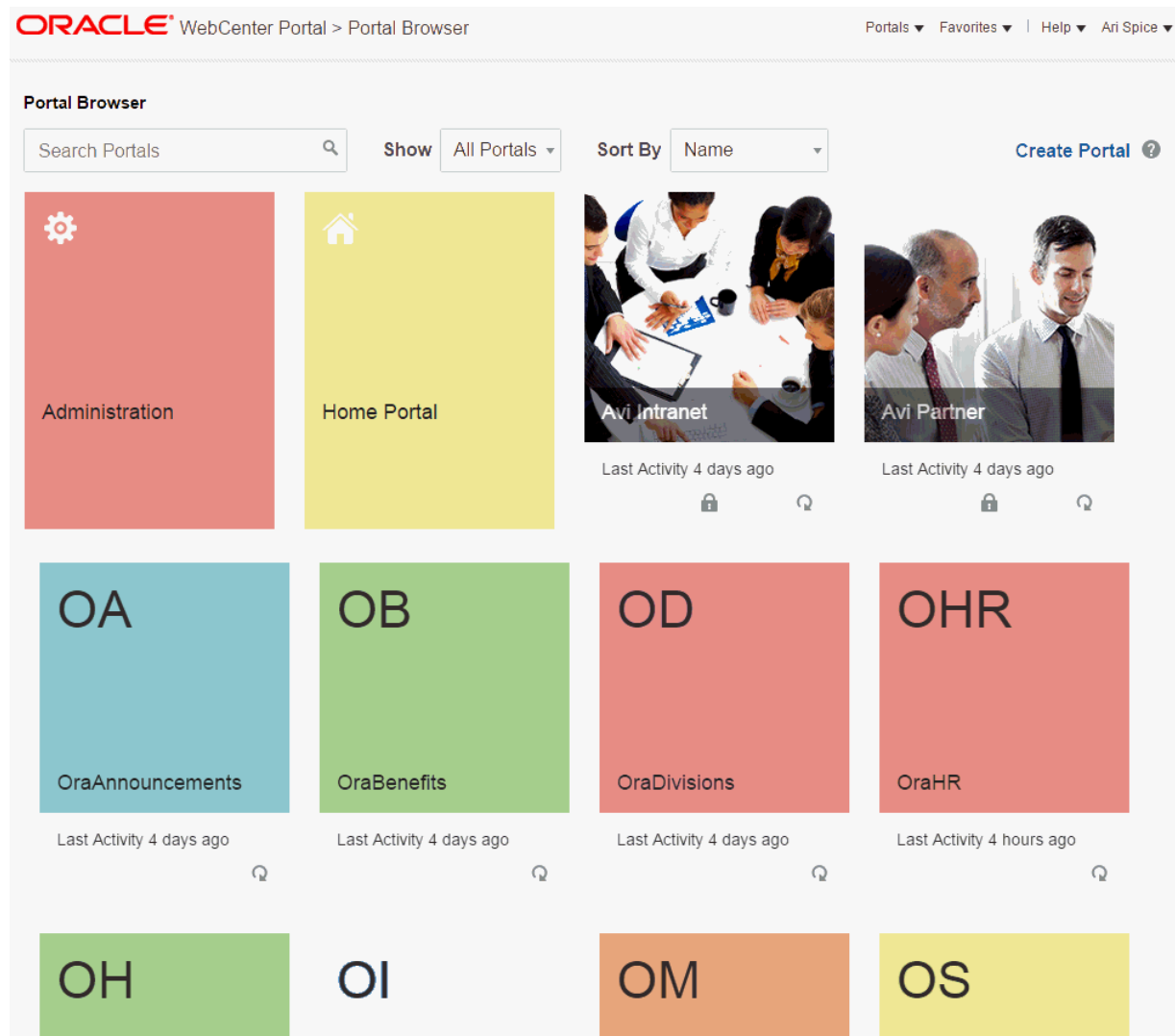
- From the **Portals** menu, select **Create Portal**.

The portal template selection screen displays.

Figure 2-2   Select a Portal Template
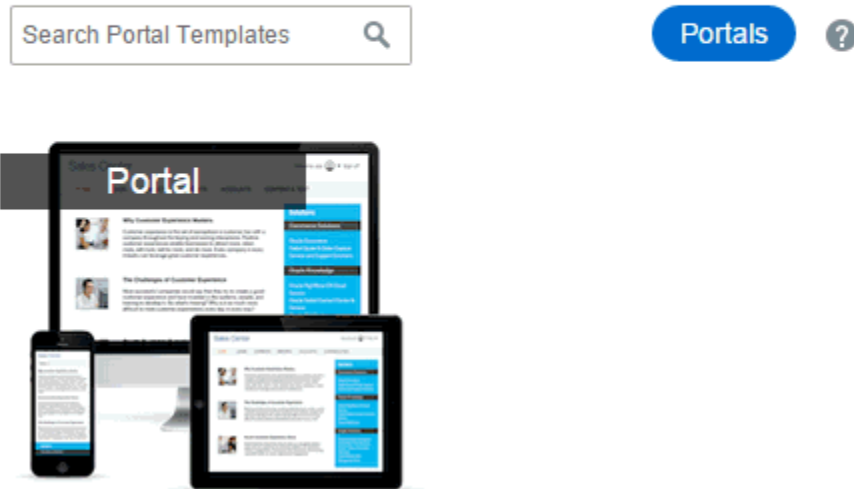
2. **Select a Portal Template**. Explore the portal templates available to you to use as the basis for your new portal. There is one built-in portal template, named **Portal**.

> **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.

3. 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.

Figure 2-3   Portal Specification Screen

4. **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`.

5. **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.

6. **URL**. Modify the default URL for the portal if desired. The internal name of the portal is derived from this field.

7. 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.

8. **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**.

9. 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.

   See Creating Pages When Creating a New Portal.

10. Click **Create Portal**.

    WebCenter Portal creates your new blank portal, and displays it in the portal editor.

Figure 2-4   Portal Editor: New Portal
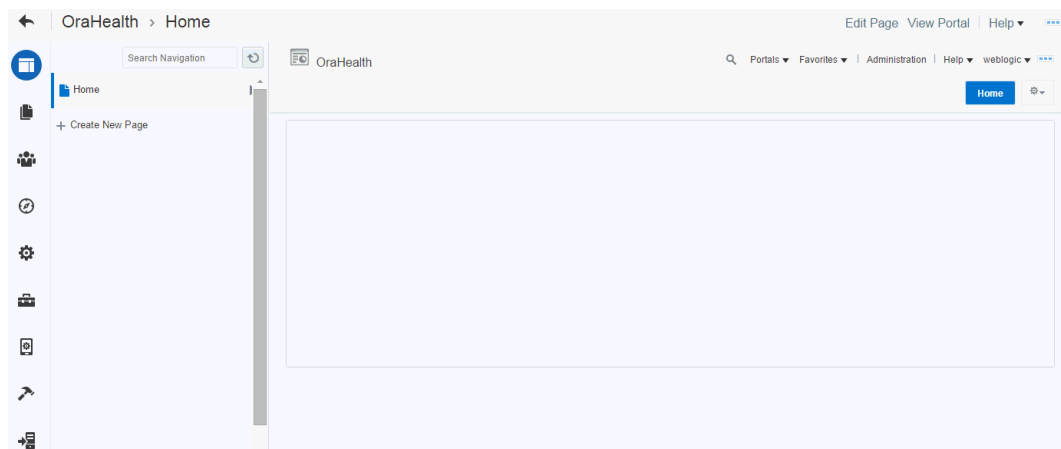
11. To view and work with your new portal in the portal browser, click the **Back to Portals** icon at the top left of the window.

Figure 2-5   Portal Editor: Back to Portals Icon
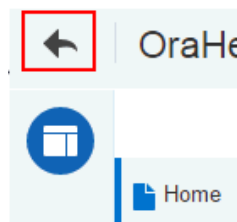
By default, your new portal displays in the portal browser as a color tile, overlaid with the portal name and an acronym depicting the first two letters of the portal name. The color is randomly assigned.

Figure 2-6   Default Display of Portal in Portal Browser
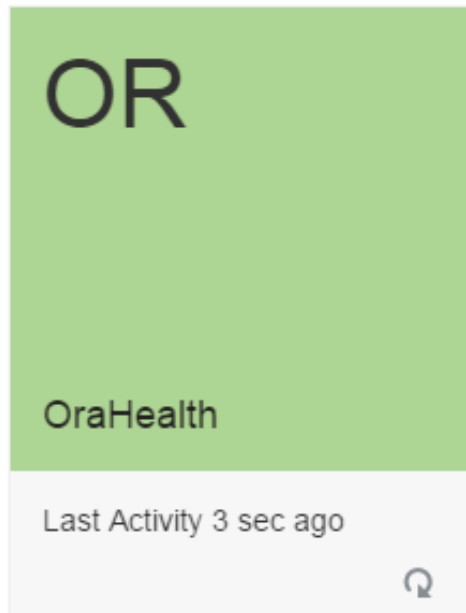
You can begin to populate, customize, and manage the portal:

- What's Next?
- Editing a Portal
- Administering a Portal

Creating Pages When Creating a New Portal

If supported by the portal template you use to create a portal, you can create pages for the new portal in-place while creating the portal, using special syntax in the portal creation wizard. The built-in portal template named Portal supports this capability. Other built-in templates do not support creating pages in-place during portal creation.

> **Note:**
>
> When you create pages while creating a new portal, as described here, there is no opportunity to select a page style for the pages. The built-in Blank page style is applied to these pages and to the Home page. It is not possible to change a page style for a page after creating the page, but you can create new pages to replace these pages, selecting a new page style.

To create pages when creating a new portal:

1. In the portal creation wizard, click **Pages** to show the existing pages in the portal, inherited from the portal template.

Figure 2-7   Creating Pages in Create Portal Wizard

2. To create a set of top-level pages for the portal, type the page names in the **Add More Pages** input area, separated by commas or type the name of each page on its own line.

   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.

> **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__`.

Figure 2-8   Creating Pages in Create Portal Wizard: Basic Syntax
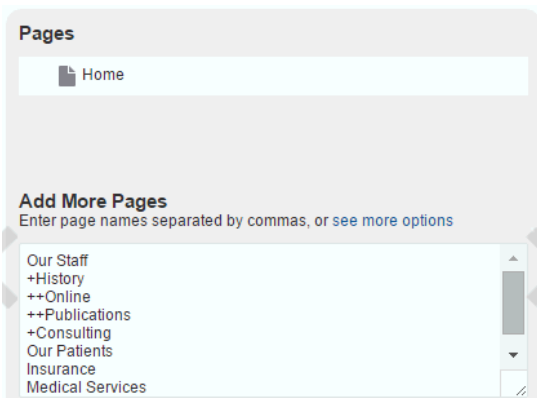
3. Optionally, click **see more options** to view syntax and examples to:

   - create a more advanced page hierarchy including subpages

   - add a link in the page navigation to certain system pages

   - rename a page that came from the portal template

   Type the syntax according to the on-screen instructions.

Figure 2-9   Creating Pages in Create Portal Wizard: Advanced Syntax
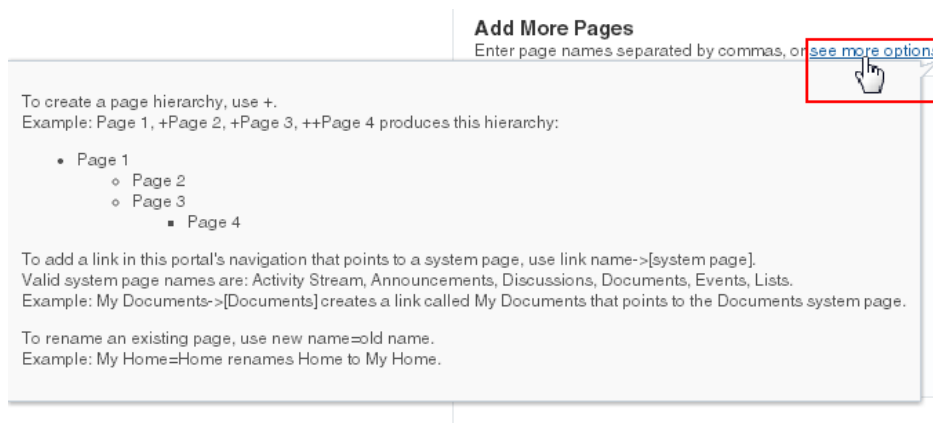
Using this syntax, you can immediately create the new portal prepopulated with a page navigation.

Figure 2-10   Page Navigation in New Portal
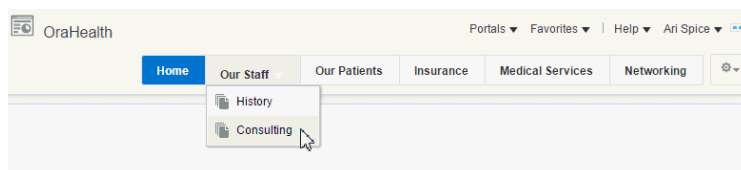
What's Next?

You have created a portal, and you now want to populate it. You may be in a situation where you need to set up a department portal quickly, and have content and links to add, so you can have something to show your managers before the end of the week. You have some ideas about how you want it to look, but what components and instructions do you use to accomplish your vision? The following table attempts to answer the questions you may be asking, and refers to documentation that provides the information you need.

Table 2-1   Building Out a Portal

Task	If I want to	What do I need to understand and do?
Adding Content	Populate my portal with content (and understand what kinds of things I can add to my portal)	Content in a portal is added to *pages*, which are exposed as the portal navigation items (tabs along the top of the portal, or links in a side navigation pane).
		The new pages that you create in a portal are independent of the portal template that you selected to create the portal. You can create a new page, and design it however you want it to look. For example, if you want it to be wiki page, you can select the Wiki Page page style in the page creation wizard. If you want to start with a blank page and add several areas to it, you can create regions on a blank page, and add desired components to each region.
		See Creating, Editing, and Publishing a Portal Page.
Adding Content	Allow other users to edit a page in my portal and add content, such as links and text	To allow other users to edit a portal page, you must give those users edit permissions on the page. Each page can be given its own set of permissions, or you can give permissions to edit all pages in the portal, then individually customize permissions for specific pages.
		• To set permissions for all pages in a portal, you assign the permissions to a user role (such as `Participant` role). See Viewing and Editing Permissions of a Portal Role (you probably want to select the permission `Edit Page Access, Structure, and Content`).
		• To set permissions on a single page in a portal, see Setting Page Security.
		• To limit editing access to just one component on a page, you can associate a security-related EL expression with the component instance. See Setting Component Access.
Editing the Layout and Structure of a Page	Change the layout of a page	See Changing Page Layout.
Modifying Navigation	In my portal navigation, create a nested page hierarchy	You can create a two-level hierarchy in your portal navigation in either of the following ways:
		• Create subpages, which by default adds them to the portal navigation hierarchy beneath their parent page. See Creating a Page When Viewing a Portal.
		• Adjust the portal navigation manually by moving the pages as desired. See Adjusting Page Order and Hierarchy in the Portal Navigation.

Table 2-1   (Cont.) Building Out a Portal

Task	If I want to	What do I need to understand and do?
Modifying Navigation	In my portal navigation, add a link to an existing page (including a wiki or blog page) in my portal	By default, *portal pages* are automatically added to the portal navigation when they are published (see Publishing a Portal Page). *Personal pages*, *system pages*, and *business role pages* are not automatically added to the portal navigation.

If a portal page is not shown in the portal navigation, it has likely never been published, or it has been hidden. To show the page in the portal navigation, edit the properties of the page and select the Visibility property. See Showing or Hiding a Page in the Portal Navigation.

If you want to expose a personal page, system page, or business role page, or add a portal page to a second location in the portal navigation:

- In the portal editor, select an existing navigation item, then click its **Actions** icon ( ) and select **Add**, then **Page Link**.
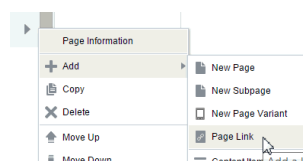
- Select any of the available pages to add the page to your navigation.

The page is added to the portal navigation:

See also, Adding an Existing Page to the Portal Navigation.

Table 2-1   (Cont.) Building Out a Portal

Task	If I want to	What do I need to understand and do?
Modifying Navigation	In my portal navigation, add a link to an existing page (including a wiki or blog page) in another portal, choosing whether to show or hide the other portal's navigation when viewing the page	To create a link to a page that exists in the connected content repository, outside of your portal:

• In the portal editor, select an existing navigation item, then click its **Actions** icon ( ) and select **Add**, then **Link**.
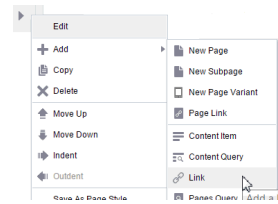
• Set the Path property to the URL of the target page. See Pretty URLs for Pages in a Specified Portal.

If you enter the URL of the target page as shown in the browser address field, the target page displays within its portal, as shown in this example using top navigation:

To hide the target portal navigation and show only the target page, edit the target page and copy the value of its Path property (on the Advanced tab of the page properties) into the Path field of the navigation item. When you click the navigation item, the page displays without its enclosing portal, as shown here:

Table 2-1   (Cont.) Building Out a Portal

Task	If I want to	What do I need to understand and do?
		Note: If you add a link to a wiki document rather than a page, you cannot use this method to hide the target portal navigation for the wiki. Instead, add a new page containing the wiki document, as described in the rows below for "Working with Wikis and Other Documents." Then, edit the page and copy the value of its Path property (on the Advanced tab of the page properties) into the Path field of the navigation item.
Modifying Navigation	In my portal navigation, add non-page navigation items, such as content item, content query, folder, separator, and so on	See Adding Items to the Portal Navigation. **Note**: If you create a Content Item link to a document/wiki, the target will not expose editing controls.
Modifying Navigation	In my portal navigation, create a menu or label, which can be expanded to reveal associated target locations	In the portal editor, select an existing navigation item, then click its **Actions** icon (▶) and select **Add**, then **Folder**. Name the folder, then add beneath it navigation items such as page links. You can also drag and drop existing navigation items under the folder. The menu is added to your portal navigation:
Modifying Navigation	In my portal navigation, rearrange pages	See Adjusting Page Order and Hierarchy in the Portal Navigation.
Modifying Navigation	In my portal navigation, delete a page link (without deleting the page itself)	To hide a page in the navigation, see Showing or Hiding a Page in the Portal Navigation. **Note:** To delete a page, see Deleting a Page.
Modifying Navigation	Change the portal navigation from side to top tabs, or vice versa	The tabs along the top and side can be changed by simply changing the page template for the portal, overriding the page template established by the portal template that was used to create the portal. See Changing the Page Template for a Portal. See also, About the Built-In Page Templates.

Table 2-1   (Cont.) Building Out a Portal

Task	If I want to	What do I need to understand and do?
Working with Wikis and Other Documents	Add a new wiki page to my portal (make the entire page a wiki)	Create a new wiki page using the Wiki page style. See Creating a Page When Viewing a Portal. **Tip:** To work with wikis, make sure that the Documents tool is enabled. See Enabling and Disabling Tools and Services Available to a Portal. See also Adding an Existing Wiki to a Portal.
Working with Wikis and Other Documents	Display available documents in a folder structure with document management controls on a page in my portal	See Enabling Document Management.
Working with Wikis and Other Documents	Add an existing document to a page in my portal, without editing controls	To add an individual document to a page, without editing controls, add the document in a Content Presenter task flow. See Publishing Content Using Content Presenter. **Note**: You can expose the page in the portal navigation using a Page Link. Another way to expose a document/wiki in the portal navigation, *without editing controls* when it is viewed, is to add it as a Content Item to the portal navigation. See Adding Items to the Portal Navigation.
Controlling Default Focus	Move focus to the top of a target document/wiki from the default focus at the bottom (**Comments** tab), removing all tabbed panes at the bottom.	In the page editor, click the **View Actions** menu for the Content Presenter task flow, then select **Parameters**. In the Parameters dialog, add to the Features Off property: `sidebars`.
Sharing a Portal and Portal Activities with Others	Add users to my portal to establish the portal membership Invite users to my portal, giving them the option to become members	See Setting Up Membership Options for a Portal.
Sharing a Portal and Portal Activities with Others	Display an events calendar Display my personal Outlook calendar	To view portal events on the Events page or task flow, or events from other portals. See Adding Events to a Portal If you use Microsoft Exchange Server, you can maintain a calendar of your personal events, external to WebCenter Portal events, that you can include on a page in the Home portal. For more information about logging in to your personal calendar. **Tip:** To work with events and calendar, make sure that the Events tool is enabled.
Sharing a Portal and Portal Activities with Others	View the activities of members	To add an activity stream or recent activities to a portal, see Adding an Activity Stream to a Portal.

Table 2-1   (Cont.) Building Out a Portal

Task	If I want to	What do I need to understand and do?
Sharing a Portal and Portal Activities with Others	Get RSS feeds	To publish content from WebCenter Portal or view news feeds from external sources on your portal pages in an RSS viewer, or both, see Adding RSS Feeds to a Portal.
		Tip: To enable RSS, see Enabling or Disabling RSS News Feeds for a Portal.

3

Working with Portal Templates

Portal templates provide a consistent look and feel for new portals. You can use the built-in portal template or create new custom portal templates to meet your portal requirements.

> ✏️ **Permissions:**
>
> To perform the tasks in this chapter, you must have the default permissions of the `Authenticated-User` role, or the application-level permission `Portal Templates: Create Portal Templates`. Note that the `Portal Creator` role does not have this permission by default. Users with this 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.
>
> With the default permissions of the `Application Specialist` role, or the `Portal Templates: Manage All` permission, you can manage *all* portal templates in WebCenter Portal on the **Portal Templates** page in WebCenter Portal administration. Create, rename, set access to, delete, publish, hide, and import or export portal templates. See Managing All Portal Templates.

Topics:

- About Portal Templates
- Viewing Available Portal Templates
- Creating a New Portal Template
- Viewing Information About a Portal Template
- Searching for a Portal Template
- Renaming a Portal Template
- Setting Up Access to a Portal Template
- Publishing or Hiding a Portal Template
- Deleting a Portal Template

About Portal Templates

When you create a portal, you can base it on the built-in portal template, your own custom portal template, or a published portal template created by others. Portal templates provide a consistent look and feel and an efficient way to get started in creating a portal that is configured as required by an organization.

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.

A portal template may include custom attributes that can be set as needed during the creation of a new portal. For example, a portal template for product development team portals may provide an attribute that can be set to a specific product ID to populate the portal appropriately when it is created.

After you create a portal based on a particular portal template, you can modify the portal as desired, such as changing the page template and skin used by the portal, which affects the look and feel of the portal. In this way, your portal may evolve to look very different to the original portal template design. You can subsequently save such a portal as a new custom portal template if you wish to use it as the basis for new portals.

About the Built-In Portal Template

WebCenter Portal provides a single built-in portal template that you can select when creating a new portal.

- **Portal**—Generic template for building a new portal, designed to accommodate the latest features of WebCenter Portal.

About Custom Portal Templates

You can create a custom portal template to allow for quickly creating new portals with a required design, or designed to solve a business process need.

A custom portal template may be simple, or may include robust functionality such as:

- Preseeded data, such as documents, lists, member information (including roles), pages, or assets. When you select such a template to build a new portal, the new portal includes all the preseeded data.

- Permissions, either simple permissions or advanced permissions, if advanced permissions are specified in the base portal from which the template is created.

- Limited available page styles and resource catalogs in order to create a safe environment for users to build portals with little support. Such a portal template could even include necessary custom documentation and references.

- If custom page permissions are specified for roles or individual users in a portal that is used to create a new portal template, then only the custom page permissions specified for the roles (not users) are included in the portal template (and subsequently in a portal that is created using the portal template).

- Custom Java code that executes when you select the template for a new portal. For example, custom code may include logic to automatically create a mailing list for a new portal. See Developing Shared Libraries in *Developing for Oracle WebCenter Portal*.

About the Built-In Portal Template

WebCenter Portal provides a single built-in portal template that you can select when creating a new (see Creating a New Portal):

- **Portal**—Generic template for building a new portal, designed to accommodate the latest features of WebCenter Portal.

About Custom Portal Templates

You can create a custom portal template to allow users to quickly create new portals designed to solve a business process need.

A custom portal template may be simple, or may include robust functionality such as:

- Preseeded data, such as discussions, documents, lists, member information (including roles), pages, or assets. When you select such a template to build a new portal, the new portal includes all the preseeded data.

- Permissions, either simple permissions or advanced permissions, if advanced permissions are specified in the base portal from which the template is created.

- Limited available page styles and resource catalogs in order to create a safe environment for users to build portals with little support. Such a portal template could even include necessary custom documentation and references.

- If custom page permissions are specified for roles or individual users in a portal that is used to create a new portal template, then only the custom page permissions specified for the roles (not users) are included in the portal template (and subsequently in a portal that is created using the portal template).

- Custom java code that executes when you select the template for a new portal. For example, custom code may include logic to automatically create a mailing list for a new portal. For more information, see Developing Shared Libraries in *Developing for Oracle WebCenter Portal*.

Viewing Available Portal Templates

To see a list of the portal templates available to you, click the **Portal Templates** tab in the Home portal.

If the **Portal Templates** tab is not exposed in the Home portal, open the **Personalize Pages** page and select the **Show Page** check box for the **Portal Templates** page.

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

Figure 3-1   Portal Templates Page in Home Portal

Creating a New 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. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal
    administration:

    •   In the Home portal, click the **Portal Templates** tab. If this tab is not showing,
        click the **Actions** icon and select **Personalize Pages**, where you can select
        Show Page.

    •   From the **Portals** menu, select **Administration**, then click the **Portal
        Templates** tab.

2. 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.

Figure 3-2   Create a Portal Template Dialog: Setup Step

3. 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`.

4. 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.

5. 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**.

   Figure 3-3   Create a Portal Template Dialog: Portals Step

6. In the **Content** step, select the services that contain data that you want the portal template to inherit from the parent portal.

> ✏️ **Note:**
>
> 3-7
>
> - 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).

Figure 3-4   Create a Portal Template Dialog: Content Step
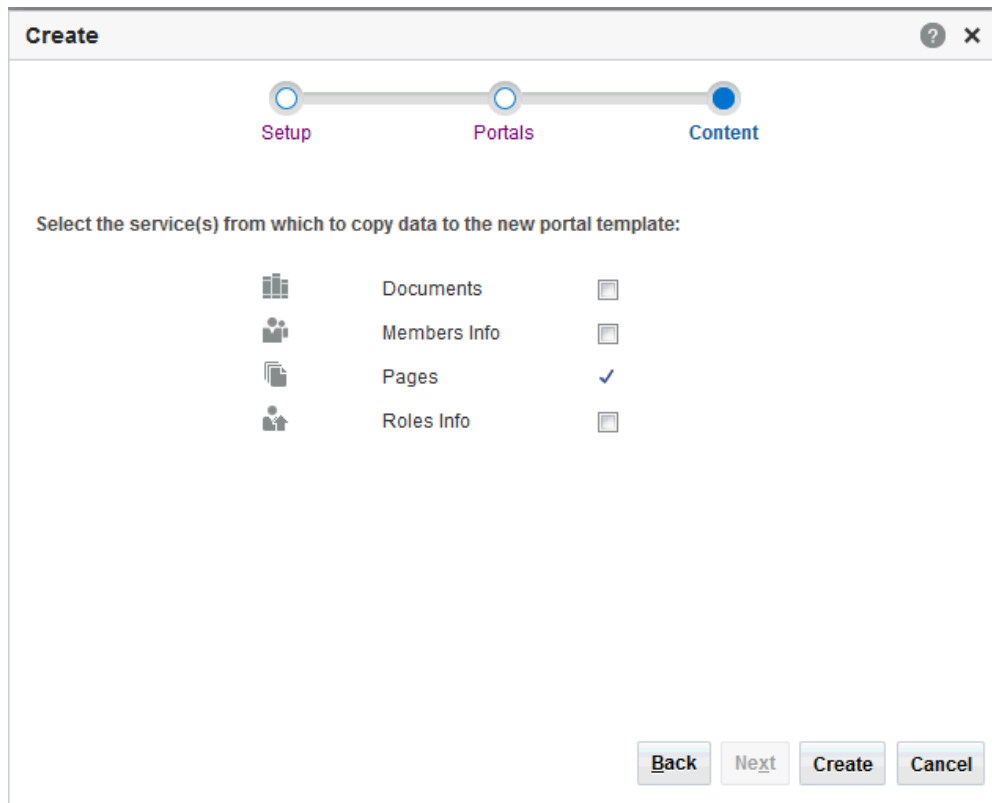
7.   Click **Create**.

   •   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.

Viewing Information About a Portal 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.   Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

- In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.
- From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. 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.

   Figure 3-5   About Portal Template Dialog

3. 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 an out-of-the-box portal 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, as described in Renaming a Portal Template.

   - **Created By**: User name of the portal template creator.

   - **Date Created**: Date and time that the portal template was created.

Searching for a Portal Template

Global search does not search portal assets, such as portal templates, page templates, resource catalogs, and so on. The **Filter** field on the **Portal Templates** page is useful for searching for portal template names or descriptions when your application includes a large number of portal templates.

> **✏ Note:**
>
> The `Portal Creator` role does not have default permissions to view or search for portal templates.

To search for a portal template by a string in the **Name** or **Description**:

1. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

    • In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

    • From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. In the **Filter** field, enter a search string and click the **Filter** icon.

Figure 3-6   Filter Icon

The **Portal Templates** page displays portal templates where the search string is found in the **Name** or **Description**.

3. To clear the current search string and display all portal templates, click the **Clear Filter** icon.

Figure 3-7   Clear Filter Icon

Renaming a Portal Template

To rename a portal template:

1. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

    • In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

    • From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. Click in the row of the portal template.

3. From the **Actions** menu, select **Rename Portal Template Display Name** to open the Rename Portal Template Display Name dialog.

4. In the **Display Name** field, enter a new name for the portal template.

5. Optionally, enter a **Description**.

6. Click **OK**.

Setting Up Access to a Portal 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. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

   • In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

   • From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. Click in the row of the portal template.

3. From the **Actions** menu, select **Set Template Access** to open the .Set Template Access dialog

Figure 3-8   Set Template Access Dialog

4. In the Set Template Access dialog:

   • Click **Add Users** to open the Search Users dialog where you can select from a list of users or search for a user name.

   • Click **Add Groups** to open the Search Groups dialog where you can search for a user group.

For tips on searching for a user or group in the identity store, see Searching for a User or Group in the Identity Store.

5. 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.

6. Click **OK**.

Publishing or Hiding a Portal 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. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

   • In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

   • From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. Click in the row of the portal template to publish or hide.

3. 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.

4. 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.

Deleting a Portal 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. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

    - In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

    - From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. Click in the row of the portal template.

3. From the **Actions** menu, select **Delete Portal Template**.

4. In the confirmation prompt, click **Delete**.

4

Publishing a Portal

Make your portal available for others to use. You can choose to make a portal publicly available or restrict it to only portal users.

> ✏ **Permissions:**
>
> To perform the tasks in this chapter, you need the portal-level permission `Manage Security and Configuration` or `Manage Configuration` permission.
>
> Any user who accesses administration settings for a portal and does not have `Manage` permission (for example, a user with `Customize Pages` permissions, granted permission to edit a page in the portal) will see only the settings available to their role and permissions.
>
> See About Roles and Permissions for a Portal.

Topics:

- About Publishing a Portal
- Making a Portal Known (Discoverable)
- Granting Users Access to a Portal
- Granting Public Access to a Portal

About Publishing a Portal

Once you have created a portal, you probably want others to be able to use it. As the portal manager, you can determine whether the portal should be discoverable only by other WebCenter Portal users, or publicly available.

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.

For information about sharing the link to a portal with others, see Publishing the Link to a Portal in *Using Portals in Oracle WebCenter Portal*.

Publishing the Link to a Portal

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

For information about sharing the link to a portal with others, see Publishing the Link to a Portal in *Using Portals in Oracle WebCenter Portal*.

Making a Portal Known (Discoverable)

You can make a portal discoverable by other WebCenter Portal users on their **Portals** page and in search results to let them know that it exists. Making a portal discoverable does not make its content accessible. Users interested in the portal can request membership through self-service (if enabled) or by mail.

To make a portal discoverable by other WebCenter Portal users:

1. Set general access to the portal:
   - If you are creating a new portal, select either **Public** or **Private** for the portal access, as described in Creating a New Portal.
   - If the portal is currently **Hidden**, change the access to **Public** or **Private**, as described in Changing the Access to a Portal.

2. (Optional) To allow users to join the portal, enable self-registration (you can still retain control by requiring approval for any subscription request), as described in Managing Self-Service Membership for a Portal.

3. To add or invite specific WebCenter Portal users and groups to the portal, allow WebCenter Portal users to self-subscribe, or invite non-WebCenter Portal users to subscribe to the portal, see Managing Members and Assigning Roles in a Portal.

Granting Users Access to a Portal

After making the portal discoverable, the next step is to assign the permissions that you want different user roles to have in the portal, if the default permissions are not satisfactory.

WebCenter Portal users have the default `Authenticated-User` role. A portal is not fully accessible until you give the `Authenticated-User` role permissions to access the pages of the portal:

- To grant access to the entire portal see Viewing and Editing Permissions of a Portal Role.

- To grant access to a limited number of individual pages in the portal, see Setting Page Security.

> **Note:**
>
> To use the task pane available through the Microsoft Office shared document management functionality (while editing a Microsoft Word, Excel, or PowerPoint file in a portal) to add members to a portal, see Adding Members to a Portal.

Granting Public Access to a Portal

You can make a portal available to anyone who has access to the URL to 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.

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

- Directly, using the portal URL provided to them.
- From the WebCenter Portal Sign In page, if their installation is configured to display this page.

Figure 4-1   Public Portals Link on Sign In Page
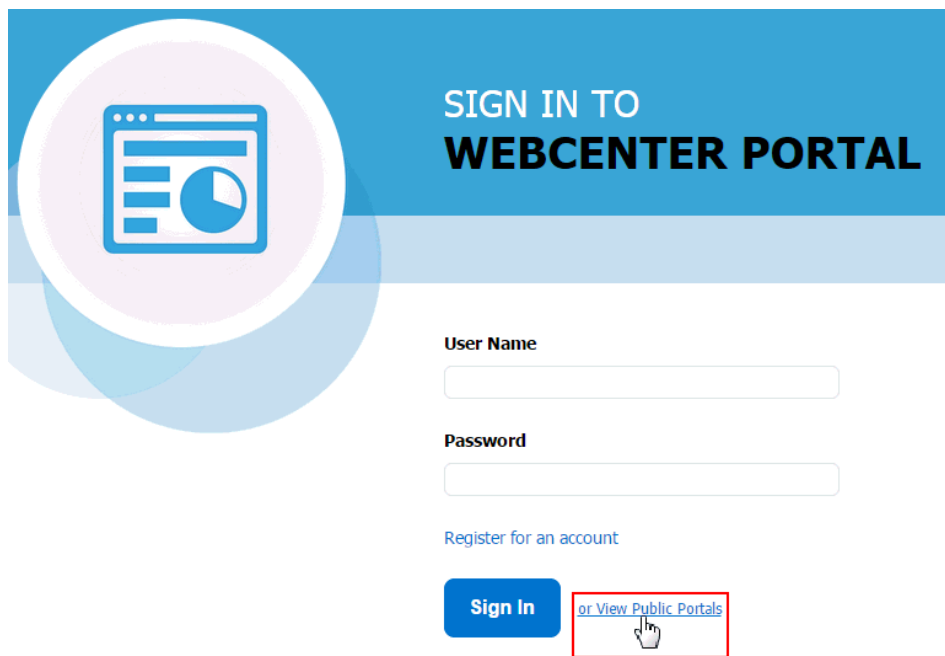
Public users are assigned the `Public-User` role, which is automatically granted `View Pages and Content` permission in the portal, which allows public users to view pages, lists, events, links, and notes. To allow public users to view documents, you need to grant these permissions. Public users do not have edit, create, or manage permissions in the portal.

To grant public users access to a portal, including any content and services you want to expose on the public pages:

1. Specify the general access settings for the portal:
    - If you are creating a new portal, select **Public** for the portal access, as described in Creating and Building a New Portal.
    - If the portal is currently **Hidden** or **Private**, change the access to **Public**, as described in Changing the Access to a Portal.
2. To see what the public view of a portal will look like, copy the **Portal URL** value from the Overview page in the portal administration (see Accessing the General Settings and Actions for a Portal), log out of WebCenter Portal, and paste the URL into your browser. Because you are logged out of WebCenter Portal, only pages designated as public display.

3. (Optional) To allow public users to join your portal, you may want to enable self-registration too (you can still retain control by requiring approval for any subscription request). See Managing Self-Service Membership for a Portal.

4. Now that you have made the portal public, the next step is to assign additional permissions that you want `Public-User` role to have in the portal, if the default read-only `View Pages and Content` permission is not sufficient. You can additionally grant public users permissions to view documents (files, folders, wikis, and blogs).

   On the **Roles** page in the portal administration, select **Public-User**, then click **Edit Permissions**.

Figure 4-2   Granting Public User Access to Portal
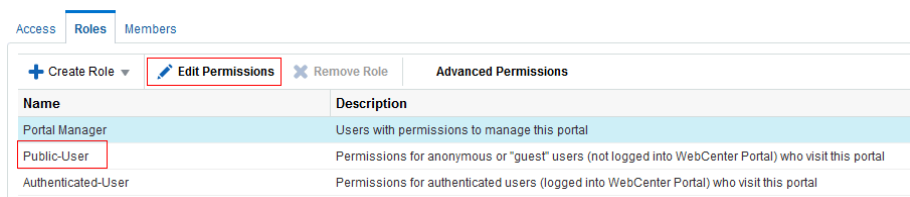
5. In the Edit Permissions dialog, select the check boxes for the desired public permissions for the portal. For information about the permissions listed in the Edit Permissions dialog.

   The public permissions that you grant here override the public permissions set by the system administrator at the application level.

6. Click **Save**.

7. If you want to restrict public access to certain pages in the portal, see Setting Page Security.

Part II

Working with a Portal

This part of *Building Portals with Oracle WebCenter Portal* provides information about management tasks for a portal.

- Editing a Portal
- Administering a Portal
- Working with the Portal Browser Task Flow

> ✏ **See Also:**
>
> Exploring Portals in *Using Portals in Oracle WebCenter Portal*.

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5

Editing a Portal

Use the portal editor to customize your portal pages. Add and edit portal navigation to help portal users easily find the information they need.

> ✏️ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the permission `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Create, Edit, and Delete Pages` (advanced permissions).
>
> Note that a user with a role that grants them permissions to create, edit, or publish a portal page, or even manage a portal, is not automatically allowed to view the portal. To view a portal, a user must be explicitly granted the portal-level permission `Basic Services: View Pages and Content` (standard permissions) or `Pages: View Pages` (advanced permissions).
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- Opening the Portal Editor
- Working with Pages in the Portal Editor
- Customizing Portal Navigation

Opening the Portal Editor

You can open the portal editor in any of the following ways:

- *From the portal browser*. Locate the portal you want to edit, then click ⟳ to display the portal actions menu and select **Edit** to open it in the portal editor. This link is shown only if you are the portal manager or member with editing permissions in the portal. To edit a page, select the page in the navigation pane, and click **Edit Page**.

Figure 5-1   Portal Editor
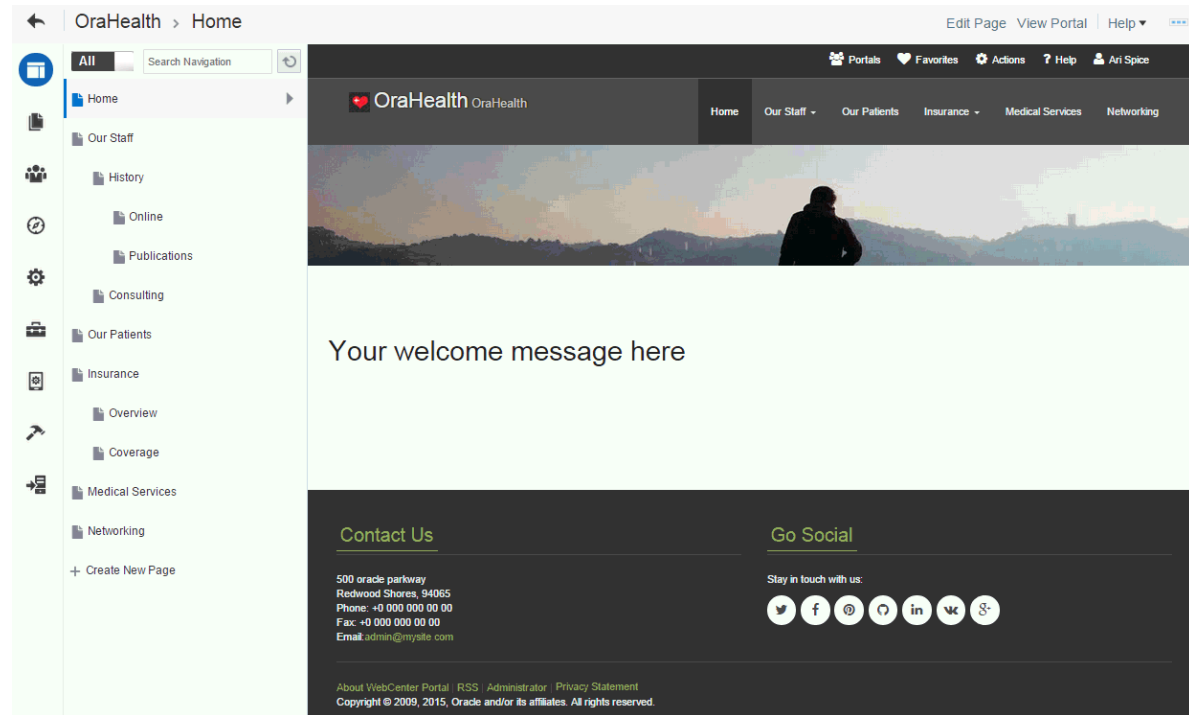
- *From portal administration*. From any portal administration page, click the **Edit Portal** icon in the left pane to open the portal editor.

Figure 5-2   Edit Portal Icon

- *From the portal viewer*. When viewing a portal, click the **Actions** icon ▾ in the floating toolbar and select **Edit Portal**. This selection is shown only if you are the portal manager or member with editing permissions in the portal. To edit a page, select the page in the navigation pane, and click **Edit Page**.

> 💡 **Tip:**
>
> The keyboard shortcut to go to the portal editor when viewing a portal is Ctrl+Shift+E. In the portal editor, you can press Ctrl+Shift+E to return to view mode.

Figure 5-3   Floating Toolbar
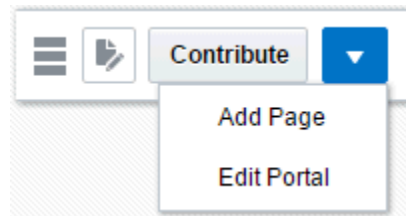
- *From the Portals page in WebCenter Portal administration*. Locate the portal you want to edit, then click the **Edit** link for the portal. This link is shown only if you are the portal manager or member with editing permissions in the portal.

Figure 5-4   Accessing Portal Editor from Portals Administration Page
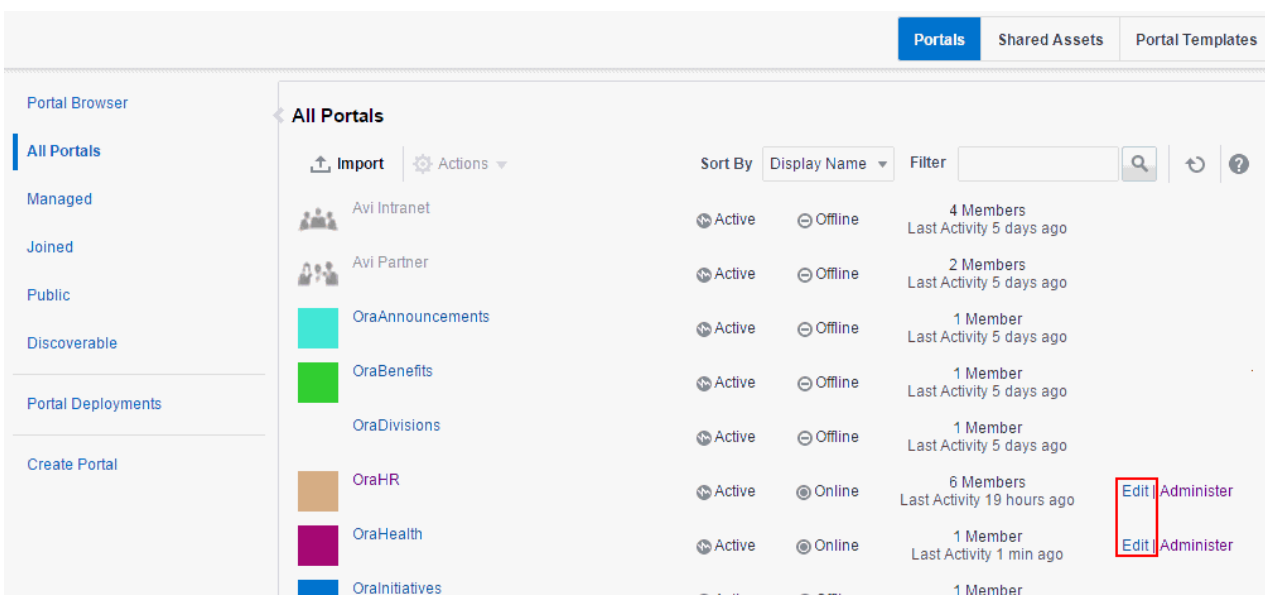
- *From Page Information view*. When managing a page (Summary, Parameters, Source, Security, or Advanced tabs), select **Edit** beneath the page name to open the portal editor, where you can edit the page in the page editor.

Working with Pages in the Portal Editor

> **Permissions:**
>
> To work with pages in the portal editor, you must be a portal manager or a portal member with the permission `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Create, Edit, and Delete Pages` (advanced permissions). Users with this permission can edit pages, revise page properties, add page content, and delete pages from a portal. This includes delegated administration to override the page security and grant other users permissions to create subpages, edit the page, and so on, overriding any permission limits of user roles.

In the portal editor, you can select existing pages, subpages, or page variants in the left navigation pane to edit or manage them, or you can create new navigation items. You can also modify the portal navigation, and preview the page in the viewport for different devices. To hide or show the left navigation pane, click the **Pages** icon.

Figure 5-5   Portal Editor
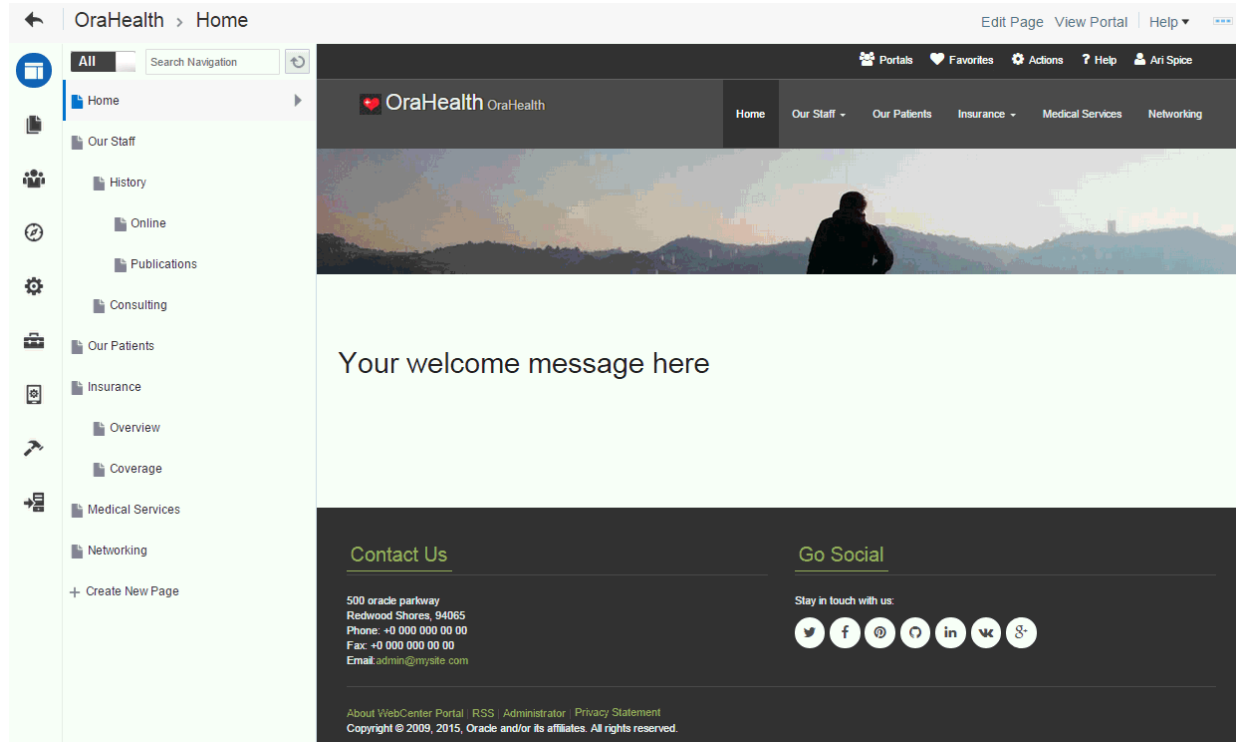
- To create and edit pages, subpages, page variants, or modify the portal navigation, see Creating, Editing, and Publishing a Portal Page.

- To manage the current page or navigation item, see Managing a Portal Page.

> ✎ **Note:**
>
> In WebCenter Portal, you can choose to display only the visible navigation items or all the navigation items in the left navigation pane. By default, all the navigation items are displayed. To display only the visible items, click **Visible** at top of the page. To display all the items in a portal, click **All** .
>
> The following example displays all the portal items.
>
> **Figure 5-6   Left Navigation Pane Showing All Items**
>
>
>
> The following figure displays only the visible portal items.
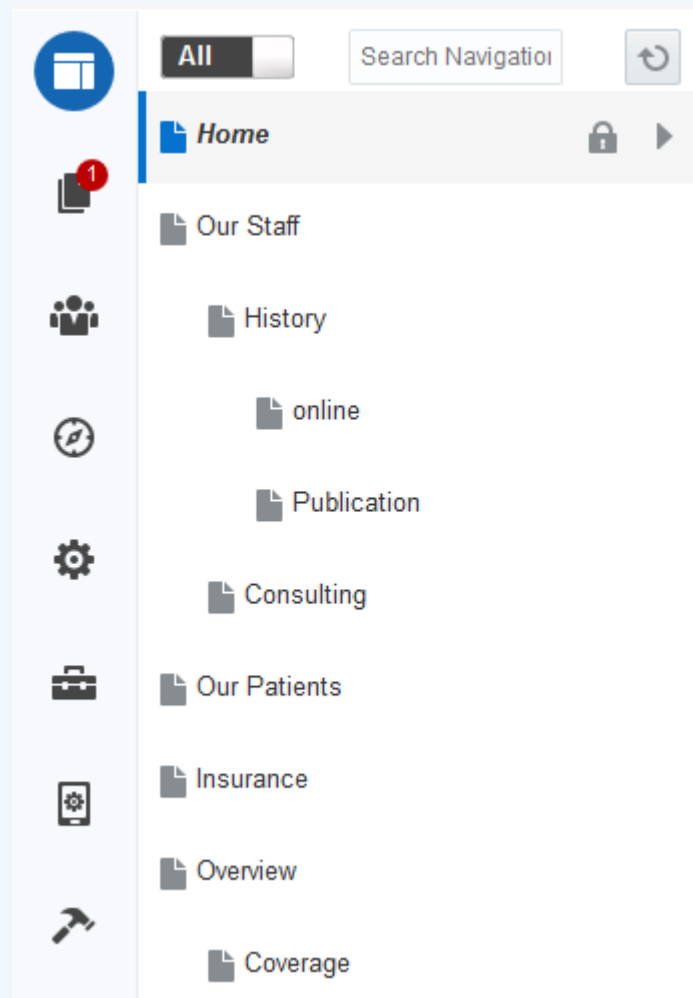
Figure 5-7   Left Navigation Pane Showing Only Visible Items
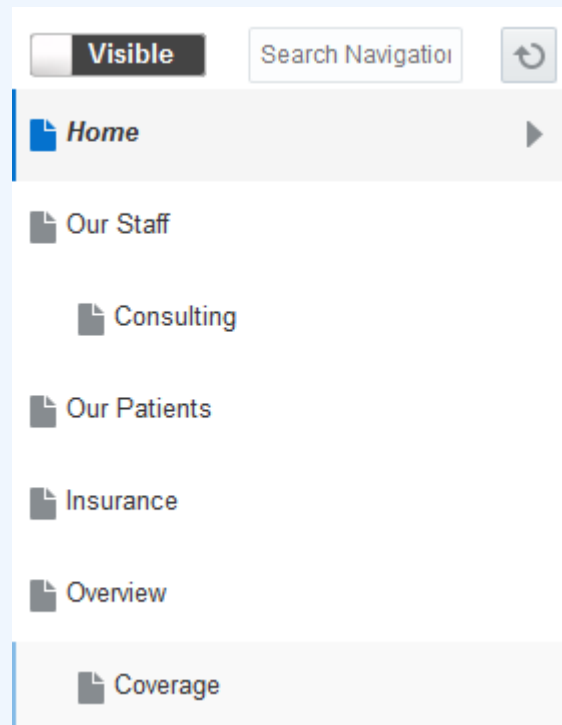
Customizing Portal Navigation

You can add both pages and non-page navigation items to the navigation for a portal, and remove any items you no longer wish to expose in the portal navigation. Mostly, the navigation will provide links to portal pages, but it can also include items such as documents, external web sites, portlets, and task flows.

This section includes the following topics:

- Editing Portal Navigation
- Adding Items to the Portal Navigation
- Setting Properties for a Portal Navigation Item

Editing Portal Navigation

To edit a portal's navigation:

1. Open the portal editor.

2. To add an item to the portal navigation, refer to the steps for the type of item that you want to add:

   - To add non-page items to the portal navigation, see Adding Items to the Portal Navigation.

   - To add an existing portal page to the portal navigation, see Adding an Existing Page to the Portal Navigation.

- To create and add a new page or subpage, see Creating Pages or Subpages in a Portal.
- To create and add a new page variant (for device groups) to the portal navigation, see Creating a Page Variant for a Device Group.

3. To edit the properties of an existing item:

   a. For pages, click the **Actions** icon (▶), and select **Page Information**.

   b. Edit the item properties as desired.

   For more information, see Setting Properties for a Portal Navigation Item.

   c. Click **Save**.

4. To change the order of an item in the navigation, either drag the item to a new position in the navigation, or click its **Actions** icon (▶) and select **Move Up** or **Move Down**.

5. To change the item hierarchy, click its **Actions** icon (▶) and select **Indent** to make it a child of the item above it, or select **Outdent** to move it to a higher level in the navigation hierarchy.

   > **Note:**
   >
   > You cannot indent a page if it is the only page or the only visible top level page in the portal.

6. To copy an existing item, click its **Actions** icon (▶) and select **Copy**.

   A copy of the item is added to the portal navigation as the last item at the same level as the original item in the navigation hierarchy. You can edit the new item and change its properties, as described in Setting Properties for a Portal Navigation Item.

7. To hide an item from the portal navigation, without deleting it:
   - For pages, see Showing or Hiding a Page in the Portal Navigation.
   - For non-page navigation items, deselect the **Visible** property, as described in Setting Properties for a Portal Navigation Item.

8. To delete an existing navigation item, click its **Actions** icon (▶) and select **Delete**.

   In the Delete dialog, click **Delete** to confirm that you want to delete the item from the portal navigation.

   > **Note:**
   >
   > If you delete an item from a portal navigation in the portal editor, you are also deleting the item itself.

Adding Items to the Portal Navigation

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.

> **Note:**
>
> If the portal navigation includes many nodes, there may be more nodes than fit in the area of the page template used for navigation. In this case, a **>>** icon provides access to a drop-down list of the remaining nodes. However, if this drop-down list is longer than the available screen size, you will not be able to access the nodes at the end of the list. For example, this situation may arise if you are using a page template where the navigation is displayed in a bar along the top of the page.
>
> To work around this issue, consider using a different page template that displays navigation down the side of the page. Alternatively, you can use folders in your portal navigation to group similar nodes together and reduce the number of nodes displayed at any one level of the portal navigation.

To add items to the portal navigation:

1. Open the portal editor.

2. Select an existing navigation item, then click its **Actions** icon ( ) and select **Add** to add a new item immediately below it.

Figure 5-8   Adding a Navigation Item
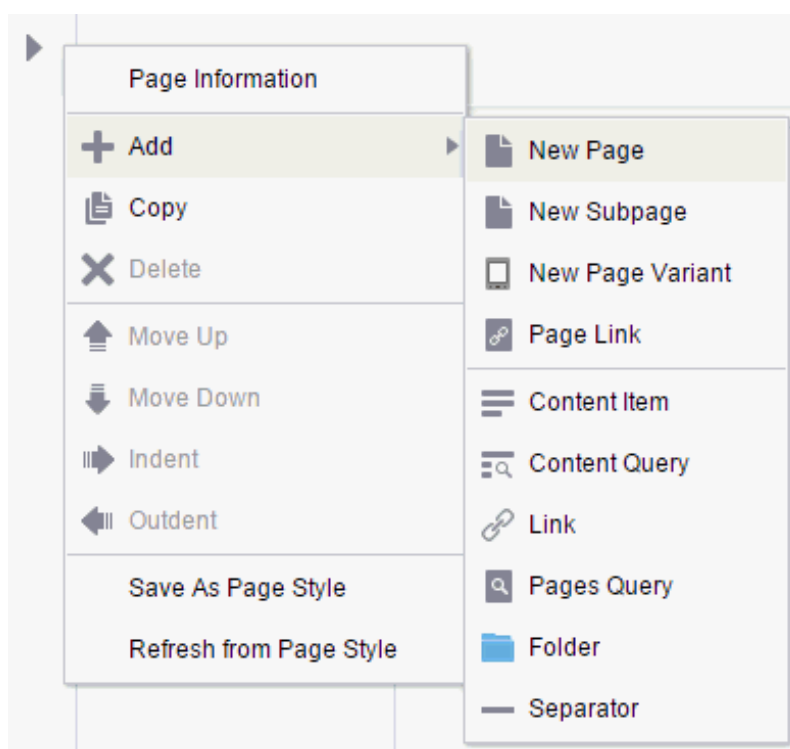
3. Select the type of navigation item that you want to add:

   • **New Page**, **New Subpage**, **New Page Variant** to add a new page, subpage, or page variant (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 (URL) or external application

   • **Pages Query** to add a list of pages

   • **Folder** to add a folder to the portal navigation

   • **Separator** to add a separator to the portal navigation

4. Edit the properties as desired.

Adding an Existing Page to the Portal Navigation

When you create new pages, they are added to the portal navigation as follows:

• If you create pages or subpages during portal creation, they are immediately added to the portal navigation and are visible to others who view the portal.

• If you create a new page or subpage while editing a portal, when page drafts are enabled in portal administration, the new page is initially a page draft and not immediately available when viewing the portal. If page drafts are not enabled, then the new page is immediately added to the portal navigation and is visible to others who view the portal.

- If you create a page while viewing a portal, the new page is immediately added to the portal navigation and is visible to others who view the portal

In all cases, users with appropriate permissions can edit or manage the page as required. Changes made to the page are saved as a page draft and are not immediately available when viewing the portal. To make updates available to others who view the portal, you must publish the page.

To expose a page that is not shown in the portal navigation, such as a system page (tool console), a page in the Home portal, or a page previously removed from the portal navigation:

1. Open the portal editor.

2. Select the navigation item immediately above the location where you want to add the page, then click its **Actions** icon ( ) and select **Add**, then **Page Link**.

Figure 5-9   Adding Existing Page to Portal Navigation (in Portal Editor)
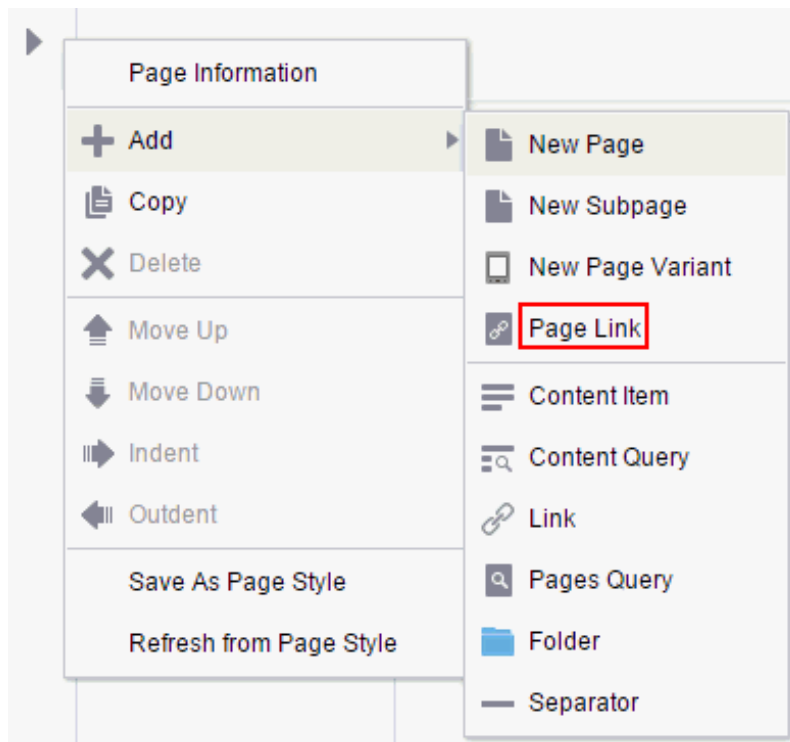
3. In the Pages dialog, select the page you want to add to the page navigation for the portal, and click **Select**.

Figure 5-10   Pages Dialog
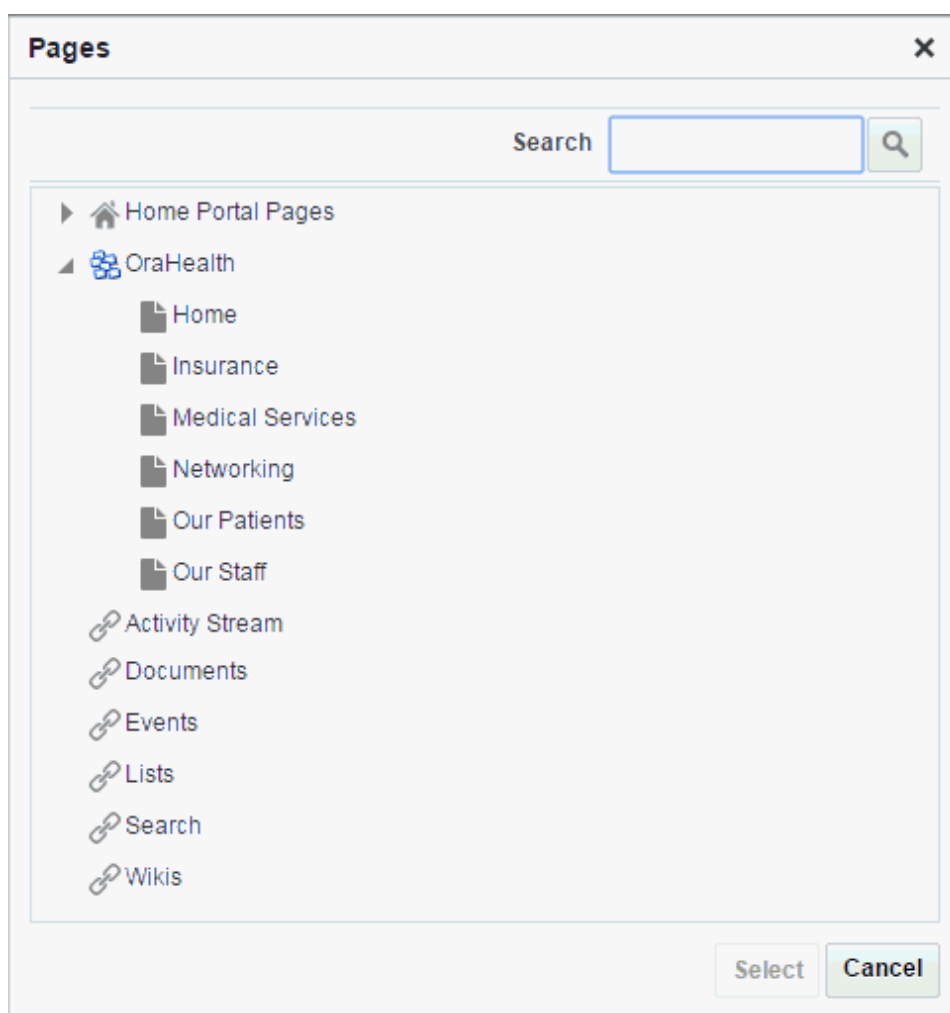
The page you selected is added to the portal navigation. You can now manage the page as described in the sections of this chapter. For example, you may wish to adjust the order and hierarchy in the portal navigation.

Setting Properties for a Portal Navigation Item

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.

> **See Also:**
>
> To set properties on page navigation items, see Setting Navigation Properties and Display Options for a Page.

To set properties for a non-page portal navigation item:

1. Open the portal editor.

2. Select the item in the left navigation pane.

3. 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.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Table 5-1   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.
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]}`

Table 5-1   (Cont.) Properties for Specific Portal Navigation Items

Property	Applies to	Description
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 5-1   (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_31ede592de1`
		`a/TemplateWiki.jspx,`
		`/oracle/webcenter/siteresources/`
		`scopedMD/`
		`s8bba98ff_4cbb_40b8_beee_296c916a23ed/`
		`pageStyle/`
		`gsr1b60e8a7_2e23_48ff_9571_31ede592de1`
		`b/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 **Actions** menu.

Table 5-1   (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.

4. On the **Options** tab, set the navigation display options for the item.

Table 5-2   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 5-2   (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**.

5. 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**.

6

Administering a Portal

Administer a portal by setting security, managing assets, enabling tools and services, deploying the portal, and more.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or member with `Administration: Manage Security and Configuration` or `Administration: Manage Configuration` permission in the portal.
>
> Any user who accesses administration settings for a portal and does not have `Manage` permission will see only the settings available to their role and permissions.
>
> Note that a user with a role that grants them permissions to create, edit, or publish a portal page, or even manage a portal, is not automatically allowed to view the portal. To view a portal, a user must be explicitly granted the portal-level permission `Basic Services: View Pages and Content` (standard permissions) or `Pages: View Pages` (advanced permissions).
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- Accessing Portal Administration
- Administering Security in a Portal
- Administering General Settings and Actions for a Portal
- Administering Look and Feel Settings for a Portal
- Administering All Assets in a Portal
- Viewing Device Groups for a Portal
- Administering Tools and Services in a Portal
- Deploying and Propagating a Portal
- Exporting and Importing a Portal

Accessing Portal Administration

The administration pages for a portal are available through the icons. Users will see only those portal administration icons available to their role and permissions. In general, you can administer a portal only if you are the portal manager or member with `Manage Security and Configuration` or `Manage Configuration` permission.

Figure 6-1   Portal Administration Page Icons
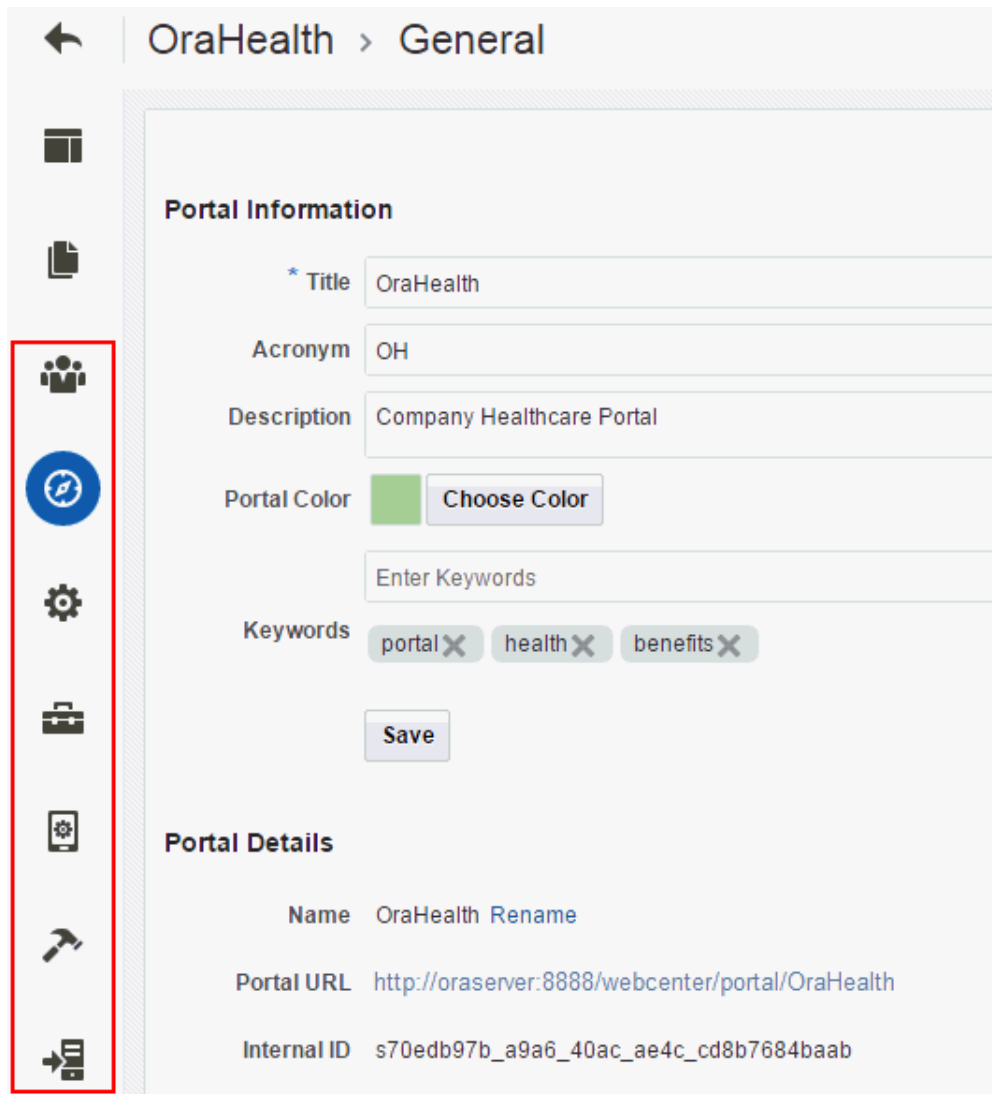
The following table describes the portal administration pages accessed by each icon.

Table 6-1   Accessing Portal Administration

Icon	Description
Security	Set security on the portal, such as access level, defining roles and permissions, and managing membership. See Administering Security in a Portal.
General	Modify general settings for the portal, such as the title (name) and description, and to perform general actions on the portal, such as closing the portal, adding RSS feeds, or deleting the portal. See Administering General Settings and Actions for a Portal.

Table 6-1   (Cont.) Accessing Portal Administration

Icon	Description
⚙ Settings	Specify settings that define the look and feel of the portal. See Administering Look and Feel Settings for a Portal.
🧰 Assets	Manage the assets for the portal, such as page templates, resource catalogs, skins, and more. SeeAdministering All Assets in a Portal.
▣ Device Settings	Use this page to manage devices and device groups in a device-enabled portal. See Viewing Device Groups for a Portal.
↗ Tools and Services	Enable and disable tools and services operating in the portal, such as Documents, Events, and Lists. See Administering Tools and Services in a Portal.
↳ Deploy	Use this page to deploy, redeploy, and propagate a portal to a target server. Note that you will only see this icon if you have a role that has `Portal Server - Deploy` permissions See Deploying and Propagating a Portal.

Access to portal administration is available through several paths, all of which display the **General** page and icons to access other administration pages. You can access portal administration in the following ways:

- *From the portal browser*. Open the portal browser in any of the following ways:

  – In the Home portal, click the **Portals** tab.

  – From the **Portals** menu, select **Portal Browser**.

  – From the portal editor or portal administration, click the **Back to Portals** icon at the top left of the screen.

Figure 6-2   Portal Editor: Back to Portals Icon
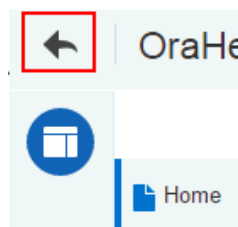
Locate the portal you want to administer, then click 🔄 to display the portal actions menu and select **Administer** , then select **General**.

Figure 6-3 Accessing Portal Administration from Portal Browser
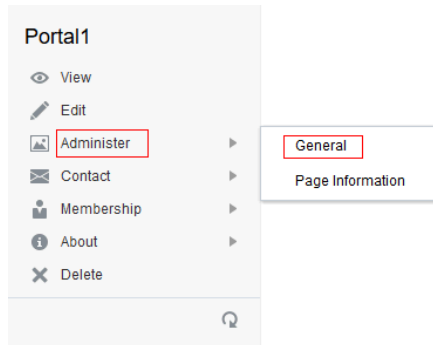
- *From the portal editor*. In the portal editor, the portal administration icons are immediately available in the left navigation pane. Click an icon in the left pane to access the administration settings associated with that icon.

- *From the Portals page in WebCenter Portal administration*. From the **Portals** menu, select **Administration**, then click the **Portals** tab. Locate the portal you want to administer, then click the **Administer** link for the portal. This link is shown only if you are the portal manager or member with `Manage Security and Configuration` or `Manage Configuration` permission in the portal.

Figure 6-4 Accessing Portal Administration
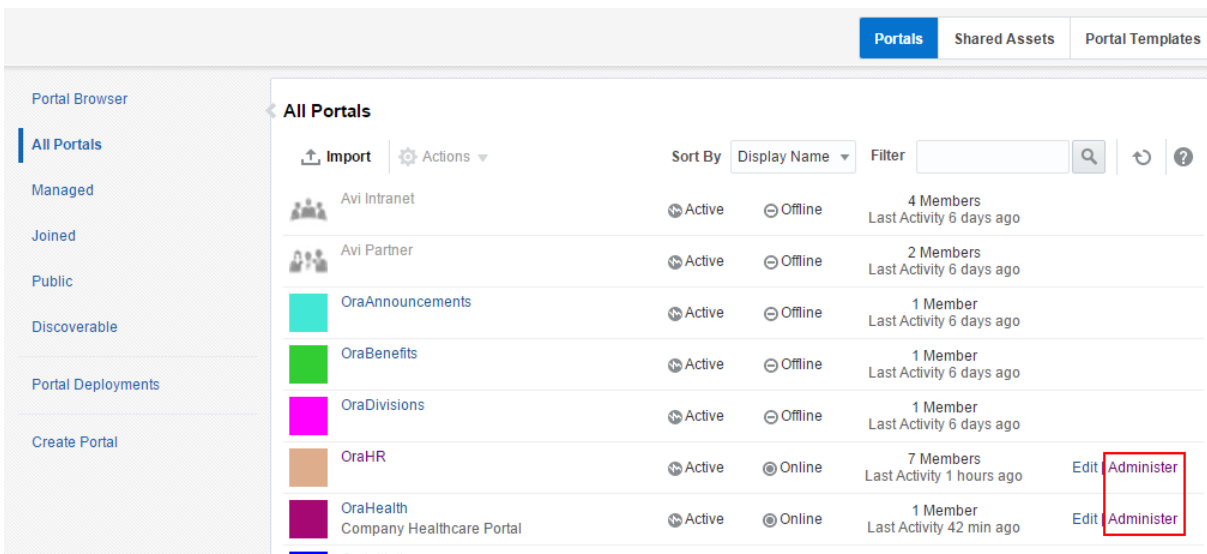
- *From the portal viewer*. When viewing a portal, select **Manage**, then **All Settings**. This menu item is shown only if you are the portal manager or member with `Manage Security and Configuration` or `Manage Configuration` permission in the portal.

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

Figure 6-5   Accessing Portal Administration When Viewing Portal
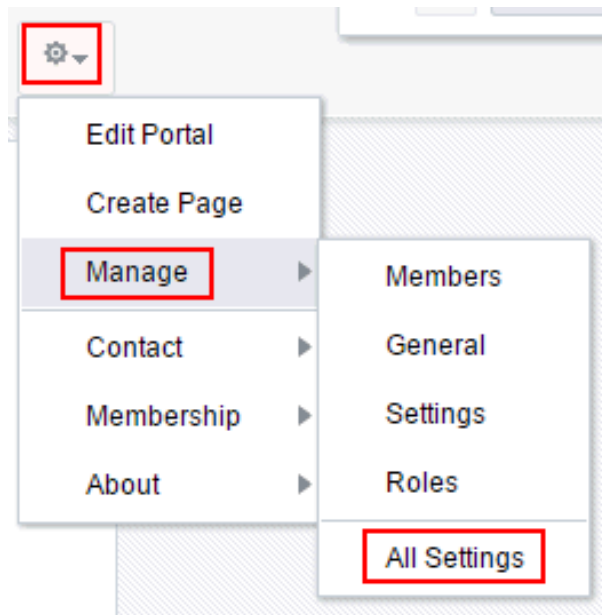
Administering Security in a Portal

> **Note:**
>
> To administer security in a portal, you must be a portal manager or have a custom role that includes both of the following permissions in the portal:
>
> - `Manage Security and Configuration`
>
> - `Manage Membership`
>
> A portal manager has these permissions by default.

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. The following sections describe the **Security** page tasks:

- Accessing Security Administration for a Portal
- Changing the Access to a Portal
- Managing Roles and Permissions in a Portal
- Managing Members in a Portal

Accessing Security Administration for a Portal

To access the security administration for a portal, click the **Security** icon.

You can also enter the following URL in your browser to navigate directly to the **Security** page, where you can click the **Access**, **Roles**, and **Members** tabs:

```
http://host:port/webcenter/portal/portalName/admin/security
```

Figure 6-6   Portal Administration: Security
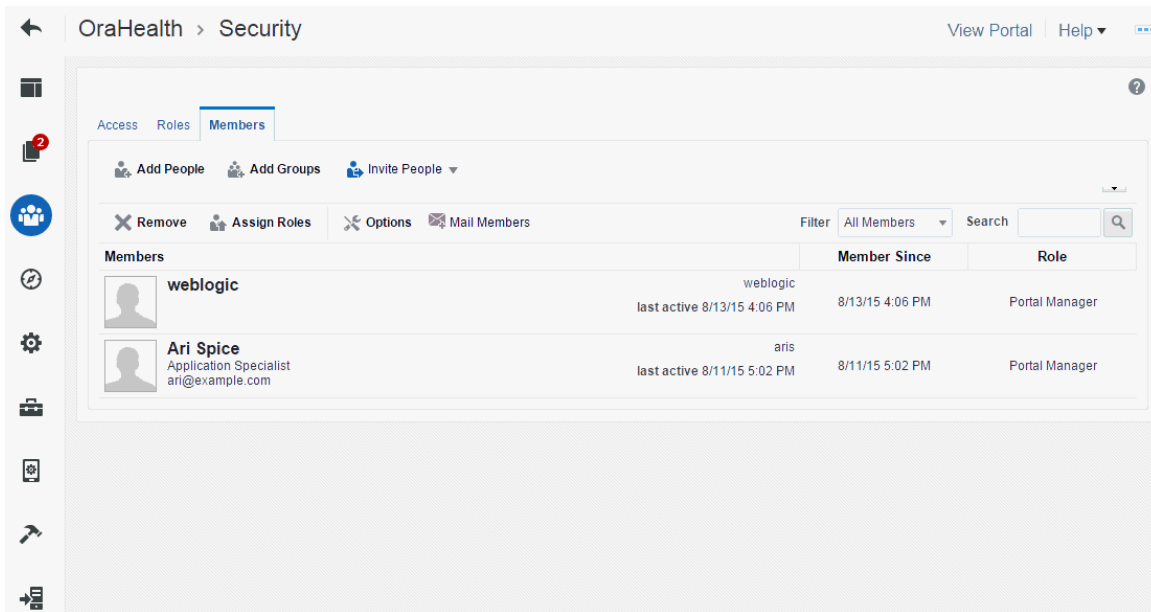
Changing the Access to a Portal

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. On the **Security** page, click the **Access** subtab and select how you want the portal to be exposed:

   Figure 6-7   Security Page for a Portal: Access Subpage
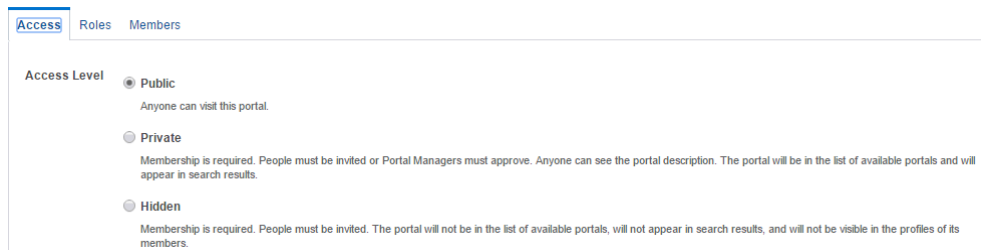
   - **Public**: Anyone can visit the portal, whether they are a registered WebCenter Portal user or not. When this setting is selected, the `Public-User` role in the portal is automatically granted `View Pages and Content` permission in the portal, which allows public users to view pages, lists, events, 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**.

Managing Roles and Permissions in a Portal

To manage the roles for assigning permissions in a portal:

1. On the **Security** page (see Accessing Security Administration for a Portal), click the **Roles** subtab.

2. To work with portal roles, refer to Managing Roles and Permissions for a Portal.

Managing Members in a Portal

To manage the membership in a portal:

1. On the **Security** page (see Accessing Security Administration for a Portal), click the **Members** subtab.

2. To work with portal membership, refer to Managing Members and Assigning Roles in a Portal.

Administering General Settings and Actions for a Portal

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. The following sections describe the **General** page tasks:

- Accessing the General Settings and Actions for a Portal

- [Changing the Title of a Portal](#)
- [Modifying the Acronym for a Portal](#)
- [Modifying the Description for a Portal](#)
- [Modifying the Color for a Portal](#)
- [Modifying the Keywords for a Portal](#)
- [Changing the Internal Name (and URL) of a Portal](#)
- [Exporting and Importing a Portal](#)
- [Closing or Activating a Portal](#)
- [Taking a Portal Offline or Online](#)
- [Enabling or Disabling RSS News Feeds for a Portal](#)
- [Deleting a Portal](#)

Accessing the General Settings and Actions for a Portal

To access the overview settings and actions for a portal, click the **General** icon.

You can also enter the following URL in your browser to navigate directly to the **General** page:

```
http://host:port/webcenter/portal/portalName/admin/overview
```

Figure 6-8   Portal Administration: General Settings

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 internal name of a portal (and consequently the URL that directly accesses the portal), see Changing the Internal Name (and URL) of a Portal.

To change the title (display name) of a portal:

1. On the **General** page, under **Portal Information**, modify the **Title** as desired.

Figure 6-9   Renaming a 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 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.

Figure 6-10   Default Display of Portal in Portal Browser
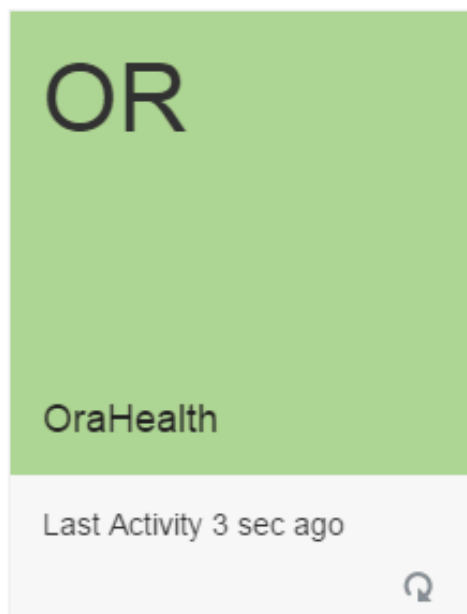
When a portal is created, WebCenter Portal generates an acronym for the portal as follows:

- 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.

> **Note:**
>
> For information about changing the default color or logo, see:
>
> - Modifying the Color for a Portal
> - Changing the Portal Logo

To change the acronym for a portal:
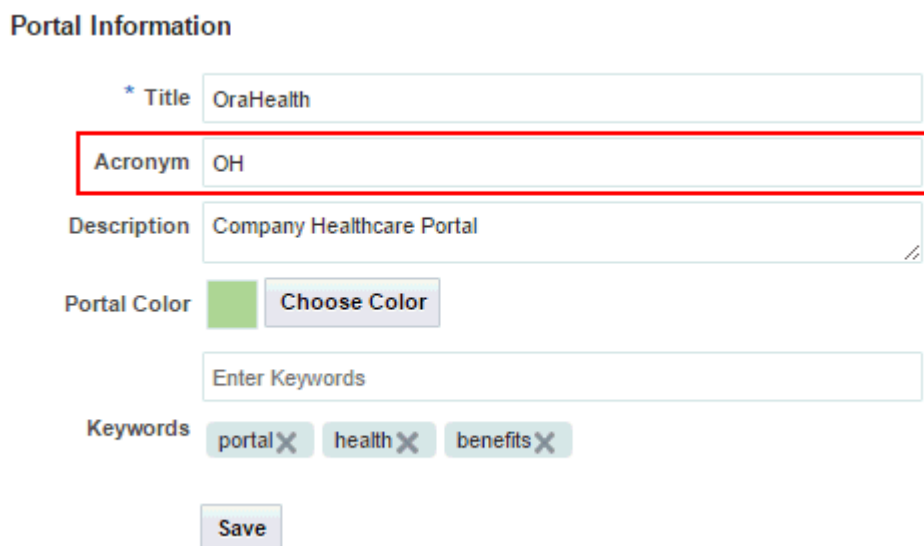
1. On the **General** page, under **Portal Information**, modify the **Acronym** as desired.

> **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`.

Figure 6-11   Modifying the Acronym for a Portal

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.

Figure 6-12   Modifying the Description for a Portal

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.

Figure 6-13   Default Display of Portal in Portal Browser
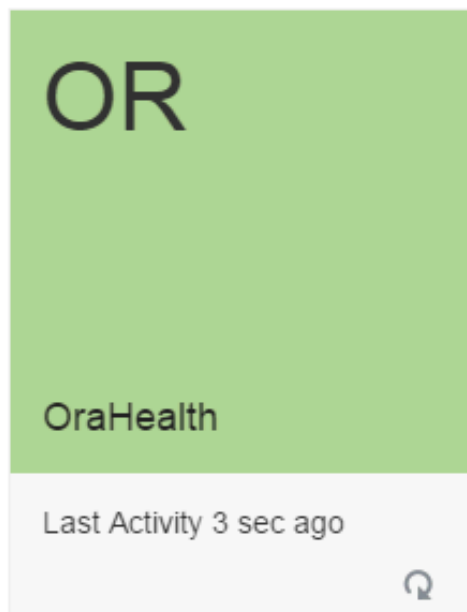
The default color is inherited from the portal template selected during portal creation. On the portal administration **Settings** page, you can specify whether the portal tile should display a color or logo in the portal browser.

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.

Figure 6-14   Modifying the Color for a Portal
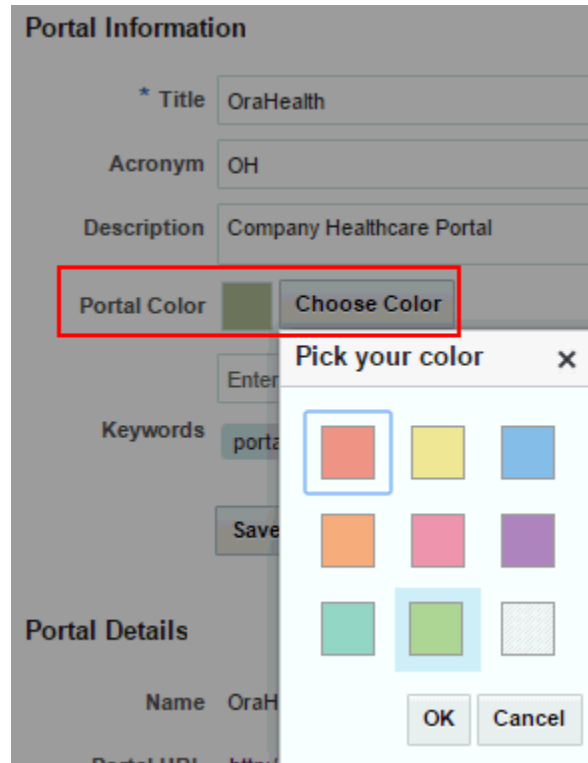
2. Click **Save**.

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 in this section.

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.

Figure 6-15   Modifying the Keywords for a Portal

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.

Figure 6-16   Changing the Internal Name of a Portal

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.

Figure 6-17   Show Menu in Portal Browser
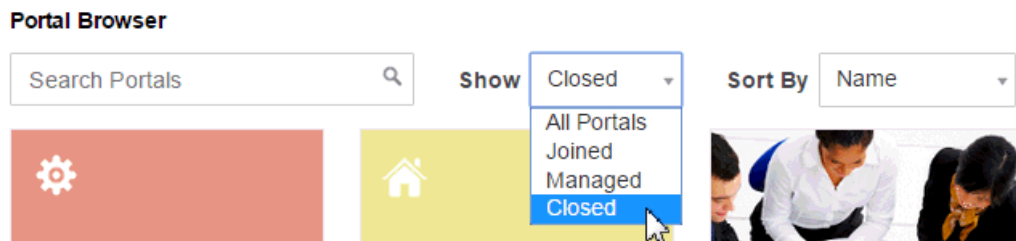
The content of a closed portal remains accessible and searchable to those who still
want to reference it and portal members can continue working in the portal either by
displaying closed portals on the **Portals** page, or by pretty URL (`http://host:port/`
`webcenter/portal/closedPortalName`).

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.

Figure 6-18   Closing or Activating a Portal

To reactivate the portal, select the **Active** check box.

> **Note:**
>
> An alternate way to close and reactivate a portal is:
>
> - From the **Portals** menu, select **Administration**, then click the **Portals** tab. On the **Portals** page, select the portal that you want to close or reactivate, then click the **Actions** icon in the toolbar and select **Close** or **Activate**:
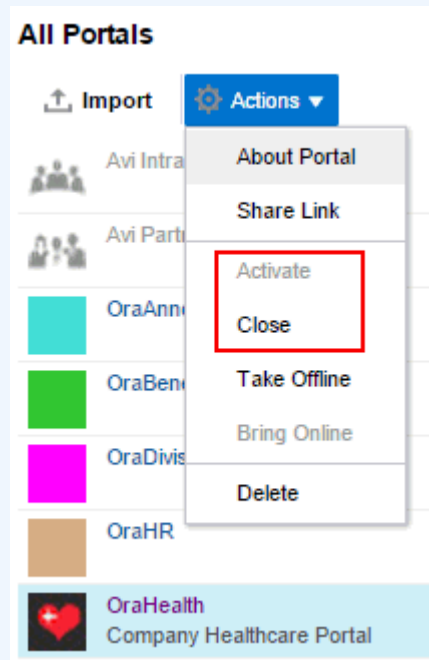
Taking a Portal Offline or Online

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.

Figure 6-19   Taking a Portal Offline or Online
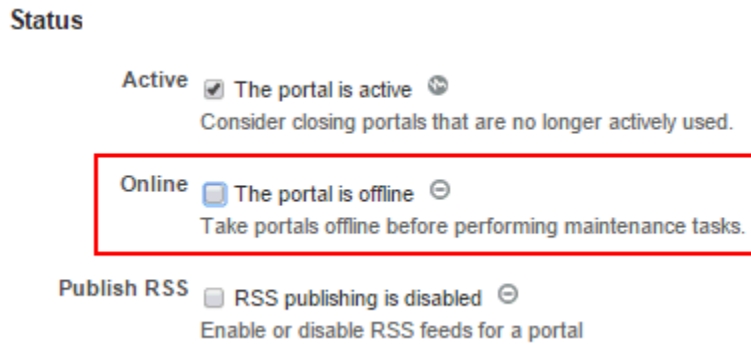
To bring the portal back online, select the **Online** check box.

> **Note:**
>
> An alternate way to take a portal offline or bring it back online is:
>
> • From the **Portals** menu, select **Administration**, then click the **Portals** tab. On the **Portals** page, select the portal that you want to close or reactivate, then click the **Actions** icon in the toolbar and select **Take Offline** or **Bring Online**.
>
>
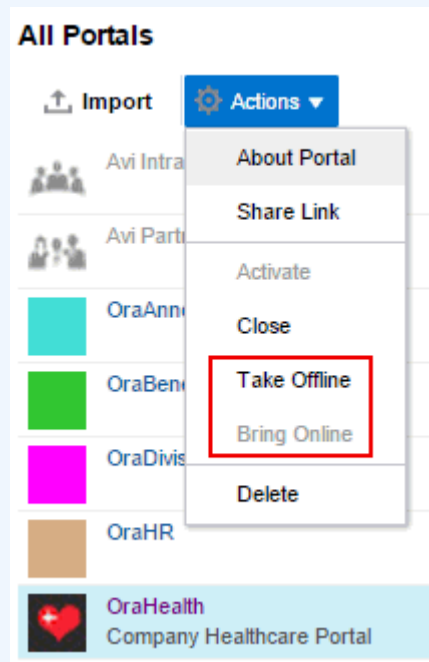
Enabling or Disabling RSS News Feeds for a Portal

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.

For more information about publishing RSS new feeds, see Adding RSS Feeds to a Portal.

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.

Figure 6-20   Enabling or Disabling RSS News Feeds
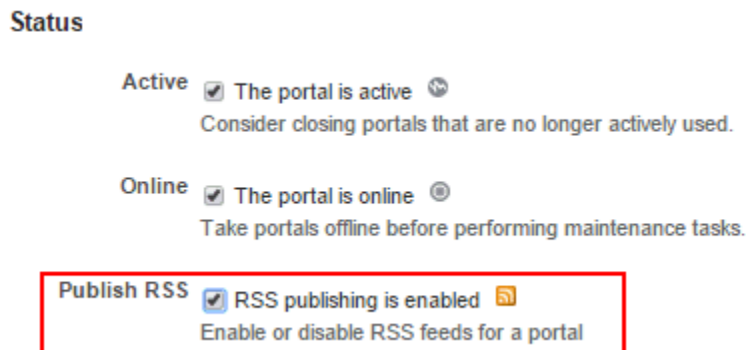
To disable RSS feeds for this portal, deselect the **Publish RSS** check box.

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**.

Figure 6-21   Deleting a Portal
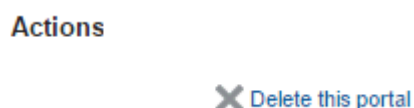
> **Note:**
>
> Alternate ways to delete a portal are:
>
> * In the portal browser, locate the portal you want to delete, then click ↻ to display the portal actions menu and select **Delete**.
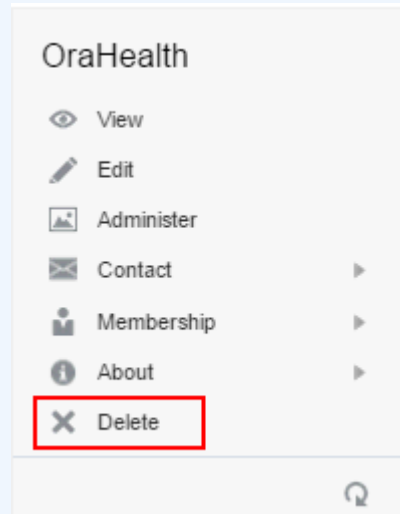
> * From the **Portals** menu, select **Administration**, then click the **Portals** tab. On the **Portals** page, select the portal that you want to delete, then click the **Actions** icon in the toolbar and select **Delete**.
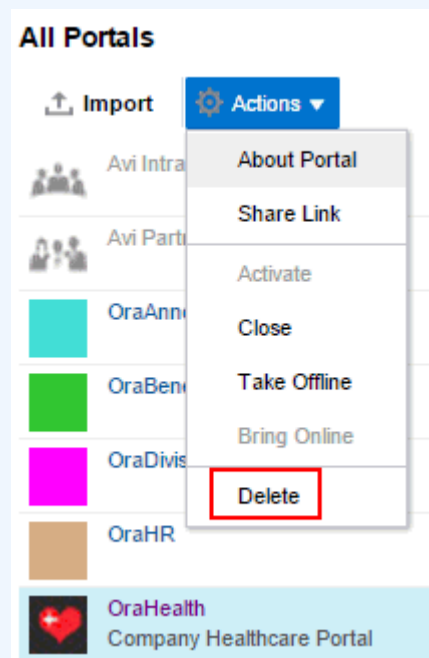
2. In the confirmation prompt, click **Delete** to confirm or **Cancel** to preserve the portal.

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.

Administering Look and Feel Settings for a Portal

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.

The following sections describe the **Settings** page tasks:

- Accessing Look and Feel Settings for a Portal
- Disabling and Enabling Page Drafts in a Portal
- Changing the Page Template for a Portal
- Changing the Skin for a Portal
- Changing the Resource Catalogs in a Portal
- Setting the Page Behavior for a Portal When No Page Variant Exists
- Displaying or Hiding a Page Footer in a Portal
- Customizing the Copyright Statement and Privacy URL in a Portal
- Setting a Portal Display Language
- Changing the Portal Icon
- Changing the Portal Logo
- Changing the Portal Preview Image

Accessing Look and Feel Settings for a Portal

- To access the assets, options, icon, and logo settings for a portal, click the **Settings** icon.

You can also enter the following URL in your browser to navigate directly to the **Settings** page:

```
http://host:port/webcenter/portal/portalName/admin/settings
```

Figure 6-22   Portal Administration: Look and Feel Settings
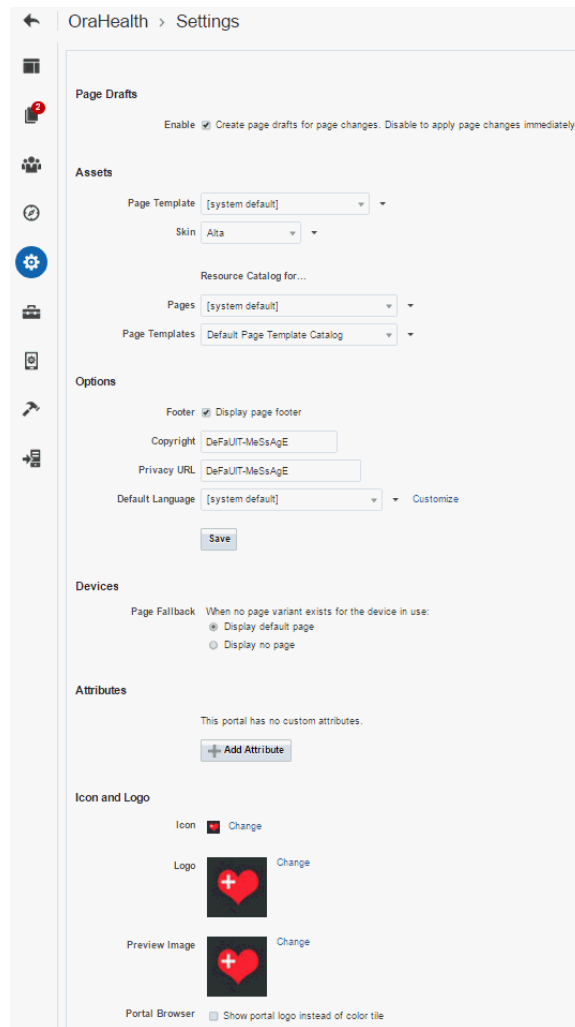
Disabling and Enabling Page Drafts in a Portal

When portal members edit portal pages, the portal administration settings specify whether changes are applied pages immediately, or applied to a page draft that must be published to allow others to view the changes. By default, page drafts are enabled. For more information, see About Page Drafts.
To enable or disable page drafts in a portal:

• On the **Settings** page in portal administration, under **Page Drafts**:

  – Deselect the **Enable** check box to apply page updates immediately, without creating a page draft.

  – Select the **Enable** check box (default) to apply page updates to page drafts. This allows users to refine their changes in draft mode in one or more editing sessions. When satisfied with the page updates, an approver can publish the page.

Figure 6-23   Disabling and Enabling Page Drafts in a Portal

Changing the Page Template for a Portal

A page template defines how individual pages and groups of pages display on a user's screen. For more information, see Working with Page Templates.

To change the page template for a portal, on the **Settings** page in portal administration under **Assets**, select a new **Page Template**.

The page templates that are listed are those that are made available to the portal on the **Shared Assets** or **Assets** page (see Showing and Hiding Assets). The **[system default]** selection applies the page template specified as the default for all portals by the system administrator.

You can add custom page templates for the portal to this list by copying an existing page template into a new page template, completely separate from the original.

An Expression Editor is available for entering custom values using Expression Language (EL) expression, allowing page template to be determined dynamically based on certain criteria. Click the ▼ icon next to the **Page Template** drop-down list, then select **Expression Builder** to open the editor. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Changing the Skin for a Portal

A skin defines the appearance and look and feel of a portal. For more information, see Working with Skins.

*   To change the skin for a portal, on the **Settings** page in portal administration under **Assets**, select a new **Skin**.

Figure 6-24   Choosing a Skin for a Portal
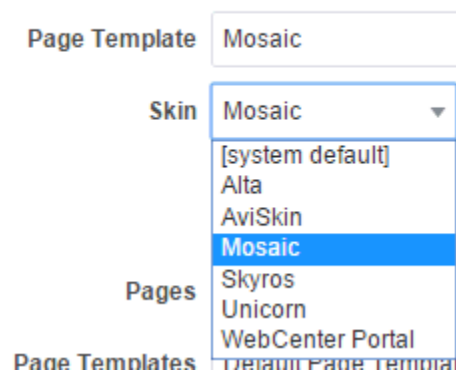
The skins that are listed are those that are made available to the portal on the **Shared Assets** or **Assets** page. The **[system default]** selection applies the skin specified as the default for all portals by the system administrator.

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

You can add custom skins for the portal to this list by copying an existing skin into a new skin.

An Expression Editor is available for entering custom values using Expression Language (EL) expression, allowing a skin to be determined dynamically based on certain criteria. Click the ▾ icon next to the **Skin** drop-down list, then select **Expression Builder** to open the editor. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*

Changing the Resource Catalogs in a Portal

When you edit a page or page template in a portal, the resource catalog lists items that you can select to add to the page or page template. For more information about resource catalogs, see Working with Resource Catalogs.

To change the resource catalogs used in a portal:

- On the **Settings** page in portal administration, under **Assets**, select a new resource catalog:
  - **Resource Catalog for Pages** specifies the resource catalog to use when editing individual pages and task flow assets in a portal.
  - **Resource Catalog for Page Templates** specifies the resource catalog to use when editing 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.

Figure 6-25   Choosing a Resource Catalog for a Portal

The **[system default]** selection applies the resource catalogs specified as the default for all portals by the system administrator.

You can add custom resource catalogs for the portal to this list by creating a new resource catalog from scratch or by copying an existing resource catalog into a new resource catalog.

An Expression Editor is available for entering custom values using Expression Language (EL) expression, allowing the resource catalog to be determined dynamically based on certain criteria. Click the ▾ icon next to the **Resource Catalog** drop-down list, then select **Expression Builder** to open the editor. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Displaying or Hiding a Page Footer in a Portal

A page footer can display copyright details for the portal and a link to its Privacy Statement.

To display or hide a page footer for a portal:

1. On the **Settings** page in portal administration, under **Options**, select the **Footer** check box to display a page footer, or deselect the check box to hide the page footer.

Figure 6-26   Displaying or Hiding the Page Footer in a Portal

2. Click **Save**.

Customizing the Copyright Statement and Privacy URL in a Portal

When enabled, the copyright statements and URL to the privacy statement specific to the portal display in the page footer of the portal:

Figure 6-27   WebCenter Portal Copyright Statement

Figure 6-28   WebCenter Portal Privacy URL in Page Footer

To customize the copyright statement and privacy URL for a portal:

1. On the **Settings** page in portal administration, under **Options**, select **Footer** to display the area at the bottom of the portal for the copyright statement and privacy URL. Deselect the check box to hide the page footer, including the copyright statement and privacy URL.

Figure 6-29   Customizing the Copyright Statement and Privacy URL

2. In the **Copyright** and **Privacy URL** fields, enter appropriate values. If you wish to expose the page footer, but not include a copyright statement and/or privacy URL, remove the existing contents and leave the field blank.

3. Click **Save**.

Setting a Portal Display Language

You can optionally set a portal display language to control the language in which the user interface (UI) elements of a particular portal render in WebCenter Portal. UI elements include button and field labels, application links, screen text, and so on.

For more information about working with languages in WebCenter Portal, and the different levels at which a display language can be set, see Translating Portals into Other Languages.

Within the scope of viewing a portal, the portal display language setting is given precedence over all other language settings. For example, if a portal named Sales Team has its display language set to English, and Monica (a member of Sales Team) has set her personal user preference language to Dutch, assuming no other language settings are in effect:

• Monica views the Sales Team portal in English, and cannot change this language setting.

• Monica views other parts of WebCenter Portal, outside the Sales Team portal, in Dutch.

> **Note:**
>
> If you create a portal based on a portal template that is defined to use a specific language, that language setting is not inherited by the portal. Instead, the initial language setting for a new portal is based on the order of precedence.

To set a portal display language:

1. On the **Settings** page in portal administration, under **Options**, select a language for the portal from the **Default Language** list.

   Figure 6-30   Setting the Portal Display Language

2. An Expression Editor is available for entering custom values using Expression Language (EL) expression, allowing the language to be determined dynamically based on certain criteria. Click the ▼ icon next to the **Language** drop-down list, then select **Expression Builder** to open the editor. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*

3. To customize the languages displayed in the **Default Language** list, click **Customize**. For example, your WebCenter Portal application might be available in 27 different languages, but you may only need to display the content in your portal in three or four different languages, so you could filter the list to display a subset of languages.

Setting the Page Behavior for a Portal 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. As the portal manager, you can set the page fallback behavior for all pages in the portal.

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

> **✎ Note:**
>
> At the application-level, your system administrator performs the following tasks described in *Administering Oracle WebCenter Portal*:
>
> - Configures device group settings, as described in Administering Device Settings.
>
> - Creates page variants for system pages, as described in Creating a Page Variant of a System Page for Device Groups.

To set the fallback behavior for all pages in the portal 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 **Settings** page in portal administration, under **Devices**, select the required **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.

   Figure 6-31   Setting Page Fallback Behavior When No Page Variant Exists for Current Device

2. Click **Save**.

> **✎ Note:**
>
> A portal member with the `Basic Services: Edit Page Access, Structure, and Content` permission can override the default setting by changing the fallback behavior for the individual page.

Working with Portal Attributes

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.

Custom attributes of a private portal are internal and cannot be accessed by a user who does not have access to the portal. For custom attributes to be accessible either the portal should be public or the user must have access to the private portal. Otherwise, you can include global attributes in your portal that 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`).

For example, if you build a portal for customer analysis purposes, it might contain several custom task flows that take the parameter `customerId` as an input: task flows such as Customer Sales History, Customer Satisfaction Rating, Future Sales Prospects, or Customer Contact Information. With a custom attribute defined named `customerId` with an appropriate value, all the task flows that can accept a `customerId` can display information specific to that customer.

A custom attribute can also be retrieved using Expression Language (EL) expressions. For example, an EL expression may read a value that is passed in through the URL that displays a portal (for example, `customerid=10`). Any portal pages, task flows, or portlets that deliver customized content based on parameter values can accept global custom attribute values and display content accordingly using the following Expression Language (EL) syntax to access the global custom attribute value:

- For portal-specific attributes:

  `#{spaceContext.currentSpace.metadata.customAttributes[`*attributeName*`]}`

- For global attributes:

  `#{WCAppContext.application.applicationConfig.customAttributes[`*attributeName*`]`
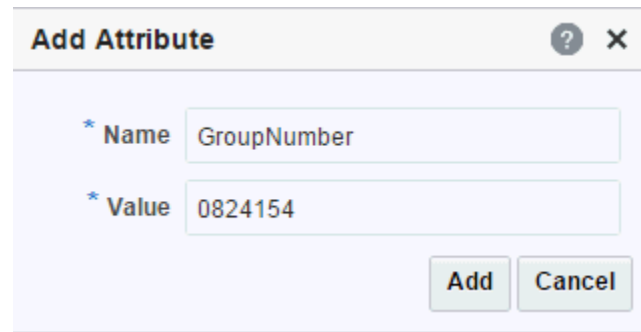
For more information, see Passing Parameter Values Through the Page URL. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

When you create a new portal that is based on a portal template that includes custom attributes, the new portal inherits the template's custom attributes and their values. You can enter new values for the attributes when you create the new portal.

To work with custom attributes for a portal:

- On the **Settings** page in portal administration, under **Attributes**, add a new attribute, edit an existing attribute, or delete an attribute:

  - To add a new attribute, click **Add Attribute**.

Figure 6-32   Entering Custom Attribute Name and Value

In the Add Attribute dialog:

– Enter a unique **Name** for the attribute. Valid names start with an alphabetic character and contain only alphanumeric characters.

– Enter a **Value** for the custom attribute. The value you type is treated as a string value.

– Click **Add** to save the custom attribute and display it in the attributes list.

• To edit a custom attribute for a portal, modify the value directly in the value field. An attribute name cannot be modified.

• To delete an attribute, click the **Delete** icon next to the attribute. In the confirmation dialog, click **Delete** to remove the attribute from the portal.

Changing the Portal Icon

The portal icon displays alongside the portal display name in menus and smaller areas. For example, it may display on the **Portals** menu at the top of the portal, or on the **Portals** administration page.

Figure 6-33   Portal Icon in Portals Menu
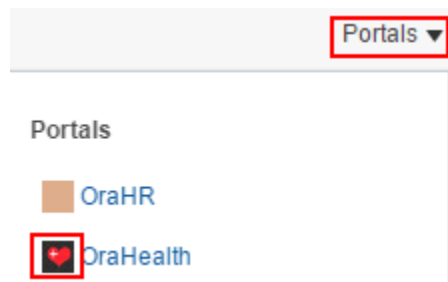
Figure 6-34   Portal Icon at Top of Portal
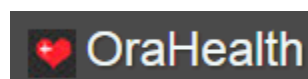
Figure 6-35   Portal Icon on Portals Administration Page
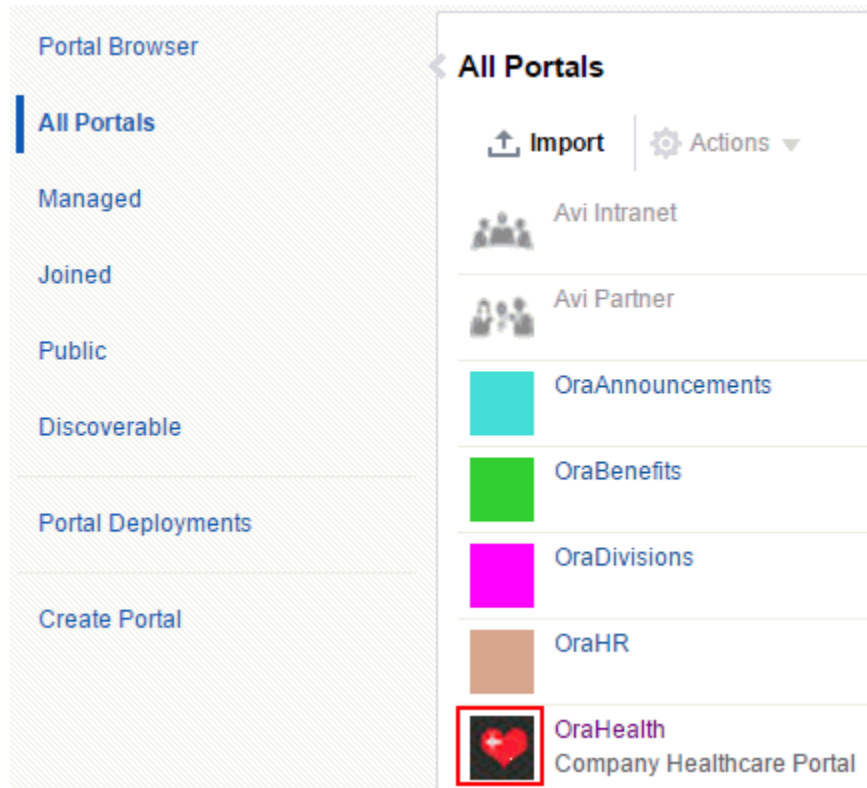
A default icon is provided by the portal template used when you create the portal, but you can assign a different icon if desired.

To change the portal icon:

1. On the **Settings** page in portal administration, under **Icon and Logo**, click **Change** next to the current portal icon to open the Select Icon dialog.

Figure 6-36   Changing the Portal Icon
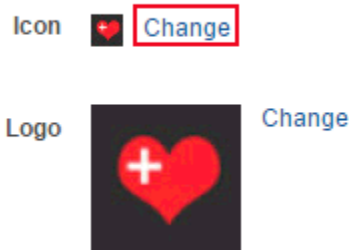
Figure 6-37   Select Icon Dialog
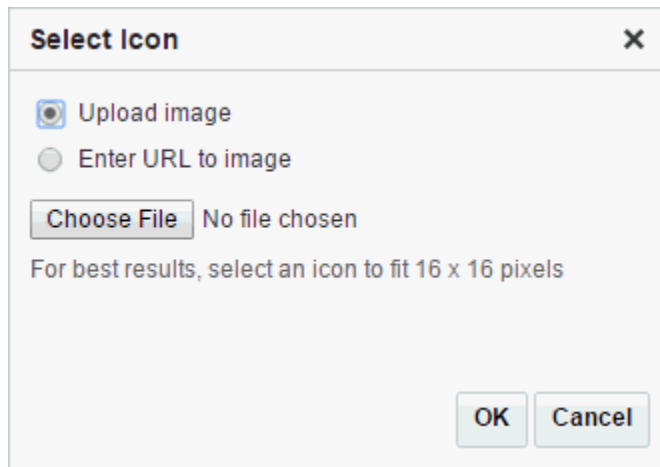
2. In the Select Icon dialog, either:

   • Select **Upload image**, then **Choose File** to navigate to the icon you want to use.

     The icon image file can be up to 150 KB, and should be no larger than 16 x 16 pixels for best results. Supported file types 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 file name must contain alphanumeric characters only.

   • Select **Enter URL to image**, then enter the URL to an icon image (beginning with `http://`).

3. Click **OK**.

Changing the Portal Logo

By default, a new portal is shown in the portal browser as a color tile, overlaid with an acronym and portal name.

Figure 6-38   Default Display of Portal in Portal Browser
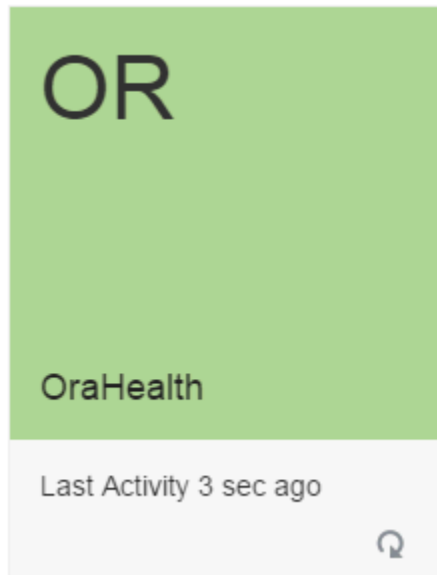
The default color is randomly assigned during portal creation.

If you select **Show portal logo instead of color tile** in the steps below, then the portal tile displays its logo instead of a color in the portal browser, and the portal name is shown beneath the logo. The default logo is inherited from the portal template, but you can upload any logo image for the portal.

To change the portal logo:

1. On the **Settings** page in portal administration, under **Icon and Logo**, click **Change** next to the current portal logo to open the Select Logo dialog.

Figure 6-39   Changing the Portal Logo
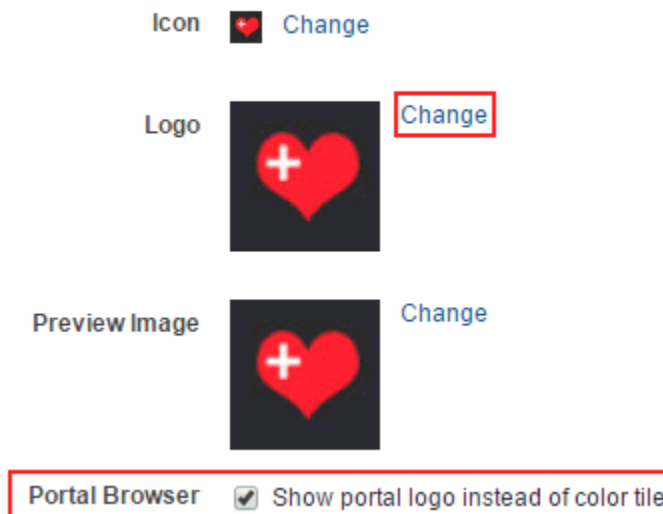
Figure 6-40   Select a Logo Dialog

2. In the Select Logo dialog, either:

   - Select **Upload image**, then **Choose File** to navigate to the logo you want to use.

     The logo image file can be up to 150 KB, and should be no larger than 64 x 64 pixels. Supported file types 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 file name must contain alphanumeric characters only.

   - Select **Enter URL to image**, then enter the URL to a logo image (beginning with `http://`).

3. Click **OK**.

4. Notice that **Show portal logo instead of color tile** is automatically selected when you change the portal logo. This means that the new portal tile will display a logo in the portal browser. To switch back to a color tile, deselect **Show portal logo instead of color tile**.

Changing the Portal Preview Image

When you create a new portal template from the current portal, the portal preview image is used to represent a preview of a new portal created with the portal template. This image is exposed in the portal creation wizard on the portal specification page.

Figure 6-41   Portal Specification Screen
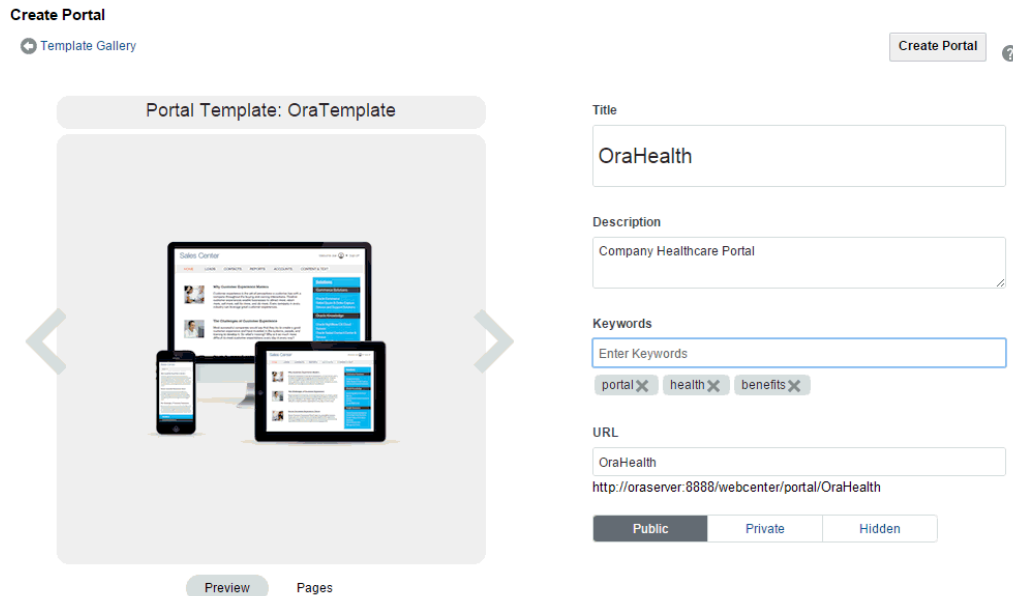
In other words, this image applies only if the current portal is used as the basis for new portal template. For example, if you create a portal for a retail site, and want to use the portal to create a portal template for portals for other retail sites, you may wish to change the portal preview image to represent such a portal, such as an image of a product selection page in the portal.

A default preview image is provided by the portal template used when you create the portal, but you can assign a different preview image if desired.

To change the portal preview image:

1. On the **Settings** page in portal administration, under **Icon and Logo**, click **Change** next to the current portal preview image to open the Select Preview Image dialog.

2. In the Select Preview Image dialog, either:

    •   Select **Upload image**, then **Choose File** to navigate to the image you want to use.

        The icon image file can be up to 150 KB. Supported file types 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 file name must contain alphanumeric characters only.

    •   Select **Enter URL to image**, then enter the URL to a preview image (beginning with `http://`).

3. Click **OK**.

Administering All Assets in a Portal

The **Assets** page in portal administration allows you to manage the assets for the portal, such as page templates, resource catalogs, and skins. The following sections describe the **Assets** page tasks:

Accessing Assets Administration for a Portal

To access the assets administration for a portal, click the **Assets** icon.

You can also enter the following URL in your browser to navigate directly to the **Assets** page:

```
http://host:port/webcenter/portal/portalName/admin/assets
```

> ✎ **See Also:**
>
> WebCenter Portal Pretty URLs

Figure 6-42   Portal Administration: Assets

Working with Portal Assets

To work with the assets for a portal, see Working with Portal Assets.

Accessing Assets Administration for a Portal

To access the assets administration for a portal, click the **Assets** icon.

You can also enter the following URL in your browser to navigate directly to the **Assets** page:

`http://`*host:port*`/webcenter/portal/`*portalName*`/admin/assets`

> ✎ **See Also:**
>
> [WebCenter Portal Pretty URLs](#)

Figure 6-43   Portal Administration: Assets

Working with Portal Assets

To work with the assets for a portal, see [Working with Portal Assets](#).

Viewing Device Groups for a Portal

The **Device Settings** page in portal administration allows you to view the various device groups available for use in the portal. The following sections describe the **Device Settings** page tasks:

- About Device Settings
- Accessing Device Settings for a Portal
- Accessing Device Settings for a Portal

About 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:**
>
> If your portal pages use a non-responsive page template, the display on different devices may exhibit formatting issues, such as overlapping text.

Accessing Device Settings for a Portal

To access the device settings administration for a portal, click the **Device Settings** icon.

You can also enter the following URL in your browser to navigate directly to the **Device Settings** page:

```
http://host:port/webcenter/portal/admin/portals/admin/portalName/device
```

Figure 6-44   Portal Administration: Device Settings

Filtering Device Groups

The **Filter** field on the Device Settings page lets you filter the list of device groups shown in the device group table. You can filter searches based on device group names, display names, and descriptions.

To filter the device groups for a portal:

1. Click the Device Settings icon to access the **Device Settings** page.

2. 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.

Administering Tools and Services in a Portal

The **Tools and Services** page in portal administration allows you to enable and disable tools and services operating in the portal, such as Documents, Events, and Lists. The following sections describe the **Tools and Services** page tasks:

- Accessing Tools and Services Administration for a Portal
- Working with Tools and Services

Accessing Tools and Services Administration for a Portal

To access the tools and services administration for a portal:

- Click the **Tools and Services** icon.

You can also enter the following URL in your browser to navigate directly to the **Tools and Services** page:

```
http://host:port/webcenter/portal/portalName/admin/services
```

Figure 6-45   Portal Administration: Tools and Services
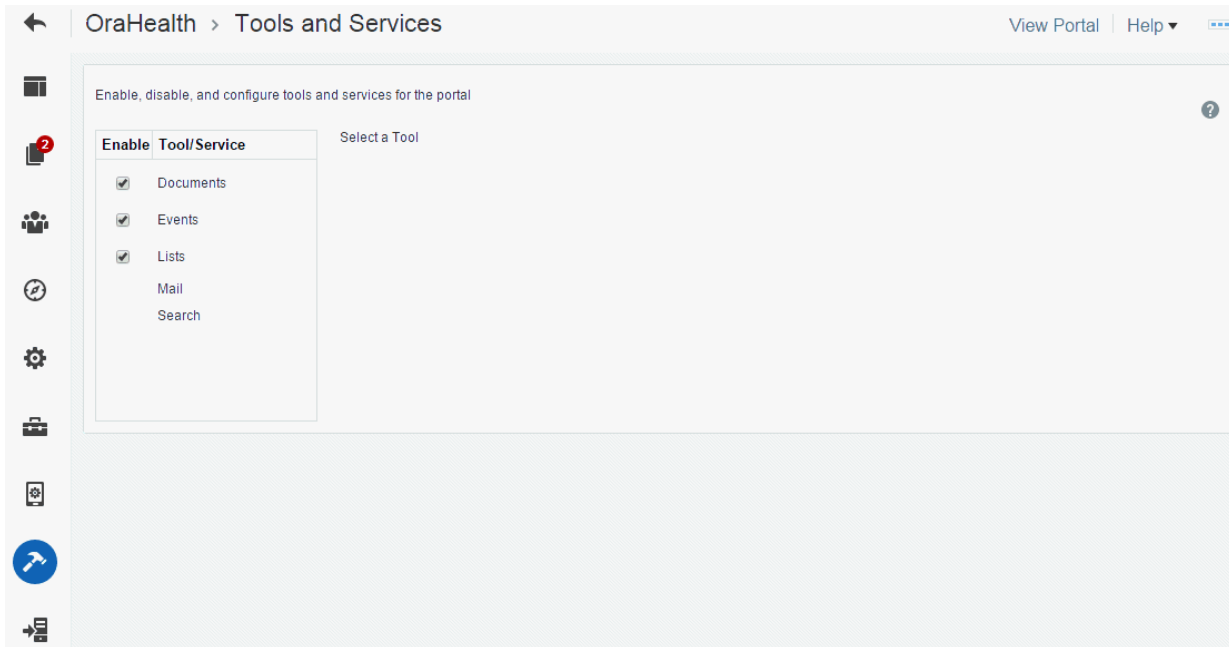
Working with Tools and Services

Most tools and services configuration is the responsibility of the system administrator, who configures and maintains connections to make the tools and services available in WebCenter Portal.

You can check the **Tools and Services** page for a portal to see which tools and services are available, and enable or disable as required. If not shown on the **Tools and Services** page, then the system administrator has not configured that tool or service connection. When you enable a tool or service in a portal, you are automatically granted `Manage` permissions on that tool or service.

To work with the tools and service for a portal, see Working with WebCenter Portal Tools and Services

Deploying and Propagating a Portal

When you deploy a portal to another portal server, you make a copy of the source portal on the target server and you can include *all or some* of the source portal's data.

Deploying a new portal on the target server and redeploying an existing portal are exactly the same. When you deploy a portal that already exists on the target, it is simply deleted and recreated as a new portal.

> **Note:**
>
> To deploy a portal:
>
> - you must have the `Portal Manager` role (or `Delegated Manager` role) for the portal you want to deploy
>
> - the system administrator must assign you to a role that has the application-level permission `Portal Server-Deploy`
>
> - the target server must be configured by the system administrator on the **Device Settings** page in WebCenter Portal Administration

For more information about deploying and propagating a portal, see Deploying Portals, Templates, Assets, and Extensions in *Administering Oracle WebCenter Portal*.

To deploy a portal:

1. In the portal administration, click the **Deploy** icon.

   You can also enter the following URL in your browser to navigate directly to the **Tools and Services** page:

   `http://host:port/webcenter/portal/portalName/admin/services`

   > **Note:**
   >
   > You will not see the **Deploy** icon unless you are granted the application-level permission `Portal Server-Deploy`.

   Figure 6-46   Portal Settings - Deploy Page
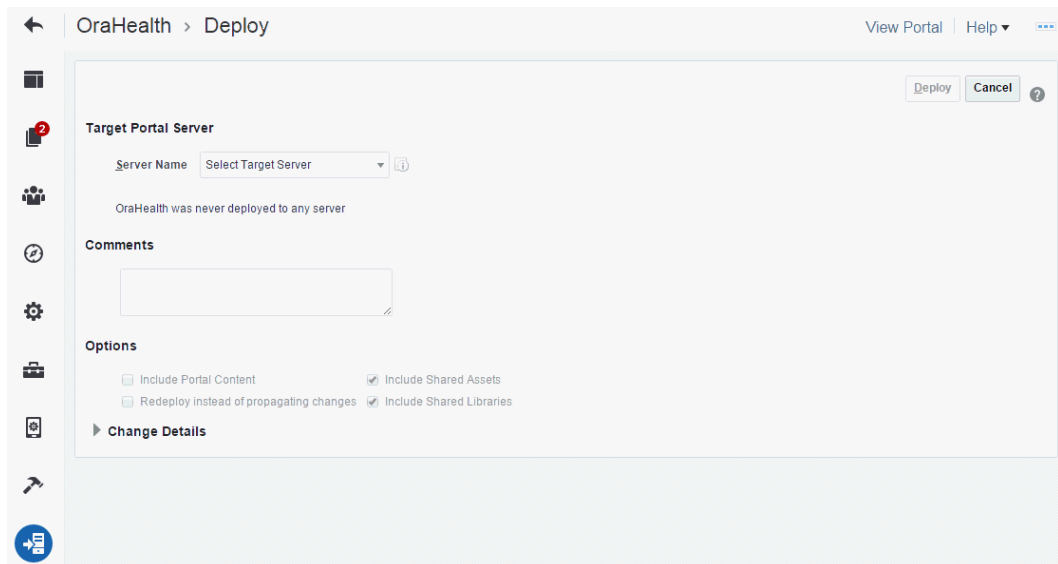
2. Select the target server and other options for deployment on the **Deploy** page.

> **Note:**
>
> The Target Server must be configured by the system administrator. For more information, see Creating a Portal Server Connection in *Administering Oracle WebCenter Portal*.

For the steps to deploy a portal, see Deploying a Portal Using WebCenter Portal in *Administering Oracle WebCenter Portal*.

3. Click **Deploy**.

   The Deploy Portals dialog displays the progress and status of portal deployment. While the portal is being deployed, you can choose to work on the portal if required.

4. Click **Close**.

   After the portal is deployed, the status of deployment can be viewed on a status page. You can view only the history of the portals that you have deployed (see Viewing Portal Deployment History in *Administering Oracle WebCenter Portal*).

Exporting and Importing a Portal

Exporting and importing a portal is primarily done by the system administrator. However, the default permissions of the `Portal Manager` allow portal managers to perform these tasks.

> **Note:**
>
> For detailed information about portal permissions and exporting and importing a portal, see Permissions Required to Perform WebCenter Portal Life Cycle Operations and Exporting and Importing a Portal in *Administering Oracle WebCenter Portal*.

This section includes the following topics:

- Exporting a Portal
- Importing a Portal

Exporting a Portal

Exporting a portal is primarily a system administrator task. However, portal managers can also export portals.
For more information about exporting a portal, see Exporting Portals to an Archive in *Administering Oracle WebCenter Portal*

To export a portal:

1. From the **Portals** menu, select **Administration**, then click the **Portals** tab.

2. Click **Managed** to view a list of portals that you manage.

To portal managers, the export action is available only on the **Managed** page, and not on the **All Portals** page under the **Portals** tab.

Figure 6-47   Managed Portals
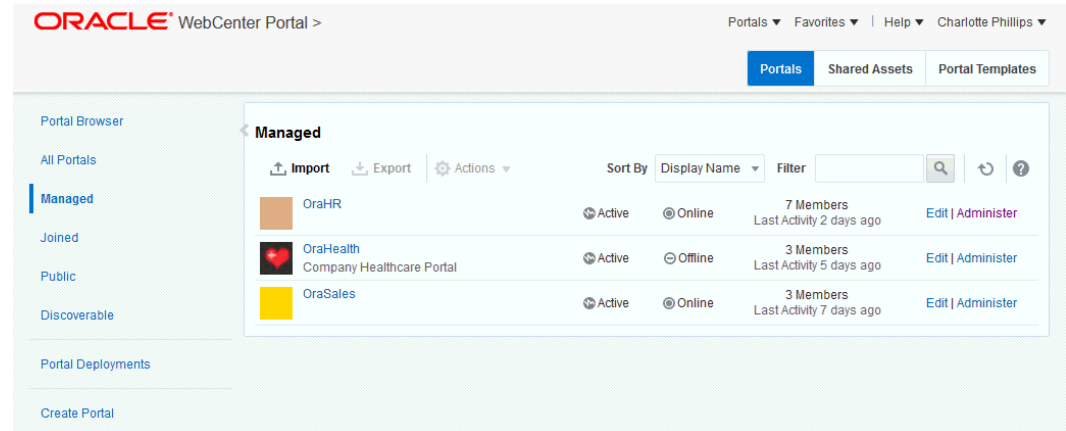
3. Select the portal you want to export or ctrl-click to select more than one portal, then click **Export**.

    The Export Portals pane opens. If you selected more than one portal, the portals you selected are listed.

Figure 6-48   Export Portals Pane
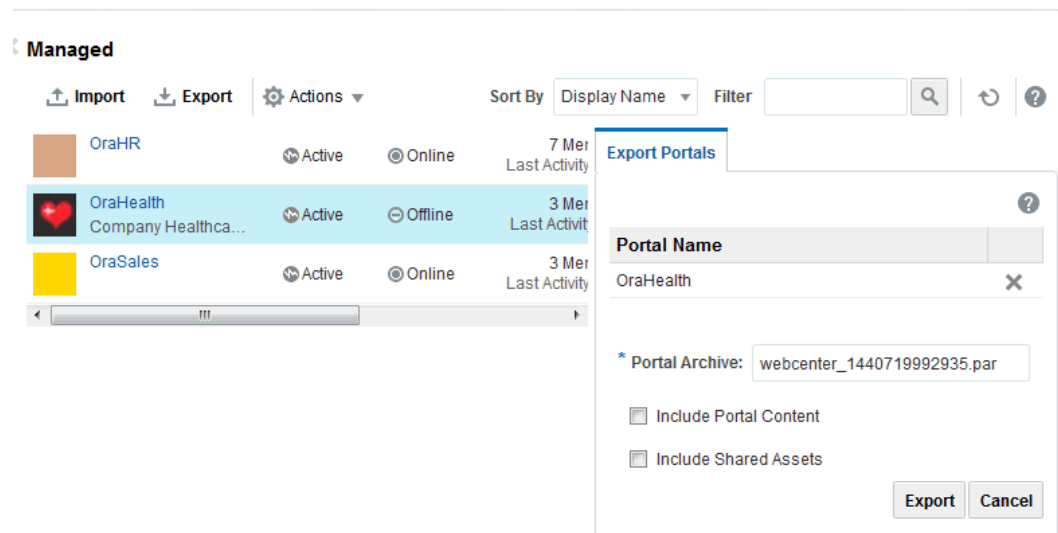
4. Select Include Shared Assets to export the shared assets used in the portal and click **Export**.

    The progress information is displayed during the export process.

5. Specify a location for the export archive (`.par` file) when the export process is complete.

Figure 6-49   Portal Export In Progress
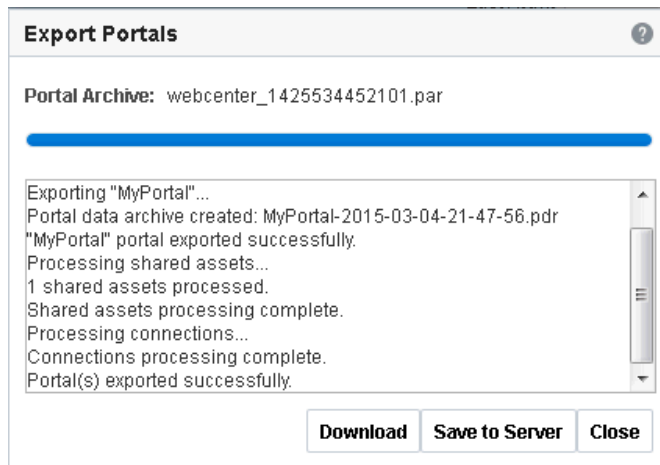
Select either of the following:

- **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** to close the Export Portals dialog.

Importing a Portal

Importing a portal is primarily done by the system administrator. However, users with `Create Portals` permissions can import a portal. This permission is granted by default to the `Authenticated-User` role.

> **Note:**
>
> To re-import a portal that already exists in your instance of WebCenter Portal (for example, if you have made any changes to it in another application such as JDeveloper), you must have `Portals: Manage Security and Configuration` and `Create Portals` permissions.

To import a portal:

1. From the **Portals** menu, select **Administration**, then click the **Portals** tab.

2. On the **Portals** page, click **Import**.

The Import Portals dialog opens.
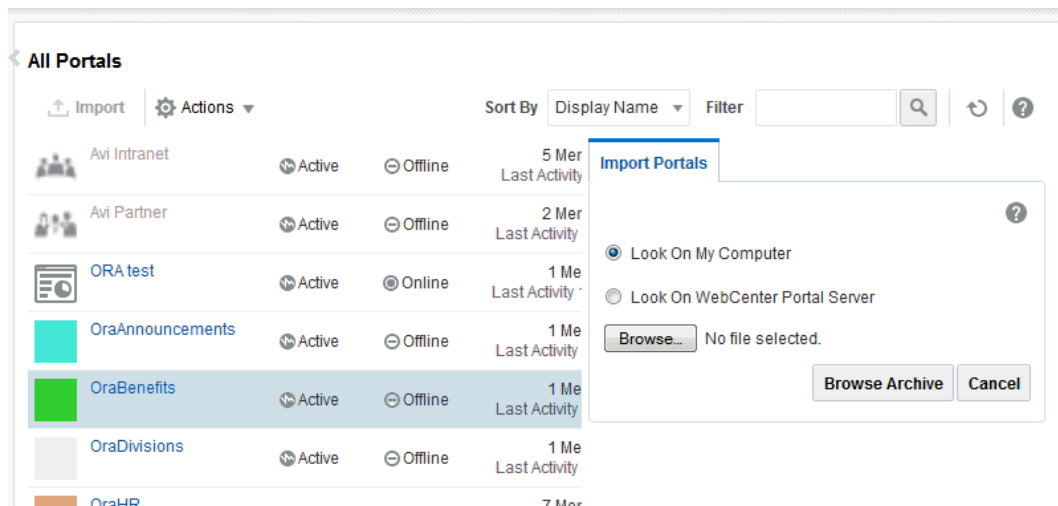
3. Specify the location of your portal archive (`.par` file). Select one of:

   - **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.

4. 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.

5. Set import options as required.

Field	Description
Include Portal Content	(Only displays if 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.
Include Shared Assets	Select to import shared assets, like skin and page templates, used in the portal.

6. Click **Import**.

- If you try to import portals that exist in the target WebCenter Portal application, the **Confirm Replace Portal** dialog displays. 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/**')
> ```

An information message displays.

7. Click **Yes** to confirm that you want to import the portals.

   An information message displays when all portals import successfully.

8. Click **Close** to dismiss the Import Portals window.

7
Working with the Portal Browser Task Flow

Add the Portal Browser task flow to a portal page to allow portal users to work with their portals directly on the page, rather than navigating to the portal browser.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permission `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Edit Pages` (advanced permissions).
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- About the Portal Browser Task Flow
- Adding a Portal Browser Task Flow to a Page
- Working with Portal Browser Task Flow Properties

About the Portal Browser Task Flow

WebCenter Portal provides two portal task flows that you can add to a page:

- **Portal Browser** task flow: Adds an area that operates identically to the portal browser, providing users with the ability to work with their portals on the page, rather than navigating to portal browser. For information about working with this task flow, see Viewing and Accessing Available Portals in *Using Portals in Oracle WebCenter Portal*.

- **Portal Members** task flow: Shows the portal members and provides controls to add new members, send a mail message to all members, filter the list by role, and search for members. For more information about this task flow, see Working with the Portal Members Task Flow.

Figure 7-1   Portal Browser Task Flow
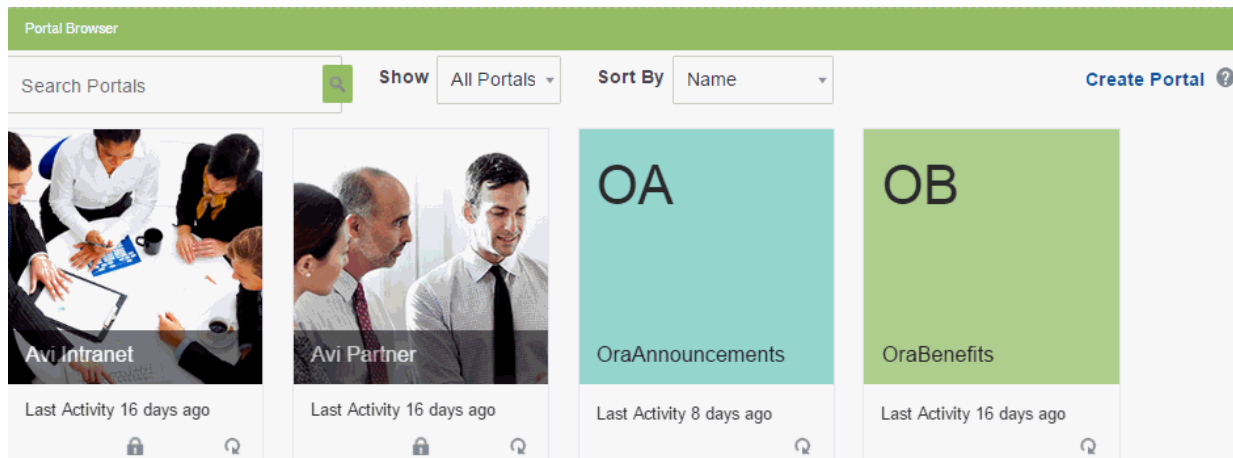
Adding a Portal Browser Task Flow to a Page

Adding a Portal Browser task flow to a page is the same as adding any other component to a page. See Adding a Component to a Page.

> **Note:**
>
> The Portal Browser task flow is not available in the Default Portal Catalog provided with WebCenter Portal, so you will only see an entry for it if it has been added to a custom resource catalog that has been made available to the page.
>
> For more information, see Adding a Resource from the Resource Registry (in the Add Resource Catalog Item dialog, select **Task Flows**, then **Design Time**, then **Portal Browser**). To use the custom resource catalog for editing portal pages, make sure it is **Available**, and set for use by pages in the portal, as described in Changing the Resource Catalogs in a Portal.

Working with Portal Browser Task Flow Properties

The Portal Browser task flow has associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu. For example, select **Parameters** to display the Parameters dialog.

Figure 7-2   Portal Browser Task Flow Component Properties

The following sections provide information about properties of the Portal Browser task flow and describe the task flow parameters:

- Setting Portal Browser Task Flow Properties
- Portal Browser Task Flow Parameters

Setting Portal Browser Task Flow Properties

In the page editor, the **View Actions** menu in the toolbar of the Portal Browser task flow provides access to the properties dialogs: Parameters, Access, Display Options, Style, and Content Style.

Figure 7-3   Portal Browser Component Toolbar: View Actions Menu
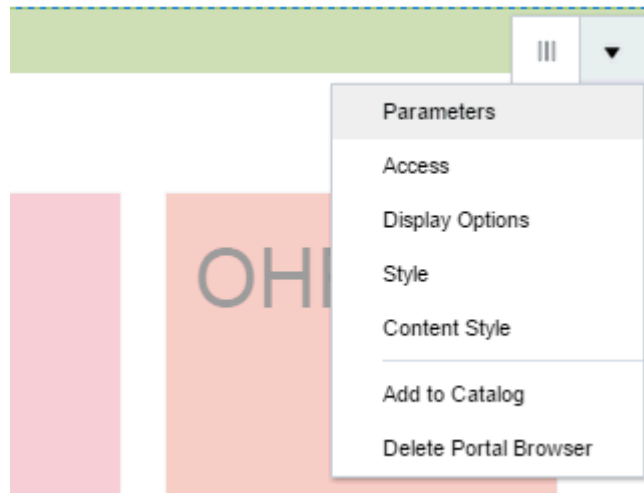
To set the Portal Browser component properties:

1. Open the page in the page editor.

2. In the Portal Browser component toolbar, click the **View Actions** menu and select the properties you want to set:

   - Parameters control the default task flow content. For descriptions of each parameter, see Portal Browser Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. See Wiring Pages and Components.

   - Access settings show or hide the component to specific roles, users, or groups. See Setting Component Access.

   - The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. See Modifying Component Properties.

   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.

   > **Note:**
   >
   > When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
   >
   > EL validation is not performed on non-generic display options.

   If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Portal Browser Task Flow Parameters

The following table describes the parameters that are unique to the Portal Browser task flow.

Table 7-1   Portal Browser Task Flow Parameters

Parameter	Description
Advanced Query	Specifies an EL expression to retrieve a list of portals based on custom criteria.
	The expression may include the population from which to choose, a WHERE clause, and sort criteria. Do *not* wrap the expression in #{ and }. Optionally, use a backslash as an escape character for quotes and backslashes (expression syntax is valid with or without an escape character).
	Examples:
	• To sort the results based on certain criteria (in this example, discoverable portals sorted alphabetically, then by date last updated):
	`spaceContext.spacesQuery.unionOf.ALL_QUERIABLE.sort['sp.discov erable']['asc'].sort['sp.lastUpdateDate']['desc']`
	Note: If you wish to filter the retrieved data, the EL expression used for the advanced query needs to include any filtering required. Any value specified by the Filter parameter is ignored when the Advanced Query parameter is set. For example, if you want to retrieve two portals MyPortal1 and MyPortal2 and only show them if you are a portal member (filter option) then the Advanced Query parameter may be set to:
	• `spaceContext.spacesQuery.unionOf.USER_JOINED.where[wCond['sp.d isplayName']['=' ]['MyPortal1']['or'][wCond['sp.displayName'] ['=']['MyPortal2']]]`
	For additional examples: In the Expression Editor, select **Portal Info**, then select from the list of examples to show the associated EL expression. To use an expression, remember to remove any enclosing #{ and }, and any backslash escape characters.
	If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal* and the JavaDoc for `oracle.webcenter.spaces.query.SpacesQueryParameters`.
Display Tool Bar	Specifies whether the tool bar displays:
	• #{true} (default): Display the toolbar.
	• #{false}: Hide the toolbar.
Display View	Specifies the type of layout in which to display portals in the Portal Browser.
	• Card Layout: Display portals in a card view.
	• Tiled Layout (default): Display portals in a tiled view.
Filter	Specifies which portals should display in the Portal Browser task flow.
	• Show All (default)
	• Show Joined
	• Show Moderated
	• Show Public
	• Show Discoverable (all Public and Private portals)
	Note: This setting is ignored if the Advanced Query parameter is used. In this case, the EL expression used for the advanced query needs to include any filtering required. See the Advanced Query parameter description for an example.

Table 7-1   (Cont.) Portal Browser Task Flow Parameters

Parameter	Description
Portal Launched on Selection	Specifies whether to navigate to a portal when selected in the Portal Browser task flow: • `#{true}` (default): Clicking a portal opens the portal on the Home page. • `#{false}`: Clicking a portal does not navigate to the portal. Instead, allows user to select the portal, staying on the same page with the selected portal highlighted.

Part III

Working with Portal Pages

This part of *Building Portals with Oracle WebCenter Portal* provides information about adding pages to a portal, managing those pages, and adding components to it to build and develop it.

- Creating, Editing, and Publishing a Portal Page
- Managing a Portal Page
- Working with Resource Catalog Components on a Page
- Working with Web Development Components on a Page
- Working with Layout Components
- Wiring Pages and Components

8

Creating, Editing, and Publishing a Portal Page

Use the portal editor to create and edit portal pages and publish them for portal users. Preview how the pages look on different device screens such as smart phones, tablets, and desktop browsers.

> ✏️ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or member with the portal-level permission `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Create, Edit, and Delete Pages` (advanced permissions). Users with this permission can create and edit pages, revise page properties, add page content, and delete pages. This includes delegated administration to override the page security and grant other users permissions to create subpages, edit the page, and so on, overriding any permission limits of user roles.
>
> Note that a user with a role that grants them permissions to create, edit, or publish a portal page, or even manage a portal, is not automatically allowed to view the portal. To view a portal, a user must be explicitly granted the portal-level permission `Basic Services: View Pages and Content` (standard permissions) or `Pages: View Pages` (advanced permissions).
>
> To publish a page, you may need additional permissions. See Publishing a Portal Page.
>
> See About Roles and Permissions for a Portal.

Topics:

- Viewing the Pages and Page Variants in a Portal
- Creating Pages or Subpages in a Portal
- Creating a Page Variant for a Device Group
- Editing a Portal Page
- Publishing a Portal Page
- Working in Structure View in the Page Editor
- Personalizing Pages

Viewing the Pages and Page Variants in a Portal

With appropriate permissions, you can view all pages in a portal, preview what a page will look like on a device (such as smart phones, tablets, and desktop browsers) in a selected device group, or filter the listing by device group:

- Accessing the Pages in a Portal
- Previewing a Page for a Device
- Filtering a Page Listing by Name or Description
- Filtering a Page Listing by Device Group

At the application level, your system administrator configures device group settings and creates page variants for system pages as described in *Administering Oracle WebCenter Portal*.

Accessing the Pages in a Portal

You can access the pages in a portal in the following ways:

- *In portal view mode.* Select pages in the portal navigation to view them.
- *In the portal editor*. If you have permissions to edit pages in the portal.

Previewing a Page for a Device

You can preview what the pages of a portal will look like on various devices (such as smart phones, tablets, and desktop browsers). This preview is useful for determining if you need to create a page variant for a page on a particular device to optimize the display of the page on that device.

> **See Also:**
>
> - Setting the Page Behavior for a Portal When No Page Variant Exists
> - Filtering a Page Listing by Device Group
> - Creating a Page Variant for a Device Group
> - Setting Page Behavior for a Specific Page When No Page Variant Exists

To preview how a page will look on a selected device:

1. Open the page in the portal editor. The default view shows how the page looks on a desktop browser.

2. Click the **Desktop** menu, and select a device group for which to preview the selected page.

Figure 8-1   Selecting Device Group for Page Preview
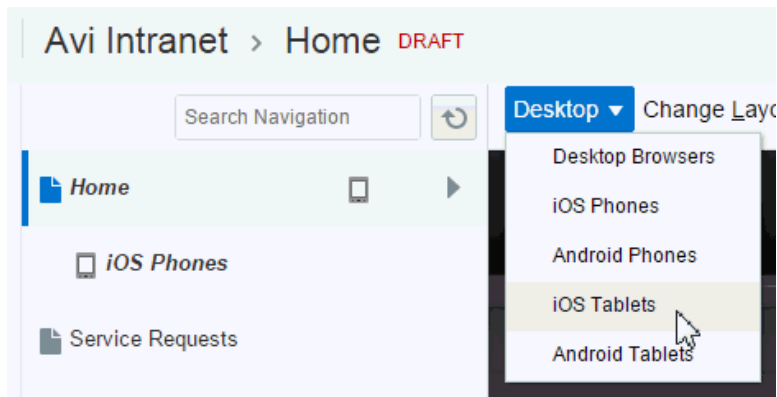
3. In the left pane, select a device from the device group, or click the ▼ and ▲ icons to sequentially select each device and view how the page content will be formatted when it is displayed on the selected device. For example, scroll bars may be added if the device viewport is not big enough for the full page.

    Viewing the page on different devices in edit view can help you decide whether the base page is suitable for certain devices. For example, if you determine that a particular base page is suitable for both desktop and tablet, you can decide a page variant for tablet is not needed.

    In this view, you can:

    *   Scroll through the list of devices in the device group.

    *   Change the orientation of the device by clicking the ▢ and ▭ icons.

    *   Hide and show the device pane by clicking the ▣ and ▣ icons.

    *   Edit the page.

Figure 8-2   Previewing Page Format
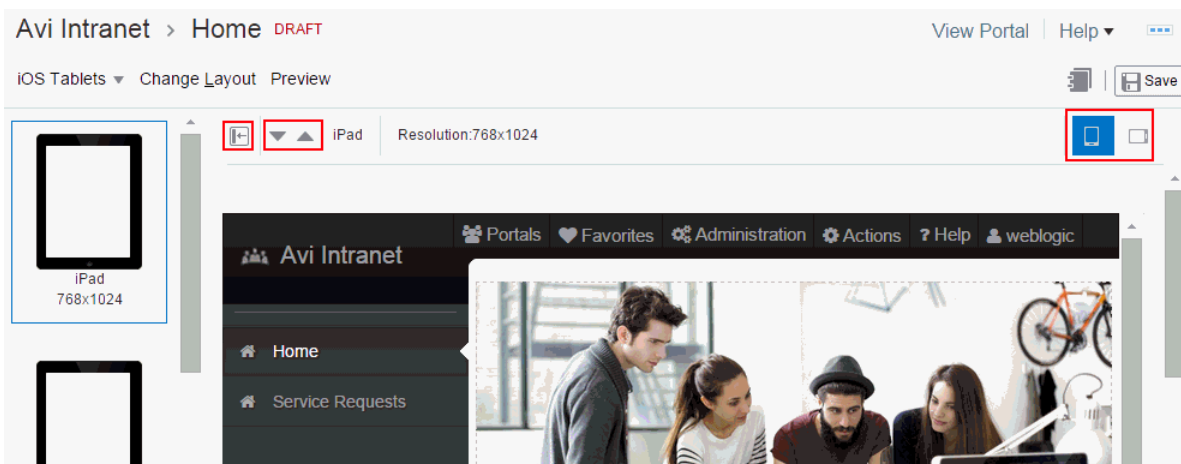
4. To preview the page in a selected device viewport, click **Preview**. In this view, you cannot edit the page. A preview shows exactly what will be seen on the device, including page fallbacks (if specified) and the device skin.

If a page is configured to have no fallback if an associated page variant does not exist, either at the application level (see Setting the Page Behavior for a Portal When No Page Variant Exists) or the portal level (Setting Page Behavior for a Specific Page When No Page Variant Exists), that page will not be shown in the device viewport.

Figure 8-3   Previewing Page in Device Viewport
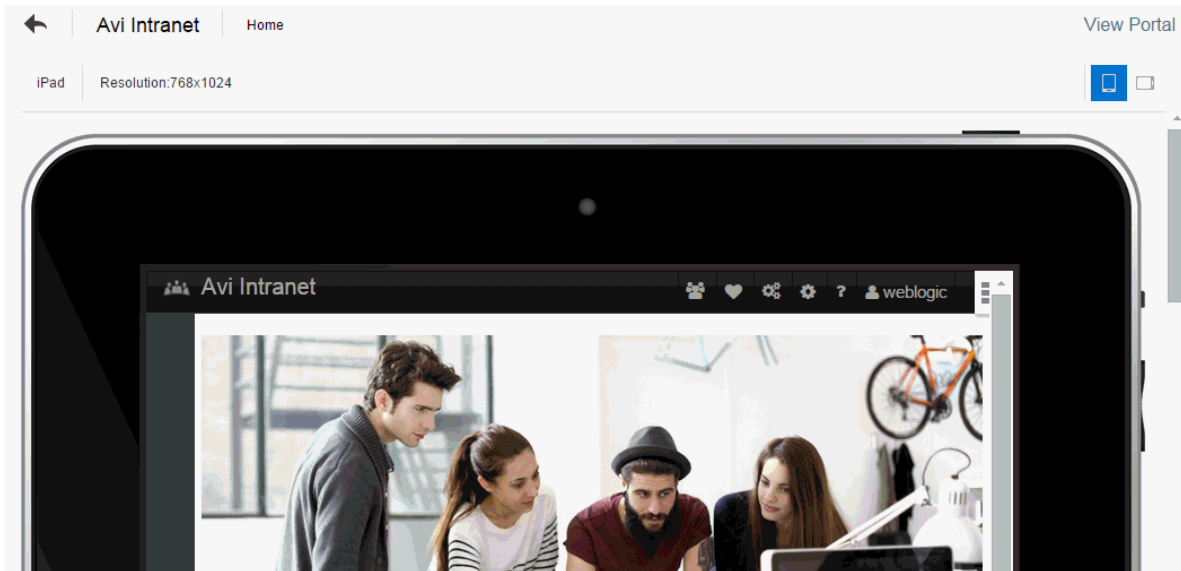
5. Click the **Back To Edit** icon to return to the portal editor.

Figure 8-4   Back To Edit Icon
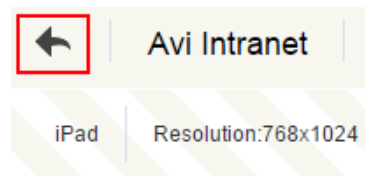
Filtering a Page Listing by Name or Description

To filter the pages listed in the navigation pane by name or description:

- In the **Filter** field, enter a string containing full or partial page names or descriptions.

The navigation pane lists pages matching the filter in name or description.

> **Note:**
>
> When the navigation pane displays a filtered list, the items in the list do not show an **Actions** icon (▶). Clear the filter to select actions on any navigation item.

Filtering a Page Listing by Device Group

If you want to view or work with only the pages for a particular device group, you can filter the listing in the navigation pane.

> ✏ **See Also:**
>
> - Setting the Page Behavior for a Portal When No Page Variant Exists
> - Previewing a Page for a Device
> - Creating a Page Variant for a Device Group
> - Setting Page Behavior for a Specific Page When No Page Variant Exists

To view pages for a particular device group:

- In the portal editor, click **Desktop**, and select the device group for which you want to view associated pages.

Figure 8-5   Filtering Page List By Device Group
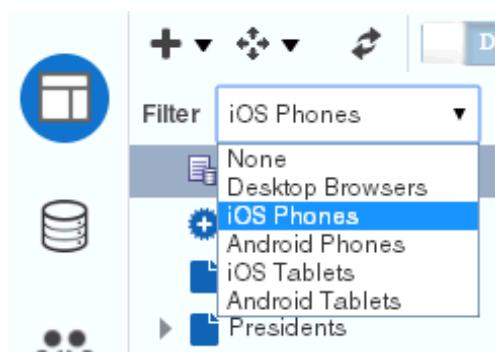
The selection pane displays pages associated with the selected device group.

Any pages that are configured to have no fallback if an associated page variant does not exist, either at the application level or the portal level, will not be shown in the navigation when you filter by that device group.

Creating Pages or Subpages in a Portal

With appropriate permissions, you can create a new page or subpage when creating a new portal in the portal creation wizard, editing an existing portal, or viewing a portal:

- Creating Pages or Subpages When Creating a New Portal
- Creating a Page or Subpage When Editing a Portal
- Creating a Page When Viewing a Portal

> ✏ **Permissions:**
>
> To create a new page in a portal, you must be a portal manager or a portal
> member with the portal-level permission `Basic Services: Edit Page`
> `Access, Structure, and Content` (standard permissions) or `Pages:`
> `Create, Edit, and Delete Pages` (advanced permissions).

Creating Pages or Subpages When Creating a New Portal

When creating a new portal, you can quickly create pages and subpages using a
special syntax in the Create Portal wizard.

Pages and subpages created using this method are immediately added to
the portal navigation and are 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.

Creating a Page or Subpage When Editing a Portal

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. In the portal editor, create a new page or subpage in either of the following ways:

   - Select any item in the portal navigation, then click its **Actions** icon (▶) and
     select **Add**, then **New Page** or **New Subpage** to add a new page or subpage
     immediately below the selected item.

   - Click **Create New Page** to add a new page at the bottom of the navigation
     pane (you can later reorder and change the hierarchy of the pages in the
     navigation pane).

Figure 8-6   Creating a Page or Subpage in the Portal Editor
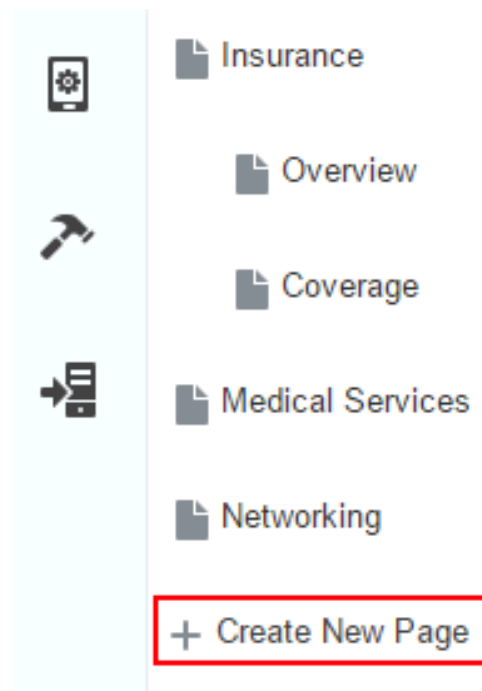
2. Click the page style you want to use for your new page. Right and left arrows may be shown to scroll through the available page styles.

    Use the search field to search for page styles by name, description, or keywords.

Figure 8-7   Selecting a Page Style

3. 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__`.

4. Optionally, modify the URL for the page from the default shown.

5. 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**.

6. To view or modify existing default security settings, click **Set Permissions** to open the **Access** page.

Figure 8-8   Create Page Wizard: Access

Access

Specify who has access to this page and what type of access they have.

Access Method ○ Override Security ● Inherit Parent Security

➕ Add Access ▾   ✕ Delete Access

Role or User	Access						
	Grant	Publish	Create	Delete	Edit	Contribute	View
No data to display							

Back to Create Page

Optionally, modify the access to the page, then click **Back to Create 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.

7. Click **Create Page**.

Creating a Page When Viewing a Portal

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.

For more information, see About Page Drafts and Publishing a Portal Page.

To create a new page while viewing a portal:

1. Click **Create Page**.

> 💡 **Tip:**
>
> The location of the **Create Page** link depends on the page template in use. For example, you may access it through an **Actions** menu.

2. 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.

3. 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__`.

4. 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.

5. 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.

6. Click **Create**.

Creating a Page Variant for a Device Group

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:**
>
> 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.

> **Note:**
>
> For portals that do not use responsive page templates, you can create page variants to optimize the display of portal pages for a specific device group. At runtime, WebCenter Portal can check if a page variant exists for the device being used to display a portal page, and displays the page using the page variant definition. By default, this check is not performed. To turn it on, see Enabling Page Variants for Device Groups in *Administering Oracle WebCenter Portal*.

When a page variant is published for a specific device group, portal users will see that variant when they view the page on a device (such as smart phones, tablets, and desktop browsers) in the device group. When viewing the page on a device in a device group that does not have a page variant defined, the device displays the base page.

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. Open the page for which you want to create a page variant in the page editor.

2. If you want to preview what the page looks like for a particular device group before creating the page variant, click the Desktop menu, and select a device group for which to preview the selected page.

3. Click the page's **Actions** icon ( ) and select **Add**, then **New Page Variant**.

   Figure 8-9   Adding New Page Variant
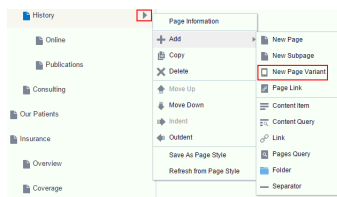
4. Select the **Device Group** and **Page Content and Style**:

   • 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.

Figure 8-10   Selecting Device Group, Content, and Style

5. 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.

Figure 8-11   Page Variant in Portal Navigation
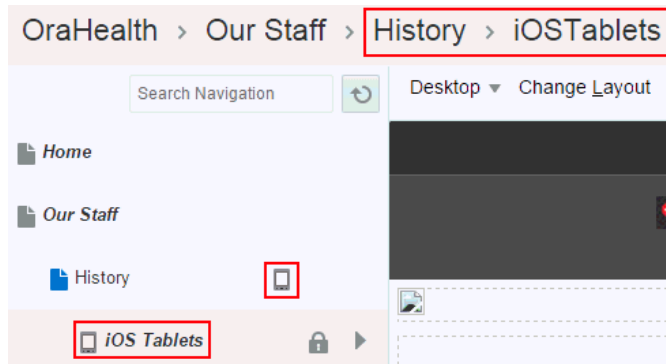
Any changes you make to the *content* of the base page are not reflected in its page variant(s), and vice versa. However, any changes to the page information, security, or parameters of base page are reflected in its page variant(s). Page variants do not include the **Summary**, **Security**, **Parameters**, and **Advanced** tabs that allow you to edit this information.

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.

6. 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.

7. Select, edit, and manage page variants as you would any other page.

Editing a Portal Page

One of the most powerful offerings in a portal is the ability to add and edit portal pages. This capability is delivered through *the page editor*, a fully-integrated environment for revising the properties, layout, and content of portal pages, and wiring pages, task flows, and portlets to each other.

This section provides an overview of the page editor and describes how to perform editorial tasks:

- About the Page Editor
- About Page Drafts
- Opening a Page in the Page Editor
- About Concurrent Users in the Page Editor
- Refreshing a Page with Page Style Updates
- Changing Page Layout
- Adding Components to a Page

About the Page Editor

In the page editor, you can select a page in the left navigation pane to edit it. To hide or show the left navigation pane, click the **Pages** icon.

Figure 8-12   Page Editor
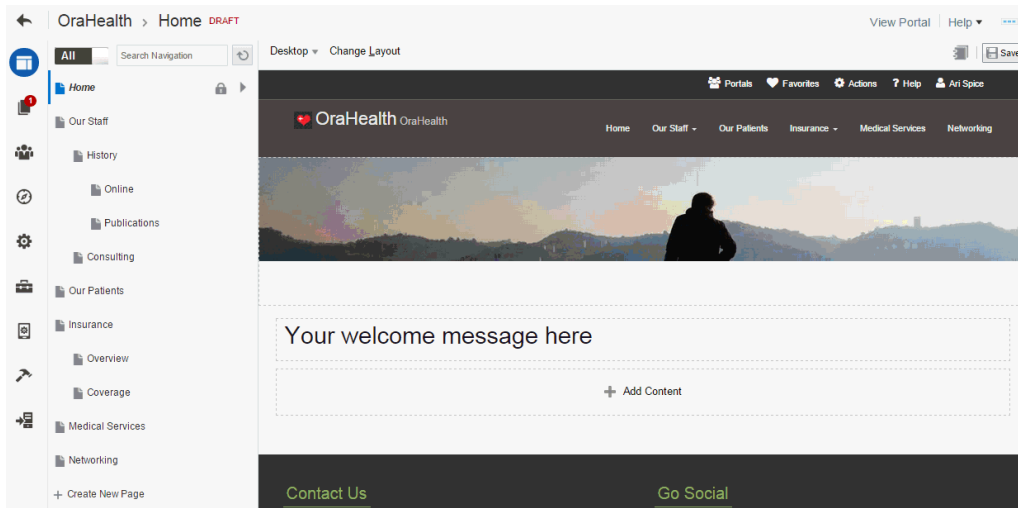
When page drafts are enabled in the portal administration settings, you can refine your page updates before making them available to others who view the portal. When users with `Edit Page` or `Contribute Page Content` permission view the page in the portal editor, they will see the latest updates in the page draft. When viewing a portal, these users can click an icon in the floating toolbar to switch views between the published page and the pending 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.

When editing a page, the page content is editable, but the page template "container" for the page is not editable.

> **Note:**
>
> You can click a page's **Actions** icon (▶) and select **Page Information** to manage pages and other navigation items, including viewing and modifying page information, defining parameters, establishing page security, and specifying additional navigation options.
>
> Alternatively, locate the portal you want to edit, then click ↻ to display the portal actions menu and select **Administer**, then select **Page Information**. Page Information for the first visible page opens.
>
>
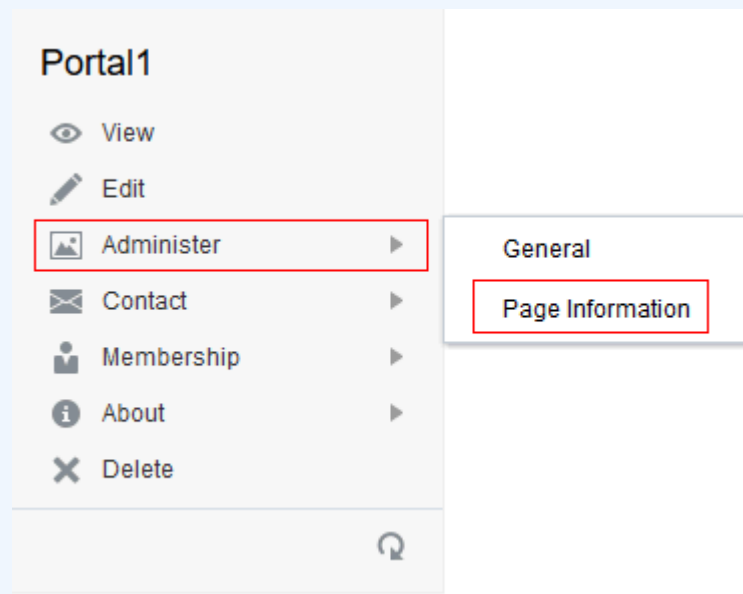
The page editor provides a WYSIWYG rendering of the page and its content, where controls are directly selectable on each component to move, delete, or perform custom actions on the component. To add components to the page, you use the resource catalog, which you can show and hide on the right side of the page.

Figure 8-13   Showing and Hiding the Resource Catalog
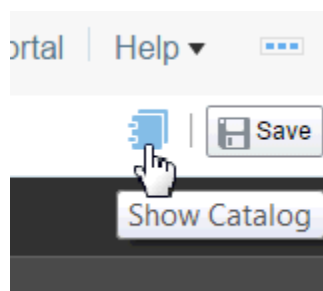
Figure 8-14   Resource Catalog
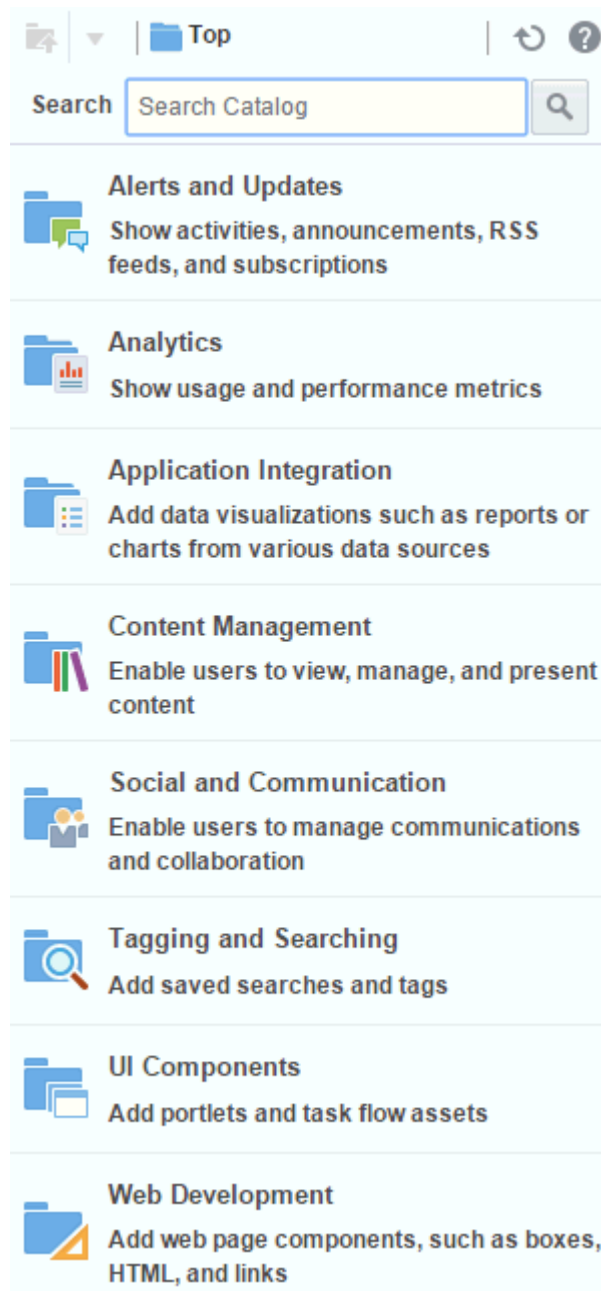
About Page Drafts

In the portal administration settings, a portal manager can enable or disable page drafts.

- When page drafts are enabled, most changes that you make to a page 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. The page editor shows DRAFT in the header to indicate that you are editing a page draft, not the published page. When you or other approvers are satisfied with your page draft,

and are ready to make the page available to others who view the portal, you can publish the page.

* When page drafts are disabled, changes that you make to a page are immediately applied to the page, and shown when viewing the portal.

For information about enabling or disabling page drafts, see Disabling and Enabling Page Drafts in a Portal.

When page drafts are enabled, changes that you make to a page are processed in one of the following ways:

* Page updates take effect only on a page draft and require that the page is published before the updates can be seen by page viewers. For example:

  – changing the contents on the page by adding or deleting components

  – rearranging contents on the page

  – changing page layout

  – setting parameters of components on the page

* Page updates take effect immediately on the published page, regardless of whether or not the page has a pending draft. This applies to refreshing the page style and to any changes made to page information (on the **Summary**, **Parameters**, **Source**, **Security**, or **Advanced** tabs).

* Page updates take effect on a page draft if it exists; otherwise, if a page draft does not exist, the updates take effect immediately on the published page. For example, editing the page source.

In the portal editor, the **Drafts** icon in the left pane is overlaid by a number indicating how many page drafts exist in the current portal. If there are no page drafts to be published, there is no number on the **Drafts** icon.

Figure 8-15   Drafts Icon

Opening a Page in the Page Editor

To open a page you created or have permissions to edit in the page editor:

1. Go to the portal editor.

2. In the navigation pane, select the page you want to edit, and click **Edit Page**. To hide or show the left navigation pane, click the **Pages** icon.

Figure 8-16   Portal Editor: View Page
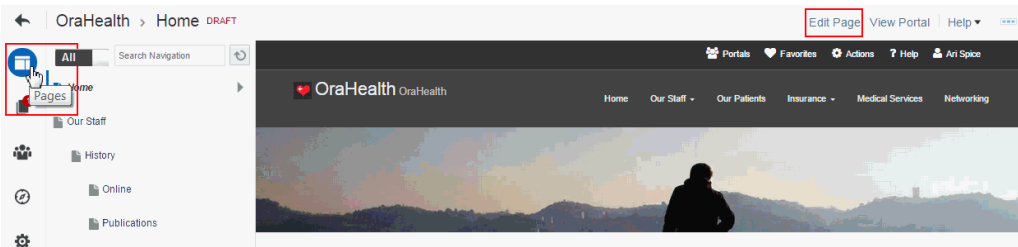
3. In the page editor, the editable body of the page displays inside its non-editable page template.

Figure 8-17   Portal Editor
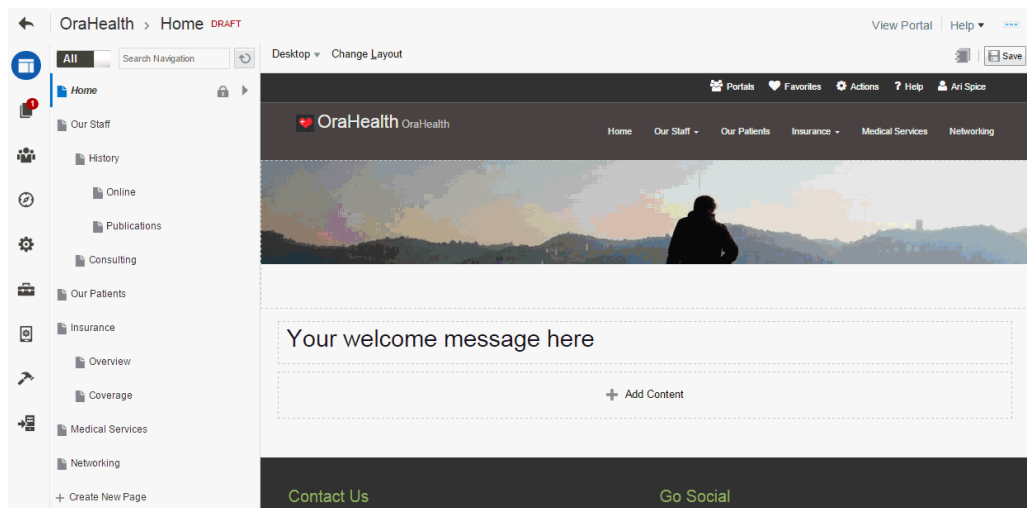
When page drafts are enabled in the portal administration settings, notice that the page editor shows DRAFT in the header to indicate that you are editing a page draft, not the published page. The **Drafts** icon in the left pane displays a number identifying the number of pages that include edits that have not yet been published. When users with `Edit Page` or `Contribute Page Content` permission view the page, they will see the latest updates in the page draft in the page editor. Users without either of these permissions will only ever see the most recently published page..

Figure 8-18   Drafts Icon
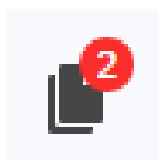
> **Note:**
>
> The page content is editable, but the page template "container" for the page is not editable.

4. Edit the page as desired, as described in the following sections:

   - Refreshing a Page with Page Style Updates
   - Changing Page Layout
   - Adding Components to a Page

> **Notes:**
>
> - To manage the current page or navigation item, click its **Actions** icon (   ) and select **Page Information**. On the **Page Information** tabs, you can set general page information, define parameters, establish page security, and specify additional navigation options. For more information, see Managing a Portal Page.
>
> - You can also use the left pane to create and add pages, subpages, page variants, and other navigation items in the current portal, adding them to the portal navigation. For more information, see:
>
>   – Creating Pages or Subpages in a Portal
>
>   – Creating a Page Variant for a Device Group
>
>   – Adding an Existing Page to the Portal Navigation
>
>   – Adjusting Page Order and Hierarchy in the Portal Navigation
>
>   – Adding Items to the Portal Navigation

About Concurrent Users in the Page Editor

Because users access a portal from the Web, multiple users may attempt to edit the same page at the same time. When one user is editing a page, a lock icon displays alongside the page in the navigation pane (Figure 8-19). If you hover over the lock icon, hint text specifies the user who has the page locked.

Figure 8-19   Page Lock Icon
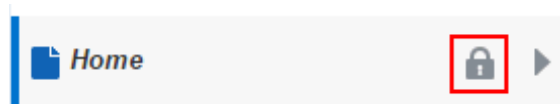
When a second user attempts to edit the page, a concurrency warning notifies the user that the page is already locked for editing (Figure 8-20). Only one user can edit a page at a time.

Figure 8-20   A Concurrency Warning in the Page Editor
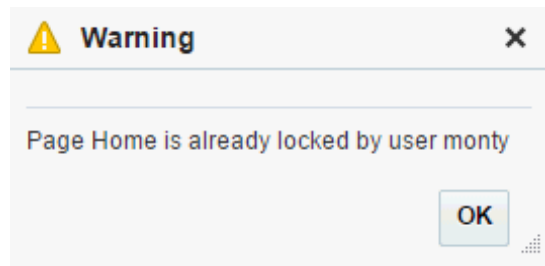
When the page is not being edited, the lock icon does not display, and the page is available for editing by any authorized user.

Refreshing a Page with Page Style Updates

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. Open the page in the page editor.

2. Click the page's **Actions** icon and select **Refresh from Page Style**.

3. In the Refresh from Page Style dialog, click **OK** to refresh the page with the changes made to its page style.

Figure 8-21   Refresh from Page Style Dialog

Changing Page 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.

When you select a new layout for a page, the new layout takes effect immediately; you do not need to explicitly save the page to apply the new layout.

When page drafts are enabled in the portal administration settings, any updates to page layout take effect only on the page draft. You must publish the page for updates to be seen by page viewers.

> **Note:**
>
> With the exception of Wiki, Blog, and Web Page, the built-in page styles allow you to modify the default layout in the page editor, selecting a new built-in or custom layout that is defined as an asset. For more information, see Table 18-1.

To change a page layout to a built-in or custom layout that is defined as an asset at either the portal or application level:

1. Open the page in the page editor.

2. Click **Change Layout** (or press Alt+L) and select one of the available layouts. The selections show both built-in and custom layouts that are listed on the **Assets** page for the portal, and the application-level **Shared Assets** page.

Figure 8-22   Changing Page Layout: Layout Menu
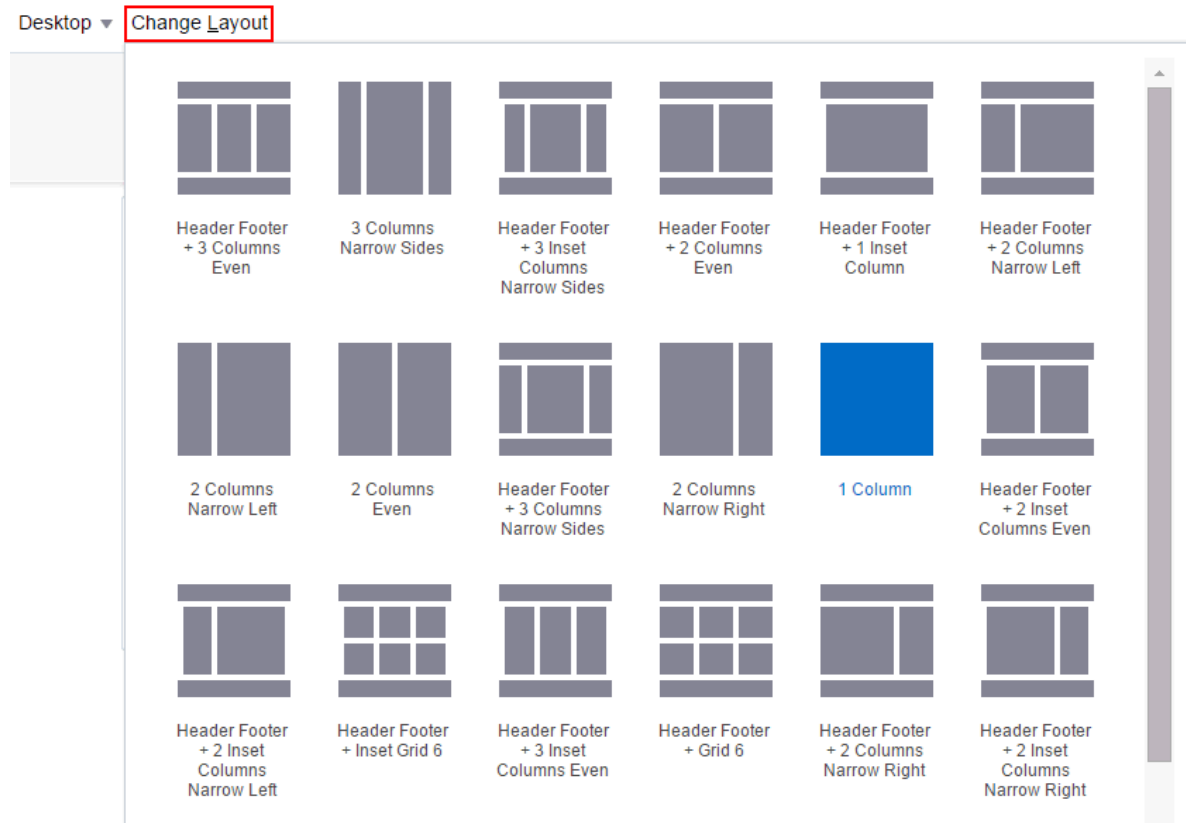
In the page editor, the page refreshes immediately with the selected layout.

Adding Components to a Page

You develop the content of a page by adding components to it in the page editor. In the page editor, the resource catalog provides a gateway to a wide range of task flows, portlets, components, and other types of resources.

When page drafts are enabled in the portal administration settings, any updates to a page take effect only on the page draft. You must publish the page for updates to be seen by page viewers.

> **✎ Note:**
>
> The page content is editable, but the page template "container" for the page is not editable. To edit a page template, see Editing a Page Template.

For information about adding components to a page, see:

- Working with Resource Catalog Components on a Page
- Working with Web Development Components on a Page

- [Adding Content Contribution and Publishing Components to a Page Style or Page](#)
- [Working with Layout Components](#)
- [Wiring Pages and Components](#)

Adding Text, Image, or Video Components to a Page

You can add text, images, or video to a page through content contribution and publishing components. For more information about content contribution and publishing and how to add these components to a page, see [Enabling Content Contribution and Publishing](#).

Publishing a Portal Page

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.

For more information, see [About Page Drafts](#).

> **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 portal editor, click the **Drafts** icon in the left pane. The icon is overlaid by a number indicating how many page drafts exist in the current portal. If there are no page drafts to be published, there is no number on the **Drafts** icon.

   Figure 8-23   Drafts Icon

2. 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.

Figure 8-24   Publish Pages Pane

3. Click **Publish**, then click **OK** in the confirmation prompt.

4. 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.

5. Click **View Portal** to verify that the published page(s) are shown in the portal navigation and display the latest edits.

Working in Structure View in the Page Editor

Structure view of the page editor displays only when editing page templates, or application-level system pages and task flows.

Structure view provides a combined WYSIWYG and hierarchical rendering of page components, where controls are available in the toolbar of the page structure pane to add, edit properties, delete, cut, and paste page components. For more information, see:

• About Structure View

• Adding a Component in Structure View

• Setting Component Properties in Structure View

• Deleting a Component in Structure View

About 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.

For examples, see Working with Layout Components .

Figure 8-25   Structure View of Page Editor: Editing a System Page
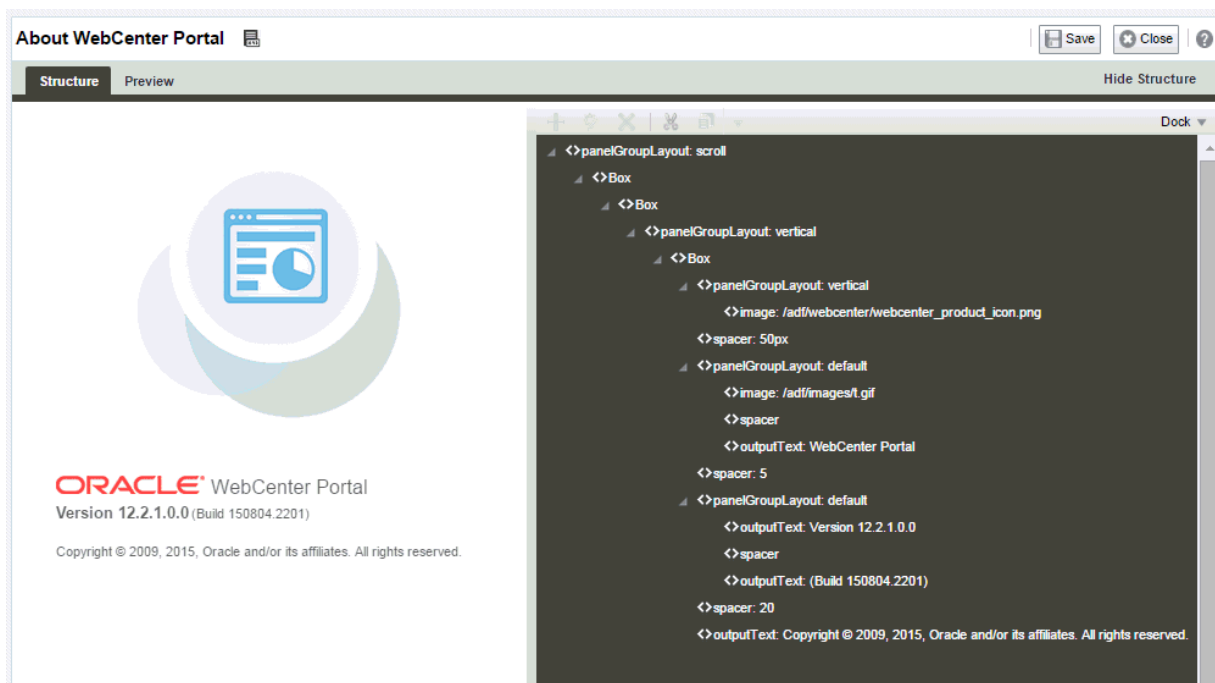
Component selection is indicated by a dark blue outline. A light blue outline is drawn when the mouse hovers around a component that can be selected for editing, and your mouse cursor changes to a magnifying glass. When you select a component in the structure pane, it is automatically selected on the page. Similarly, if you select a component on the page, it is automatically selected in the structure pane.

Figure 8-26   Mouse Cursor as Magnifying Glass in Structure View
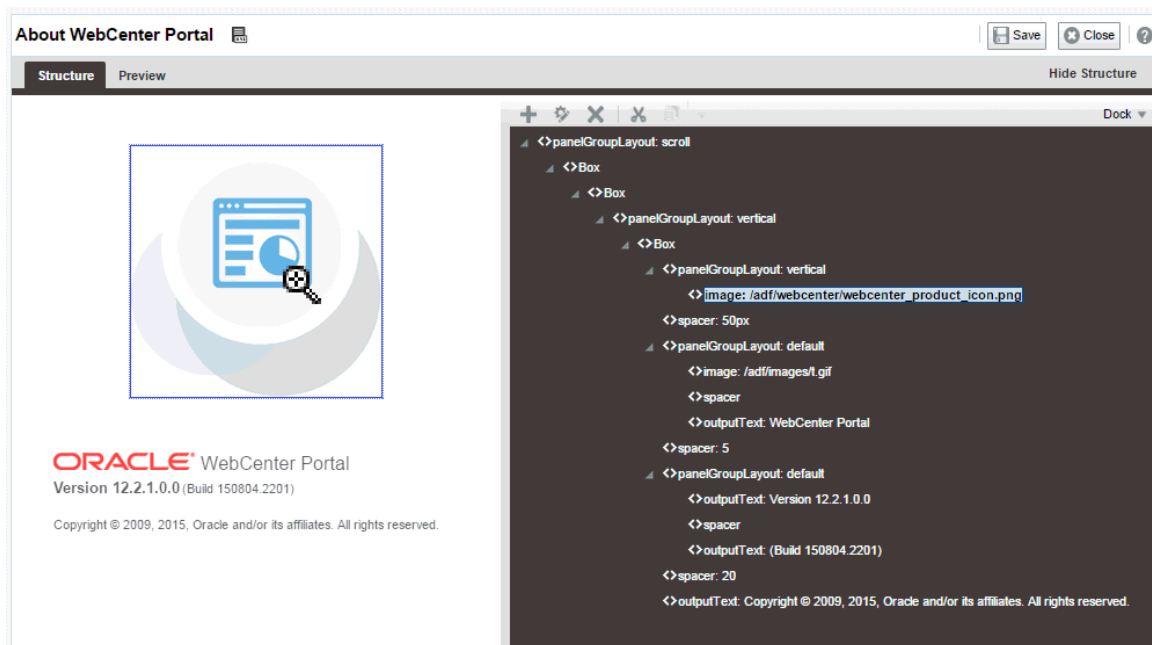
> **Note:**
>
> You can edit core ADF Faces components, task flows, and declarative components only in Structure view of the page.

Adding a Component in Structure View

To add a component in Structure view:

1. Open the page template, system page, or task flow in the page editor to display it in Structure view.

2. 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.

3. Click the **Add content into the selected component** icon to open the resource catalog.

Figure 8-27   Resource Catalog in Structure View of the Page Template
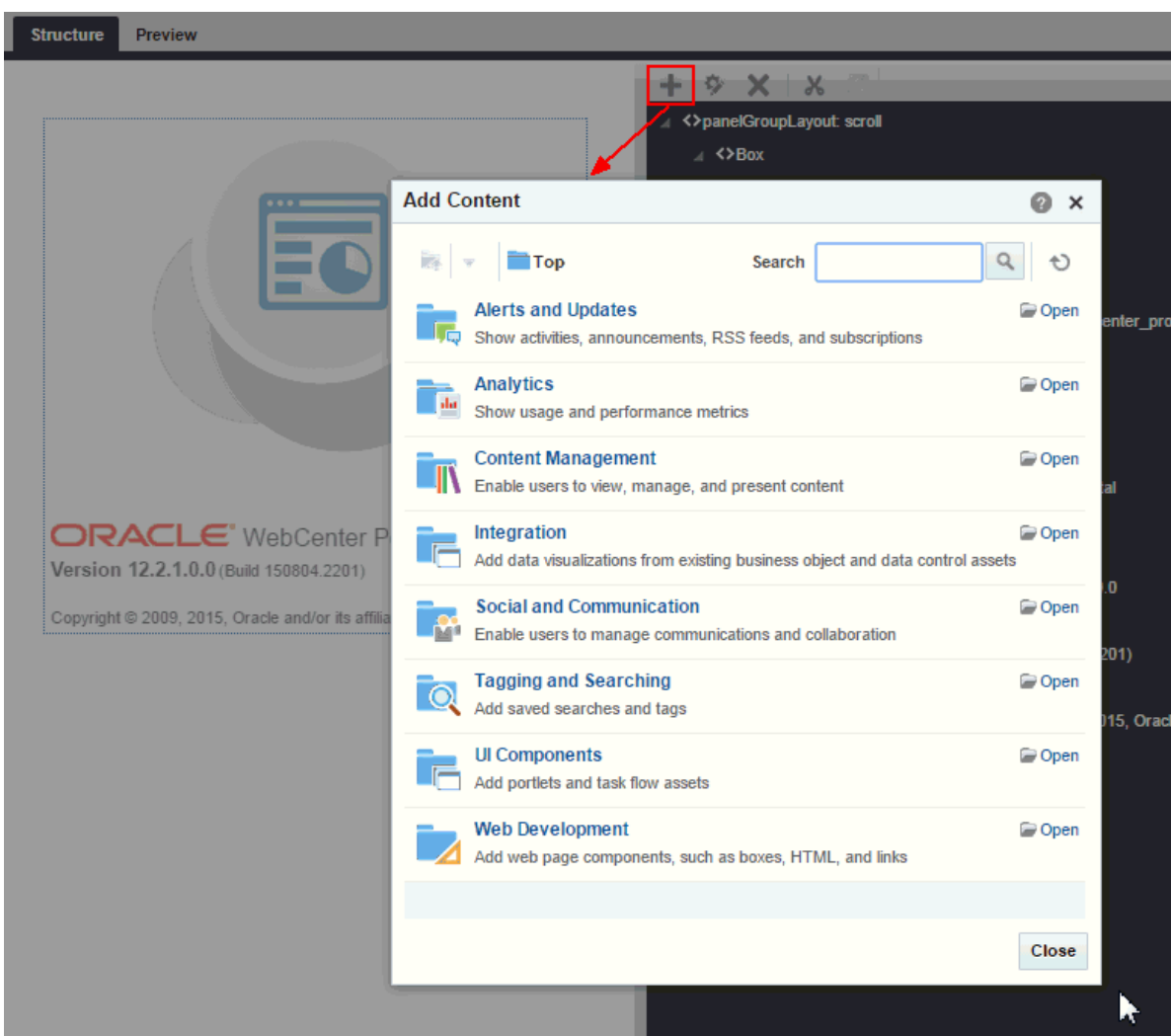
4. In the resource catalog, navigate to the component you want to add by clicking **Open** next to folders to drill down to related components, or search for it, then click the **Add** link next to it. The resource catalog dialog does not support drag-and-drop.

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

Setting Component Properties in Structure View

To set properties of a component on a page in Structure view:

1. Open the page template, system page, or task flow in the page editor to display it in Structure view.

2. Select the component by clicking it in the WYSIWYG pane, or clicking its entry in the hierarchical list pane.

3. Click the **Show the properties of** *component name* icon above the hierarchical list pane.

Figure 8-28   Show Properties Icon in Structure View
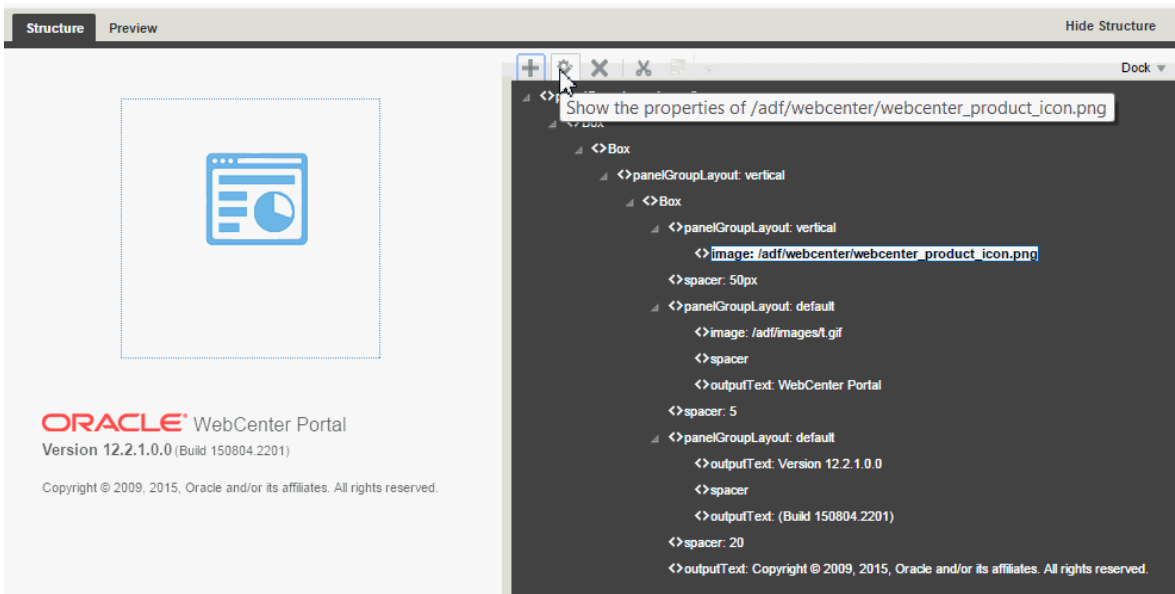
4. In the Component Properties dialog, edit component properties as desired. Click the **Help** icon on each tab for property descriptions.

5. Click **OK** to close the Component Properties dialog.

Deleting a Component in Structure View

The controls for deleting a component are located on the header of the hierarchical list pane in Structure view:

To delete a component from a page in Structure view:

1. Open the page template, system page, or task flow in the page editor to display it in Structure view.

2. In the list of components, select the component to delete.

3. Click the **Delete** icon.

Figure 8-29   Delete Icon in Structure View
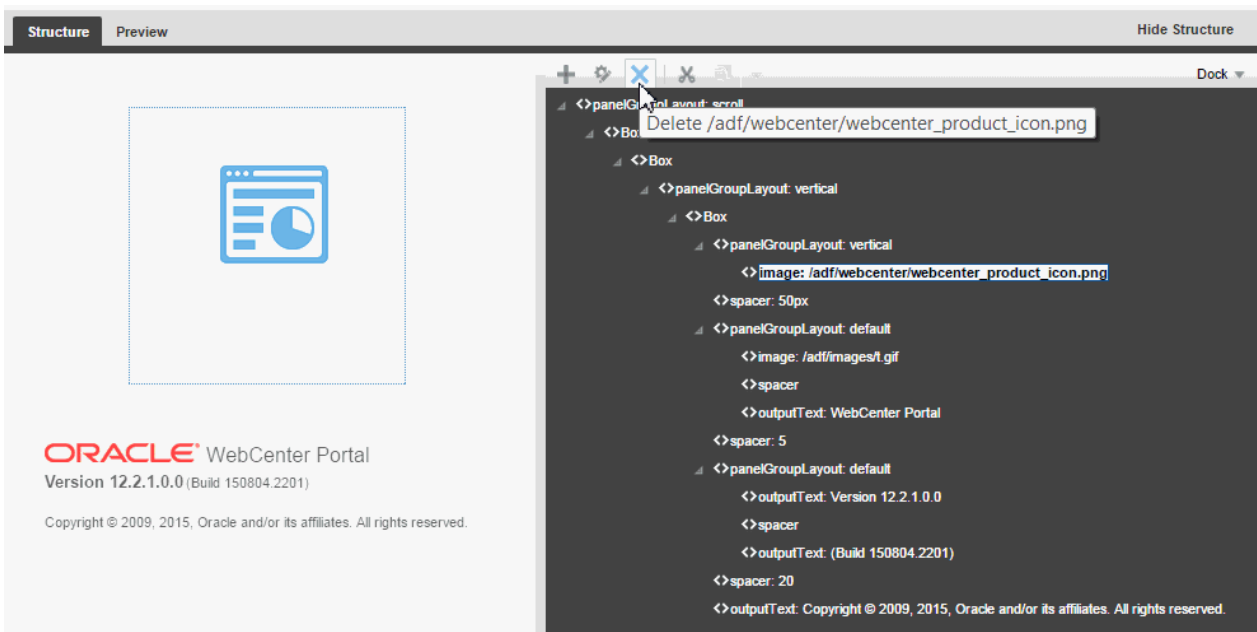
4. In the resulting confirmation dialog, click **Delete**.

   The component is permanently removed from the page. If the component had any child components, those child components are deleted as well.

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

Personalizing Pages

Using Expression Language (EL) expressions, you can present targeted content or shape the way content is presented by selecting and applying a page template based on whoever is the current user. For example, one user role sees a page through template A, while another user role sees the same page through template B. If you need assistance, an application developer can help provide an EL expression to add to your page (see Expression Language Expressions in *Developing for Oracle WebCenter Portal*).

There is a wide variety of user and application context that can determine the content a user sees. For example, content can be restricted by role through a security mechanism, such as page hierarchy security. Or, content can be targeted based on more dynamic user and application context, such as user profile values and session information.

9
Managing a Portal Page

Manage a portal page and its settings, including page security and how a page is exposed in the portal navigation.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the permission `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Create, Edit, and Delete Pages` (advanced permissions).
>
> Note that a user with a role that grants them permissions to create, edit, or publish a portal page, or even manage a portal, is not automatically allowed to view the portal. To view a portal, a user must be explicitly granted the portal-level permission `Basic Services: View Pages and Content` (standard permissions) or `Pages: View Pages` (advanced permissions).
>
> See About Roles and Permissions for a Portal.

Topics:

- Accessing Portal Page Management
- Adjusting Page Order and Hierarchy in the Portal Navigation
- Copying a Page
- Deleting a Page
- Viewing and Modifying Page Settings
- Renaming a Page
- Entering or Changing a Page Description
- Showing or Hiding a Page in the Portal Navigation
- Setting Page Behavior for a Specific Page When No Page Variant Exists
- Adding or Modifying Page Parameters
- Viewing and Modifying Page Source Code
- Setting Page Security
- Setting Navigation Properties and Display Options for a Page

Accessing Portal Page Management

As a portal member, you will have access to pages in the portal. The portal manager can grant you permissions to view, create, edit, and manage pages in the portal. Other portal

members can grant you permissions to access the pages that they own. Pages that you create are for your own use only, unless you specifically share them with other users.

To manage a page that you created or have permissions to manage:

1. Open the page in the page editor.

2. Click the page's **Actions** icon (▶) and select actions to adjust the position of the page in the navigation hierarchy, copy the page, or delete the page.

3. Click the page's **Actions** icon (▶) and select **Page Information** to display the page management tabs.

> ✎ **Note:**
>
> Alternatively, locate the portal you want to edit, then click ↻ to display the portal actions menu and select **Administer**, then select **Page Information**. Page Information for the first visible page opens.
>
>
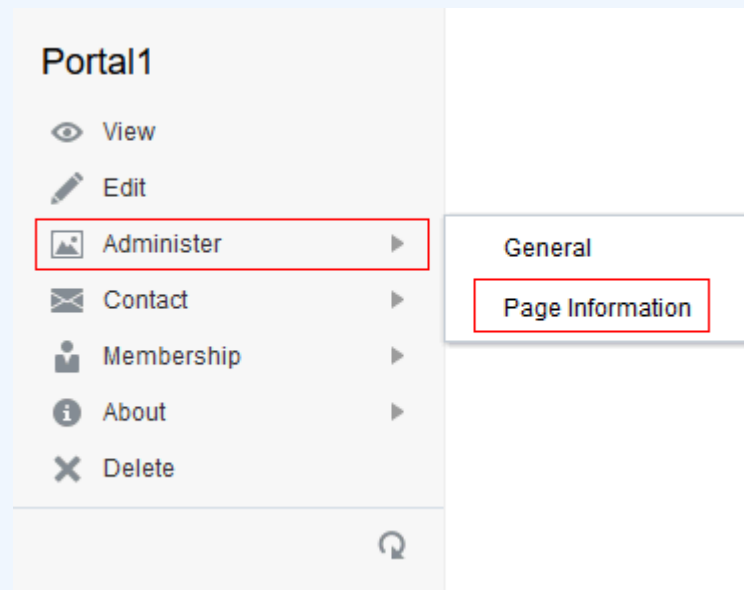
Figure 9-1   Page Information Tabs
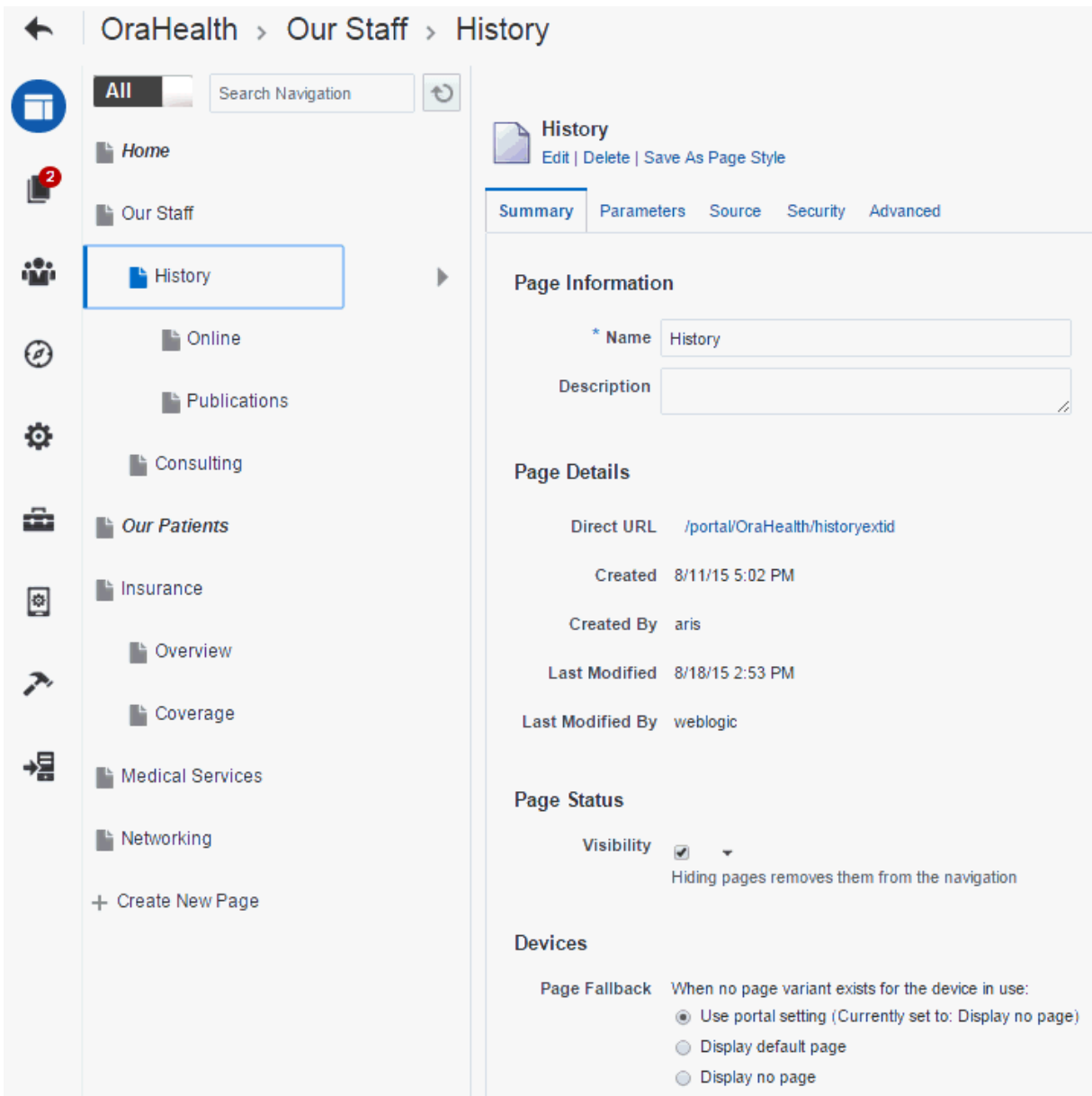
4. Modify page settings and properties as described in the following sections:

- **Summary** tab:

  – Viewing and Modifying Page Settings

  – Renaming a Page

  – Entering or Changing a Page Description

  – Showing or Hiding a Page in the Portal Navigation

  – Setting Page Behavior for a Specific Page When No Page Variant Exists

- **Parameters** tab: Adding or Modifying Page Parameters

- **Source** tab: Viewing and Modifying Page Source Code

- **Security** tab: Setting Page Security

- **Advanced** tab: Setting Navigation Properties and Display Options for a Page

Adjusting Page Order and Hierarchy in the Portal Navigation

To adjust the order and hierarchy of a page, open the page in the page editor, then::

- To change the page order, either drag the page to a new position in the page hierarchy, or click its **Actions** icon ( ) and select **Move Up** or **Move Down**.

- To change the page hierarchy, click its **Actions** icon ( ) and select **Indent** to make the page a subpage of the page above it, or select **Outdent** to move the page to a higher level in the page hierarchy.

> **Note:**
>
> As you organize your page hierarchy, take into account the size of the browser window and the screen resolution. While you can create a page hierarchy with many pages at the same level, the browser display may not have enough room to expose pages past a certain point in the hierarchy (for example, if they are listed in a drop down that extends to the bottom of the browser window). Try to limit and arrange your portal navigation for optimal display without overflow.

Figure 9-2   Moving a Page in the Portal Navigation (in Portal Editor)
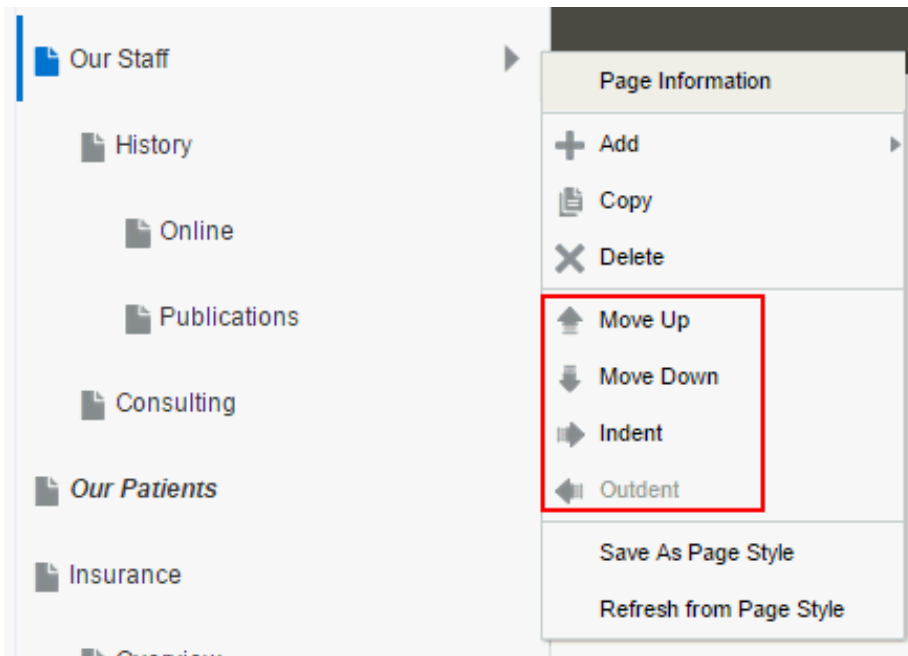
Copying a Page

You can copy any page to create a new page, whether or not you have permissions on the original page.

> **Notes:**
>
> - Copying a page also copies its subpages and page variants.
> - If the page you are copying includes portlets or task flows, then the customizations of those portlets or task flows are also copied.

To copy a page, Open the page in the page editor, then click its **Actions** icon (▶) and select **Copy**.

Figure 9-3   Copying a Page (in Portal Administration)
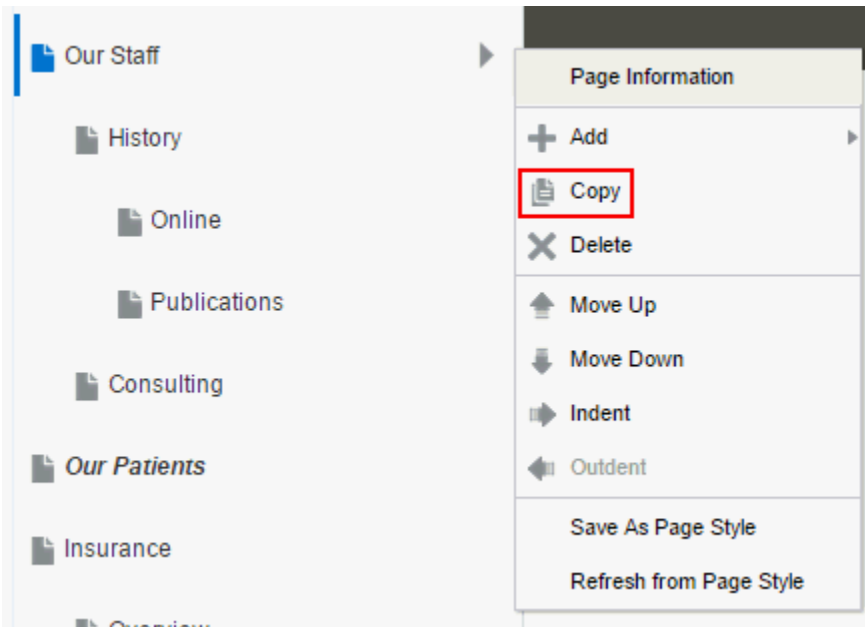
The copied page (and its subpages and page variants) are not immediately available when viewing the portal. You can modify the page and/or its subpages and page variants in draft mode, then when you are satisfied with your changes, and are ready to make a page available to others who view the portal, you can publish the page.

Figure 9-4   Page Copy Added to Navigation
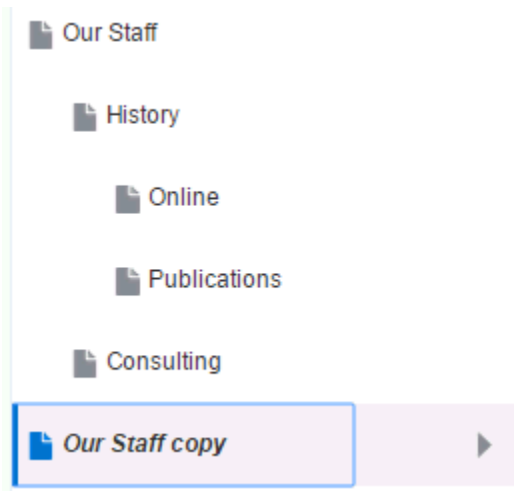
Deleting a Page

If you created or have permissions to manage a page, you can delete the page. However, you should be aware that deleting a page affects all members of the portal.

> ✏️ **Notes:**
>
> • Deleting a page also deletes its subpages.
> • You cannot delete a page if it is the only page or the only visible top level page in the portal.

To delete a page that you created or have permissions to manage:

1. Open the page in the page editor, then delete it in either of the following ways:

   • Click its **Actions** icon (▶) and select **Delete**.

Figure 9-5   Deleting a Page
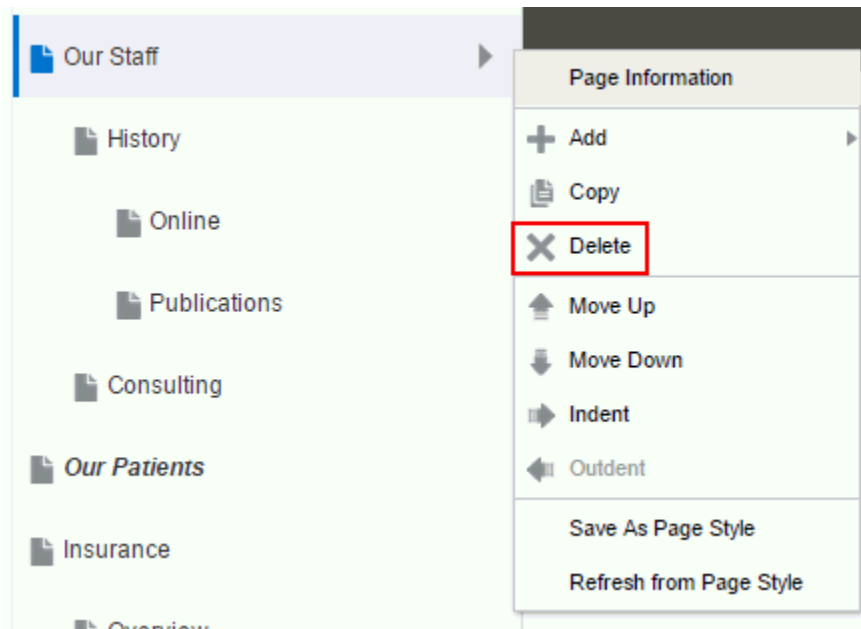
- Select the page, then click the **Delete** link in the right pane.

Figure 9-6   Deleting a Page
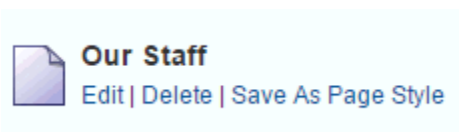
2. In the Delete dialog, click **Delete** to confirm the request to delete the selected page.

Viewing and Modifying Page Settings

To view and modify page settings (such as title, description, visibility, parameters, source code, security, properties, and display options):

1. Open the page in the page editor.

2. Click the page's **Actions** icon ( ) and select **Page Information**.

Figure 9-7   Accessing Page Management Settings
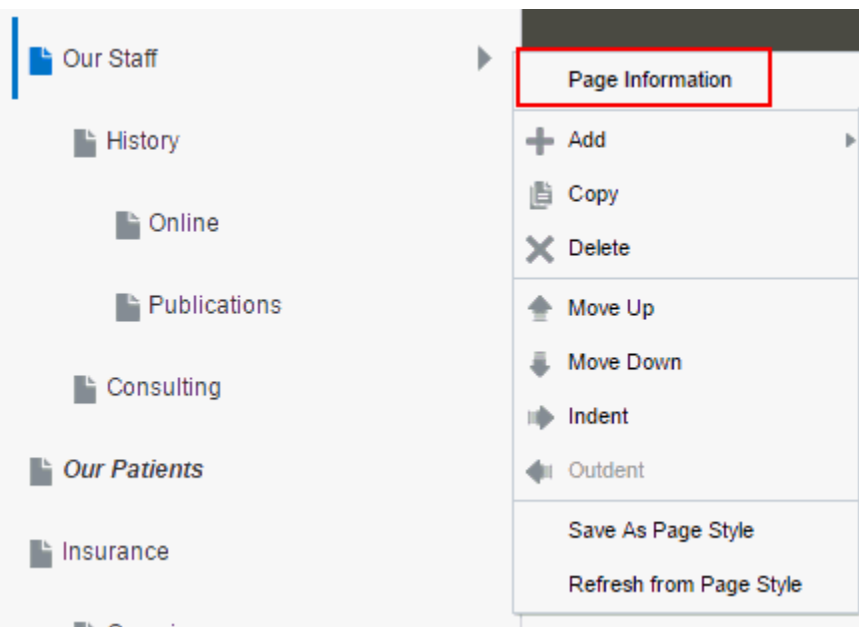
3. Modify page settings and properties as described in the following sections:

   • **Summary** tab (Figure 9-8):

      – Renaming a Page

      – Entering or Changing a Page Description

      – Showing or Hiding a Page in the Portal Navigation

      – Setting Page Behavior for a Specific Page When No Page Variant Exists

   • **Parameters** tab: Adding or Modifying Page Parameters

   • **Source** tab: Viewing and Modifying Page Source Code

   • **Security** tab: Setting Page Security

   • **Advanced** tab: Setting Navigation Properties and Display Options for a Page

Figure 9-8   Page Summary Tab

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. Open the page in the page editor, then click its **Actions** icon ( ) and select **Page Information**.

2. On the **Summary** tab, enter a new page name in the **Name** field.

Figure 9-9   Renaming a Page
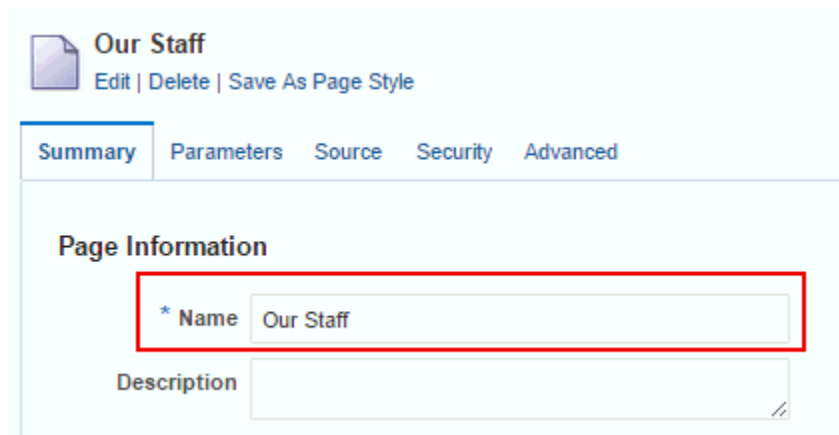
The page display name and the page navigation item display the new name.

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. Open the page in the page editor, then click its **Actions** icon ( ) and select **Page Information**.

2. 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.

Figure 9-10   Entering or Changing a Page Description
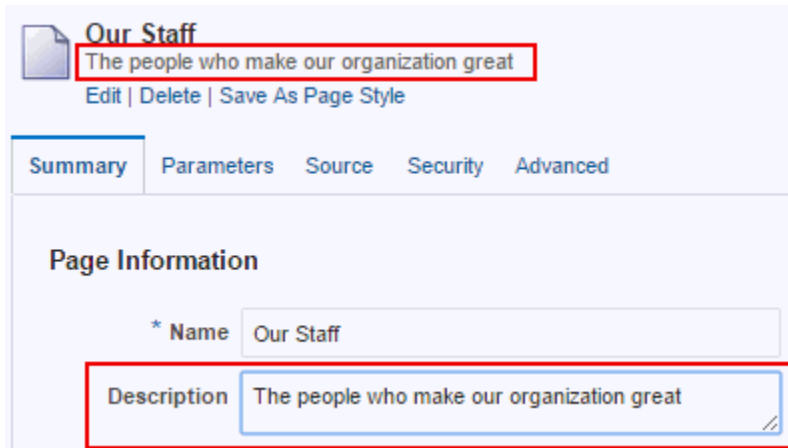
Showing or Hiding a Page in the Portal Navigation

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. Open the page in the page editor, then click its **Actions** icon ( ) and select **Page Information**.

2. 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.

Figure 9-11   Showing or Hiding a Page
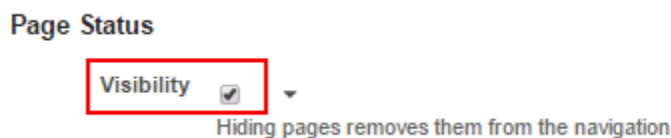
To enter an Expression Language (EL) expression that determines whether or not the page displays in the navigation, click the ▾ icon on the right, then select **Expression Builder** to open the Expression Language editor, and then enter an EL expression. If the expression evaluates to `false`, the page is not visible in the navigation. Otherwise, the page is visible in the navigation.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

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:

    > **See Also:**
    >
    > - Setting the Page Behavior for a Portal When No Page Variant Exists
    > - Previewing a Page for a Device
    > - Filtering a Page Listing by Device Group
    > - Creating a Page Variant for a Device Group
    >
    > At the application-level, your system administrator configures device group settings and creates page variants for system pages.

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. Open the page in the page editor, then click its **Actions** icon ( ) and select **Page Information**.

2. 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.

Figure 9-12   Setting Page Fallback Behavior When No Page Variant Exists for Current 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:
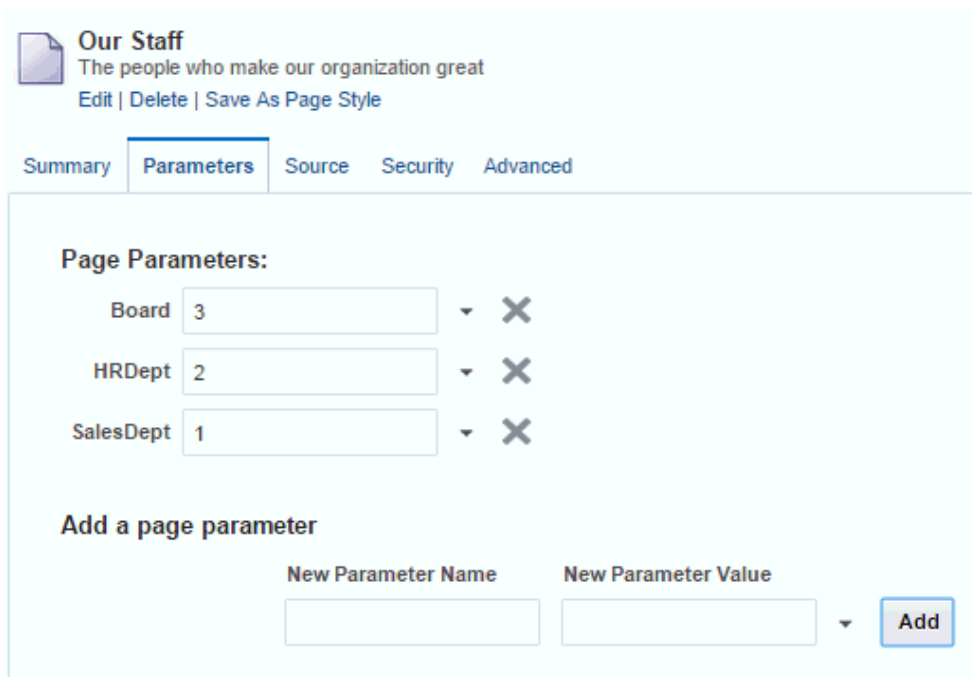
1. Open the page in the page editor, then click its **Actions** icon ( ) and select **Page Information**.

2. 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

Figure 9-13   Adding a Page Parameter

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.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. 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.

Figure 9-14   Viewing Page Source Code (in Portal Editor)
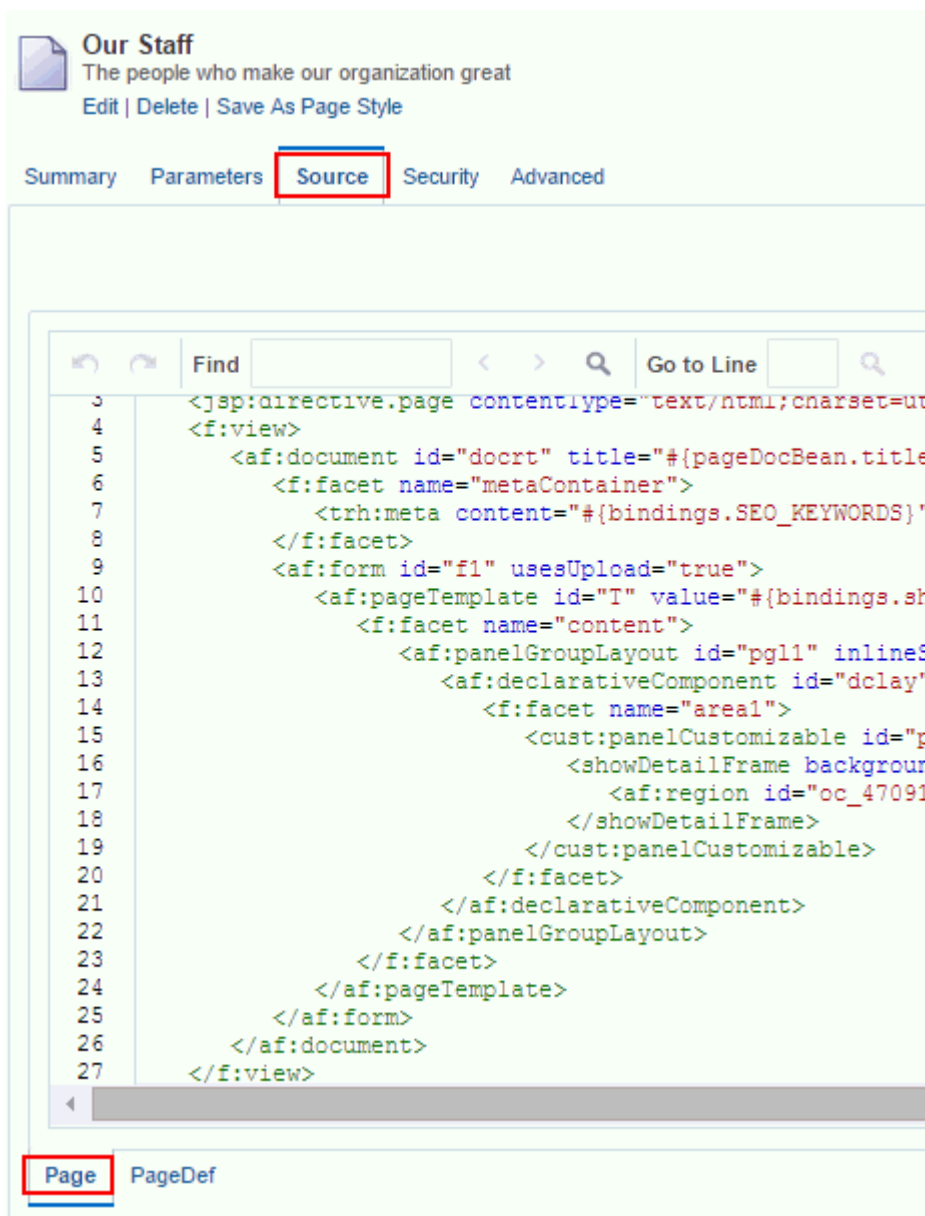
To view the source code for a page:

1. Open the page in the page editor, then click its **Actions** icon ( ) and select **Page Information**.

2. 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.

3. 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. Open the page in the page editor, then click its **Actions** icon ( ) and select **Page Information**.

2. 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).

Figure 9-15   Setting Page Security: Inherit Security
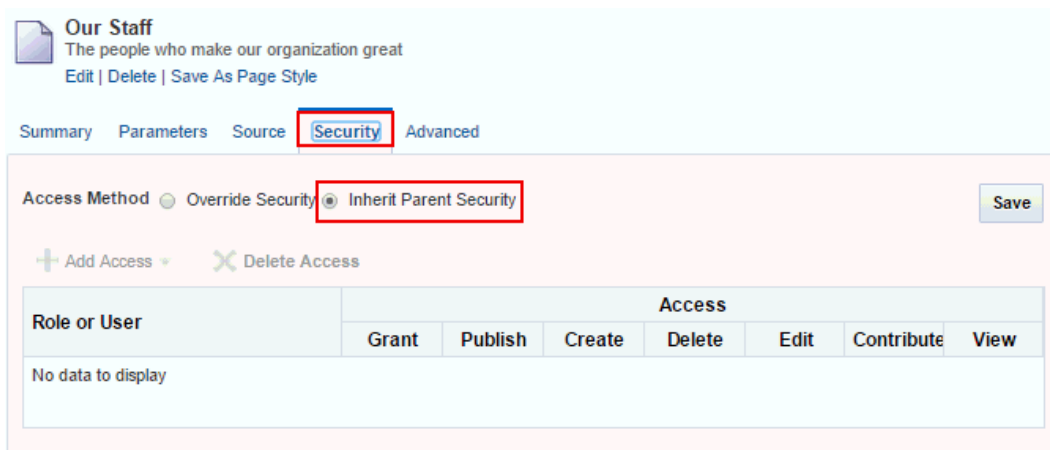
Figure 9-16   Setting Page Security: Custom Settings
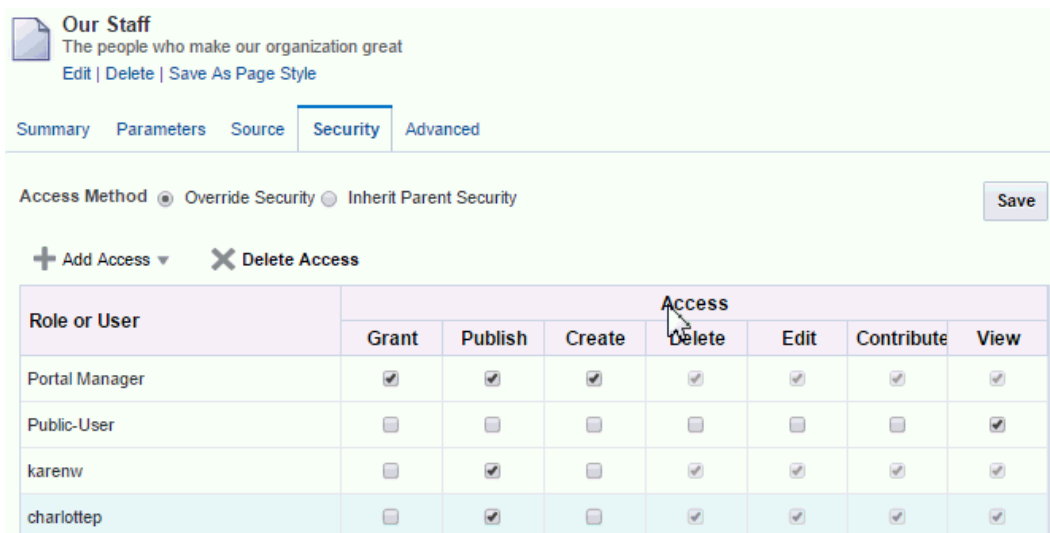
3. To modify the access permissions to users or roles listed under **Role or User**, select or deselect the **Access** check boxes, described in the following table.

> **✎ 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 9-1   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.
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.

4. 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.

5. In the **Search** field, enter a search term or the name of the user, group, or role for whom you want to enable access, and click the **Search** icon.

   For tips on searching for a user or group in the identity store, see Searching for a User or Group in the Identity Store.

   > **✎ Note:**
   >
   > In the Add Roles dialog for pages in a portal, you can add any custom roles that have been created for the portal.

6. 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.

To make multiple selections:

- Ctrl+click to select multiple rows.
- Shift+click to select a range of rows.

7. Click **OK** to confirm your selections, and populate the **Security** tab with the selected users, group, or roles.

8. 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.

9. 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.

10. 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.

11. 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**.

12. 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. Open the page in the page editor, then click its **Actions** icon ( ) and select **Page Information**.

2. On the **Advanced** tab, specify information about the page on the **Target** pane, then click **Save**.

Figure 9-17   Setting Navigation Options for a Page: Target Tab
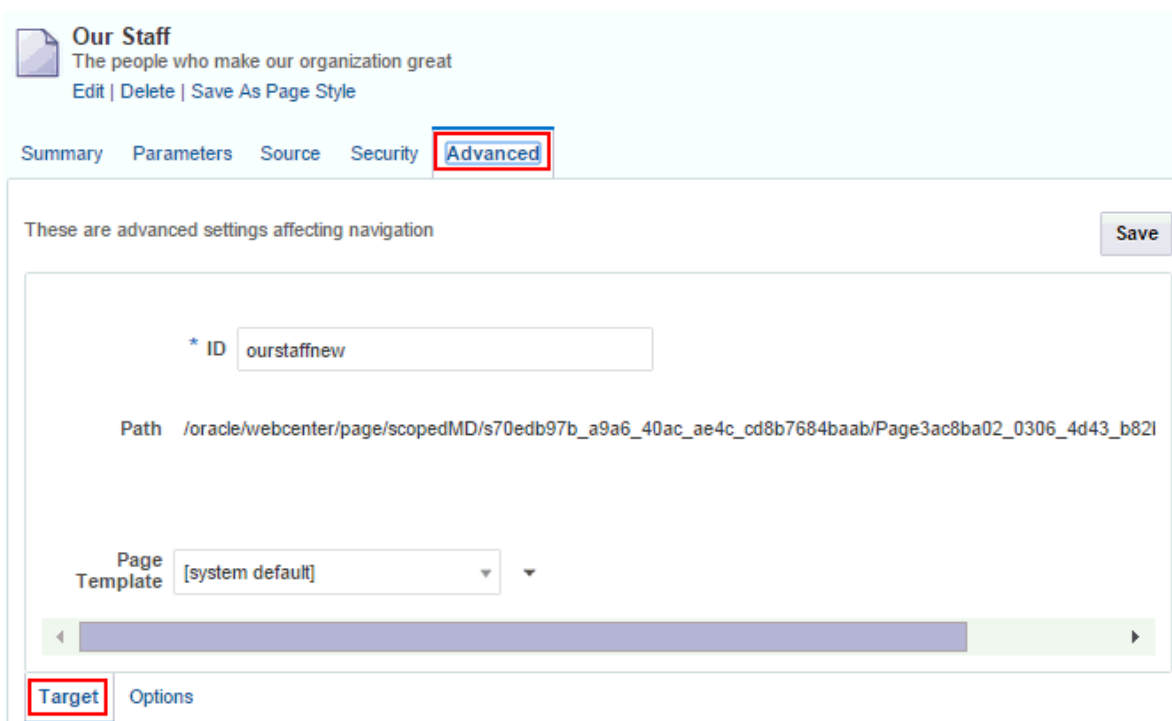
Table 9-2   Page Navigation Item Settings: Target Pane

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.

Table 9-2   (Cont.) Page Navigation Item Settings: Target Pane

Field	Description
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.
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.

3. Set page navigation options on the **Options** pane, then click **Save**.

Figure 9-18   Setting Navigation Options for a Page: Options Tab (in Portal Editor)

Table 9-3   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.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*

10

Working with Resource Catalog Components on a Page

Select from a resource catalog to add resources to a portal page, page template, page style, or task flow.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permission `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Edit Pages` (advanced permissions).
>
> See About Roles and Permissions for a Portal.

Topics:

- About Resource Catalogs
- Adding a Component to a Page
- Performing Actions on a Component
- Saving a Customized Task Flow to a Resource Catalog
- Modifying Component Properties
- Deleting a Component from a Page

About 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.

Displaying and Using a Resource Catalog

When you edit a page, page template, page style, or task flow, the resource catalog is shown when you click **Add Content** in any region, or when you click the **Show Catalog** icon. A resource catalog is organized into folders and subfolders to categorize resources. You can click a folder to expand the resource category, then select the resource that you want to add.

You can navigate back through the resource catalog hierarchy using the icons in the resource catalog menu bar. Use the **Search** field to locate resources by name or description. Click the **Refresh** icon to update the resource catalog with newly added resources.

Figure 10-1 shows the Default Portal Catalog, one of the built-in resource catalogs described in About the Built-In Resource Catalogs.

Figure 10-1   Default Portal Catalog
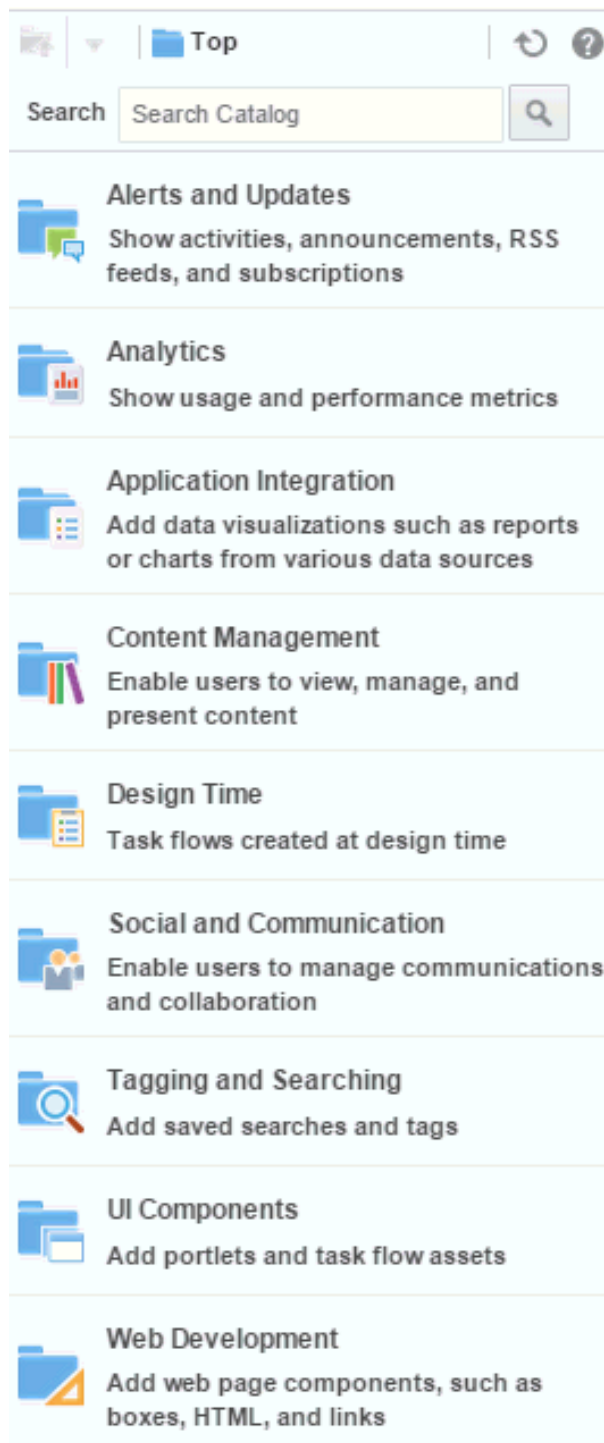
Adding a Component to a Page

The method for adding a component to a page is the same for every resource in the resource catalog.

> **✎ Notes:**
>
> - When you add a component to a page, you must wait for the application status indicator to finish processing before taking additional action.
>
> - The content of the resource catalog varies according to the services that are integrated with the portal, the location from which the catalog is opened, and the resources provided by your administrator. For example, the components that appear in the catalog when you open it from the Home portal differ from those that appear when you open it from a portal.
>
> - For a full list of all components available in WebCenter Portal, you can see the Resource Registry. If the component you want is not present in the resource catalog assigned to the portal pages, you may need to add it.

To add a component to a page:

1. Open the page in the page editor.

Figure 10-2   Page Editor
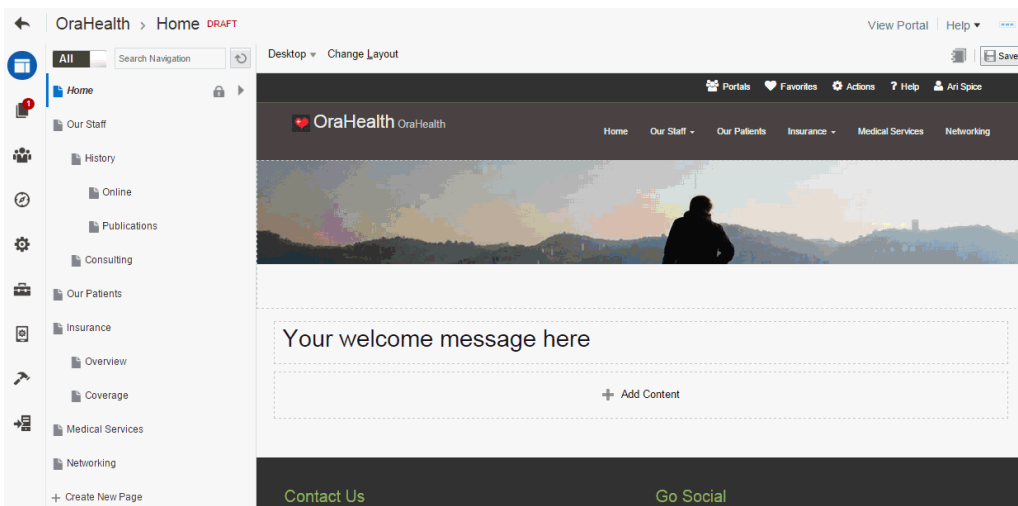
2. (Optional) To show the resource catalog, click **Add Content** in an area of the page or click the **Show Catalog** icon. Click the icon again to hide the resource catalog.

Figure 10-3   Showing and Hiding the Resource Catalog
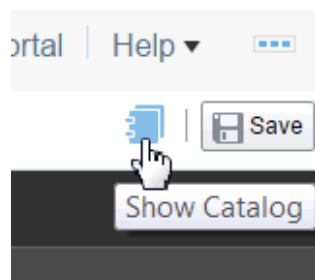
3. In the resource catalog, navigate to the component you want to add to the page by clicking folders to drill down to related components, or search for it.

If the component that you want to add to the page is not included in the resource catalog used by the page, you can create a new version of the resource catalog that includes the components you need, and assign that resource catalog to the page.

As an example, the following figure shows the components available in the **Web Development** folder in the resource catalog.

Figure 10-4   Web Development Components in Resource Catalog
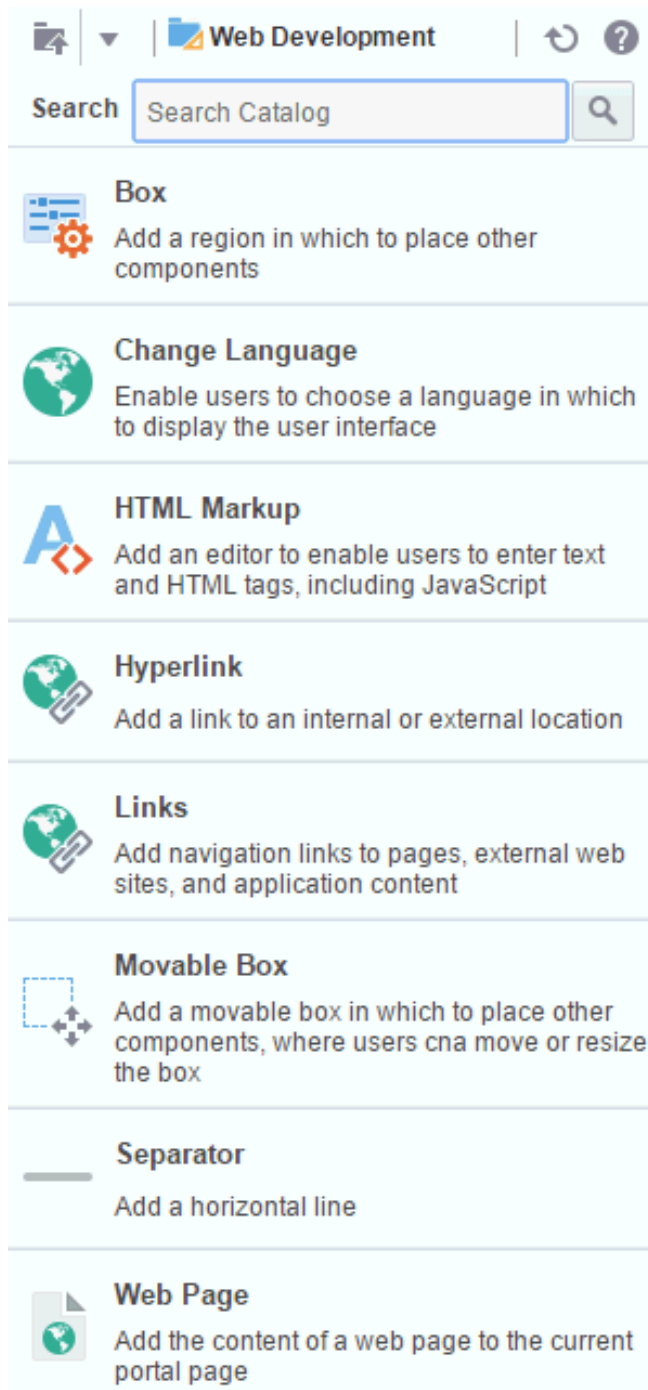
4. Add new components to the page in the following ways:

   • Click a component in the resource catalog to add it to the area where you clicked **Add Content**.

   • Drag the component from the resource catalog to a target location on the page.

5. To move components on the page, click the **Move** icon in the component toolbar and drag it to a new position, or click the **View Actions** menu and select **Move Up** or **Move Down**.

Figure 10-5   Component Toolbar: Move Icon

Figure 10-6   Component Toolbar: View Actions Menu
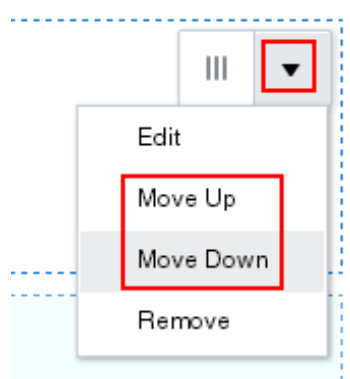
6. Click **Save** to save your changes.

Performing Actions on a Component

When editing a page, you can view and perform available actions on any component.

To view and perform actions on a component on a page:

1. Open the page in the page editor.

2. In the component toolbar, click the **View Actions** menu to view the available actions.

   The available actions may include custom actions added by a developer. The following shows the built-in component actions.

Figure 10-7   Actions Menu on a Component
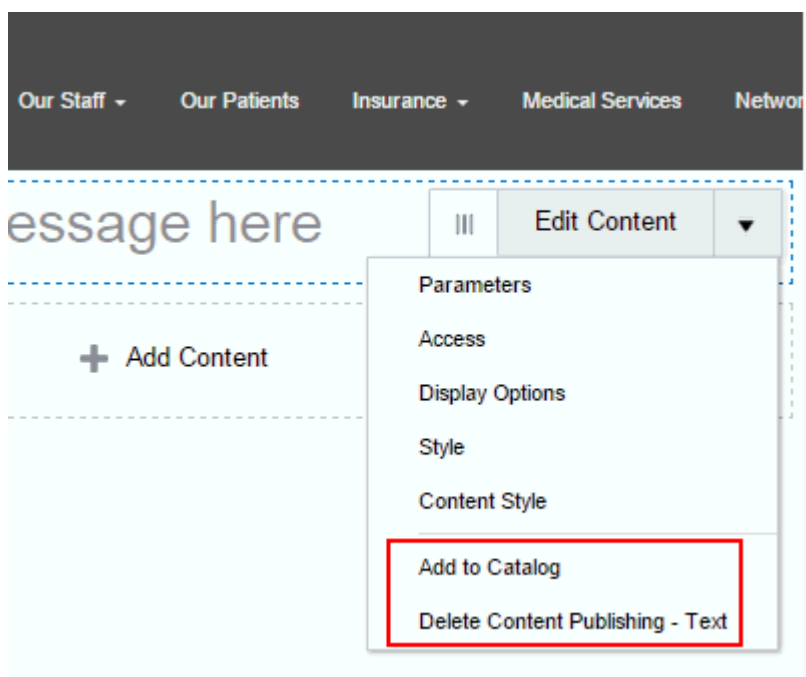
3. Select the desired action:

    *   **Parameters**, **Access, Display Options**, **Style**, and **Content Style** to open the associated properties dialog for the component.

    *   **Move Up** and **Move Down** to reposition the component on the page.

    *   **Add to Catalog** to add the component as a new custom component to the resource catalog for reuse on other portal pages.

    *   **Delete** to delete the component from the page.

Saving a Customized Task Flow to a Resource Catalog

> **Note:**
>
> To perform this task on shared resource catalogs, you must have the application-level `Create, Edit and Delete Resource Catalogs` permission. Users with the `Application Specialist` role have this permission by default.
>
> To perform this task on a portal-level resource catalog, you must have the portal-level permission `Create, Edit and Delete Assets` (standard permissions) or `Create, Edit, and Delete Resource Catalogs` (advanced permissions).

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).

> **Note:**
>
> For a full list of all task flows available in WebCenter Portal, you can refer to the Task Flows folder of the Resource Registry. If you want to use a task flow that is not available to the resource catalog assigned to the portal pages, you can create a custom resource catalog that includes the task flow, and assign that resource catalog to the pages of your portal.

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.

For example, you can add an RSS task flow to a page, modify the RSS properties to point to a news feed, and set the title to "News". If you save this customized task flow to the resource catalog as "News", then other users can simply select it from the resource catalog to add it to a page. Note that 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.

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. Open the page containing the task flow in the page editor.

2. Optionally, edit the task flow properties to modify parameters and display options as desired. Click **Save**.

3. In the task flow component's toolbar, click the **Actions** menu and select **Add to Catalog**.

   > **Note:**
   >
   > The **Add to Catalog** action is available only if you have permission to create a resource catalog. The existing default resource catalog is copied to a new editable resource catalog, which is set as the default resource catalog for the pages in the portal.

Figure 10-8   Actions Menu on a Task Flow
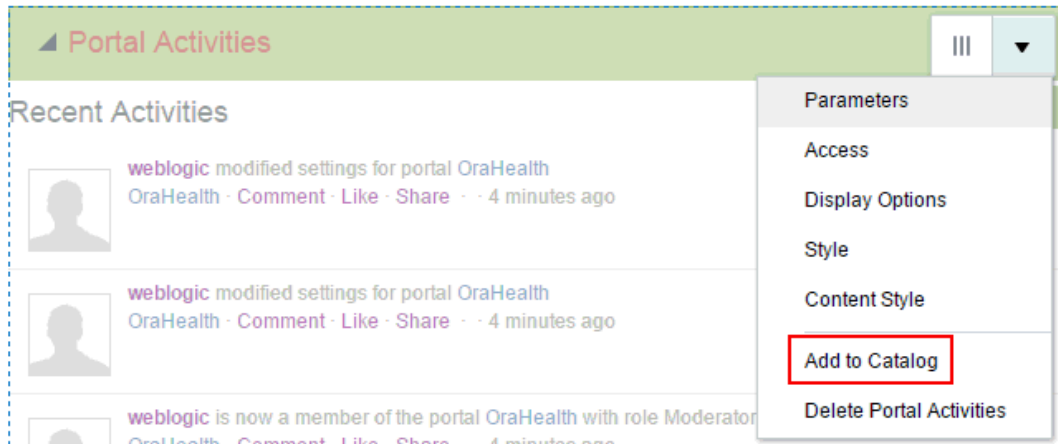
4. In the Add to Catalog dialog:

    a. Enter a name for the custom task flow in the resource catalog. A name that duplicates an already existing task flow name is allowable.

    b. Optionally, enter a description.

    c. From the **Folder** list, select the folder where you want the custom task flow to appear in the resource catalog.

    d. Click **Add to Catalog**.

Figure 10-9   Add to Catalog Dialog
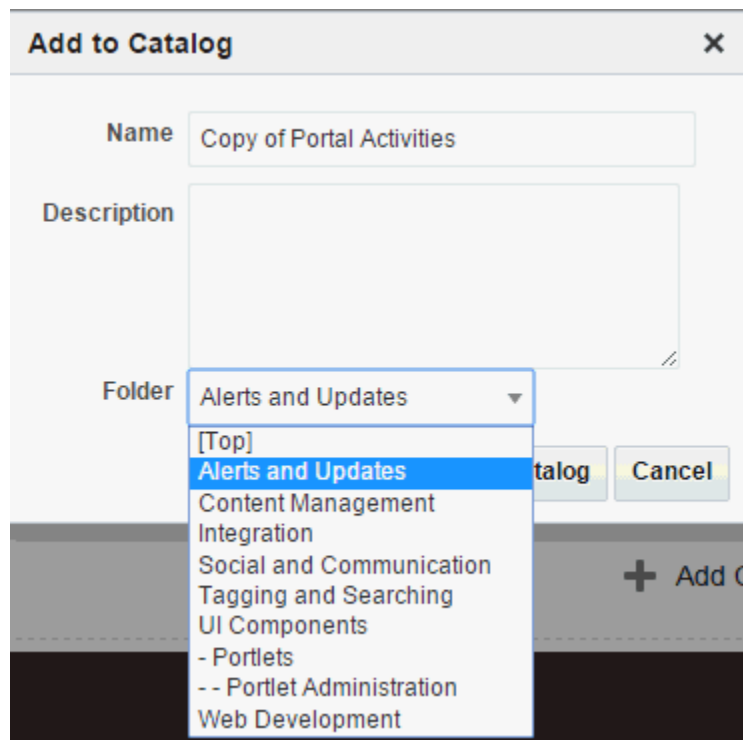
5. Click **Save**.

> **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.

6. Check the resource catalog to confirm that the task flow is listed in the selected folder in the resource catalog. If you do not see the new task flow, try clicking the Refresh icon in the resource catalog.

> **Note:**
>
> If a built-in resource catalog, such as the (non-editable) Default Portal Catalog, is assigned to portal pages and you add a task flow to the resource catalog, a new editable version of the resource catalog is automatically created and set as the default resource catalog for the portal. You will find the new editable resource catalog listed on the portal **Assets** page as **Copy of** *original resource catalog*. If desired, you can further edit and manage the new resource catalog.

7. Perform a test by adding the task flow to the current page to verify that it includes the customizations that you made.

   The task flow can be selected in the resource catalog by any user who has permissions to edit pages that are assigned that resource catalog in the portal.

Modifying Component Properties

The components that you can add to a page from the resource catalog have configurable properties that control the appearance and behavior of the component. The properties available differ from component to component.

This section describes how to customize and set properties on page components, including component access:

- About Component Properties
- Setting Properties on a Component
- Setting Component Parameters
- Setting Component Access
- Setting Component Display Options Properties
- Setting Style and Content Style Properties

About Component Properties

You can use component properties to adjust the appearance and behavior of a component instance and to wire components to each other and to page parameters and page definition variables.

The properties for a component are set in the following dialogs:

> **Note:**
>
> For those properties that allow you to type a value, there is no validation of the value that you enter. If you enter an invalid value for such properties, then the component will ignore the property setting.

- **Parameters**—Settings, unique to the component type, that can control such things as the source of the component's content.
- **Access**—Security settings to show or hide the component to specific roles, users, or groups.
- **Display Options**—Settings for determining content orientation, hiding and showing a header, selecting a display method for an actions menu, and so on.
- **Style**—Font, color, and dimension settings on the component that override such values on the parent component, the page, and the application. Style values affect component content and the elements that surround the content, but may or may not be exposed depending on whether or not the component elements (such as the skin) support modifications to these settings.
- **Content Style**—Font, color, and dimension settings on component content that override such values specified for **Style**. These settings may or may not be exposed depending on whether or not the component elements (such as the skin) support modifications to these settings.

Setting Properties on a Component

This section outlines the general steps for setting properties on any page component.

> **See Also:**
>
> For information about properties associated with a particular component, see the section that covers that component.

> **Note:**
>
> - When you enter most types of property values and then click **Apply**, the properties dialog remains open. With values other than expected value types, the dialog closes, and the page is refreshed to reflect the new value. For example, if a component takes a `java.util.ArrayList` of `java.awt.Color` classes, then the properties dialog closes after you add the value, and the page refreshes with the new properties.
>
> - In addition to entering literal text (*value*), you can also enter an Expression Language (EL) expressions (`#{value}`). If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.
>
> - 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. Generic Display Options are those cataloged in Table 10-1.
>
>   EL validation is not performed on non-generic display options.

To set properties of a component on a page:

1. Open the page in the page editor.

2. In the component toolbar, click the **View Actions** menu and select the properties you want to edit.

Figure 10-10   Edit Action on a Component
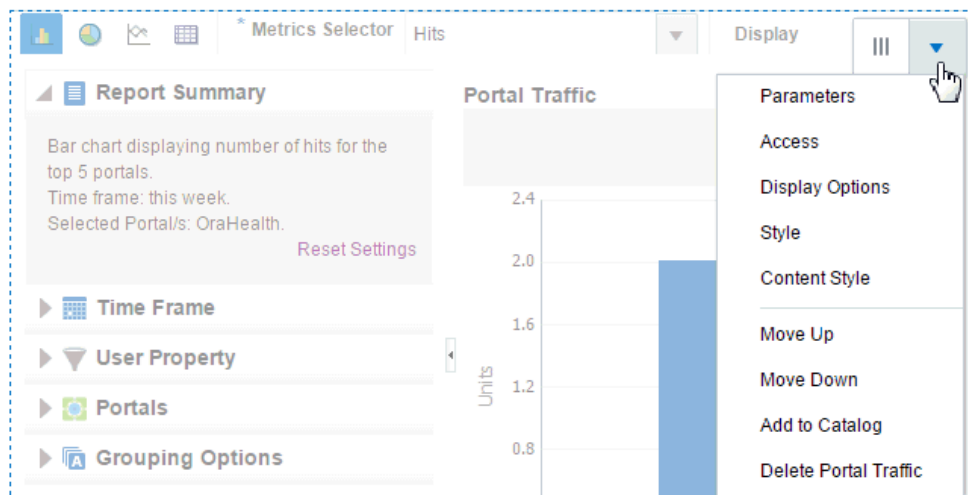
3. In the properties dialog, edit the component properties.

> **Tip:**
>
> Click the **Help** icon in the properties dialog to navigate to property descriptions for the current component.

4. Click **OK** to close the properties dialog.

Setting Component 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.

Figure 10-11   Parameters Dialog for a Consumer Component
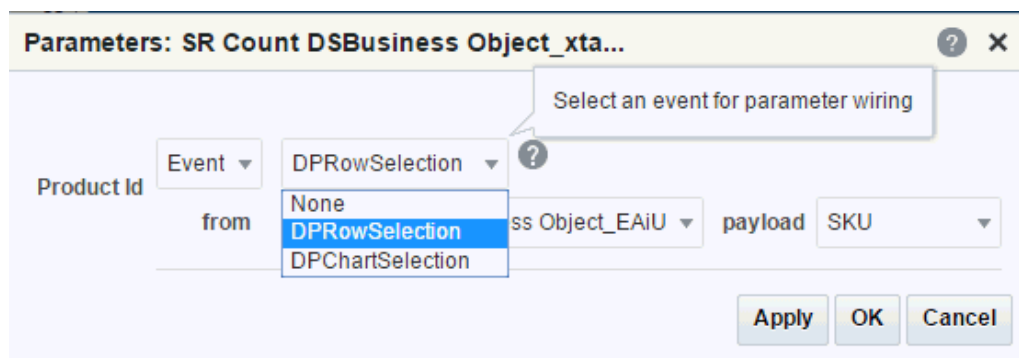
For more information, see Wiring Events to Component Parameters
To set the parameters for a component on a page:

1. Open the page in the page editor.

2. In the component toolbar, click the **View Actions** menu and select **Parameters** to open the Parameters dialog.

Figure 10-12   Parameters Dialog: Portal Browser Task Flow

3. 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.

    If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

    For parameter descriptions, click the link for the task flow or component you are editing:

    *   Activity Stream Task Flow Parameters
    *   Analytics Task Flow Parameters
    *   Announcements Task Flow Parameters
    *   Connections Task Flow Parameters
    *   Content Manager Task Flow Parameters
    *   Content Presenter Task Flow Parameters
    *   Discussions 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

- • Oracle DOCS Content Manager Task Flow Parameters

- • Polls Task Flow Parameters

- • 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

- • Saved Search Task Flow Parameters

- • Styled Text Component Parameters

- • Subscription Preferences (Notifications) Task Flow Parameters

- • Tags Task Flow Parameters

- • Text Component Parameters

4. Save your changes.

Setting Component 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.
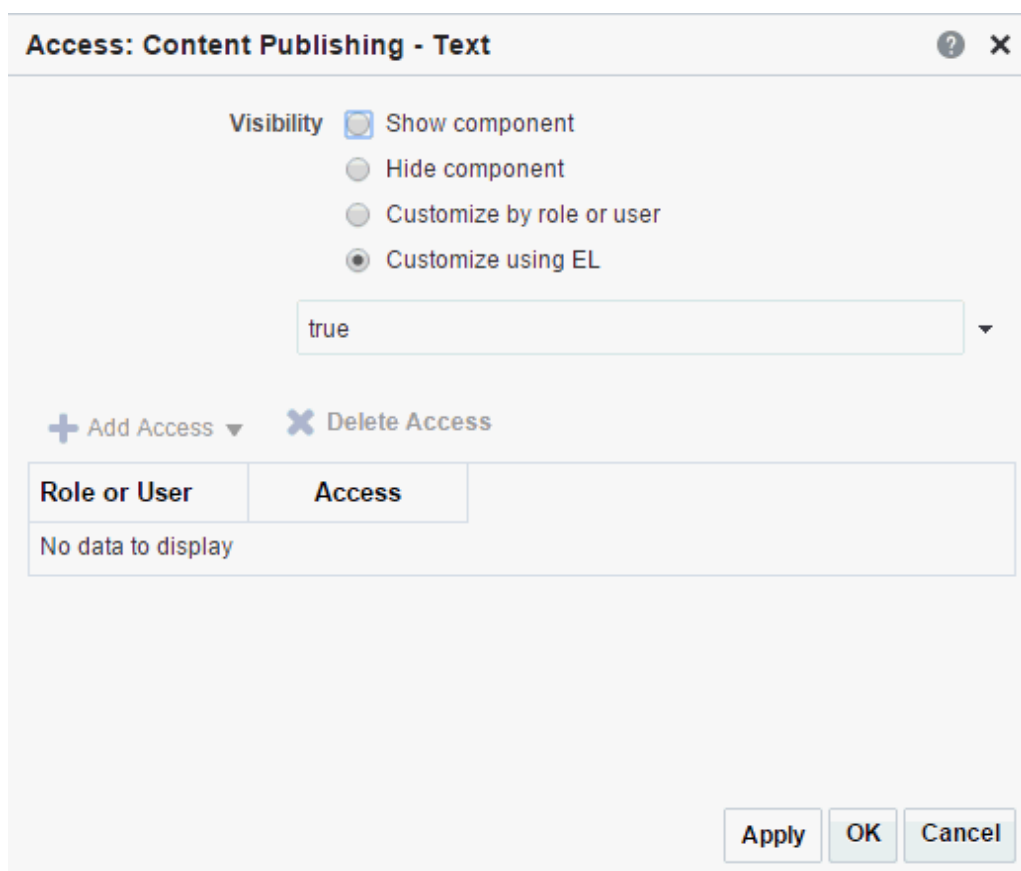
> ✏ **See Also:**
>
> You can also set security on the custom components that you import through the Assets Manager. For more information, see Setting Security for an Asset.

To set the access (visibility) for a component on a page:

1. Open the page in the page editor.

2. In the component toolbar, click the **View Actions** menu and select **Access** to open the Access dialog.

Figure 10-13   Component Access Dialog

3. 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.

See step 4.

- **Customize using EL** to enter Expression Language (EL) that must evaluate to true for the component to be visible.

  See step 5

4. 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.

     > **Tip:**
     >
     > For help on searching for a user or group, see Searching for a User or Group in the 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**.

Figure 10-14   Setting Component Access

5. If you select **Customize using EL**, enter Expression Language (EL) that must evaluate to true for the component to be visible.

> **Note:**
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

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']}
```

6. Save your changes.

Setting Component Display Options Properties

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 10-1   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 10-1   (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 10-1   (Cont.) Display Options Properties

Property	Description
Font Size	Specify the size of text appearing in the component header.
	Enter a value using one of the following types of values:
	• length—Sets the font size to a fixed size. For example, enter: 14px, 1.5em, and so on
	• xx-small, x-small, or small
	• medium—The default
	• large, x-large, or xx-large
	• smaller—Sets the font size to a size smaller than the parent element.
	• larger—Sets the font size to a size larger than the parent element.
	• %—Sets the current font size to a percentage of the font size of the parent element. For example, enter: 75%
Font Style	Select an option for applying a font style to the text in a component header. Choose from:
	• **Bold**
	• *Italic*
	• <u>Underline</u>
	• 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. Open the page in the page editor.

2. In the component toolbar, click the **View Actions** menu and select **Display Options** to open the Display Options dialog.

Figure 10-15   Component Display Options: Basic Properties

3. 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.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

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

- 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

4. Save your changes.

Setting Style and Content Style Properties

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.

Table 10-2   Style and Content Style Properties

Property	Description
Background Color	Select a component background color.
	If you specify a background color for Content Style, then the background color specified for the Style property is not applied.

Table 10-2   (Cont.) Style and Content Style Properties

Property	Description
Background Image	Enter the URL to an image you want to render in the component background. Use standard CSS syntax. For example: `url(http://www.abc.com/image.jpg)`
Color	Select a default color for any text included in the component instance. For example, imagine that you have added a Text component to a Box component. When you set Box Style properties, the default text color you apply to the Box is also automatically applied to the Text component, unless you also define a Color value for the Text component. Select a color using one of the following techniques: • Select a color by clicking it. • Enter the color's RGB equivalent in the **Color** field. Enter RGB values in the format `RRGGBB` or `#RRGGBB` or `r,g,b` • Create a custom color by clicking **Custom Color** in the picker and selecting a color and a saturation level using the selector and the slider provided.
Font	Specify the font to use for text appearing in the component header. Enter one or more fonts. Separate multiple values with a comma (,), for example `arial,helvetica,sans serif`. Enclose font names that contain spaces in single quotation marks, for example `'Times New Roman'`. The browser tries to use the first value, and uses other values in turn, depending on which font is available to the local system.
Font Size	Enter the size of component text relative to either your browser's default font size or the font size of the parent element. Enter one value from the following types of values: • `length`–Sets the font size to a fixed size. For example, enter: `14px. 1.5em`, and so on • `xx-small, x-small,` or `small` • `medium`–The default • `large, x-large,` or `xx-large` • `smaller`–Sets the font size to a size smaller than the parent element. • `larger`–Sets the font size to a size larger than the parent element. • `%`–Sets the current font size to a percentage of the font size of the parent element. For example, enter: **75%**
Font Style	Select the style for the component fonts. Choose from: • **Bold** • *Italic* • Underline • Strikethrough The font style you select here applies to any text inside the component.
Height	Specify the height of component content. Set a fixed height for component content. You can use any standard CSS unit of measure, such as `pt, px, pc, li`, and so on. Avoid expressing a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect. For example, resizing an image using a % value will resize its parent container, not the image itself. If you want your component to take up 100% of a page, consider creating a page using the Stretch page style and adding the component to it. The Height property works with the `Stretch Content` property, available in the Display Options dialog. `Stretch Content` enables a container to stretch its content to the specified height.

Table 10-2   (Cont.) Style and Content Style Properties

Property	Description
Margin	Specify the border of space to draw around the component. Enter one of the following types of values: • An absolute value. Include your preferred unit of measurement. For example: `2px` Use only those units of measurement supported in standard CSS, such as `pt`, `px`, `pc`, `li`, and so on. • A percentage of the margin of a parent component (provide a percent sign with your value, such as `10%`). • `auto`: Set the value automatically according to browser defaults.
Other CSS	Specify additional CSS for the component. Add any other CSS encoding you care to that is not covered by the other Style or Content Style properties. You must use standard CSS syntax for this value to be valid. For example, a setting of `padding:0` removes all padding on a Box component, useful when nesting boxes inside boxes.
Style Class	Specify the CSS style class to use for this component. For example, you can use this property to target specific skin settings on an individual Box component. The style class may be defined in your JSF (`.jspx`) or skinning CSS file. **Note:** Style classes are a set of styles bundled together and given a name. In contrast, values entered for `Other CSS` are individual styles. `Style Class` values are added to a component's `styleClass` attribute. `Other CSS` values are added to a component's `inlineStyle` attribute. This property appears only in the Style dialog.
Width	Specify the width of component content. Set a fixed width for component content. You can use any standard CSS unit of measure, such as `pt`, `px`, `pc`, `li`, `%`, and so on. Avoid expressing a Width value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect. For example, resizing an image using a % value will resize its parent container, not the image itself. If you want your component to take up 100% of a page, consider creating a page using the Stretch page style and adding the component to it.

To set the Style and Content Style properties for a component on a page:

1. Open the page in the page editor.

2. In the component toolbar, click the **View Actions** menu and select either **Style** or **Content Style** to open the associated dialog.

Figure 10-16   Style Dialog

Figure 10-17   Content Style Dialog
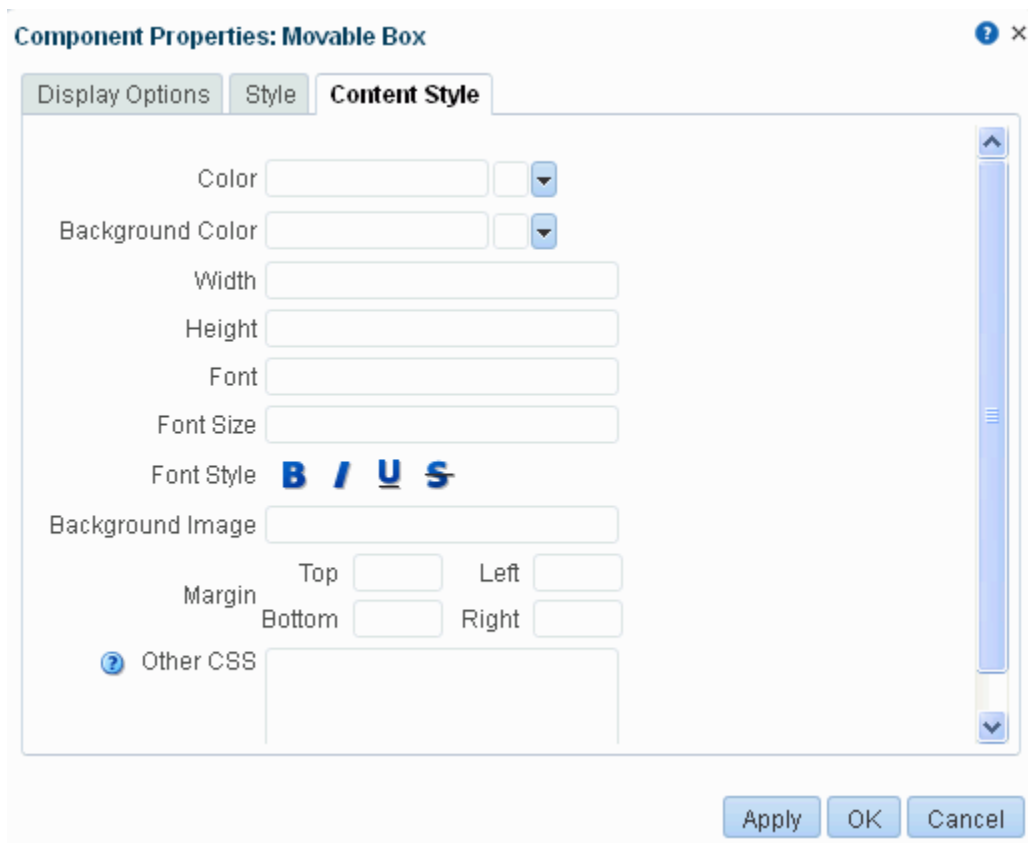
3. Enter values for Style and Content Style properties, or specify your own values through the `Other CSS` property.

    See "Other CSS Property: Usage and Examples").

4. Save your changes.

Other CSS Property: Usage and Examples

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.

See `http://www.w3.org/TR/CSS2/propidx.html`.

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.

To create a border on a task flow, access its properties and add CSS encoding in the **Other CSS** field in the Style dialog.

Figure 10-18   Adding CSS Encoding to a Component
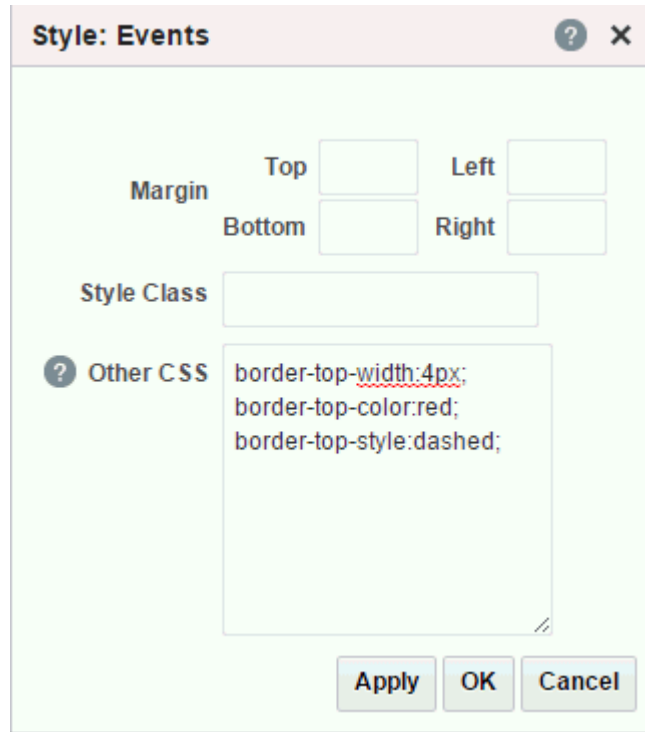
Figure 10-19   A Border Created Through the Other CSS Property
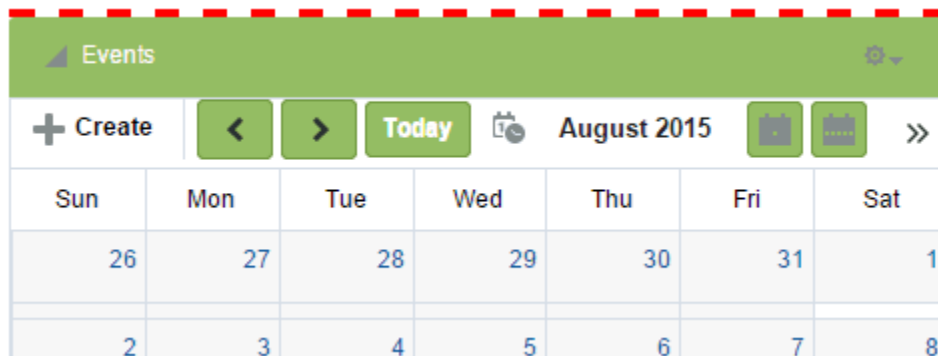
This table provides examples of CSS you can use the set the `Other CSS` property.

Value	Description and Examples
`font-size`	Size of component text relative to either your browser's default font size or the font size of the parent element.
	Syntax:
	`font-size:`*`value`*
	where *`value`* is one of the following:
	• *`length`*—fixed font size; for example: `font-size: 14px`.
	• `xx-small`
	• `x-small`
	• `small`
	• `medium`—default.
	• `large`
	• `x-large`
	• `xx-large`
	• `smaller`—smaller font than the parent element.
	• `larger`—larger font than the parent element.
	• *`x`*`%`—a percentage of the font size of the parent element; for example: `font-size: 75%`.
`background-position`	Starting position of a background image.
	Syntax:
	`background-position:`*`value1 value2`*
.	Typically, you enter two values. Except where noted, if you specify only one value, the second value is interpreted as `center`.
	`value1 value2` express horizontal and vertical as positions in any of the following combinations:
	• `top left`
	• `top center`
	• `top right`
	• `center left`
	• `center center`
	• `center right`
	• `bottom left`
	• `bottom center`
	• `bottom right`
	• *`x`*`%` *`y`*`%`—Horizontal (*x*) and vertical (*y*) positions expressed as percentage. The top left corner is `0% 0%`. The bottom right corner is `100% 100%`. If you specify only one value, the other value is interpreted as `50%`. You can mix % and positions.
	• *`x`* *`y`*—Horizontal (*x*) and vertical (*y*) positions expressed as unit of measure. The top left corner is `0 0`. Units can be pixels (`0px 0px`) or other CSS units. If you specify only one value, the other value is interpreted as `50%`. You can mix % and positions.
	For example:
	`background-position: top left`

Value	Description and Examples
`background-repeat`	Repetition value for the background image. Syntax: `background-repeat:value` where `value` is one of the following: • `no-repeat`—Do not repeat the image. • `repeat`—Repeat the image to fill the container. • `repeat-x`—Repeat the image horizontally but not vertically. • `repeat-y`—Repeat the image vertically but not horizontally.
`padding`	White space (or clear space) around a component. Enter up to four values. Express values in a specific length or as a percentage of the closest element, using any standard CSS unit of measure, such as `pt`, `px`, `pc`, `li`, `%`, and so on. • One value sets padding for all four sides. For example: `padding: 10px` • Two values set padding for top/bottom and left/right. For example: `padding: 10px 15px` • Three values set padding for top, left/right, and bottom. For example: `padding: 10px 5% 10px` • Four values set padding in turn for top, right, bottom, left. For example: `padding: 5px 10px 15px 20px`
`padding-bottom`	White space (or clear space) below of the element. Express values in a specific length or as a percentage of the closest element. For example: `padding-bottom: 10px`
`padding-left`	White space (or clear space) at the left side of the element. Express values in a specific length or as a percentage of the closest element. For example: `padding-left: 2%`
`padding-right`	White space (or clear space) at the right side of the element. Express values in a specific length or as a percentage of the closest element. For example: `padding-right: 1pc`
`padding-top`	White space (or clear space) above the element. Express values in a specific length or as a percentage of the closest element. For example: `padding-top: 16pt`

Deleting a Component from a Page

To delete a component from a page:

1. Open the page in the page editor.

2. In the component toolbar, click the **Actions** menu and select **Delete *component name***

Figure 10-20   Remove Action on a Component
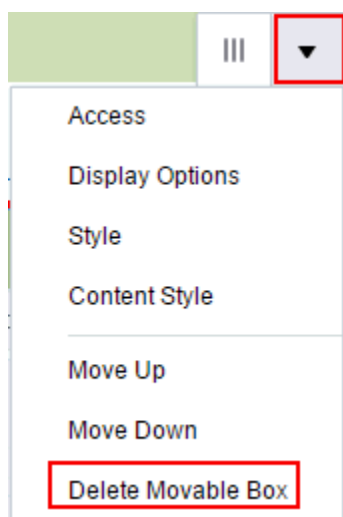
3. In the confirmation dialog, click **Delete**.

    The component is permanently removed from the page. If the component had any
    child components, those child components are deleted as well.

4. Click **Save** to save your changes.

11
Working with Web Development Components on a Page

Add web development components to a portal page to include dynamic content such as images, HTML, links, and provide areas for users to add or work with content.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permission `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Edit Pages` (advanced permissions).
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- About Web Development Components
- Adding a Web Development Component to a Page
- Working with the Box Component
- Working with the Change Language Component
- Working with the HTML Markup Component
- Working with the Hyperlink Component
- Working with the Links Component
- Working with the Movable Box Component
- Working with the Separator Component
- Working with the Web Page Component

About Web Development Components

Web development components add dynamic content to a page, such as images, HTML, and links, as well as components that end users can modify at runtime, such as language selection and areas to add their own content. You can use these components to boost company branding (Image), provide a mission statement (Text), direct users to related information (Links and Hyperlink), and provide areas for users to add or work with content (Box).

> **✎ Note:**
>
> The Text and Image components are available in the default resource catalog under the Content Management folder. See Adding a Text Component to a Page Style or Page and Adding an Image Component to a Page Style or Page for more information on how to add a Text or Image component to a page style or page.

Adding a Web Development Component to a Page

The process of adding a web development component to a page is the same as the process for any resource catalog component, as described in Adding a Component to a Page.

To add a web development component to a page:

1. From the resource catalog in the page editor, click the **Open** link next to **Web Development** to display a selection of web development components.

Figure 11-1   Web Development Components in Resource Catalog
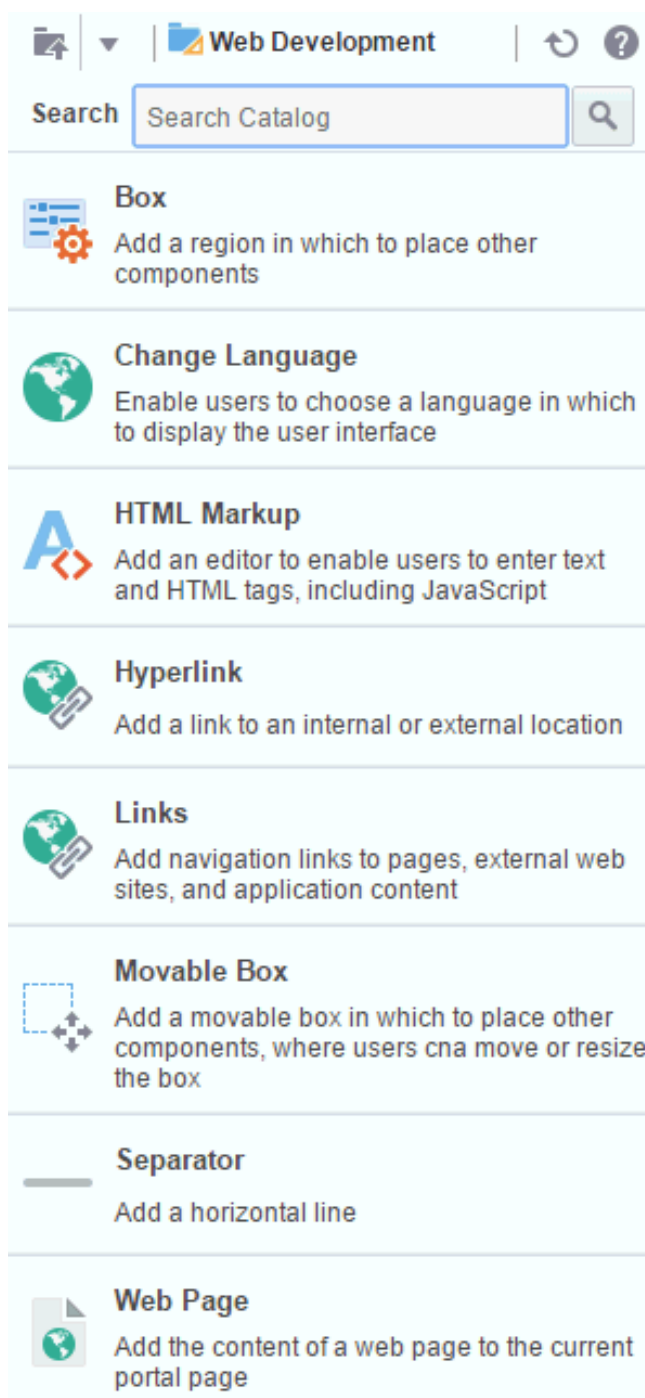
2. Click **Add** next to the component that you want to add to the page.

3. Set properties for the new component:

   • Working with the Box Component

   • Working with the Change Language Component

   • Setting HTML Markup Component Properties

   • Setting Hyperlink Component Properties

- • Working with the Links Component
- • Setting Movable Box Component Properties
- • Working with the Separator Component
- • Setting Web Page Component Properties

> 💡 **Tip:**
>
> Some components are provided as part of the page infrastructure and are not obviously exposed in the resource catalog. An example of this is the `spacer` component. Although you cannot add more of them to a page, you can configure their properties. For more information, see Working with Layout Components .

Working with the Box Component

The Box component is a content area that you can use to place other components on the page. Unlike its counterpart, Movable Box, a Box cannot be moved around the page at application runtime. The Box component is the landing place for the task flows, portlets, and other components that you add to a page.

In the page editor, a Box is rendered simply as a rectangle comprised of dashed lines, where a user can click **Add Content** to open the resource catalog and add a component.

Figure 11-2   Box Component Above a Movable Box Component
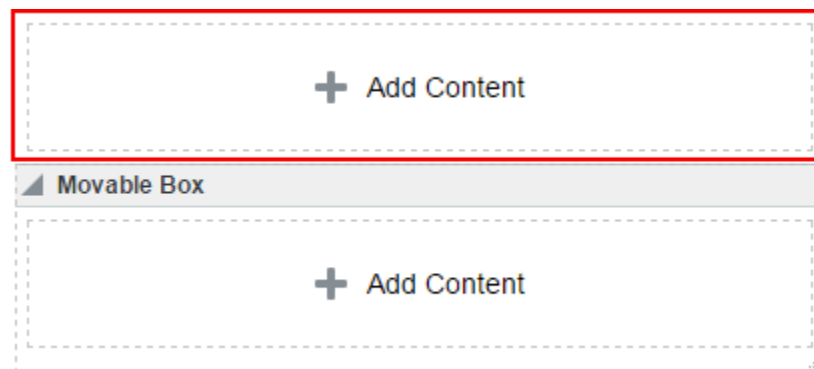
Working with the Change Language Component

You can add the Change Language task flow to any page (in the Home portal, in a portal, or a business role page) to allow users to choose the language in which to display the UI.
For more information, see Adding a Change Language Task Flow to a Page.

Working with the HTML Markup Component

This section provides an overview of the HTML Markup component and lists and describes its associated properties. It also provides a sample use case for embedding a YouTube video onto a page.

This section includes the following subsections:

- About the HTML Markup Component
- Setting HTML Markup Component Properties

About the HTML Markup Component

The HTML Markup component is a simple editor for entering raw text and HTML tags, including JavaScript embedded in HTML `<script>` tags.

Figure 11-3   An HTML Markup Component

Enter markup through the editor's component properties:

- Enclose JavaScript in the appropriate HTML markup. The HTML must be valid XHTML.

  For example:

  ```
  <script type="text/javascript">
       document.write("Welcome to the club");
  </script>
  ```

- If you need to enter non-XHTML, then it must be bracketed appropriately (that is, wrapped in CDATA). For example: `<![CDATA[non-conforming HTML]]>`.

- JavaScript will execute *only* when the page is rendered with a full URL page request. If you navigate to the page from a tab in your portal, the JavaScript will not execute. You can work around this limitation by creating a page style to execute JavaScript when it loads.

> ⚠ **WARNING:**
>
> This component must be used with caution as it can cause pages to break if not used properly. If necessary to resolve errors, you can log out and log in again to reset the page editor.

The editor's header appears in the page editor, but does not appear in page view mode. This enables you to place an individualized message on a page, for example, `Welcome #{securityContext.userName}!`, without cluttering the message with the component header.

> 💡 **Tip:**
>
> If you enter an EL expression, such as `#{securityContext.userName}`, the output is the value of the expression; in this case, the name of the current user.

Setting HTML Markup Component Properties

You can set Display Options and Style properties on a HTML Markup component.

To set HTML Markup component properties:

1. Open the page in the page editor.

2. In the HTML Markup component toolbar, click the **View Actions** menu and select the properties you want to set:

   - **Display Options** properties.

   - **Style** properties are common to many other components. See Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

3. Save your changes.

HTML Markup Component Display Options

The following table lists and describes HTML Markup component display options.

Table 11-1   HTML Markup Component Display Options

Property	Description
`Escape`	A check box for enabling or disabling literal evaluation of special characters.
	Use this property to make the output *safe* or *not safe*. Safe means that any tags, such as `<script>` are escaped into `<script>` so that they do not run. Not safe means whatever you enter for `value` finds its way onto the page, even if it does something undesirable.
	• Checked (`true`) enables literal evaluation of such characters as angle brackets (<|>) and HTML special characters. For example, when a user enters — it is rendered as —.
	• Deselected (`false`) disables literal interpretation of special characters. For example, when a user enters —, it is rendered as —. False is the default value.
`No Wrap`	A check box for enabling or disabling text wrapping.
	• Checked (`true`) disables text wrapping. Users must enter line breaks manually.
	• Deselected (`false`) enables text wrapping. Lines wrap in accordance with the component width. False is the default value.
`Short Desc`	A field for entering tooltip text for the HTML Markup component.
	When users roll their mouse pointers over the component, this text appears as a tooltip.

Table 11-1   (Cont.) HTML Markup Component Display Options

Property	Description
Value	A field for specifying the content that this component renders.
	In addition to text, this property also accepts JavaScript, Expression Language (EL) expressions, and HTML to publish video, music, Google Gadgets, and other types of content to your application pages. For example:

```
<object width="640" height="385">
    <param name="movie"
            value="http://www.youtube.com/v/cAYw2zcSIPw?
fs=1&amp;hl=en_US" />
    <param name="allowFullScreen" value="true" />
    <param name="allowscriptaccess" value="always" />
    <embed src="http://www.youtube.com/v/cAYw2zcSIPw?fs=1&amp;hl=en_US"
            type="application/x-shockwave-flash"
allowscriptaccess="always"
            allowfullscreen="true" width="640" height="385" />
</object>
```

After you save your changes and close the page editor, the HTML Markup component shows the evaluated value of the markup.

> ✎ **See Also:**
>
> Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Working with the Hyperlink Component

This section provides an overview of the Hyperlink component and lists and describes its unique properties. It includes the following subsections:

- About the Hyperlink Component
- Setting Hyperlink Component Properties

About the Hyperlink Component

Use the Hyperlink component to add a link to a page. The Hyperlink can point to a location that is either internal or external to the application.

A Hyperlink component is comprised of two elements: the link text and the link URL, both of which are added through component properties.

Figure 11-4   Hyperlink Component

Click edit icon to define hyperlink

Hyperlinks can take both internal and external link targets. For an internal target, you can use a relative directory path. For an external target (a target outside of the portal), always use the full URL.

> **✎ Note:**
>
> **Note**: For an external URL to be found valid by WebCenter Portal, the system administrator must add it to the list of valid URLs in the `valid-link-url.xml` file. See Adding a List of Valid External URLs in *Administering Oracle WebCenter Portal*. If an external URL is not listed in the file, the following error message appears:
>
> *The URL entered is not available in the list of valid URLs. Contact your system administrator for the list of valid URLs.*

> **💡 Tip:**
>
> An easy way to obtain the relative directory path of a portal page is to navigate to the target page and go through the motions of adding it as a Favorite. By default, the Add Favorite dialog provides the relative URL of the current page. Simply copy this information, and use it to define the Hyperlink target. For information about adding a Favorite to the portal, see Managing Your Favorites in *Using Portals in Oracle WebCenter Portal*.
>
> An easy way to obtain the direct URL to a portal page is to access its page information settings. For more information, see Viewing and Modifying Page Settings.

Setting Hyperlink Component Properties

You can set Display Options and Style properties on a Hyperlink component.

To set Hyperlink component properties:

1. Open the page in the page editor (see Opening a Page in the Page Editor).

2. In the Hyperlink component toolbar, click the **View Actions** menu and select the properties you want to set:

   - **Display Options** properties are described in Hyperlink Component Display Options.

   - **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

3. Save your changes.

Hyperlink Component Display Options

The following table lists and describes Hyperlink component display options.

Table 11-2   Hyperlink Component Display Options

Property	Description
`Title`	A field for specifying hyperlink text Enter a word or phrase to use as link text.
`Destination`	A field for entering the hyperlink target URL. Enter the web address of the page to link to.
`Open in a new window`	Option for determining link target open behavior. • Select to open the link target in a new browser tab or window. • Deselect to open the link target in the current browser tab or window.
`Show Component`	Select (default) to show the component on the page. Deselect to hide the component from view.

> **✎ See Also:**
>
> Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Working with the Links Component

This section provides information about the Links component, how to set it up, and how to configure its properties. It includes the following subsections:

- About the Links Component
- Adding Navigation Links Using the Links Component
- Configuring an Advanced Search for Content Links
- Configuring a Link in the Links Component
- Reordering Navigation Links
- Deleting a Link from the Links Component
- Setting Links Component Properties

About the Links Component

To add a Links component to a page click the **Open** link next to **Web Development** from the resource catalog to display a selection of web development components. Click **Add** next to the Links Component.

Use the Links component to add a navigation instance to a page. Links component navigation can include links to pages, external web sites, and portal content. A browse capability is available to simplify the process of locating link targets. An advanced search feature is also available to assist in locating application objects, such as a file.

The Links component enables you to add a navigation links to a page, outside the more formal structure of your portal's navigation.

Figure 11-5   Links Component

The links component is associated with the page or template on which it is placed. When you put a links component on a page and add some links, those links are associated with the page. That is, the lifecycle of the links component respects the lifecycle of the page or template on which it is placed. For example:

- When a page containing links is copied, all the links are also copied, and the page copy has its own set of links. Modifying links on the original page does not affect the page copy. The same is true for links on page templates.

- When a page is deleted, all links associated with the page are also deleted. The same is true for links on page templates.

- If a portal template contains pages with links, creating a new portal based on the template effectively creates a clone of the template. Consequently, the new portal has its own set of links, which can modified in the portal.

- When a portal is exported or imported, any links associated with portal pages are also exported or imported.

There are also controls on each link for configuring a given link's properties and deleting the link.

Figure 11-6   Controls on Individual Links

The Links component's **Add Link**, **Edit Link**, and **Delete Link** actions are available only in page view mode. Users with `Edit Page` permission can add, modify, or delete links. Users without `Edit Page` permission can see the added navigation links, but cannot add, modify, or delete them.

The Links component's properties provide opportunities for controlling the behavior and look and feel of a Links component instance.

> **⚠ WARNING:**
>
> The Links component Parameters `Navigation` and `Start Path` are preconfigured and must not be changed. Changing these parameters can result in breaking the page.

Adding Navigation Links Using the Links Component

To add portal navigation links using the Links component:

1. Click the **Add Link** menu and select a link type:

    *   **Page Link**—Add a link that targets an application page.
    *   **External Link**—Add a link that targets a site that is external to the application.
    *   **Content Link**—Add a link that targets a document from a content repository.

To add a Page Link:

1. Select **Page Link** to open the New Page Link dialog.

    Figure 11-7   New Page Link Dialog

2. In the **Name** field, enter a display name for the link.
3. For **Path**, click the Search icon to open the Select a Page dialog.

Figure 11-8   Select a Page Dialog
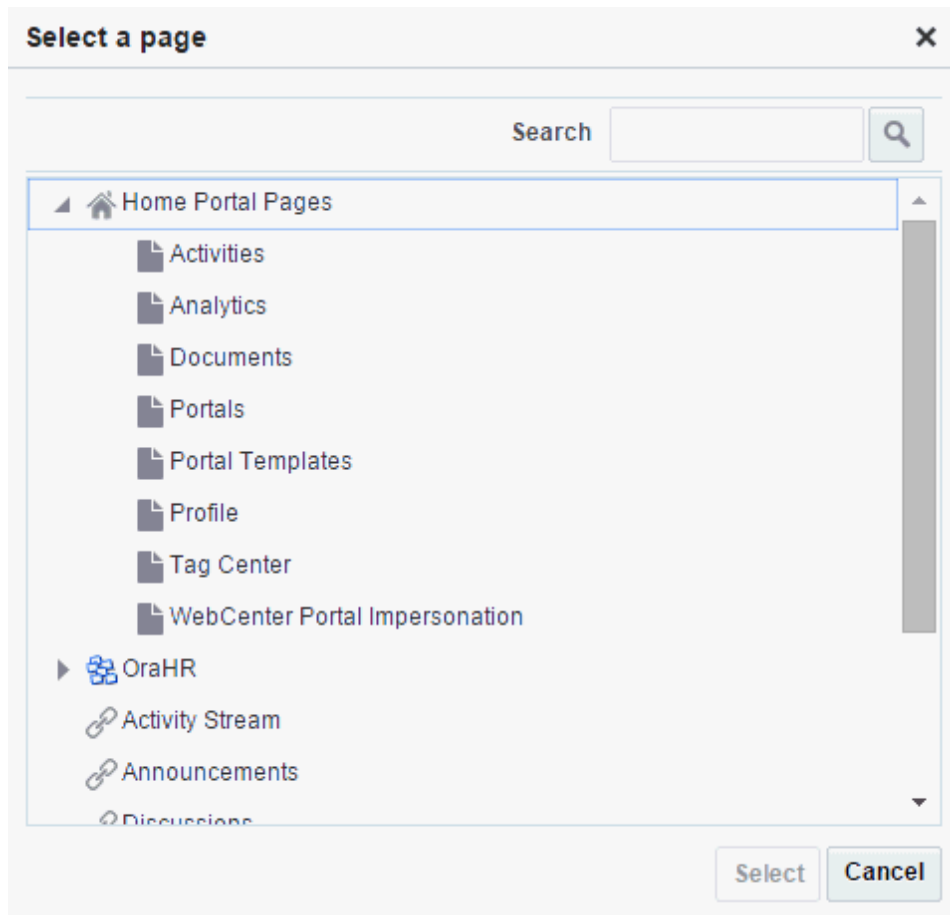
4. Select a page from the given options, or click **Search** to locate a page on the available list of pages.

> 💡 **Tip:**
>
> In the Home portal, you can select from pages that are available to you in your view of the Home portal. In other portals, you can select from pages that are available within the scope of the current portal.

5. Click **Select**.

6. Click **OK**.

To add an External Link:

1. Select **External Link** to open the New External Link dialog.

Figure 11-9   New External Link Dialog

2. In the **Name** field, enter a display name for the link.

3. In the **URL** field, enter the URL to the link target, for example:

   ```
   http://www.mywebdestination.com
   ```

   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.

4. To present the link target content within the context of the current page template, select **Render in page template**.

   Deselect this check box to redirect the current page to the link target.

5. Click **OK**.

To add a Content Link:

1. Select **Content Link** to open the New Content Link dialog.

Figure 11-10   New Content Link Dialog

2. In the **Name** field, enter a display name for the link.

3. For **Path**, click the Search icon to open the Select Document dialog.

   If necessary, search for the link target. For a more directed search, click **Advanced**. For more information, see Configuring an Advanced Search for Content Links

Figure 11-11   Select Document Dialog
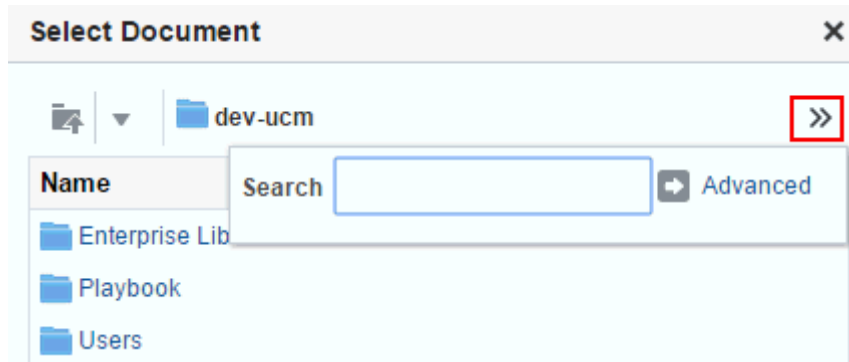
4. Click **Select**.
5. Click **OK** to close the New Content Link dialog.

Configuring an Advanced Search for Content Links

The Links component's Advanced Search feature provides controls for specifying additional search criteria and filters for Content Links searches. In the Select Document dialog (Figure 11-11), click **Advanced** to open the Advanced Search dialog (Figure 11-12).

Figure 11-12   Advanced Search Dialog

Configuring a Link in the Links Component

A user with permission to edit a page can configure a link on the page to revise the link's name and target. If you can see the **Configure** icon to the right of a link, you are authorized to configure links (Figure 11-13).

Figure 11-13   Configure Icon on a Link

To configure a link:

1. In the Links component, click the **Configure** icon to open the Edit *type* Link dialog (Figure 11-14).

Figure 11-14   Edit External Link Dialog

2. Revise the values as required.

> **Note:**
>
> Different link types present different fields and require different values.
>
> For information about the values required by Edit `type` Link fields, see Adding Navigation Links Using the Links Component.

3. Click **OK**.

Reordering Navigation Links

To reorder navigation links in a Links component in the page editor or when viewing a page:

1. Click and hold on a link.

2. Drag the link to its new position in the list.

3. Release the link.

Deleting a Link from the Links Component

Authorized users can access a delete control on a given link to remove the link from the Links component. If you can see the **Delete** icon to the right of each link, you are authorized to delete links.

Figure 11-15   Delete Icon on a Link

To delete a link from the Links component:

1. In the Links component, click the **Delete** icon next to the link of interest.

2. Click **Delete** in the confirmation dialog.

Setting Links Component Properties

You can set Display Options and Style properties on a Links component.

To set Links component properties:

1. Open the page in the page editor (see Opening a Page in the Page Editor).

2. In the Links component toolbar, click the **View Actions** menu and select the properties you want to set:

   • **Display Options** properties are common to many other components, as described in Table 10-1.

   • **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

3. Save your changes.

Working with the Movable Box Component

This section provides an overview of the Movable Box component. It includes the following subsections:

• About the Movable Box Component
• Setting Movable Box Component Properties

About the Movable Box Component

To add a Movable Box component to a page, click the **Open** link next to **Web Development** from the resource catalog to display a selection of web development components. Click **Add** next to the Movable Box Component.

A Movable Box is a container wrapped around a Box that not only enables the placement of content on a page, but also provides a means of moving all of that content at once in both the page editor and view mode.

Figure 11-16   Movable Box Component Below Box Component
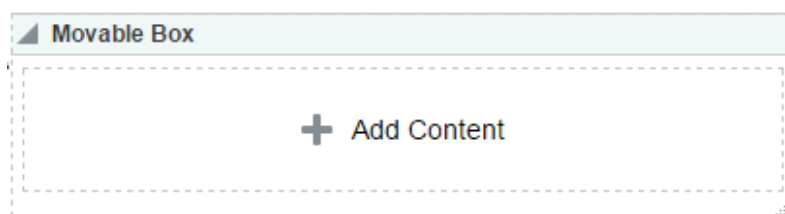
In the page editor, or when viewing a page, you can click on a Movable Box header and drag it and all of its content to a new position on a page. Movable Boxes can also be resized.

> 💡 **Tip:**
>
> Avoid adding a portlet to a Movable Box component. Doing so creates an unnecessary and potentially error-prone redundancy.

Setting Movable Box Component Properties

You can set Display Options and Style properties on a Movable Box component.

By default, each Movable Box encloses a Box component.

To set Movable Box component properties:

1. Open the page in the page editor.

2. In the Movable Box component toolbar, click the **View Actions** menu and select the properties you want to set:

   - **Display Options** properties are common to many other components, as described in Table 10-1.

   - **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

3. Save your changes.

Working with the Separator Component

This section provides an overview of the Separator component and lists and describes its associated properties. It includes the following subsections:

- About the Separator Component
- Setting Separator Component Properties

About the Separator Component

To add a Separator component to a page, click the **Open** link next to **Web Development** from the resource catalog to display a selection of web development components. Click **Add** next to the Separator Component.

The Separator component provides a visual break, in the form on a horizontal line, on a page.

Figure 11-17   Separator Component Between Two Text Components

Setting Separator Component Properties

You can set Display Options and Style properties on a Separator component.

To set Separator component properties:

1. Open the page in the page editor.

2. In the Separator component toolbar, click the **View Actions** menu and select the properties you want to set:

- **Display Options** properties are common to many other components, as described in Table 10-1.

- **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

3. Save your changes.

Working with the Web Page Component

This section provides an overview of the Web Page component and lists and describes its associated properties. It includes the following subsections:

- About the Web Page Component
- Setting Web Page Component Properties

About the Web Page Component

To add a Web Page component to a page, click the **Open** link next to **Web Development** from the resource catalog to display a selection of web development components. Click **Add** next to the Web Page Component.

The Web Page component opens a view onto another web page within the context of a portal page.

Figure 11-18   Web Page Component

The content exposed through a Web Page component retains all of the controls associated with the exposed web page. For example, the componet allows users to control the volume of a video, edit a wiki,, or post an entry to a blog, depending on the type of content you expose.

You can use internal and external link targets for a Web Page. For an internal target, you can use a relative directory path.

> **Tip:**
>
> In the portal, an easy way to obtain the relative directory path of an application page is to navigate to the target page and go through the motions of adding it as a Favorite. By default, the Add Favorite dialog provides the relative URL of the current page. Simply copy this information, and use it to define the Web Page target.
>
> For more information, see Managing Your Favorites in *Using Portals in Oracle WebCenter Portal*.

The Web Page component provides a variation on the built-in Web Page page style (for more information, see Table 18-1). The Web Page page style is useful for offering the full external web page experience. In contrast, the Web Page component is useful for including web page content along with other content types on a page.

Setting Web Page Component Properties

You can set Display Options and Style properties on a Web Page component.

To set Web Page component properties:

1. Open the page in the page editor.

2. In the Web Page component toolbar, click the **View Actions** menu and select the properties you want to set:

   • **Display Options** properties are described in Web Page Component Display Options.

   • **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

3. Save your changes.

Web Page Component Display Options

The following table lists and describes Web Page component display options.

Table 11-3   Web Page Component Display Options

Property	Description
`Name`	A display name for the Web Page component.
`Short Desc`	A field for entering `ALT` text for the Web Page area.
	Note that, for the Web Page component, the `ALT` text appears only when users hover their mouse pointers over the component border. You can increase the active area by increasing the padding around the component using the `Other CSS` property in the Style dialog. For example, you can enter the following in the `Other CSS` text box:
	`padding-top:30px;`

Table 11-3   (Cont.) Web Page Component Display Options

Property	Description
`Source`	A field for entering the fully qualified URL to the source Web content to render in the Web Page area. For example: `http://www.oracle.com` Note that `www.oracle.com` (that is, without `http://`) does not qualify. If a given URL is invalid, your content does not render within the Web Page component. **Note:** Use the component's Style properties to adjust the width and height of the display area (for more information, see Setting Style and Content Style Properties). If you plan to display the content of another portal page, you can use a relative address. For more information, see About the Web Page Component

> ✎ **See Also:**
>
> Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

12

Working with Layout Components

Use layout components in Structure view of the page editor to fine-tune the design of a page template, system page, or task flow.

> **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permission `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or permission to edit the asset for example, `Page Templates, Task Flow Styles` (Advanced Permissions).
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- About Layout Components
- Working with the gridCell Component
- Working with the gridRow Component
- Working with the panelGridLayout Component
- Working with the panelGroupLayout Component
- Working with the panelStretchLayout Component
- Working with the panelTabbed Component
- Working with the showDetailFrame Component
- Working with the sidebarItem Component
- Working with the spacer Component

About Layout Components

Layout components can be used to fine-tune the design of the page template, system page, or task flow. They are not exposed in the resource catalog, but you can access them when you edit a page template, system page, or task flow in the page editor in *Structure view* . For more information, see About Structure View.

Figure 12-1 Structure View of Page Edit Mode
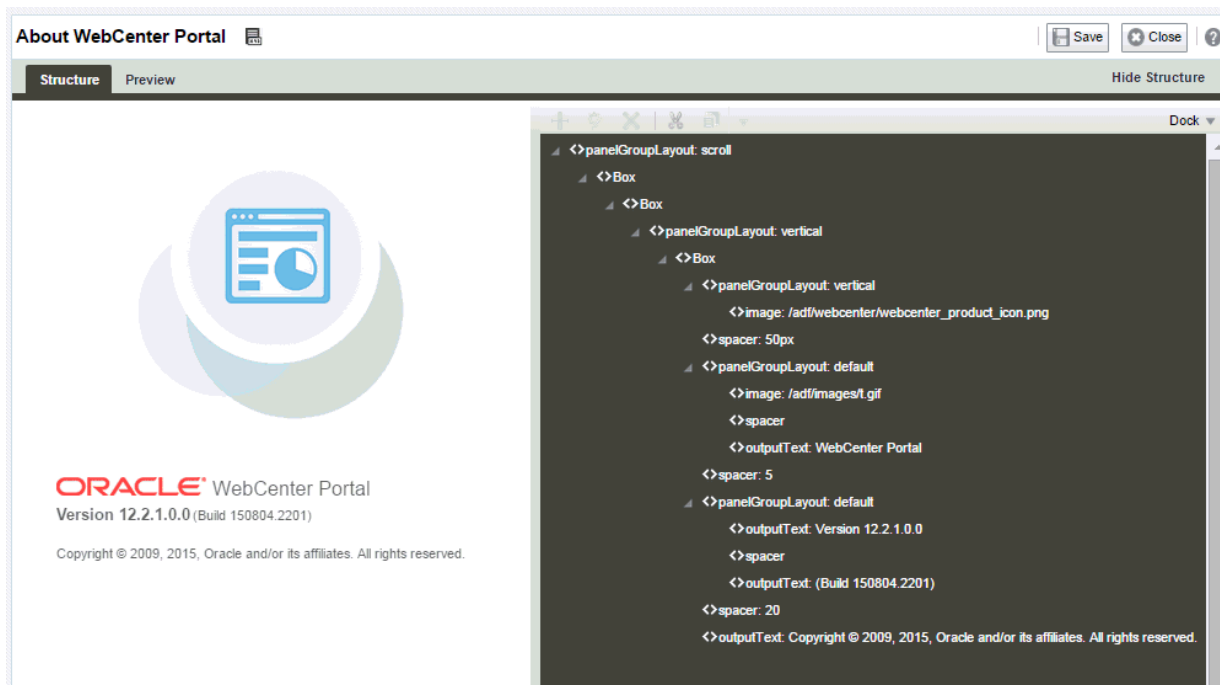
Table 12-1 lists and describes the layout components you will find in Structure view of the page editor.

Table 12-1 Layout Components

Layout Component	Description
gridCell	In a `panelGridLayout` component, each `gridRow` component uses one or more `gridCell` components to describe the cells for columns in that row of the grid layout structure. Each cell defines width, margins, column span, row span, horizontal alignment, and vertical alignment. For more information, see Working with the gridCell Component.
gridRow	In a `panelGridLayout` component, one or more `gridRow` components describe the rows of a grid layout structure. Each row defines a height and margins. For more information, see Working with the gridRow Component.
panelGridLayout	Provides a means of arranging a series of child components vertically or horizontally (no wrapping), or consecutively (wrapping). The `Layout` property determines the arrangement of the child components. For more information, see Working with the panelGridLayout Component.
panelGridLayout	Provides a means of arranging a series of child components vertically or horizontally (no wrapping), or consecutively (wrapping). The `Layout` property determines the arrangement of the child components. For more information, see Working with the panelGridLayout Component.
panelGroupLayout	Provides a means of arranging a series of child components vertically or horizontally (no wrapping), or consecutively (wrapping). The `Layout` property determines the arrangement of the child components. For more information, see Working with the panelGroupLayout Component.

Table 12-1   (Cont.) Layout Components

Layout Component	Description
panelStretchLayout	Provides a means of arranging content in defined areas on a page. Useful for enabling content to stretch when the browser is resized. An example of a panelStretchLayout component is a task flow that uses the Stretch task flow style (see Creating a Task Flow). For more information, see Working with the panelStretchLayout Component.
panelTabbed	The parent component of a tab set. For more information, see Working with the panelTabbed Component.
showDetailFrame	Renders a border, or chrome, around its child component along with a header that contains icons to enable users to perform some operations. These include a menu icon with options for moving the component, along with its content, to new positions on the page. Users can drag and drop showDetailFrame components from one panelCustomizable component to another on the page. Note that a showDetailFrame must be included inside a panelCustomizable component for it to be movable.
	For more information, see Working with the showDetailFrame Component.
sidebarItem	A child component of a tab set (panelTabbed). For more information, see Working with the sidebarItem Component.
spacer	Provides a means of incorporating some blank space in pages so that the page appears less cluttered than it would if all the components were presented immediately next to each other or immediately below each other. For more information, see Working with the spacer Component.

Working with the gridCell Component

This section provides an overview of the gridCell component and lists and describes its associated properties. It includes the following subsections:

- About the gridCell Component
- Setting gridCell Component Properties

About the gridCell Component

To add a gridRow component to a page template, system page, or task flow in Structure view in the page editor, see Adding a Component in Structure View.

Each gridRow component uses one or more gridCell components to describe the cells for columns in that row of the grid layout structure. Each cell defines width, margins, column span, row span, horizontal alignment, and vertical alignment.

Setting gridCell Component Properties

To set gridCell component properties:

1. Open the Component Properties dialog for the component, as described in Setting Component Properties in Structure View.

2. On each tab of the Component Properties dialog, enter properties as required:

   - **Display Options** properties are described in gridCell Component Display Options.

- **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

- **Child Components** properties provide options for hiding, showing, and rearranging component content.

3. Click **OK** to your changes.

gridCell Component Display Options

Table 12-2 lists and describes the `gridCell` properties in the Display Options dialog.

Table 12-2   gridCell Display Options

Property	Description
Column Span	Specifies the number of columns wide this cell will consume (see `Width` for `columnSpan` impact).
Halign	A means of expressing the horizontal alignment of component content. Choose from: • `start`—Align content horizontally, starting from the starting position. This is either left or right depending on whether the current context is localized for a left-reading or right-reading language. • `center`—Align content horizontally, starting from the center. This option is not valid for cell content that uses unstable, percentage-based widths. • `end`—Align content horizontally, starting from the ending position. This is either right or left depending on whether the current context is localized for a left-reading or right-reading language. • `stretch`— if (1) the cell has a non-auto width, (2) the row has a non-auto height, (3) `Valign` is also set to `stretch`, and (4) there is only one child component within the `gridCell`, then the cell will attempt to anchor the child component to all sides of the cell's coordinates. Otherwise, the `start` behavior will be used instead. Note that not all components can be stretched; refer to each component's "geometry management" documentation for details.

Table 12-2   (Cont.) gridCell Display Options

Property	Description
Landmark	A means of enhancing user accessibility as described by the Web Accessibility Initiative for Accessible Rich Internet Applications (WAI-ARIA). Each option describes the intended role of a content area to assist in using the area as a navigational landmark on the page.
	Screen readers and other assistive technologies can make use of these landmarks in page navigation.
	Select an option to clarify the role or purpose of a content area's content:
	• none—A content area that is not intended as a page navigational landmark.
	• banner—A content area containing mostly site-oriented content, rather than page-specific content, such as the company logo or the portal-wide search feature.
	Typically, a banner appears at the top of a page and spans the page width.
	• complementary—Supporting content, designed to be complementary to the main content at a similar level on the page, but still meaningful when separated from the main content, such as related documents.
	• contentinfo—A content area that contains information about the application, such as the copyright or privacy statement.
	• main—The main content area of the page.
	• navigation—A collection of navigational elements (usually links) for navigating the page or related pages.
	• search—A content area that contains one or more widgets used to define and execute a search.
Margin End	Specifies the amount of space to be added after this cell's last column. Other cells in this cell's last column position could provide their own values through the marginEnd value. Other cells from the next column could provide their own values through their marginStart values. Only fixed dimension units are supported, such as px, em, pt (not auto nor %). The margin values are resolved using the largest value of the first unit type encountered (conflicting unit types will be ignored).
Margin Start	Specifies the amount of space to be added after this cell's first column. Other cells in this cell's first column position could provide their own values through the marginStart value. Other cells from the previous column could provide their own values through their marginEnd values. Only fixed dimension units are supported, such as px, em, pt (not auto nor %). The margin values are resolved using the largest value of the first unit type encountered (conflicting unit types will be ignored).
Row Span	Specifies the number of rows tall this cell will consume.
Short Desc	Specifies ALT text for the component.
	ALT text appears as a tooltip when users roll their mouse pointers over the component.

Table 12-2   (Cont.) gridCell Display Options

Property	Description
`Valign`	Specifies the vertical alignment for this cell's anchor point within the cell's coordinates. Choose from:
	• `top`—Content is aligned with the top of the cell.
	• `middle`—Content is aligned with the middle of the cell.
	• `bottom`—Content is aligned with the bottom of the cell.
	• `stretch`—If (1) the cell has a non-auto width, (2) the row has a non-auto height, (3) `Halign` is also set to `stretch`, and (4) if there is only one child component within the `gridCell`, then the cell will attempt to anchor the child component to all sides of the cell's coordinates. Otherwise, the `top` behavior is used instead. Note that not all components can be stretched; refer to each component's "geometry management" documentation for details.
`Width`	Specifies the width of the cell's column:.
	• `dontCare`—Allows other cells in this column define the width.
	• `auto`—The browser draw the components in this column then the `panelGridLayout` uses the widths of these components to adjust the layout accordingly. This option is not valid for cell content that uses unstable, percentage-based widths.
	• A fixed CSS length, such as `px`, `em`—Constrains the width of this column to be exactly this size regardless of what components are in the column.
	• A `%` length—Uses a normalized fraction of the remaining `panelGridLayout` space not already used by the other columns (this may resolve to zero).
	Other considerations:
	• This value must be omitted (use the default value of `dontCare`) if `columnSpan` is not equal to `1`. The effective width will be the sum of the widths of the spanned columns.
	• If more than 1 cell in the column defines a non-`dontCare` width, then the width will be resolved using the largest value of the first unit type encountered (conflicting unit types will be ignored).
	• If all cells in the column do not specify a `dontCare` value for width, the width is treated as if they were all using `auto`; the widest natural width value given by the browser will be used.

> **✎ See Also:**
>
> Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Working with the gridRow Component

This section provides an overview of the `gridRow` component and lists and describes its associated properties. It includes the following subsections:

• About the gridRow Component

- Setting gridRow Component Properties

About the gridRow Component

To add a `gridRow` component to a page template, system page, or task flow in Structure view in the page editor, see Adding a Component in Structure View.

In a `panelGridLayout` component, one or more `gridRow` components describe the rows of a grid layout structure. Each row defines a height and margins. Each `gridRow` component uses one or more `gridCell` components to describe the cells for columns in that row of the grid layout structure.

Setting gridRow Component Properties

To set `gridRow` component properties:

1. Open the Component Properties dialog for the component, as described in Setting Component Properties in Structure View.

2. On each tab of the Component Properties dialog, enter properties as required:

   - **Display Options** properties are described in gridRow Component Display Options.

   - **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

   - **Child Components** properties provide options for hiding, showing, and rearranging component content.

3. Click **OK** to your changes.

gridRow Component Display Options

Table 12-3 lists and describes the `gridRow` properties in the Display Options dialog.

Table 12-3   gridRow Display Options

Property	Description
Height	Specifies the row height. Valid values are: • `auto`—The browser draws the components in this row then the `panelGridLayout` component uses the heights of these components to adjust the layout accordingly. • A fixed CSS length, such as `px`, `em`—Constrains the height of the row to be exactly this size regardless of what components are in the row. • A `%` length—Uses a normalized fraction of the remaining `panelGridLayout` space not already used by the other rows (this may resolve to zero). This option is only valid if the `panelGridLayout` has a fixed height or if it is being stretched by its parent component because otherwise it would be a circular definition for height.
Margin Bottom	Specifies the amount of space to be added below this row. The next row could provide a value through its `marginTop` value. Only fixed dimension units are supported, such as `px`, `em`, `pt` (not `auto` nor `%`). The margin candidates are resolved using the largest value of the first unit type encountered (conflicting unit types are ignored).

Table 12-3   (Cont.) gridRow Display Options

Property	Description
`Margin Top`	Specifies the amount of space to be added above this row. The previous row could provide a value through its `marginBottom` value. Only fixed dimension units are supported, such as `px`, `em`, `pt` (not `auto` nor `%`). The margin candidates are resolved using the largest value of the first unit type encountered (conflicting unit types will be ignored).

> **✎ See Also:**
>
> Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Working with the panelGridLayout Component

This section provides an overview of the `panelGridLayout` component and lists and describes its associated properties. It includes the following subsections:

- About the panelGridLayout Component
- Setting panelGridLayout Component Properties

About the panelGridLayout Component

To add a `panelGridLayout` component to a page template, system page, or task flow in Structure view in the page editor, see Adding a Component in Structure View.

The `panelGridLayout` component is a newer ADF component that uses one or more `gridRow` components to describe the rows of a grid layout structure. Each row defines a height and margins. Each `gridRow` uses one or more `gridCell` components to describe the cells for columns in that row of the grid layout structure. Each cell defines width, margins, column span, row span, horizontal alignment, and vertical alignment. This component is used in the newest 11.1.1.8.3 out-of-the-box page templates (see Table 15-1) to provide a powerful and concise way of defining a layout with the basic building blocks of `panelGridLayout`, `gridRow`, and `gridCell`.

Setting panelGridLayout Component Properties

To set `panelGridLayout` component properties:

1. Open the Component Properties dialog for the component, as described in Setting Component Properties in Structure View.

2. On each tab of the Component Properties dialog, enter properties as required:

   - **Display Options** properties are described in panelGridLayout Component Display Options.

- **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

3. Click **OK** to your changes.

panelGridLayout Component Display Options

Table 12-4 lists and describes the `panelGridLayout` properties in the Display Options dialog.

Table 12-4   panelGridLayout Display Options

Property	Description
Dimensions From	Specifies the source of the dimensions applied to the component:
	• `auto`—Either `parent` or `children`, depending on the `panelGridLayout` parent container. If the parent's `Layout` attribute is set to `stretch`, then `parent` is used; otherwise `children` is used.
	• `children`—The dimensions are taken from the children (`topHeight` will still be honored so the contents of this facet will be constrained to those dimensions; if percent units are specified, then the default value will be used instead). Note that any height assignment (e.g. `inlineStyle` or `styleClass`) on the `panelGridLayout` component must be omitted to avoid a competing assignment for how tall the component will be.
	• `parent`—The dimensions are taken from the `inlineStyle` specified on the component; if not specified, then they are taken from the parent; if no values are specified on the parent, then they are taken from the skin.
	Default value: If the `oracle.adf.view.rich.geometry.DEFAULT_DIMENSIONS` `context-param` is set to `auto` in the project's `web.xml`, the default value for this attribute will be `auto`. Otherwise, the default value will be `parent`.
Landmark	A means of enhancing user accessibility as described by the Web Accessibility Initiative for Accessible Rich Internet Applications (WAI-ARIA). Each option describes the intended role of a content area to assist in using the area as a navigational landmark on the page.
	Screen readers and other assistive technologies can make use of these landmarks in page navigation.
	Select an option to clarify the role or purpose of a content area's content:
	• `none`—A content area that is not intended as a page navigational landmark.
	• `banner`—A content area containing mostly site-oriented content, rather than page-specific content, such as the company logo or the portal-wide search feature.
	Typically, a banner appears at the top of a page and spans the page width.
	• `complementary`—Supporting content, designed to be complementary to the main content at a similar level on the page, but still meaningful when separated from the main content, such as related documents.
	• `contentinfo`—A content area that contains information about the application, such as the copyright or privacy statement.
	• `main`—The main content area of the page.
	• `navigation`—A collection of navigational elements (usually links) for navigating the page or related pages.
	• `search`—A content area that contains one or more widgets used to define and execute a search.

Table 12-4   (Cont.) panelGridLayout Display Options

Property	Description
`Short Desc`	A field for entering `ALT` text for the component.
	`ALT` text appears as a tooltip when users roll their mouse pointers over the component.

> **✎ See Also:**
>
> Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Working with the panelGroupLayout Component

This section provides an overview of the `panelGroupLayout` component and lists and describes its associated properties. It includes the following subsections:

- About the panelGroupLayout Component
- Setting panelGroupLayout Component Properties

About the panelGroupLayout Component

To add a `panelGroupLayout` component to a page template, system page, or task flow in Structure view in the page editor, see Adding a Component in Structure View.

The `panelGroupLayout` component provides a means of arranging a series of child components vertically or horizontally (no wrapping), or consecutively (wrapping). The component's `Layout` property determines the arrangement of child components.

Setting panelGroupLayout Component Properties

To set `panelGroupLayout` component properties:

1. Open the Component Properties dialog for the component, as described in Setting Component Properties in Structure View.

2. On each tab of the Component Properties dialog, enter properties as required:

   - **Display Options** properties are described in panelGroupLayout Component Display Options.

   - **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

- **Child Components** properties provide options for hiding, showing, and rearranging component content.

3. Click **OK** to your changes.

panelGroupLayout Component Display Options

Table 12-5 lists and describes the `panelGroupLayout` properties in the Display Options dialog.

Table 12-5   panelGroupLayout Display Options

Property	Description
Halign	A means of expressing the horizontal alignment of component content. Choose from: • `start`—Align content horizontally, starting from the starting position. This is either left or right depending on whether the current context is localized for a left-reading or right-reading language. • `center`—Align content horizontally, starting from the center. • `end`—Align content horizontally, starting from the ending position. This is either right or left depending on whether the current context is localized for a left-reading or right-reading language. • `left`—Align content horizontally, starting from the left. • `right`—Align content horizontally, starting from the right.
Landmark	A means of enhancing user accessibility as described by the Web Accessibility Initiative for Accessible Rich Internet Applications (WAI-ARIA). Each option describes the intended role of a content area to assist in using the area as a navigational landmark on the page. Screen readers and other assistive technologies can make use of these landmarks in page navigation. Select an option to clarify the role or purpose of a content area's content: • `none`—A content area that is not intended as a page navigational landmark. • `banner`—A content area containing mostly site-oriented content, rather than page-specific content, such as the company logo or the portal-wide search feature. Typically, a banner appears at the top of a page and spans the page width. • `complementary`—Supporting content, designed to be complementary to the main content at a similar level on the page, but still meaningful when separated from the main content, such as related documents. • `contentinfo`—A content area that contains information about the application, such as the copyright or privacy statement. • `main`—The main content area of the page. • `navigation`—A collection of navigational elements (usually links) for navigating the page or related pages. • `search`—A content area that contains one or more widgets used to define and execute a search.
Layout	A means of specifying the orientation of component content. Choose from: • `default`—Align content vertically. • `horizontal`—Align content horizontally. • `vertical`—Align content vertically. • `scroll`—Align content vertically with a scrollbar. The scrollbar is rendered when the height/width of component content exceeds the component height or width.

Table 12-5   (Cont.) panelGroupLayout Display Options

Property	Description
Short Desc	A field for entering `ALT` text for the component. `ALT` text appears as a tooltip when users roll their mouse pointers over the component.
Theme	The component style theme to apply to the children of this component. Use this property to change the theme without causing associated skin changes. Application skins are the sources of the themes. Some skins may have no theme definitions. Enter one of: • `dark` • `medium` • `light` No theme (none) is the default.
Valign	A means of expressing the vertical alignment of component content. Choose from: • `middle`—Content is aligned with the middle of the parent component. • `top`—Content is aligned with the top of the parent component. • `bottom`—Content is aligned with the bottom of the parent component. • `baseline`—Content is aligned with the baseline of the parent component.

> **✎ See Also:**
>
> Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Working with the panelStretchLayout Component

This section provides an overview of the `panelStretchLayout` component and lists and describes its associated properties. It includes the following subsections:

- About the panelStretchLayout Component
- Setting panelStretchLayout Component Properties

About the panelStretchLayout Component

To add a `panelStretchLayout` component to a page template, system page, or task flow in Structure view in the page editor, see Adding a Component in Structure View.

The `panelStretchLayout` component provides a means of arranging content in defined areas on a page. This component is useful for enabling content to stretch when the browser is resized.

The `panelStretchLayout` component's defined areas are called *facets* (Figure 12-2).

Figure 12-2   Facets of a panelStretchLayout Component
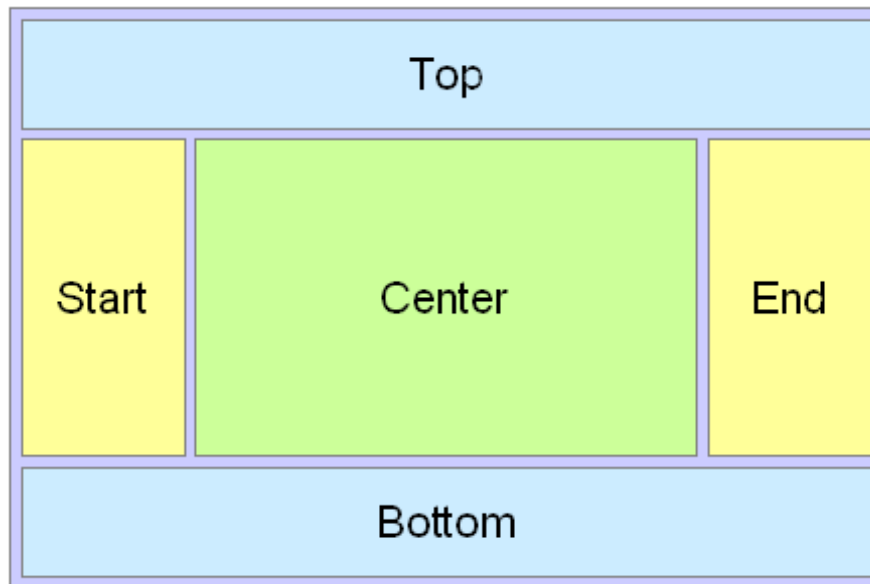
> **Note:**
>
> Figure 12-2 shows the facets when the language reading direction of the application is configured left-to-right. If instead the language direction is right-to-left, the start and end facets are switched.

Facets are controlled by the values you enter for their Display Options properties. When you set the height of the top and bottom facets, any contained components are stretched to fit the height. Similarly, when you set the width of the start and end facets, any components contained in those facets are stretched to that width. If no components are placed in a facet, then the facet does not take up any space.

Setting panelStretchLayout Component Properties

To set `panelStretchLayout` component properties:

1. Open the Component Properties dialog for the component, as described in Setting Component Properties in Structure View.

2. On each tab of the Component Properties dialog, enter properties as required:

   • **Display Options** properties are described in panelStretchLayout Component Display Options.

> ✎ **See Also:**
>
> Display Options properties additionally provide access to an
> Expression Language (EL) editor, which you can use to enter and
> test EL values. If you need EL assistance, an application developer
> can provide an EL expression; see Expression Language
> Expressions in *Developing for Oracle WebCenter Portal*.

- **Style** properties are common to many other components, as described in
  Table 10-2. The styles you set here override the styles that would otherwise
  govern the component's appearance. These include styles set on the
  component's parent container, the current page, and the portal skin.

3. Click **OK** to your changes.

panelStretchLayout Component Display Options

Table 12-6 lists and describes the `panelStretchLayout` properties in the Display
Options dialog.

> ✎ **Note:**
>
> All `panelStretchLayout` height and width facets take the value `auto`;
> however, using `auto` slows page performance.

Table 12-6   panelStretchLayout Display Options

Property	Description
Bottom Height	The height of the bottom facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on.
	Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect. If you want your component to take up 100% of a page, consider creating a page using the Stretch page style and adding the component to it.

Table 12-6   (Cont.) panelStretchLayout Display Options

Property	Description
Bottom Landmark	A means of enhancing user accessibility as described by the Web Accessibility Initiative for Accessible Rich Internet Applications (WAI-ARIA). Each option describes the intended role of a content area to assist in using the area as a navigational landmark on the page.
	Screen readers and other assistive technologies can make use of these landmarks in page navigation.
	Select an option to clarify the role or purpose of the content area's content:
	• none—A content area that is not intended as a page navigational landmark
	• banner—A content area containing mostly site-oriented content, rather than page-specific content, such as the company logo or the portal-wide search feature
	Typically, a banner appears at the top of a page and spans the page width.
	• complementary—Supporting content, designed to be complementary to the main content at a similar level on the page, but still meaningful when separated from the main content, such as related documents
	• contentinfo—A content area that contains information about the application, such as the copyright or privacy statement.
	• main—The main content area of the page
	• navigation—A collection of navigational elements (usually links) for navigating the page or related pages.
	• search—A content area that contains one or more widgets used to define and execute a search.
Center Landmark	See the description for Bottom Landmark.
Dimensions From	Specifies the source of the dimensions applied to the component:
	• auto—Either parent or children, depending on the panelStretchLayout parent container. If the parent's Layout attribute is set to stretch, then parent is used; otherwise children is used.
	• children—The dimensions are taken from the children (topHeight will still be honored so the contents of this facet will be constrained to those dimensions; if percent units are specified, then the default value will be used instead). Note that any height assignment (e.g. inlineStyle or styleClass) on the panelStretchLayout component must be omitted to avoid a competing assignment for how tall the component will be.
	• parent—The dimensions are taken from the inlineStyle specified on the component; if not specified, then they are taken from the parent; if no values are specified on the parent, then they are taken from the skin.
	Default value: If the oracle.adf.view.rich.geometry.DEFAULT_DIMENSIONS context-param is set to auto in the project's web.xml, the default value for this attribute will be auto. Otherwise, the default value will be parent.
End Landmark	See the description for Bottom Landmark.
End Width	The width of the end facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on.
Short Desc	A field for entering tooltip text for the component.
	The tooltip appears when users roll their mouse pointers over the component.
Start Landmark	See the description for Bottom Landmark.
Start Width	The width of the start facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on.

Table 12-6   (Cont.) panelStretchLayout Display Options

Property	Description
Theme	The component style theme to apply to the children of this component. Use this property to change the theme without causing associated skin changes. Application skins are the sources of the themes. Some skins may have no themed definitions.
	Enter one of:
	• dark
	• medium
	• light
	No theme (none) is the default.
Top Height	The height of the top facet. Use any standard CSS unit of measure, such as pt, px, pc, li, and so on.
	Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect. If you want your component to take up 100% of a page, consider creating a page using the Stretch page style and adding the component to it.
Top Landmark	See the description for Bottom Landmark.

> **✎ See Also:**
>
> Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*

Working with the panelTabbed Component

This section provides an overview of the panelTabbed component and lists and describes its associated properties. It includes the following subsections:

- About the panelTabbed Component
- Setting panelTabbed Component Properties

About the panelTabbed Component

To add a panelTabbed component to a page template, system page, or task flow in Structure view in the page editor, see Adding a Component in Structure View.

The panelTabbed layout component is the parent component of a tab or tab set. Its unique set of Display Options controls the behind-the-scenes method of tab creation, the source for the tabs dimensions, the tab's position, and the like.

Setting panelTabbed Component Properties

To set panelTabbed component properties:

1. Open the Component Properties dialog for the component, as described in Setting Component Properties in Structure View.

2. On each tab of the Component Properties dialog, enter properties as required:

   • **Display Options** properties are described in panelTabbed Component Display Options.

   • **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

3. Click **OK** to your changes.

panelTabbed Component Display Options

Table 12-7 lists and describes Display Options associated with the `panelTabbed` layout component.

Table 12-7   panelTabbed Display Options

Property	Description
Child Creation	Specifies when tabs are created: • `immediate`—Tabs are created as soon as the page is accessed. Use this setting for content to be used by all users every time they use this page. • `lazy`—Tabs are created when the parent (`panelTabbed` component) is brought forward and are maintained in cache thereafter. This selection may enhance performance when content is fetched from cache. • `lazyUncached`—Tabs are created when the parent (`panelTabbed` component) is likely to be brought forward and may be removed when the parent is not forward. Use this setting for data that can become stale.
Content Delivery	Specifies when tab content is rendered: • `immediate`—All tab content is rendered as soon as the page is accessed. Use this setting for content to be used by all users every time they use this page. • `lazyUncached`—Tab content is rendered when the tab is likely to be brought forward and may be removed when the tab is not forward. Use this setting for data that can become stale.
Dimensions From	Specifies the source of the dimensions applied to the component: • `auto`—Either `parent` or `disclosedChild`, depending on the `panelTabbed` parent container. If the parent's `Layout` attribute is set to `stretch`, then `parent` is used; otherwise `disclosedChild` is used. • `disclosedChild`—The dimension is taken from the currently active tab. • `parent`—(default) The dimension is taken from any values specified on the component; if no values are specified, then they are taken from the parent; if no values are specified on the parent, then they are taken from the skin.
Position	The position of the tab portion of the `panelTabbed`: • `above`—(default) Tabs are shown above the tab content area. • `below`—Tabs are shown below the tab content area. • `both`—Tabs are shown above and below the tab content area. In accessibility screen reader mode, the tab position is always `above`.
Short Desc	A field for entering tooltip text for the component. The tooltip appears when users roll their mouse pointers over the component.

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Table 12-7   (Cont.) panelTabbed Display Options

Property	Description

Tab Removal	Specifies whether some, none, or all tabs can be removed:
	• `none`—Tabs cannot be deleted from the tab set
	• `all`—All tabs can be deleted from the tab set
	• `allExceptLast`—All but one the last tab can be deleted from the tab set
	
	Note: The selection `allExceptLast` renders a **Close** icon on all except the last tab when users hover their mouse pointers over them. Additional coding is required on the `panelTabbed` component before the **Close** action can execute.
	
	Developers must write code to respond to `ItemEvent` with a listener attached to the `showDetailItem`'s `itemListener` attribute. For example:
	
	`<af:panelTabbed tabRemoval="allExceptLast" id="pt1">`
	`    <af:showDetailItem itemListener="myBean.onRemove" id="sdi1">`
	`…`
	
	Write the deletion code in a Java bean named `myBean` with the method `onRemove`.

> ✎ **See Also:**
>
> Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Working with the showDetailFrame Component

This section provides an overview of the `showDetailFrame` component and lists and describes its associated properties. It includes the following subsections:

- About the showDetailFrame Component
- Setting showDetailFrame Component Properties

About the showDetailFrame Component

To add a `showDetailFrame` component to a page template, system page, or task flow in Structure view in the page editor, see Adding a Component in Structure View.

The `showDetailFrame` component renders a border, or chrome, around its child component along with a header that contains icons to enable users to perform some operations. These include a menu icon with options for moving the component, along with its content, to new positions on the page. Users can drag and drop `showDetailFrame` components from one `panelCustomizable` component to another on the page. Note that a `showDetailFrame` must be included inside a `panelCustomizable` component for it to be movable.

A `showDetailFrame` component enables the following actions:

- Collapse and expand the component
- Move content to different positions on the page
- Rearrange task flows using options on the **Actions** menu
- Edit and save text in a text editor.

Setting showDetailFrame Component Properties

To set `showDetailFrame` component properties:

1. Open the Component Properties dialog for the component, as described in Setting Component Properties in Structure View.

2. On each tab of the Component Properties dialog, enter properties as required:

   - **Display Options** properties are described in showDetailFrame Component Display Options.

   - **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

3. Click **OK** to your changes.

showDetailFrame Component Display Options

The Display Options associated with `showDetailFrame` are common to many components and are listed in Table 10-1 with one exception: the `showDetailFrame` layout component does not expose the property `Allow Child Selection`. Refer to Table 10-1 for recommendations related to `Allow Resize` on the `showDetailFrame` component.

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.

When you display the properties of a `showDetailFrame` component in Structure view (Setting Component Properties in Structure View). the Display Options are presented on two subtabs: **Basic** and **Advanced** (Figure 12-3).

Figure 12-3   Basic and Advanced Display Options for showDetailFrame Around Movable Box Component
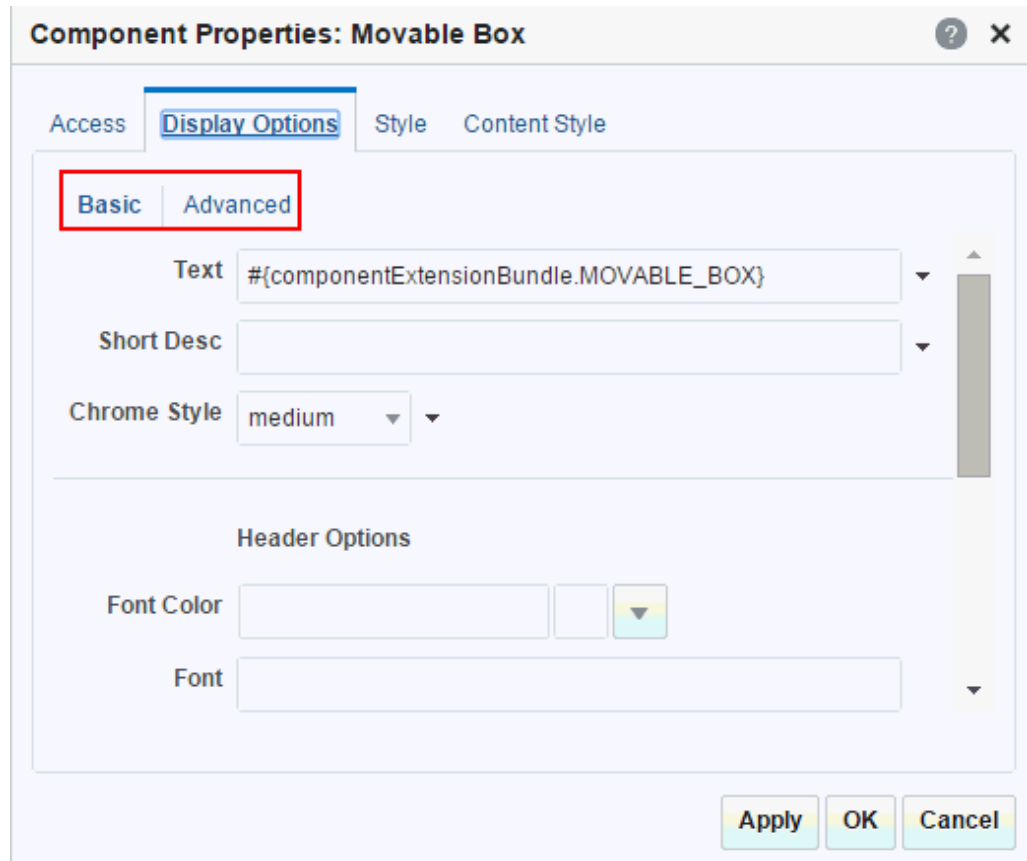
Working with the sidebarItem Component

This section provides an overview of the sidebarItem component and lists and describes its associated properties. It includes the following subsections:

- About the sidebarItem Component
- Setting sidebarItem Component Properties

About the sidebarItem Component

To add a `sidebarItem` component to a page template, system page, or task flow in Structure view in the page editor, see Adding a Component in Structure View.

The `sidebarItem` component is a child component of `panelTabbed` (see Working with the panelTabbed Component). Unlike `panelTabbed`, which provides all of the properties associated with a tab set, `sidebarItem` provides all of the properties associated with a single tab.

Setting sidebarItem Component Properties

To set `sidebarItem` component properties:

1. Open the Component Properties dialog for the component, as described in Setting Component Properties in Structure View.

2. On each tab of the Component Properties dialog, enter properties as required:

   • **Display Options** properties are described in sidebarItem Component Display Options.

   • **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.

3. Click **OK** to your changes.

sidebarItem Component Display Options

Table 12-8 describes the `sidebarItem` properties in the Display Options dialog.

Table 12-8   sidebarItem Display Options

Property	Description
Disclosed	Indicates the current active tab; that is, the tab that is forward.
	This value is set by default depending on whether the selected tab is forward. Changes you make to this value have no effect.
Icon	The URL to an image.
	Use any Web-compatible image from any accessible location. That is, do not put in a path to an image on an external server that requires authentication.
	Enter a full URL or a URL that is relative to the application root. Use CSS formatting. For example, enter:
	`url(http://www.abc.com/image.jpg)`
Inflexible Height	The number of pixels the component will use when in a container that allocates size among multiple sibling items.
	If the component requires more than the set limit, its sibling components are pushed to overflow menus. The default is 100 pixels.
	Note: This attribute is valid only when the parent container is a `panelAccordion` component.
Short Desc	A field for entering tooltip text for the component,
	The tooltip appears when users roll their mouse pointers over the component.
Text	The text to render on the tab.
	The default value, an EL expression, evaluates to `New Tab`.

> **✎ See Also:**
>
> Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Working with the spacer Component

This section provides an overview of the spacer component and lists and describes its associated properties. It includes the following subsections:

- About the spacer Component
- Setting spacer Component Properties

About the spacer Component

To add a `spacer` component to a page template, system page, or task flow in Structure view in the page editor, see Adding a Component in Structure View.

The `spacer` component provides a means of incorporating some blank space in pages so that the page appears less cluttered than it would if all the components were presented immediately adjacent to each other.

Setting spacer Component Properties

To set `spacer` component properties:

1. Open the Component Properties dialog for the component, as described in Setting Component Properties in Structure View.
2. On each tab of the Component Properties dialog, enter properties as required:
   - **Display Options** properties are described in spacer Component Display Options.
   - **Style** properties are common to many other components, as described in Table 10-2. The styles you set here override the styles that would otherwise govern the component's appearance. These include styles set on the component's parent container, the current page, and the portal skin.
3. Click **OK** to your changes.

spacer Component Display Options

Table 12-9 lists and describes the spacer properties in the Display Options dialog.

Table 12-9   spacer Display Options

Property	Description
Height	A field for specifying the spacer height.
	Use any standard CSS unit of measure, such as pt, px, pc, li, and so on.
	Never express a Height value as a percentage. Because of differences between browsers and between layout containers, percentages do not work as you expect.
Short Desc	A field for entering tooltip text for the component.
	The tooltip appears when users roll their mouse pointers over the component.
Width	A field for specifying spacer width.
	Use any standard CSS unit of measure, such as pt, px, pc, li, %, and so on.

> **✎ See Also:**
>
> Display Options properties additionally provide access to an Expression Language (EL) editor, which you can use to enter and test EL values. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

13

Wiring Pages and Components

Use component wiring to create more complex relationships between a page and its components, synchronizing the content of a page with its components, or the content of one component to another.

> **✦ Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permission `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Edit Pages` (advanced permissions).
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- About Page and Component Wiring
- Wiring Events to Component Parameters
- Wiring Components and Page Parameters
- Passing Parameter Values Through the Page URL

About Page and Component Wiring

> **✦ Note:**
>
> In this chapter, *component* refers collectively to ADF components (such as buttons), web development components (such as hyperlinks), task flows, and portlets.

Often a page needs information from a component on the page, or a region needs information from another region. While you can pass parameters through the page URL to obtain that information, doing so makes sense only when the parameters are well-known and the inputs are accessible to the page through Expression Language (EL). For more information, see Passing Parameter Values Through the Page URL.

Consider the case where you have a task flow with multiple page fragments that contain various interesting values that could be used as input on a page. For example, consider a page devoted to the display of information specific to the company that a user specifies in an input form. If you were to use parameters to pass the value, the task flow must surface output parameters for the union of each of the interesting values on each and every fragment. This is where *component wiring* becomes useful. Instead, for each fragment that contains the

needed information, you can use component wiring to define a contextual event that is raised when the input is submitted. The page or fragment that requires the information can then subscribe to the various events and receive the information through the event.

Component wiring is useful for synchronizing the content of a page with its components, or the content of one component to another. For example, you can wire a Parameter Form portlet so that the event of clicking its **OK** button triggers the passing of its user-entered values to another component on the page. One way to apply this model is to pass a user-entered name to a task flow or portlet that displays details relevant to that name. This is known as *contextual event wiring* (events within the current context trigger the action of the event handler).

To clarify what happens when an event occurs, it helps to think of one component as the *producer* and the other component as the *consumer*. The producer component provides the data (referred to as the *payload*) that the consumer component consumes. For example, a form portlet is typically a producer. Its payload is the data that users enter into the form. An event defined on the producer triggers the passing of the producer's payload to the consumer. Consumer components use the payload in various ways. For example, as a display string, a master in a master-detail relationship, and so on. How a consumer component uses the payload is specified in an event handler that was defined when the consumer component was created.

When developers build applications and components, they specify events and event maps in page definition files. Consequently, for runtime wiring to work, the components you want to wire must provide support for wiring through elements that were built-in at design time. The following built-in WebCenter Portal task flows are pre-configured for event wiring:

- the Content Manager task flow is a consumer
- the Data Visualization task flow is both a consumer and producer when properly configured to a REST URL

The page editor provides tools for wiring pages and components through the page **Parameters** tab and component **Parameters** dialogs. You can wire pages and components together in the following ways:

- Wire events in a producer task flow or portlet to parameters in a consumer task flow (see Wiring Events to Component Parameters).
- Pass values from a page parameter to a component on that page (see Wiring Components and Page Parameters).
- Pass values to page components by specifying parameter values in the page's URL (see Passing Parameter Values Through the Page URL).

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.

As described in About Page and Component Wiring, application developers define component events and event handlers.

To wire an event (in a producer component) to a parameter in a consumer task flow or portlet:

1. Navigate to the page containing the producer component(s), and open it in the page editor (see Opening a Page in the Page Editor). Figure 13-1 illustrates a Data Visualization task flow producer component (list) and consumer component (pie chart) in the sample AviIntranet portal.

Figure 13-1   Producer and Consumer Components
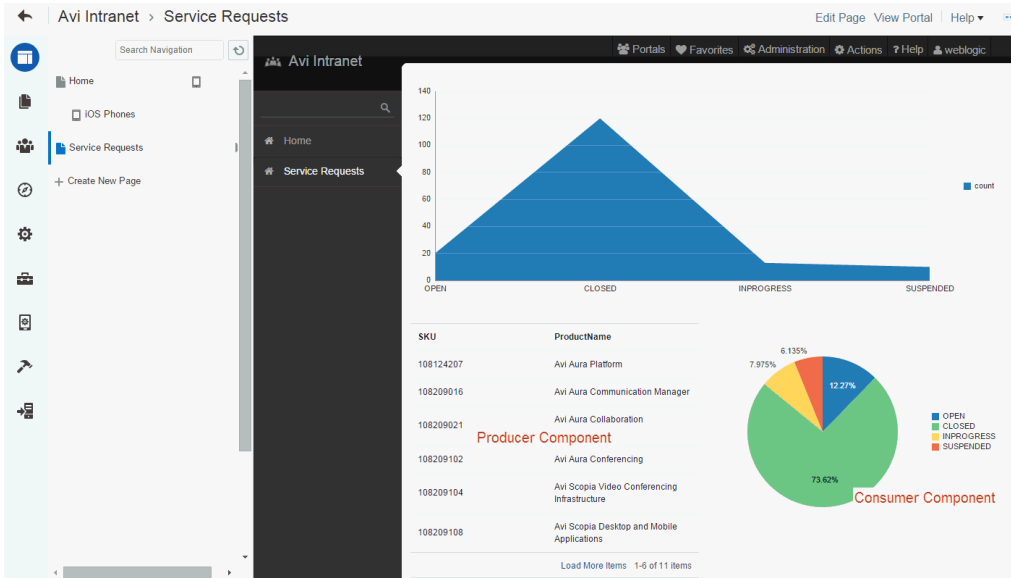
2. If the consumer task flow or portlet is not already on the page, add it.

   See Adding Components to a Page.

3. Click the **View Actions menu** icon on the consumer task flow or portlet, and select **Parameters**.

Figure 13-2   View Actions Menu on a Consumer Task Flow
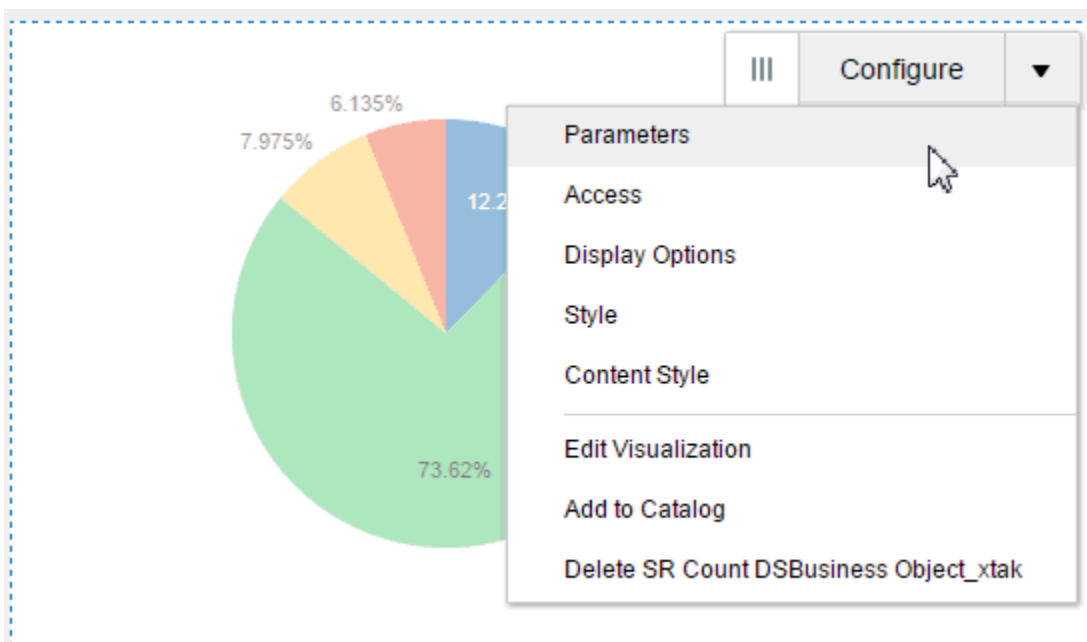
4. In the Parameters dialog, the settings you see are available only when there is a producer and consumer task flow on the page. For each parameter defined for the consumer task flow or portlet that you want to wire to an event:

   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.

Figure 13-3   Parameters Dialog for a Consumer Task Flow
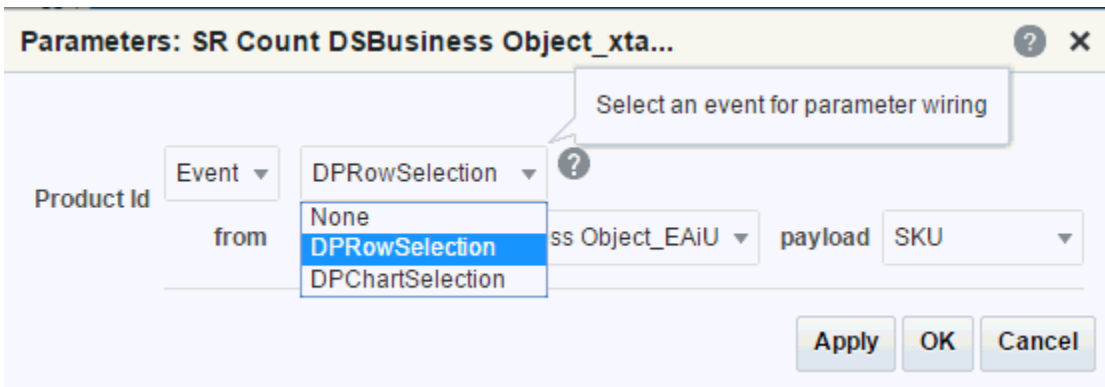
5. Click **OK** and **Save**.

6. Test your wiring by triggering the event and observing the results in the consumer task flow or portlet.

Wiring Components and Page Parameters

This section describes how to create and consume page parameters in the following subsections:

- About Wiring Components and Page Parameters
- Creating Page Parameters
- Consuming Page Parameters

About Wiring Components and Page Parameters

Page parameters and page variables enable communication between components and the pages that contain 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. Page parameters and page variables are part of a simple mechanism for setting this up.

- *Page parameters* provide a means of storing values for passing to page components that have been configured to consume them. Create page parameters through the page editor at application runtime.

- *Page variables* contain output values that are produced by portlets. Page variables are created at application design time.

Creating Page Parameters

Use the **Parameters** tab in the page editor to create page parameters.

To create a new page parameter, refer to Adding or Modifying Page Parameters.

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.
>
> For more information, see Creating Page Parameters.

To consume a page parameter (wiring a task flow to a page parameter):

1. Navigate to the relevant page, and open it in the page editor (see Opening a Page in the Page Editor).

2. Click the **View Actions menu** icon on the consumer task flow, and select **Parameters**.

3. 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.

Figure 13-4   The Expression Editor
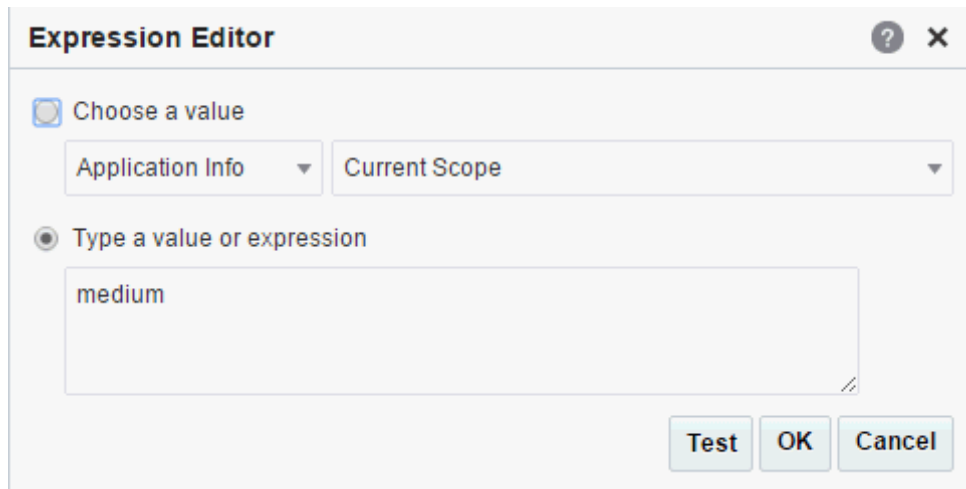
4. Select **Choose a value**.

5. Under **Choose a value**, select **Page Parameter** from the first list, and the name of the relevant page parameter from the second.

6. Click **OK** to exit the Expression Editor.

7. 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.

8. Click **Save**.

Passing Parameter Values Through the Page URL

You can provide Expression Language (EL) expressions in place of other types of values to component parameters. This option can provide a much more dynamic response. For example, the page could set a page parameter based on a component on the page. In this case, you would want the other components on the page to be refreshed whenever this value changed. You can take this capability one step further by passing parameter values with your page URLs.

This section provides one scenario, which you can use as a model for other parameter passing situations.

To pass parameter values through a page URL:

1. Go to the page that contains a component to which you want to pass values through the page URL.

2. Edit the relevant component's properties.

3. Open the EL Editor for the Parameter or Display Option to which you want to pass a value.

4. Under **Type a value or expression**, enter `#{param.val}`.

5. Save your changes.

6. To pass a value to the parameter, append the following to your page URL:

    `?val=value`

Where `value` represents the value you want to pass, for example, `true`, `medium`, or `Default`.

Part IV

Working with Portal Assets

This part of *Building Portals with Oracle WebCenter Portal* provides information about the different assets that you can use to define the structure, look and feel, and content of your portals.

- Creating, Editing, and Managing Portal Assets
- Working with Page Templates
- Working with Resource Catalogs
- Working with Skins
- Working with Page Styles
- Working with Content Presenter Display Templates
- Working with Task Flow Styles
- Working with Layouts
- Working with Task Flows
- Working with Data Visualizations
- Working with Visualization Templates
- Working with Web Service Data Controls
- Working with Business Objects
- Working with Data Sources

14

Creating, Editing, and Managing Portal Assets

Use portal assets to define the structure, look and feel, and the content of a portal.

> **Permissions:**
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> - `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
>
> - `Create, Edit, and Delete` or `Create` and `Edit` on the asset type with which you want to work (advanced permissions).
>
>   For example, users with the `Create, Edit, and Delete Page Templates` permission can create, edit, and delete the page templates owned by a portal.
>
> For more information about portal-level permissions, see About Roles and Permissions for a Portal.

Topics:

- About Assets
- Accessing Portal Assets
- Creating Assets
- Editing Assets
- Managing Assets
- Querying Assets Using EL Expressions
- Applying Assets Dynamically Using EL Expressions
- Working with Portal Assets in JDeveloper

About Assets

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

The following table lists the assets available in WebCenter Portal.

Table 14-1   Assets in WebCenter Portal

Assets	Description	Reference
Page Templates	Define the interface that surrounds page content and help to apply a consistent look and feel across all pages in a portal.	Working with Page Templates

Table 14-1   (Cont.) Assets in WebCenter Portal

Assets	Description	Reference
Resource Catalogs	Define the components that users can add to their pages, page templates, and task flows.	Working with Resource Catalogs
Skins	Define the appearance and look and feel, including colors and fonts, of a specific portal or the entire application.	Working with Skins
Page Styles	Define the initial layout of the main content area of a newly created page, and may also dictate the type of content the page supports. A page style may be unique for every portal page.	Working with Page Styles
Content Presenter Display Templates	Define templates for displaying content	Working with Content Presenter Display Templates
Task Flow Styles	Define the layout of task flows created in WebCenter Portal	Working with Task Flow Styles
Layouts	Define how to present data retrieved by a web service data control.	Working with Layouts
Task Flows	Define how to present data retrieved by a web service data control.	Working with Task Flows
Data Visualizations	Define the configuration of a business object that retrieves data from a REST or SQL data source, and the visualization template that displays that data on a page.	Working with Data Visualizations
Visualization Templates	Define how data retrieved by a business object from a REST or SQL data source should be presented on a page.	Working with Visualization Templates
Data Controls	Define how to connect to and retrieve data from a web service to present that data on a page in a task flow asset.	Working with Web Service Data Controls
Business Objects	Define the data to retrieve from a REST or SQL data source to present that data on a page in a visualization template.	Working with Business Objects
REST Data Sources	Define REST data sources that can be used to provide data for portal pages through business objects configured through data visualizations.	Working with Data Sources
SQL Data Sources	Define SQL data sources that can be used to provide data for portal pages through business objects configured through data visualizations.	Working with Data Sources

Shared Assets and Portal Assets

Assets can exist at the application level (shared assets) or 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.
- *Portalassets* are available for use only in the portal in which they are created.

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

Figure 14-1   The Shared Icon

This chapter focuses on how to work with portal assets. For information about shared assets, see Working with Shared Assets.

Default Asset Settings

By default, global default asset settings, such as the page template, skin, and resource catalogs, are used by all portals (indicated by **[system default]** in the portal-level settings). However, in a portal, you can choose to specify portal-specific asset settings. If your portal uses global default settings, any changes to a global setting are reflected in your portal too. For example, consider that the global default skin is the `WebCenter Portal` skin, and you have two portals: `PortalA` and `PortalB`. By default, both your portals will use the `WebCenter Portal` skin. Consider that you change `PortalB` to use the `Mist` skin. `PortalA` still uses the global default `WebCenter Portal` skin. If you then change the global default skin to the `Dew` skin, `PortalA` is automatically updated to use the `Dew` skin; however `PortalB` continues to use `Mist`.

For information about configuring global default asset settings, see Configuring Global Defaults Across Portals in *Administering Oracle WebCenter Portal*.

For information about configuring portal-specific default asset settings, see Administering Look and Feel Settings for a Portal.

Accessing Portal Assets

To access the assets for a portal, open the **Assets** page in the portal administration.

You can also enter the following URL in your browser to navigate directly to the **Assets** page:

```
http://host:port/webcenter/portal/portalName/admin/assets
```

Figure 14-2   Portal Administration: Assets

Shared assets are identified by the **Shared** icon. To work with shared assets, you must use the **Shared Assets** page (see Working with Shared Assets).

Creating Assets

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.

The following table describes the support available for creating assets in WebCenter Portal.

Table 14-2   Support for Creating Assets in a Browser

Asset	Create in Browser?	How?	Further Information
Page Templates	Yes	Only by extending another page template	Creating a Page Template
Resource Catalogs	Yes	From scratch or by extending another resource catalog	Creating a Resource Catalog
Skins	Yes	Only by making a copy of another skin	Creating a Skin
Page Styles	Yes	By saving an existing page to create a new page style, or making a copy of another page style	Creating a Page Style
Content Presenter Display Templates	No	(Not applicable)	Creating a Content Presenter Display Templates in *Developing for Oracle WebCenter Portal*
Task Flow Styles	Yes	Only by making a copy of another task flow style and editing the source code	Editing a Task Flow Style
Layouts	Yes	Only by making a copy of another layout	Creating a Layout
Task Flows	Yes	Only from scratch	Creating a Task Flow
Data Visualizations	Yes	Configure in page editor	Configuring a Data Visualization
Visualization Templates	No	(Not applicable)	Developing Visualization Templates in *Developing for Oracle WebCenter Portal*
Data Controls	Yes	Only from scratch	Creating a Web Service Data Control
Business Objects	Yes	By making a copy of another business object, or from scratch	Creating a Business Object
REST Data Sources	Yes	In the Define Data Visualization wizard or from scratch	Creating a REST Data Source
SQL Data Sources	Yes	Only from scratch	Creating a SQL Data Source

Editing Assets

The **Assets** page enables you to edit the assets that have been created within a portal. It provides two options for editing assets:

- **Edit**—Provides a means of editing an asset either in Structure view in the page editor or in an Edit dialog.

- **Edit Source**—Enables you to work with the source code of an asset.

You may want to edit an asset's source file to make advanced edits to its code without having to download the file, edit it in JDeveloper, and upload it back into WebCenter Portal. You can even use the **Edit Source** option to create an asset from scratch; by creating the asset and then replacing its default source code with your own original code. Note, however, that, due to the heavy hand-coding requirement, this scenario is not recommended, and should only be done by experienced ADF developers.

You cannot edit built-in assets. If you want to modify a built-in asset, you must first create a copy of the asset and then edit the copy according to your requirements.

WebCenter Portal supports round-trip development of assets. To get enhanced functionality for your assets, you can download the asset, edit it in JDeveloper, and then upload it back into WebCenter Portal. For more information, see Working with Portal Assets in JDeveloper.

This section includes the following topics:

- Editing an Asset Using the Edit Link
- Editing the Source Code of an Asset

Editing an Asset Using the Edit Link

Depending on the asset being edited, clicking **Edit** alongside an asset on the **Assets** or **Shared Assets** page either opens the asset in the page editor or in an asset-specific Edit dialog. The following table provides information about editing an asset.

Table 14-3   Editing Assets Using the Edit Link

Asset	Edit Using	Documentation
Page Templates	Page editor	Editing a Page Template
Resource Catalogs	Edit dialog	Editing a Resource Catalog
Skins	Edit dialog	Editing a Skin
Page Styles	Page editor	Editing a Page Style
Content Presenter Display Templates	Edit Source dialog	Editing the Source Code of an Asset
Task Flow Styles	Edit Source dialog	Editing the Source Code of an Asset
Layouts	Edit Source dialog	Editing a Layout
Task Flows	Page editor (Design and Structure views)	Editing a Task Flow
Data Visualizations	(Not applicable)	Configuring a Data Visualization
Visualization Templates	(Not applicable)	Developing Visualization Templates in *Developing for Oracle WebCenter Portal*
Data Controls	Edit dialog	Editing a Web Service Data Control
Business Objects	Edit dialog (Edit Business Object wizard)	Editing a Business Object
REST Data Sources	Edit dialog (Edit REST Data Source wizard)	Editing a REST Data Source

Table 14-3   (Cont.) Editing Assets Using the Edit Link

Asset	Edit Using	Documentation
SQL Data Sources	Edit dialog (Edit SQL Data Source wizard)	Editing a SQL Data Source

Editing the Source Code of an Asset

Use the Edit Source dialog to get more control over asset editing in WebCenter Portal. You can edit the underlying source code of any asset except data controls. Changes made to an asset are saved to the Oracle Metadata Services Repository (MDS Repository), and are made available immediately.

The content of the Edit Source dialog varies depending on the type of asset being edited. If there are multiple files associated with the asset, the dialog provides different tabs for editing the source code of each of these files.

You cannot edit the source code of built-in assets. If you want to modify the code of a built-in asset, you must first create a copy of the asset and then edit the copy according to your requirements.

> **Note:**
>
> Edit an asset's source files only when absolutely necessary. To ensure that you do not end up with an invalid asset that does not work properly, edit the source code very carefully.

To edit the source code of an asset:

1. Open the **Assets** page for the portal that owns the asset.
2. Click the type of asset that you want to edit, for example, **Page Templates**.
3. Select the asset that you want to edit.
4. In the toolbar, click **Actions**, and then choose **Edit Source**.
5. In the Edit Source dialog, edit the code as required.

> **Tip:**
>
> For XML files, the XML syntax in the code is validated and an error message is displayed if you miss any tags or add them incorrectly. Validation is not performed for non-XML files, such as CSS files for skins.

Table 14-4   Editing Asset Source Code

Asset	Tab	Description
Page Templates	Template Page Definition	Edit the JSF (`.jspx`) file that represents the page template. Edit the page template's associated page definition XML file.
Resource Catalogs	Catalog Definition	Edit the XML file that represents the resource catalog.
Skins	CSS	Edit the CSS file for the skin.
Page Styles	Page Page Definition	Edit the JSF (`.jspx`) file that represents the page style. Edit the page style's associated page definition XML file.
Content Presenter Display Templates	Fragment Page Definition	Edit the JSFF file that represents the Content Presenter display template. Edit the page fragment's page definition XML file.
Task Flow Styles	Taskflow Definition Fragment Page Definition	Edit the XML file that represents the task flow style. Edit the page fragment JSFF file. Edit the page fragment's page definition XML file.
Layouts	Component CSS	Edit the XML file that represents the layout component. Edit the CSS file for the layout.
Task Flows	Taskflow Definition Fragment Page Definition	Edit the XML file that represents the task flow. Edit the page fragment JSFF file. Edit the page fragment's page definition XML file.
Data Visualizations	Taskflow Definition Fragment Page Definition	Edit the XML file that represents the data visualization. Edit the page fragment JSFF file. Edit the page fragment's page definition XML file.
Visualization Templates	Fragment	Edit the page fragment JSFF file.
Data Controls	(Not Applicable)	Source code cannot be edited in the browser.
Business Objects	(Not Applicable)	Source code cannot be edited in the browser.
REST Data Sources	(Not Applicable)	Source code cannot be edited in the browser.
SQL Data Sources	(Not Applicable)	Source code cannot be edited in the browser.

6. When you are done, click **Save and Close**.

Managing Assets

In addition to creating and editing assets, there are other operations that you can perform on assets in the **Assets** page.

This section includes the following topics:

- Viewing Information About an Asset
- Previewing an Asset
- Showing and Hiding Assets
- Copying an Asset
- Setting Properties on an Asset
- Setting Security for an Asset
- Downloading an Asset
- Uploading an Asset
- Deleting an Asset

Viewing Information About an Asset

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.

To view information about an asset:

1. Open the **Assets** page for the portal that owns the asset.

2. Click the type of asset for which you want to view information (for example, **Page Templates**).

3. Select the asset for which you want to view information.

4. In the toolbar, click **Actions**, and then choose **Show Properties**. Review the properties for the selected asset:

Table 14-5   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.

Table 14-5   (Cont.) Asset Properties

Property	Description
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.
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. To set attribute values, see Setting Asset Attributes.

Previewing an Asset

WebCenter Portal provides a way to preview certain assets, namely page templates, page styles, task flow styles, and task flows. This enables you to quickly get an idea of how the asset looks, without having to publish it and go through the process of using it within the portal. This means that you can make adjustments quickly, if required.

To preview an asset:

1. Open the **Assets** page for the portal that owns the asset.

2. Click the type of asset that you want to preview, for example, **Page Templates**.

3. Click the name of the asset that you want to preview.

> **Note:**
>
> Not all assets can be previewed. If the name of the asset is not a hyperlink, then it cannot be previewed.

The asset is displayed as it would appear when used in a portal.

4. View and interact with the asset to determine whether it looks and behaves the way you want.

5. When you are done, click **Close**.

You can either edit the asset to make changes or publish it to make it available in the portal.

Showing and Hiding Assets

The system administrator can make shared assets available for use in all portals, or hide some assets so that they cannot be selected in a portal. At the portal level, you can make a custom asset available for use in a portal by marking it as available, or you can hide an asset to prevent users of your portal from selecting it. For example, you may want to hide an asset while you are making further refinements to it after its initial creation and publication.

> **Note:**
>
> Even if an asset is hidden, it can still be referred to by its internal ID through an EL expression. For example, you can refer to a hidden page template by using an EL expression to set the **Page Template** value on the **Settings** page in portal administration.

The following table shows several skins. The built-in shared skins are all available, the custom OraMosaic skin is available, and the custom Karen Skin is hidden.

Figure 14-3   Showing and Hiding Assets

When you first create or upload an asset, by default it is marked as hidden. A hidden asset is not available for wherever assets are selected. For an asset to become available, it must be published, that is, made available. For example, the figure shows the list of skins that are available for selection as the portal's default skin. Note that the hidden skin, Karen Skin, is not included in this list.

Figure 14-4   Hidden Asset Not Available for Selection to Assign
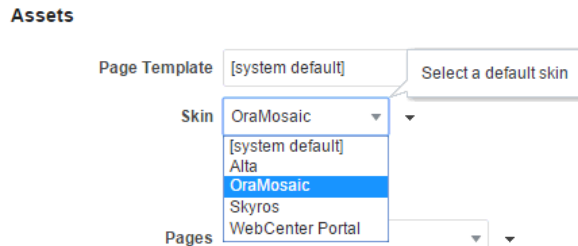
You can, however, use a hidden asset as the starting point for creating a new asset. For example, the figure shows that the hidden skin, Example Skin, is listed in the **Copy From** list when you create a new skin.

Figure 14-5   Hidden Asset Available for Selection to Copy
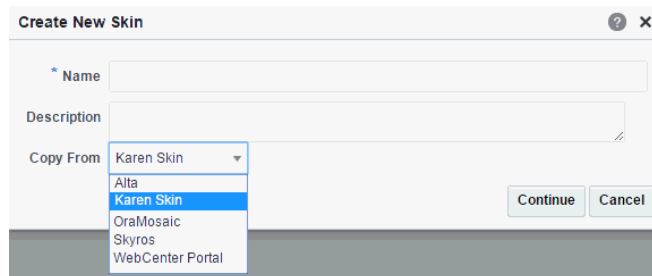
To show or hide an asset:

1. Open the **Assets** page for the portal that owns the asset.

2. Click the type of asset that you want to show or hide (for example, **Page Templates**).

3. Select or deselect the check box in the **Available** column for the asset that you want to show or hide.

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. Open the **Assets** page for the portal that owns the asset.
2. Click the type of asset that you want to copy, for example, **Page Templates**.
3. Select the asset that you want to copy.
4. In the toolbar, click **Actions**, and then choose **Copy**.
5. In the Copy dialog, in the **Display Name** field, enter a name for the copy.

Figure 14-6   Copy Dialog for a Page Template

6. In the **Description** field, optionally enter a description for the new asset.
7. Click **OK**.

Setting Properties on an Asset

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:

- **General**—This section displays details such as the asset's name, location, and internal ID. These properties are common across all asset types.
- **Attributes**—This section lists the attributes associated with an asset. The attributes displayed in the **Attributes** section vary from asset to asset. For example, while a page template does not have any default attributes, skins have the following default attributes: `skinFamily`, `skinId`, and `skinExtends`.

> **✎ Note:**
>
> The Edit Properties dialog for shared assets also includes an **Exclude Asset Usage** section for specifying in which portals a shared asset is available.

This section includes the following topics:

- Accessing the Edit Properties Dialog for an Asset
- Editing the Name or Description of an Asset
- Categorizing an Asset
- Associating an Icon with an Asset
- Setting Asset Attributes

Accessing the Edit Properties Dialog for an Asset

To access the Edit Properties dialog for a portal asset:

1. Open the **Assets** page for the portal.

2. Click the type of asset that you want to edit (for example, **Page Templates**).

3. Select the asset that you want to edit.

4. In the toolbar, click **Actions**, and then choose **Edit Properties** to open the Edit Properties dialog. View and edit the properties of the selected asset:

Table 14-6   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 14-6   (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. To set attribute values, see Setting Asset Attributes.

Editing the Name or Description of an Asset

To maintain a well-organized set of assets, consider developing a standard naming scheme and method of description. This is not a required step, but it may be useful in identifying your intended purpose for a given asset.

To edit the name or description of an asset:

1. Open the Edit Properties dialog for the asset that you want to edit.

2. In the Edit Properties dialog, in the **Display Name** field, edit the name of the asset, if desired.

3. In the **Description** field, enter a description for the asset.

4. Click **OK**.

Associating an Icon with an Asset

You can associate an icon with an asset. Currently, the only asset that can be associated with an icon is a page style.

To associate an icon with an asset:

1. Open the Edit Properties dialog for the asset that you want to edit.

2. In the Edit Properties dialog, in the **Icon URI** field, enter a standard URI path to the icon.

> **Tip:**
>
> You can specify either an absolute URL, or a relative URL that points to an image located somewhere on the portal server.
>
> To store an image on the portal server, you must first upload the required file and then obtain the image's URL using Get Link.

3. Click **OK**.

Categorizing an Asset

You can classify assets into relevant groups. For example, all page styles associated with Sales could belong to a Sales category.

> **Note:**
>
> This value is available and exposed only in the Edit Properties dialog.

To categorize an asset:

1. Open the Edit Properties dialog for the asset that you want to edit.

2. In the Edit Properties dialog, in the **Category** field, enter a category name.

3. Click **OK**.

Setting Asset Attributes

Asset attributes determine the behavior of an 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.

To set asset attributes:

1. Open the Edit Properties dialog for the asset that you want to edit.

2. In the **Attributes** section, edit or enter the **Name** field.

3. In the **Value** field, edit or enter the value for the attribute.

4. Click **Add More** if you want to add more attributes.

5. To remove an attribute associated with an asset, click the **Remove** icon displayed next to the attribute you want to remove.

6. Click **OK**.

Setting Security for an Asset

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. Open the **Assets** page for the portal that owns the asset.

2. Click the type of asset for which you want to set access permissions, for example, **Page Templates**.

3. Select the asset for which you want to set access permissions.

4. In the toolbar, click **Actions**, and then choose **Security Settings**.

5. 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.

Figure 14-7   Security Settings Dialog

> **Tip:**
>
> If you select **Use Custom Permissions**, ensure that at least one user or group is granted the `Manage` permission.

6. 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.

   > 💡 **Tip:**
   >
   > For help on searching for a user or group, see Searching for a User or Group in the Identity Store.

7. 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.

8. If you want to revoke access from any user or group, select that entity and click **Delete Access**.

9. To revoke all custom permissions granted on the asset, select **Use Portal Security Settings**.

10. Click **OK**.

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. Open the **Assets** page for the portal that owns the asset.

2. Click the type of asset that you want to download, for example, **Page Templates**.

3. Select the asset that you want to download.

4. In the toolbar, click **Download**.

5. 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.

Figure 14-8   Download Dialog for a Page Template
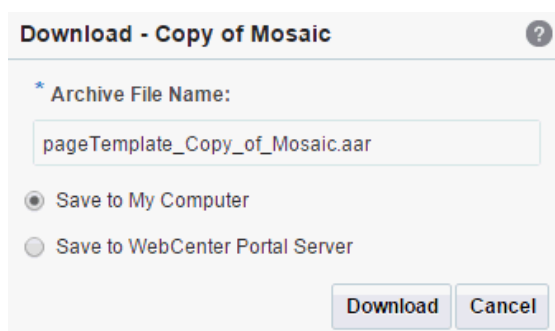
6. Select:

   • **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.

7. Click **Download**.

8. 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.

9. 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 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.
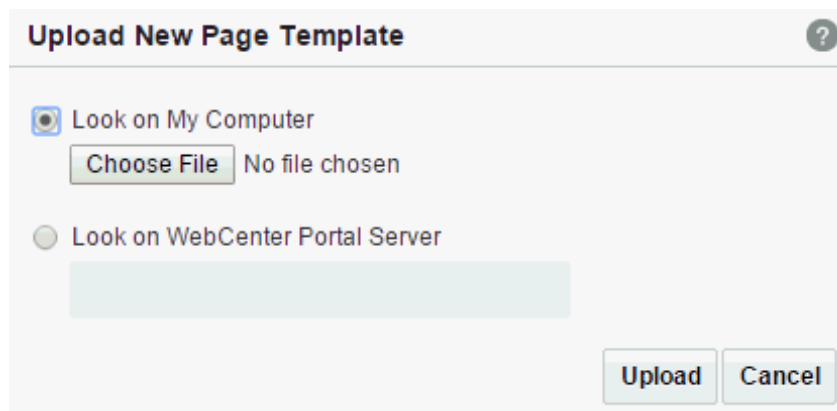
When you upload an asset to WebCenter Portal:

- 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. Open the **Assets** page for the portal that owns the asset.

2. Click the type of asset that you want to upload, for example, **Page Templates**.

3. In the toolbar, click **Upload**.

4. 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.

   Figure 14-9   Upload Dialog for a Page Template

5. Click **Upload**.

6. 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.

7. Click **OK** in the resulting success dialog.

> 💡 **Tip:**
>
> System administrators can upload assets using the WLST command, `importWebCenterResource`. For more information, see importWebCenterResource in *WebCenter WLST Command Reference Reference.*

> ✎ **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`.

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. Open the **Assets** page for the portal that owns the asset.

2. Click the type of asset that you want to delete, for example, **Page Templates**.

3. Select the asset that you want to delete.

4. In the toolbar, click **Delete**.

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

Querying Assets Using EL Expressions

You can access any asset anywhere in WebCenter Portal through Expression Language (EL) expressions.

For example, the following EL expression returns the first page template found with a display name of `myPage`:

```
#{srmContext.resourceType['siteTemplate'].displayName['myPage'].singleResult}
```

You must set query parameters in the format `.property['value']`, where `property` is the name of the asset property, for example, `id`, `displayName`, or `resourceScope`, and `value` is the value of that property you want to search for.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Applying Assets Dynamically Using EL Expressions

WebCenter Portal provides a way to dynamically apply certain assets at runtime based on some criteria. For example, you can present content or shape the way content is presented by using personalization-related EL expressions to select and apply a page template based on whoever is the current user.

Consider an example where you want a top-navigation page template to be displayed to portal managers, and a side-navigation page template to be displayed to other users. You could use the following EL expression to specify the page template:

```
#{WCSecurityContext.userInScopedRole['Moderator'] ?
'gsr3396194a_3a72_44d6_90b4_57fd6efe4ff1' :
'gsr3396194a_3a72_44d6_90b4_57fd6efe4ff7'}
```

The EL expression uses the internal IDs of the page templates.

Instead of using the exact internal ID of the asset that you want to apply, you can also include queries in an EL expression as shown in the following example:

```
#{WCSecurityContext.userInScopedRole['Moderator'] ?
srmContext.resourceScope['space_name'].resourceType['siteTemplate'].displayName['
Top'].singleResult.id :

srmContext.resourceScope['space_name'].resourceType['siteTemplate'].displayName['
Side'].singleResult.id}
```

To dynamically apply an asset at runtime:

1. Note down the internal ID of the required asset from its Show Properties dialog.

   To view Show Properties dialog, select the asset for which you want to view information, , click **Actions** in the toolbar, and then choose **Show Properties**.

2. Access WebCenter Portal Administration and open the **General** page. Or access a specific portal's administration page and open the **Settings** page.
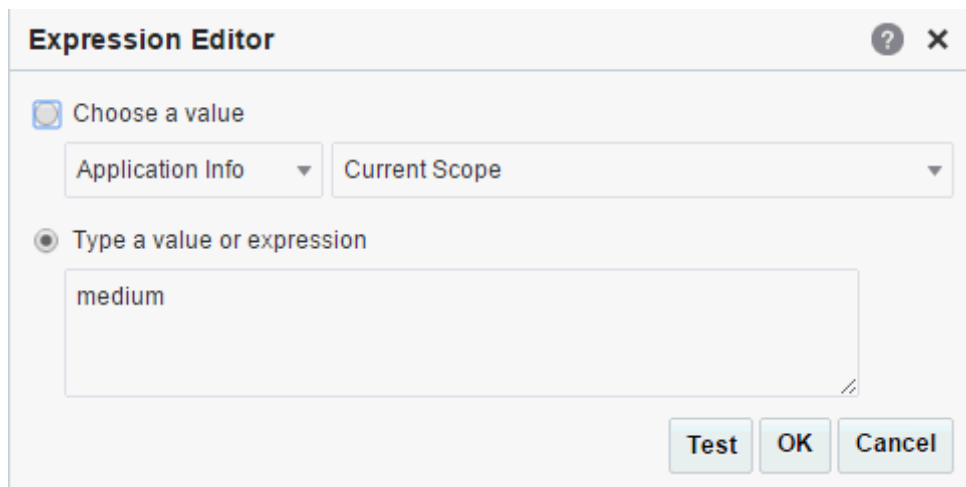
> **Tip:**
>
> You can also enter the following URLs in your browser to navigate directly to
> the appropriate administration pages:
>
> - Application-level: `http://host:port/webcenter/portal/admin/settings/general`
>
> - Portal-level: `http://host:port/webcenter/portal/portalName/admin/settings`

3. Click the ▾ icon next to the desired asset field, then select **Expression Builder** to open the editor.

4. In the Expression Editor dialog, enter the required EL expression.

Figure 14-10   Expression Editor Dialog

For example, if you want to display different page templates depending on whether the page is rendered in a browser on a Windows platform or on a mobile device, you can use the following EL expression:

```
#{requestContext.agent.platformName=='windows' ?
'gsr3396194a_3a72_44d6_90b4_57fd6efe4ff7' :
'gsr1472d17b_8f10_4689_89fb_7431f561567f'}
```

This EL expression is an `if-then-else` statement. The EL `requestContext.agent.platformName` retrieves the platform information. The page template IDs are the ones noted down from the Show Properties dialog.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

5. Click **OK**.

Working with Portal Assets in JDeveloper

You may find that you want to develop portal assets beyond the capabilities of the browser-based interface offered by WebCenter Portal. In this case, Oracle recommends that developers use JDeveloper to develop more complex assets (such a page templates, skins, and page styles) for portals. When fully developed, the developer can publish the assets directly to WebCenter Portal (the portal server) or to a specific portal for immediate use or for testing. Alternatively, the developer can export an asset to a file and upload it to WebCenter Portal later.

For more information, see Working with WebCenter Portal Assets in *Developing for Oracle WebCenter Portal*.

15
Working with Page Templates

A page template ensures that all pages in the portal look and behave consistently. WebCenter Portal provides several built-in page templates, and you can create new custom page templates to meet specific requirements.

> ✏ **Permissions:**
>
> To perform the tasks in this chapter on shared page templates, you must have the application-level `Create, Edit and Delete Page Templates` permission. Users with the `Application Specialist` role have this permission by default. For more information about application-level permissions, see About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> - `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
>
> - `Page Templates: Create, Edit, and Delete Page Templates` or `Create Page Templates` and `Edit Page Templates` (advanced permissions)
>
> See About Roles and Permissions for a Portal.

> ✏ **Note:**
>
> Beginning with Release 12c (12.2.1.4.0), Oracle WebCenter Portal has deprecated the support for the built-in page templates Mosaic and Unicorn. However, if you have upgraded from a prior release, these page templates remain available in your upgraded instance.

Topics:

- About Page Templates
- Changing the Theme Color in the Mosaic Page Template
- Changing the Theme Type in the Unicorn Page Template
- Changing a Page Icon in the Unicorn Page Template
- Setting the Default Page Template
- Creating a Page Template
- Editing a Page Template
- Setting the Preferred Skin for a Page Template

About 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.
>
> For more information, see Developing Page Templates in *Developing for Oracle WebCenter Portal*.

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.

The following figure shows a typical page template, which includes the following elements:

1. Header at the top of the page.

2. Navigation structure below the header, or in a sidebar, to link to important resources.

3. Page content area, which can have its own style and layout as defined by the page style.

4. Footer at the bottom of the page.

Figure 15-1   Page Template - Basic Structure
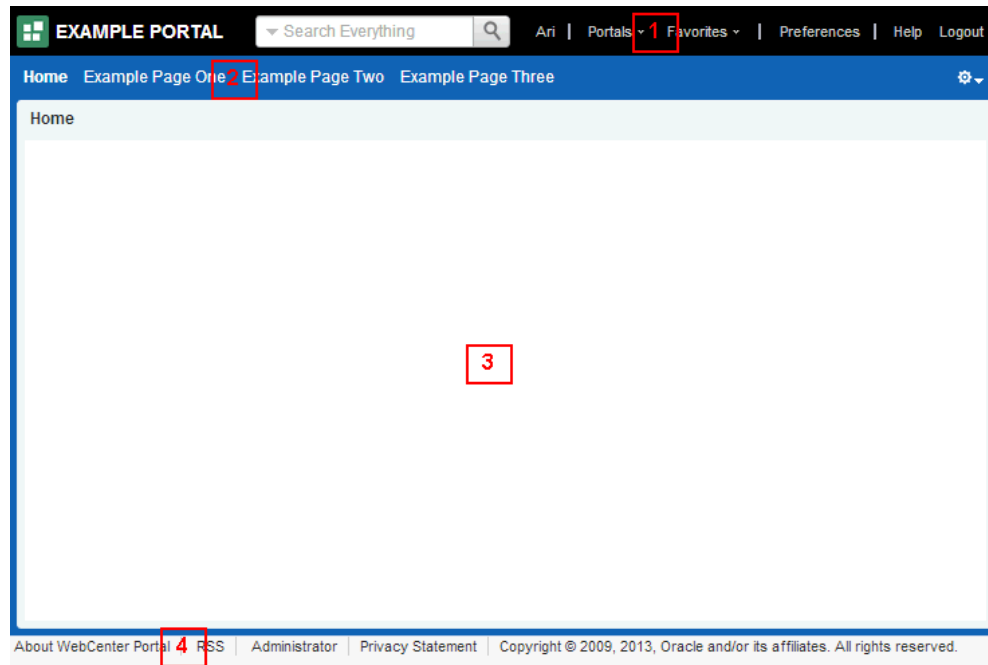
A page template exposes the navigation for a portal along the top of the page, or down the side of the page:

- 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.

About the Built-In Page Templates

WebCenter Portal provides several built-in page templates suited to common page design requirements, described in Table 15-1.

At the *application level*, you cannot directly edit or customize any of the built-in page templates. If you want to alter one of these templates to make it match your requirements, you must create a new page template, selecting the built-in page template from the **Copy From** list, and then make the required adjustments in the new page template.

> **Note:**
>
> The built-in page templates are designed to show one or two levels of navigation. If your navigation includes more than two levels, then only the first one or two levels are displayed when using the built-in page templates. To display further levels of the navigation, you must create your own page template or make a copy of the built-in page template and edit the copy to meet your requirements. .

There are several functions built into the WebCenter Portal page templates:

- Login and logout
- User profile and user preferences

- Edit, create, and manage pages

- Home portal

- Portals menu

- Contact administrator

- Copyright message and branding

- Search

Table 15-1 organizes the built-in page templates chronologically, by release, from newest to oldest. Some of the older page templates are provided for backward compatibility with prior releases, as noted in their descriptions. For new pages, use the latest page templates.

The newer page templates provide the following advantages over the older page templates:

- Simplified customization through improved structured use of ADF components.

- Fewer task flows, replacing unnecessary task flows with URLs.

- Efficient XML with fewer nested layout components and easy-to-understand layout creation.

- Inline navigation, rather than embedded in a JAR-based task flow, allowing for easier customization of portal navigation.

- Faster performance.

> **Note:**
>
> Beginning with Release 12c (12.2.1.4.0), Oracle WebCenter Portal has deprecated the support for the built-in page templates Mosaic and Unicorn. However, if you have upgraded from a prior release, these page templates remain available in your upgraded instance.

Table 15-1   Built-in Page Templates
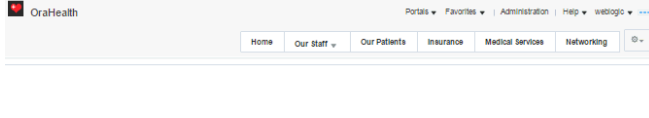
Name	Release	Preferred Skin	Description
Alta Side Navigation	12.2.1	Alta	A flowing page layout with side navigation that offers simplified customization and fewer task flows for faster performance over the earlier Side Navigation template. Page and portal actions are available under an Actions icon at the top right of the page header. When the browser window shows scroll bars, the side navigation area, page header, and page footer scroll out of view as you scroll the contents of the page.
Alta Top Navigation	12.2.1	Alta	A default page template for flowing layout and top navigation that offers simplified customization and fewer task flows for faster performance over the earlier Top Navigation templates. Page and portal actions are available under an Actions icon at the top right of the page header. When the browser window shows scroll bars, the page header and footer scroll out of view as you scroll the contents of the page.

Table 15-1   (Cont.) Built-in Page Templates
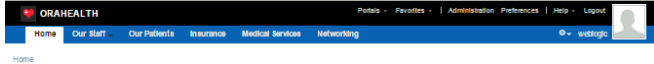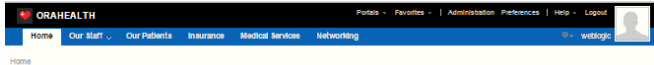
Name	Release	Preferred Skin	Description
Skyros Top Navigation	11.1.1.8.0	Skyros	A flowing page layout with top navigation. Page and portal actions are available under an Actions icon at the top right of the page header.
			When the browser window shows scroll bars, the page header and footer remain in view as you scroll the contents of the page.
			This page template is very similar to WebCenter Portal Top Navigation, with a different skin.
			This page template is used for backward compatibility with prior releases where it may have been used to create a custom page template. For new pages, use the newer template Alta Top Navigation.
WebCenter Portal Top Navigation	11.1.1.8.0	WebCenter Portal Skin	A page template with flowing layout and top navigation. Page and portal actions are available under an Actions icon at the top right of the page header.
			When the browser window shows scroll bars, the page header and footer remain in view as you scroll the contents of the page.
			This page template is very similar to Skyros Top Navigation, with a different skin.
			This page template is used for backward compatibility with prior releases where it may have been used to create a custom page template. For new pages, use the newer template Alta Top Navigation.

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Table 15-1 (Cont.) Built-in Page Templates

Name	Release	Preferred Skin	Description
Mosaic	12.2.1	Mosaic	A responsive page layout with top navigation designed for optimal display on mobile devices (tablet and phone). This template automatically adjusts to the size of the mobile device on which it is viewed, as shown in the illustrations below.
			The Mosaic and Unicorn page templates use bootstrap and Font Awesome icons, popular for web design.
			Because this template is designed to be responsive to the display device, pages that use this template do not need device-specific settings or page variants.
			This template includes four theme color options: green (default), blue, orange, and red. To change the theme color for the pages of a portal, see Changing the Theme Color in the Mosaic Page Template.
Unicorn	12.2.1	Unicorn	A responsive page layout with side navigation designed for optimal display on mobile devices (tablet and phone). This template automatically adjusts to the size of the mobile device on which it is viewed, as shown in the illustrations below.
			The Mosaic and Unicorn page templates use bootstrap and Font Awesome icons, popular for web design.
			Because this template is designed to be responsive to the display device, pages that use this template do not need device-specific settings or page variants.
			This template includes two theme types: classic (default) and flat. To change the theme type for the pages of a portal, see Changing the Theme Type in the Unicorn Page Template.
			This template uses the `fa-icon` page attribute to specify the icon to display for each page (see Changing a Page Icon in the Unicorn Page Template).

Changing the Theme Color in the Mosaic Page Template

> **Note:**
>
> Beginning with Release 12c (12.2.1.4.0), Oracle WebCenter Portal has deprecated the support for the built-in page templates Mosaic and Unicorn. However, if you have upgraded from a prior release, these page templates remain available in your upgraded instance.

The Mosaic page template includes four theme color options: green (default), blue, orange, and red. You can change the theme color, then use the revised page template as the default page template for one or all portals.

To change the theme color:

1. Make a copy of the Mosaic page template.

2. In the copied page template, set the `themeColor` attribute to one of the follow values:

   - `body-green`

   - `body-blue`

   - `body-orange`

   - `body-red`

3. Set the revised page template as the default page template for one or all portals.

Changing the Theme Type in the Unicorn Page Template

> **Note:**
>
> Beginning with Release 12c (12.2.1.4.0), Oracle WebCenter Portal has deprecated the support for the built-in page templates Mosaic and Unicorn. However, if you have upgraded from a prior release, these page templates remain available in your upgraded instance.

The Unicorn page template includes two theme types: classic (default) and flat. You can change the theme type, then use the revised page template as the default page template for one or all portals.

To change the theme type:

1. Make a copy of the Unicorn page template.

2. In the copied page template, set the `themeType` attribute to one of the follow values:

   - `old` (default classic theme)

   - `flat`

3. Set the revised page template as the default page template for one or all portals.

Changing a Page Icon in the Unicorn Page Template

> **Note:**
>
> Beginning with Release 12c (12.2.1.4.0), Oracle WebCenter Portal has deprecated the support for the built-in page templates Mosaic and Unicorn. However, if you have upgraded from a prior release, these page templates remain available in your upgraded instance.

For pages that use the Unicorn page template, you can change the page icons that display in the portal navigation to any Font Awesome icon.

To change the icon for a page that uses the Unicorn page template:

1. On the portal administration **Settings** page, verify that the default page template and skin is set to `Unicorn`.

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2. Open the page in the page editor, then click its menu icon (▶) and select **Page Information** to display the page management tabs.

Figure 15-2   Selecting Page Information
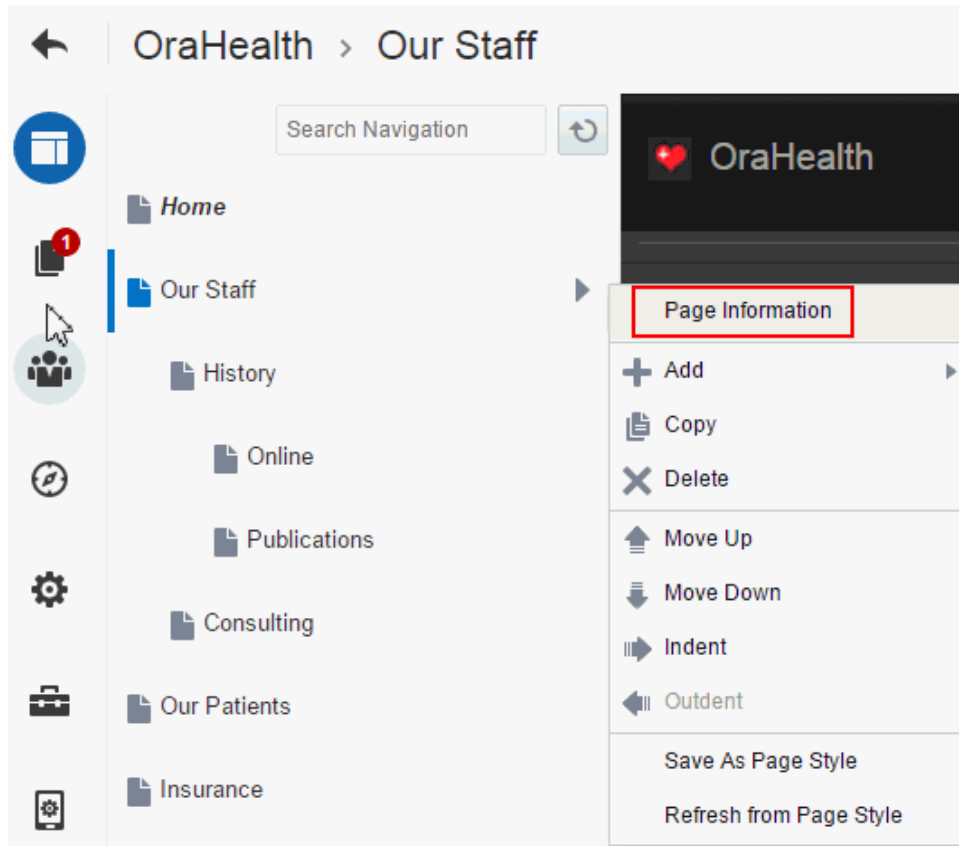
3. On the **Advanced** tab, click the **Options** subtab, and specify the following settings:

   • **New Attribute Name**: `fa-icon`

   • **New Attribute Value**: a Font Awesome icon name (for example, `fa-group` or `fa-bullhorn`)

Figure 15-3   Adding a Page Attribute

4. Click **Add**, then **Save**.

5. In the portal editor, notice that the left navigation pane in the page template displays the icon set by the `fa-icon` attribute for the page.

Figure 15-4   New Icon for Page
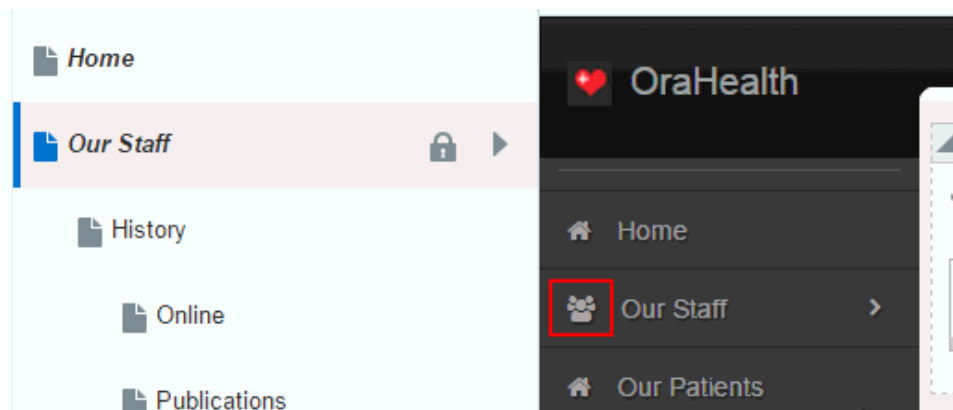
6. Click **Save**.

Setting the Default Page Template

When a user creates a new page in a portal, the portal's default page template is used to determine the structure and layout of the page. This helps to ensure that all pages in a portal have a consistent look and feel. This consistency within pages makes a portal easy to use.

> **Tip:**
>
> To determine which page template to use as the default page template, you can preview page templates.

Page templates work in combination with skins to determine the look and feel of the pages in a portal. When you set the default page template, the default skin is automatically set to the preferred skin for that page template, if it has one.

> **Note:**
>
> If you change the default skin to something other than the page template's preferred skin, the pages in your portal may not look as expected.

Setting the Default Page Template for a Portal

> **Permissions:**
>
> To perform this task, you must be a portal manager or member with `Administration: Manage Security and Configuration` or `Administration: Manage Configuration` permission in the portal.

Every portal has a set of default assets, including a default page template. By default, a portal inherits the page template defined for the portal template that you select when you create the portal. If the portal template does not define a default page template, the system default page template is used instead.

Setting the Default Page Template for All Portals

> ✏ **Permissions:**
>
> To perform this task, you must be a system administrator (have the `Administrator` role, or the `Portal Server: Manage All` or `Portal Server: Manage Configuration` permission).

System administrators can select a page template to use as the WebCenter Portal application-level default page template. This page template is used for pages in the Home portal and for pages in portals where the portal template used to create the portal did not define a default page template.

For information about how to specify the system default page template, see Choosing a Default Page Templates in *Administering Oracle WebCenter Portal*.

Setting the Default Page Template for a Portal

> ✏ **Permissions:**
>
> To perform this task, you must be a portal manager or member with `Administration: Manage Security and Configuration` or `Administration: Manage Configuration` permission in the portal.
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Every portal has a set of default assets, including a default page template. By default, a portal inherits the page template defined for the portal template that you select when you create the portal. If the portal template does not define a default page template, the system default page template is used instead.

To set a different default page template for the pages in your portal, see Changing the Page Template for a Portal.

Setting the Default Page Template for All Portals

> ✏️ **Permissions:**
>
> To perform this task, you must be a system administrator (have the `Administrator` role, or the `Portal Server: Manage All` or `Portal Server: Manage Configuration` permission).

System administrators can select a page template to use as the WebCenter Portal application-level default page template. This page template is used for pages in the Home portal and for pages in portals where the portal template used to create the portal did not define a default page template.

For information about how to specify the system default page template, see Choosing a Default Page Templates in *Administering Oracle WebCenter Portal*.

Creating a 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.
>
> For more information, see Developing Page Templates in *Developing for Oracle WebCenter Portal*.

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. Navigate to one of the following:

   • To create an application-level page template, go to the **Shared Assets** page.

- To create a portal-level page template, go to the **Assets** page for the portal in which you want to create it.

2. In the left panel, under **Structure**, click **Page Templates**.

3. In the toolbar, click **Create**.

Figure 15-5   Creating a Page Template
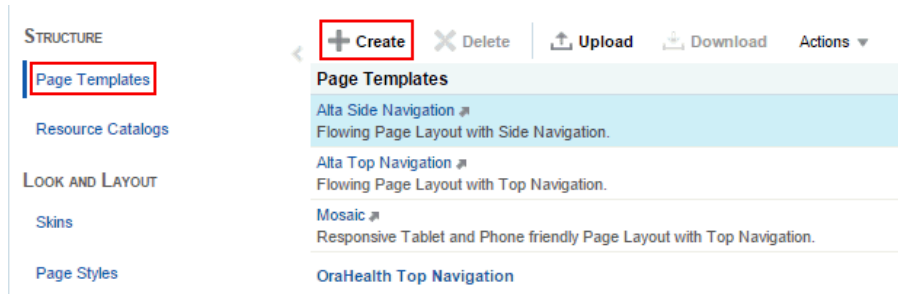
4. In the Create New Page Template dialog, in the **Name** field, enter a name for the page template.

   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.

Figure 15-6   Create New Page Template Dialog

5. 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.

6. 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.

7. 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.

For more information, see Editing a Page Template.

Editing a Page Template

In a portal, you can edit a page template using Structure view of the page editor to fine-tune the layout and content as desired. Note that you can not edit built-in page templates; you can copy a built-in page template to create a new custom page template for a portal, then edit that copy.

> **✐ Note:**
>
> Creating and editing a page template is a 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. New page templates can also be developed from scratch using JDeveloper. When fully developed, the developer can upload page templates directly to WebCenter Portal (the portal server) 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.
>
> For more information, see Developing Page Templates in *Developing for Oracle WebCenter Portal*.

To edit a page template:

1. Navigate to one of the following:

    •   To edit an application-level page template, go to the Shared Assets page.

    •   To edit a portal-level page template, go to the **Assets** page for the portal that owns it.

2. In the left panel, under **Structure**, click **Page Templates**.

3. Click the **Edit** quick link in the row for the page template that you want to edit.

    > **💡 Tip:**
    >
    > If you prefer, you can edit the source code of the page template directly. In the toolbar, click **Actions**, then select **Edit Source**.

Figure 15-7   Edit Link for Page Template

4. In Structure view of the page editor, edit the layout and the content of the page template as desired.

Figure 15-8   Editing a Page Template
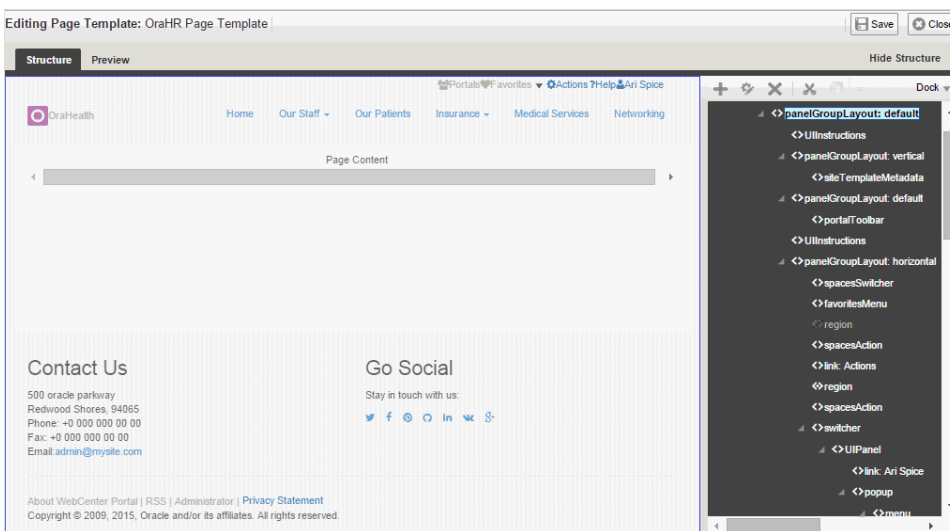
A page template must include at least one content region (Box component).

To include or modify portal navigation, see Adding Navigation to a Page Template.

WebCenter Portal provides a range of reusable components that provide ready-to-go pieces of the WebCenter Portal user interface, such as a login link or search field.

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

Setting the Preferred Skin for a Page Template

Page templates and skins are designed to work in combination to define the look and feel of the pages in your portal. When you create a page template to define the structure and layout of your pages, you should also create a corresponding skin to define the colors, fonts, and so on, used by that page template. As they are so closely related, you may want to identify the skin that is intended to be used with the page template as the page template's preferred skin.

> **Note:**
>
> When a user identifies a page template as the default for a portal or as the system default, the default skin is automatically set to the preferred skin for that page template, if it has one. If a different default skin is selected, the pages in the portal may not look as expected.

To set a page template's preferred skin:

1. Navigate to one of the following:

    • To set the preferred skin for an application-level page template, go to the **Shared Assets** page.

    • To set the preferred skin for a portal-level page template, go to the **Assets** page for the portal that owns it.

2. In the left panel, under **Structure**, click **Page Templates**.

3. Select the page template for which you want to set the preferred skin.

4. In the toolbar, click **Actions**, and then choose **Edit Properties**.

5. In the Attributes section of the Edit Properties dialog, in the **Name** field, enter `preferredSkin`.

6. In the **Value** field, enter the skin family of the skin that you want to use as the page template's preferred skin.

    > **Tip:**
    >
    > The skin family is provided on the Show Properties dialog for the skin.

7. Click **OK**.

Adding Navigation to a Page Template

One of the key parts of a page template is the navigation visualization. This determines how the navigation looks and behaves in your portal.

> **Best Practice:**
>
> You can add navigation visualization to a page, but typically you add it to a page template so that it can be defined in one place and propagated consistently across the whole portal.

This section includes the following topics:

• Adding a Built-in Navigation Task Flow to a Page Template

• Working with Navigation Task Flow Properties

• Downloading Additional Navigation Task Flows

• Designing Advanced Navigation Visualization

Adding a Built-in Navigation Task Flow to a Page Template

WebCenter Portal provides three built-in navigation task flows that you can add to page templates:

• **Navigation Breadcrumb task flow**—Breadcrumb navigations display a series of horizontal or vertical links that show users their current position in the navigation hierarchy. Breadcrumbs are particularly useful for deep hierarchies, say four levels or more, and when users might want to get back to a specific place.

Figure 15-9   The Navigation Breadcrumb Task Flow

Personal Banking > Current Account > Regular Current Accounts

• **Navigation Menu task flow**—Menu navigations display navigational links as a series of tabs, menus, bars, buttons, choices, or as a list. Menu navigation is appropriate when linking to WebCenter Portal pages, portals, and documents, and where the number of items is known, such that there is enough room to display all the options that are available.
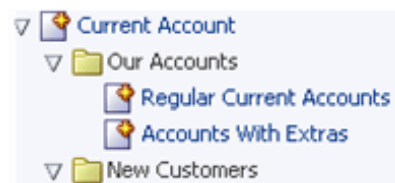
Figure 15-10   The Navigation Menu Task Flow

Personal Banking   Private Banking   Business Banking   Commercial Banking

• **Navigation Tree task flow**—Tree navigations display navigational links in a hierarchical structure and often contain multiple-level hierarchies. Tree navigations can provide relatively simple access to a complex structure and quite often appear in a left pane in page templates.

Figure 15-11   The Navigation Tree Task Flow

```
▽ 🎴 Current Account
   ▽ 📁 Our Accounts
         🎴 Regular Current Accounts
         🎴 Accounts With Extras
   ▽ 📁 New Customers
```

To add a built-in navigation task flow to a page template:

1. Open the page template in Structure view in the page editor.

2. In the hierarchical list of page components, select the component in which to place the navigation task flow.

> 💡 **Tip:**
>
> You can also select a component by clicking it in the WYSIWYG section of the page. A selected component is outlined in blue.

3. Click the **Add content into the selected component** icon to open the resource catalog.

Figure 15-12   Resource Catalog in Structure View of Page Template
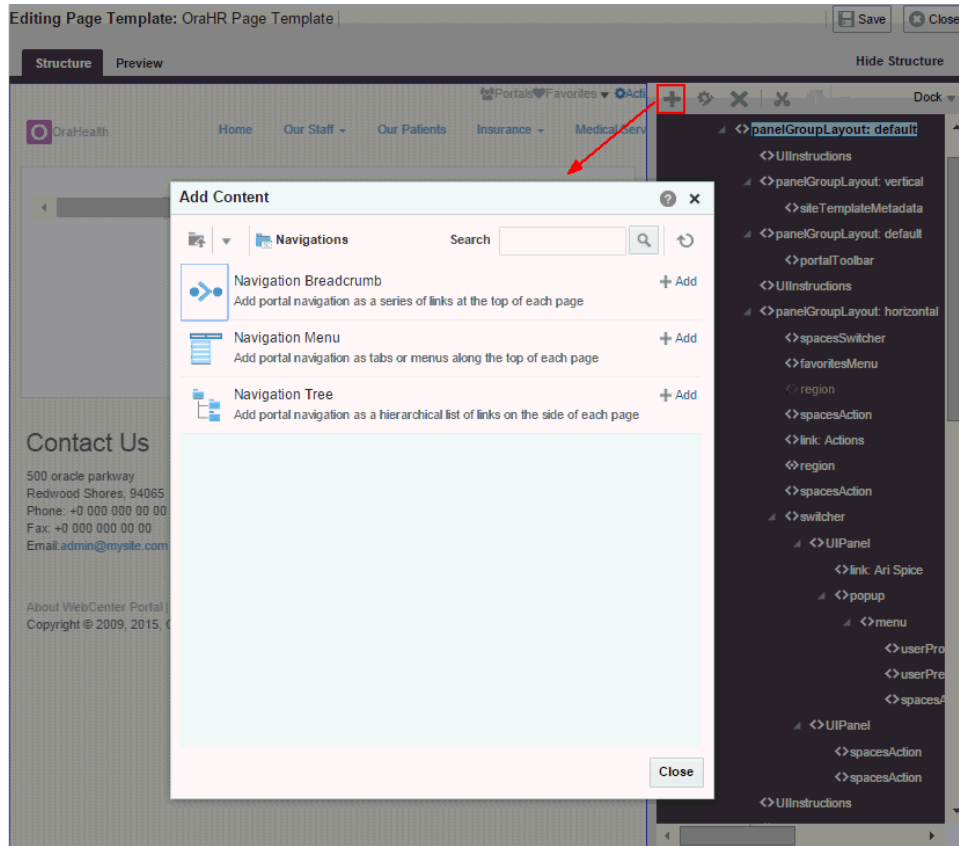
4. Navigate to the section of the resource catalog that contains the built-in navigation task flows.

> 💡 **Tip:**
>
> The presence and location of these task flows depends on how the resource catalog is configured. In the Default Page Template Catalog, you can find the built-in navigation task flows under the **Navigations** folder.

5. Modify the navigation task flow as required.

6. Click **Save** to save your changes.

Working with Navigation Task Flow Properties

The navigation task flows have associated properties, which users with sufficient properties can access from the Component Properties dialog in Structure View in the page editor (Figure 15-13).

Figure 15-13   Navigation Tree Task Flow - Component Properties

> **See Also:**
>
> Setting Component Properties in Structure View

This section provides an overview of the navigation task flow properties and steps you through examples of configuring a task flow instance using property values. It includes the following topics:

- Setting Navigation Task Flow Properties
- Navigation Task Flow Properties
- Configuring Navigation Task Flows

Setting Navigation Task Flow Properties

To set properties on a navigation task flow (Navigation Breadcrumb, Navigation Menu, and Navigation Tree), see Setting Component Properties in Structure View.

Navigation Task Flow Properties

This section describes the parameters that are unique to each of the built-in navigation task flows.

Table 15-2 describes the parameters for the Navigation Breadcrumb task flow. For steps to set parameter values, see Rendering Navigation as Breadcrumbs.

Table 15-2   Navigation Breadcrumb Task Flow Parameters

Parameter	Description
Navigation	Displays the name of the navigation model.
Start Path	The level in the navigation model at which to start the navigation.
	You can enter a path or an EL expression or click the **Select Path** icon to select the start node.
	Valid values are:
	• **Start at the Currently Selected Page Path** • **Start at This Level of the Currently Selected Page Path** • **Select Page Path**
	For more information, see Selecting the Navigation Start Path.
Show Root	Specifies whether to show the start node in the breadcrumbs.
Display Style	Enter horizontal or vertical

Table 15-3 describes the parameters for the Navigation Menu task flow.

Table 15-3   Navigation Menu Task Flow Parameters

Parameter	Description
Navigation	Displays the name of the navigation model.
Second Level Style	The style for rendering the second level of navigation items.
	Valid values are: donotdisplay, tabs, bar, buttons, choice, list
	Notes:
	• If the resource being rendered is non-navigable, for example, a folder, then it cannot be displayed as a tab, bar, button, choice, or list. It can be displayed only if the style menu or menumenu is selected. • This property is available only if the Style property is not menu or menumenu.
Start Path	The level in the navigation model at which to start the navigation.
	You can enter a path or an EL expression or click the **Select Path** icon to select the start node.
	Valid values are:
	• **Start at the Currently Selected Page Path** • **Start at This Level of the Currently Selected Page Path** • **Select Page Path**
	For more information, see Selecting the Navigation Start Path.
	Note: The Navigation Menu task flow is limited to showing a maximum of two levels of navigation items.

Table 15-3   (Cont.) Navigation Menu Task Flow Parameters

Parameter	Description
Style	The style for rendering the first level of navigation items.
	Valid values are `tabs`, `bar`, `buttons`, `choice`, `list`, `menu`, `menumenu`
	Notes:
	• If the resource being rendered is non-navigable, for example, a folder, then it cannot be displayed as a tab, bar, button, choice, or list. It can be displayed only if the style `menu` or `menumenu` is selected.
	• If a navigable item is rendered using the `menumenu` style, the item is rendered twice, once as a drop-down menu, and once as a link to the item itself.
Show Icons	Specifies whether to render icons for each resource.

Table 15-4 describes the parameters for the Navigation Tree task flow.

Table 15-4   Navigation Tree Task Flow Parameters

Parameter	Description
Navigation	Displays the name of the navigation model.
Start Path	The level in the navigation model at which to start the navigation.
	You can enter a path or an EL expression or click the **Select Path** icon to select the start node.
	Valid values are:
	• **Start at the Currently Selected Page Path**
	• **Start at This Level of the Currently Selected Page Path**
	• **Select Page Path**
	For more information, see Selecting the Navigation Start Path.
Show Levels	The number of levels shown when the tree is initially rendered.
	Valid values are:
	• `1`—Show top level nodes only; all other nodes are initially collapsed
	• `2`—Expand the first level of child nodes
	• `3`—Expand the second level of child nodes
	• `all`—Expand all nodes
	Note: This option applies only if the tree is rendered as a `collapsed` tree. If the tree is rendered as an `expanded` tree then all nodes are shown expanded regardless of the value of this property.
Show Root	Specifies whether to render the start node in the tree.

Table 15-4   (Cont.) Navigation Tree Task Flow Parameters

Parameter	Description
Style	The style of the navigation. Valid values are: • `collapsed`—Render the given levels (as specified by the **Show Levels** property) as initially collapsed • `expanded`—Render all tree nodes, expanded to show all children • `list`—Render a flat list of top-level navigation items. If any of the top-level navigation items are folders, the content of those folders are provided in drop-down menus. **Note:** Specifying the `list` option overrides the **Show Levels** and **Show Root** properties.
Show Icons	Specifies whether to render icons for each resource.

Configuring Navigation Task Flows

The following sections use examples based on the sample navigation shown in Figure 15-14:

Figure 15-14   Sample Navigation
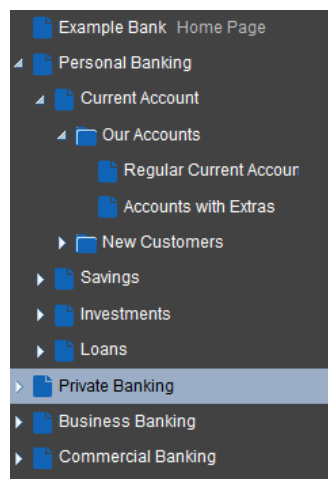
- Selecting the Navigation Start Path
- Rendering Navigation as a Tree
- Rendering Navigation as a Menu
- Rendering Navigation as Breadcrumbs
- Linking Navigation Task Flows

Selecting the Navigation Start Path

To select the start path for your navigation:

1. Add a navigation task flow to the page template used by the portal, as described in Adding a Built-in Navigation Task Flow to a Page Template.

2. Open the task flow Parameters properties (see Setting Navigation Task Flow Properties), and next to the **Start Path** parameter, click the **Select Path** icon.

3. 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.pr
     ettyUrl}
     ```

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

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

     In the sample navigation shown in Figure 15-14: If this option is selected, when the user navigates to the Current Account page, the navigation looks as shown in Figure 15-15.

     Figure 15-15   Start at the Currently Selected Page Path
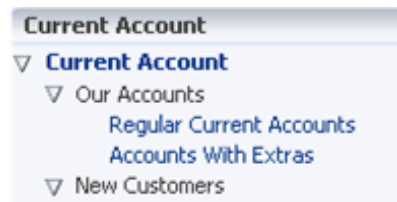
   - **Start at This Level of the Currently Selected Page Path** to use the *n*th level of the path to the currently selected page as the starting point of the navigation (where *n* is the number specified in the field next to this option). This populates the **Start Path** property with the following EL expression:

     ```
     #{navigationContext.navigationModel['modelPath=path'].currentSelection.pr
     ettyUrlPath[level]}
     ```

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

     In the sample navigation shown in Figure 15-14: If this option is selected with the value of `1`, when the user navigates to the Personal Banking page, and then the Current Account page, the navigation starts at the first level of this path (that is, Personal Banking) as shown in Figure 15-16.

Figure 15-16   Start at Specified Level of the Currently Selected Page Path

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

Rendering Navigation as a Tree

To render your navigation as a tree:

1. Add the Navigation Tree task flow to the page template used by the portal, as described in Adding a Built-in Navigation Task Flow to a Page Template.

2. Open the task flow Parameters properties (see Setting Navigation Task Flow Properties), and select the **Start Path** for the navigation when it is rendered on the page, as illustrated in Selecting the Navigation Start Path.

3. From the **Show Levels** drop-down list, select how many levels to expand when the tree is initially rendered with the **Collapsed Tree** style.

> **Note:**
>
> If the navigation is rendered using the **Expanded Tree** style, this option is ignored and the navigation is rendered will all nodes fully expanded.

4. From the **Show Root** drop-down list, select whether to display the start node in the tree.

   For example, if the start node is **Current Account**, select:

   - **Show Tree Root** to include the **Current Account** node in the tree (Figure 15-17).

   Figure 15-17   Show Tree Root
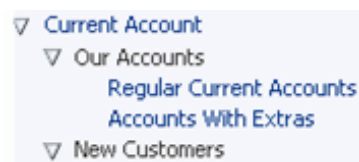
   - **Do Not Show Root** to not include the **Current Account** node (Figure 15-18).

Figure 15-18   Do Not Show Root
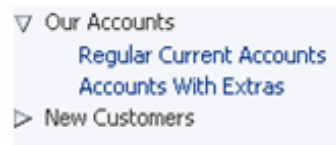
- **Show Root As Box** to include the Current Account node as the header of a box that contains the rest of the navigation (Figure 15-19).

Figure 15-19   Show Root As Box
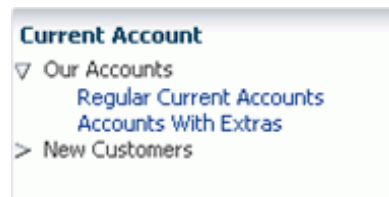
5. Specify the **Style** to use for the tree.

   - `collapsed` displays the tree initially collapsed according to the levels specified by the **Show Levels** property.

   - `expanded` displays the tree with all levels completely expanded.

   - `list` displays the tree as a flat list of the top-level navigation items. If any of the top-level navigation items are folders, they are displayed as drop-down menus that display the contents of the folders.

     In the sample navigation shown in Figure 15-14: If the start node is Personal Banking, a tree navigation with the List style looks like Figure 15-20.

Figure 15-20   List Style Tree with No Folders

However, if the start node is Current Account (which contains two folders), it looks like Figure 15-21.

Figure 15-21   List Style Tree with Folders
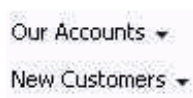
6. Select **Show Icons** to display the icons associated with the navigation items in the tree (Figure 15-22).

Figure 15-22   Show Icons

Rendering Navigation as a Menu

To render your navigation as a menu:

1. Add the Navigation Menu task flow to the page template used by the portal, as described in Adding a Built-in Navigation Task Flow to a Page Template.

2. Open the task flow Parameters properties (see Setting Navigation Task Flow Properties), and select the **Start Path** for the navigation when it is rendered on the page, as illustrated in Selecting the Navigation Start Path.

3. For the **Style** parameter, specify how you want to display the first level of navigation items in the menu. In the sample navigation shown in Figure 15-14, we can illustrate the different options for this property:

   - `tabs`

     Figure 15-23   Tabs Menu Navigation Style

   - `bar`

     Figure 15-24   Bar Menu Navigation Style

   - `buttons`

     Figure 15-25   Buttons Menu Navigation Style

   - `choice`

     Figure 15-26   Choice Menu Navigation Style

- `list`

Figure 15-27   List Menu Navigation Style

- `menu`

Figure 15-28   Menu Navigation Style
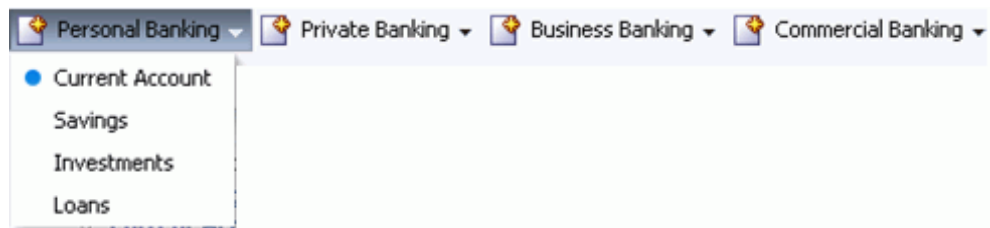
4. For the **Second Level Style** parameter, specify the style to use for the second level of navigation items: `donotdisplay`, `tabs`, `bar`, `buttons`, or `choice`, `list`.

> **Note:**
>
> Menu navigations can render only two levels of navigation items.

5. Select **Show Icons** to display the icons associated with the navigation items in the menu.

Rendering Navigation as Breadcrumbs

To render your navigation as breadcrumbs:

1. Add the Navigation Breadcrumb task flow to the page template used by the portal, as described in Adding a Built-in Navigation Task Flow to a Page Template.

2. Open the task flow Parameters properties (see Setting Navigation Task Flow Properties), and select the **Start Path** for the navigation when it is rendered on the page, as illustrated in Selecting the Navigation Start Path.

3. Select **Show Root** to display the start node in the breadcrumbs.

4. For the **Display Style** parameter, specify whether to display the breadcrumbs vertically (`vertical`) or horizontally (`horizontal`) . For example, Figure 15-29 shows breadcrumbs displayed horizontally.

Figure 15-29   Horizontal Breadcrumbs

Figure 15-30 shows breadcrumbs displayed vertically.

Figure 15-30   Vertical Breadcrumbs

Personal Banking >
    Current Account >
           Regular Current Accounts

Linking Navigation Task Flows

You may want to include more than one area of navigation in your portal. For example, you might want to include tabs along the top of the page, displaying the top level of your navigation, and a second tree structure down the side of the page. You can link the navigation task flows together so that the tree navigation reflects the selected navigation item in the tabbed menu.

The following procedure shows how to do this using the sample navigation shown in Figure 15-14.

To link navigation task flows:

1. Add the Navigation Menu task flow to the page template used by the portal, as described in Adding a Built-in Navigation Task Flow to a Page Template.

2. Add the Navigation Tree task flow to a region along the side of your portal's page template, as described in Adding a Built-in Navigation Task Flow to a Page Template.

3. Open the Navigation Menu task flow Parameters properties (see Setting Navigation Task Flow Properties), and from the **Navigation** drop-down list, select the desired navigation model, or enter an EL expression. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

4. For the **Start Path** parameter, enter `/` to start at the root of the navigation model.

5. For the **Style** parameter, enter `tabs`.

6. For the **Second Level Style** parameter, specify `donotdisplay`.

   This restricts this part of the navigation to display only the top level of the navigation model. The rest of the navigation model is displayed in the tree navigation.

7. Click **OK**.

8. Hover the mouse over the Navigation Tree task flow and click the **View Actions** menu, then select **Parameters**.

9. In the **Parameters** dialog, from the **Navigation** drop-down list, select the same navigation model as is used for the Navigation Menu task flow, or enter the same EL expression.

10. Next to the **Start Path** field, click the **Select Path** icon.

11. In the Select Start Path dialog, select **Start at the Currently Selected Page Path** and click **OK**.

    This ensures that the tree navigation displays the navigation for whatever has been selected in the menu navigation.

12. From the **Show Root** drop-down list, select **Do Not Show Root**.

    The root of the navigation model is displayed in the tabs at the top of the page, so there is no need to duplicate it here.

13. Click **OK**.

14. Save and close the page template.

    Figure 15-31 shows how the above procedure might work for In the sample navigation shown in Figure 15-14. Selecting the Personal Banking tab at the top of the page displays the rest of the navigation (from Personal Banking down) on the side of the page.

Figure 15-31   Linking Navigation Task Flows
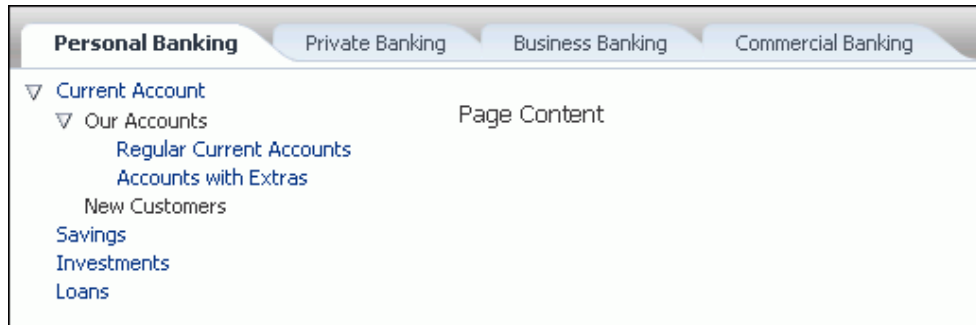
Downloading Additional Navigation Task Flows

Additional navigation task flows are available for download from Oracle Technology Network at:

http://www.oracle.com/technetwork/middleware/webcenter/samples-196325.zip

The ZIP file contains the following navigation task flows:

- **List Navigation**—Renders portal navigation in a vertical list format. Folders and their items are rendered as drop-down menus. Empty folders are not rendered.

- **Menu with Links Navigation**—Renders portal navigation in a horizontal menu format. For top level navigation items, folders are rendered as drop-down menus, navigable links with no children are rendered as a top level link. Empty folders are not rendered.

- **Tree Navigation**—Renders portal navigation in a vertical collapsed tree format.

Download the ZIP file and extract its contents locally. You can then upload one or more of the archive files to your application, as described in Uploading an Asset. The task flows are then available in the resource catalog under **Integration, Task Flows**.

Designing Advanced Navigation Visualization

The navigation task flows provided by WebCenter Portal enable you to quickly visualize your navigation in your application. However, you may find that these task flows do not quite match your navigation requirements. If you find this is the case, you can use JDeveloper to edit the page templates you create in WebCenter Portal and add the navigation UI directly to the templates using the navigation EL APIs provided by WebCenter Portal. You can then upload these edited page templates back into WebCenter Portal. You can also create your page templates entirely in JDeveloper before uploading them to WebCenter Portal. The WebCenter Portal built-in page templates were created in this way.

> **Note:**
>
> Designing advanced navigation visualization in a page template is a complex task. Therefore, the implementation of advanced navigation visualization should be completed by an experienced Web Developer.

The steps to download and upload page templates from WebCenter Portal are described in Working with Portal Assets in JDeveloper.

For information about specific considerations for creating page templates in JDeveloper for use in WebCenter Portal, see Developing Page Templates in *Developing for Oracle WebCenter Portal*.

Managing a Page Template

The following options are available on the **Assets** or **Shared Assets** page to enable you to manage page templates.

> **See Also:**
>
> Accessing Portal Assets and Accessing Shared Assets

- **Create**—For more information, see Creating a Page Template.
- **Delete**—You can delete a page template when it is no longer required.

  For more information, see Deleting an Asset.
- **Upload**—You can upload an archive file that contains a page template that has been developed using JDeveloper.

  For more information, see Uploading an Asset.
- **Download**—You can download a page template into an archive file for further development in JDeveloper.

  For more information, see Downloading an Asset.
- **Actions**
  - **Copy**—You can create a copy of a page template.

    For more information, see Copying an Asset.
  - **Security Settings**—You can control whether all users or only specific users or groups can access a page template.

    For more information, see Setting Security for an Asset.
  - **Restore Default**—If you have customized a shared page template at the portal level, you can use this option to revert the page template back to its original state.
  - **Show Properties**—Each page template has an associated Show Properties dialog that summarizes useful information about it.

    For more information, see Viewing Information About an Asset.

- – **Edit Source**—You can directly edit the source code of a page template.

  For more information, see Editing the Source Code of an Asset.

- – **Edit Properties**—Each page template has certain properties associated with it that control how it is displayed in the portal. You can edit these properties through the Edit Properties dialog.

  For more information, see Setting Properties on an Asset.

- • **Preview**—You can preview what a page template looks like, enabling you to make adjustments quickly, if required.

  For more information, see Previewing an Asset.

- • **Available**—You can control whether or not a page template is available for use in a portal by selecting or deselecting this check box.

  For more information, see Showing and Hiding Assets.

  > 💡 **Tip:**
  >
  > In addition to showing or hiding a page template, you can also control whether a shared page template is available to any, all, or selected portals in WebCenter Portal. For more information, see Setting Properties on an Asset.

- • **Edit**—For more information, see Editing a Page Template.

16
Working with Resource Catalogs

Resource catalogs are portal assets that expose components and connections that you can add to a portal. Use a resource catalog to populate pages, page templates, page styles, and task flows.

> **Permissions:**
>
> To perform the tasks in this chapter on shared resource catalogs, you must have the application-level `Create, Edit, and Delete Resource Catalogs` permission. Users with the `Application Specialist` role have this permission by default. For more information about application-level permissions, see About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> - `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
>
> - `Resource Catalogs: Create, Edit, and Delete Resource Catalogs` or `Create Resource Catalogs` and `Edit Resource Catalogs` (advanced permissions)
>
> See About Roles and Permissions for a Portal.

Topics:

- About Resource Catalogs
- About the Resource Registry
- Setting the Default Resource Catalogs
- Creating a Resource Catalog
- Editing a Resource Catalog
- Managing a Resource Catalog

About 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.

Displaying and Using a Resource Catalog

When you edit a page, page template, page style, or task flow, the resource catalog is shown when you click **Add Content** in any region, or when you click the **Show Catalog** icon. A resource catalog is organized into folders and subfolders to categorize resources. You can click a folder to expand the resource category, then select the resource that you want to add.

You can navigate back through the resource catalog hierarchy using the icons in the resource catalog menu bar. Use the **Search** field to locate resources by name or description. Click the **Refresh** icon to update the resource catalog with newly added resources.

Figure 16-1 shows the Default Portal Catalog, one of the built-in resource catalogs described in About the Built-In Resource Catalogs.

Figure 16-1   Default Portal Catalog
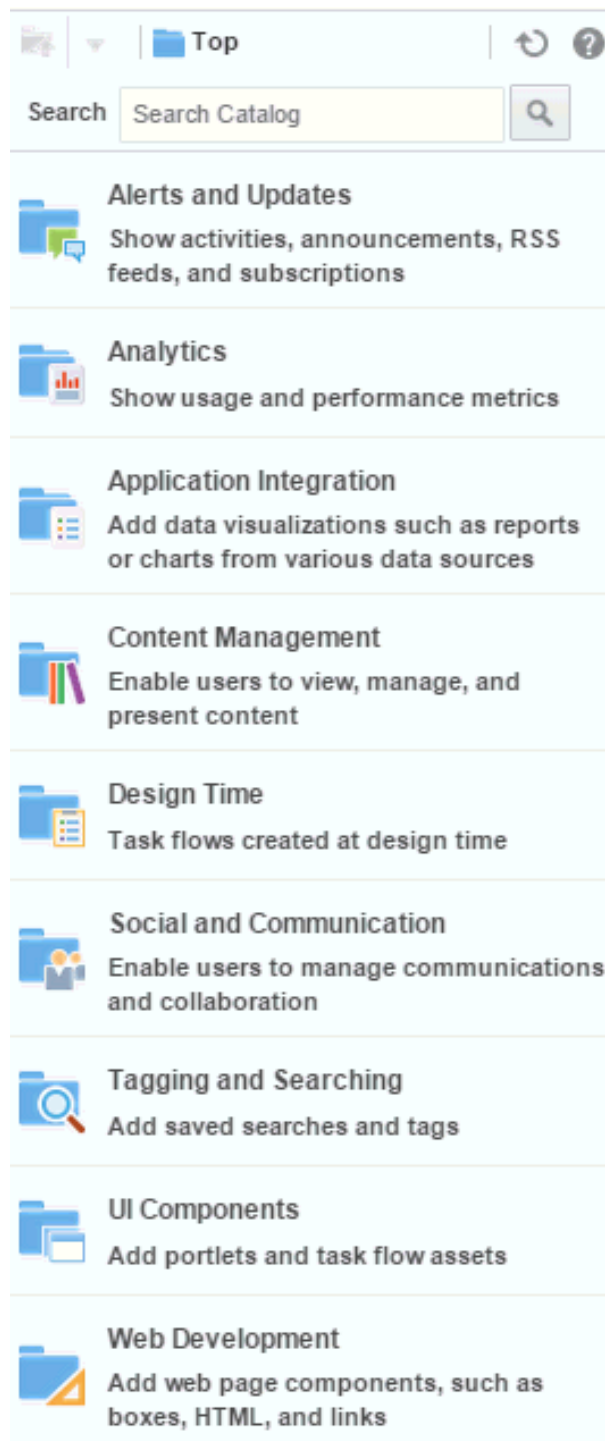
About the Built-In Resource Catalogs

WebCenter Portal includes three built-in resource catalogs:

• Default Portal Catalog

- Default Home Portal Catalog
- Default Page Template Catalog

Table 16-1 describes and contrasts the three built-in resource catalogs.

> **Note:**
>
> You can create also a custom resource catalog specific to your needs that include a subset of these categories and resources, or add more resources from the resource registry, then make it available to pages and page templates. See Creating a Resource Catalog and Setting the Default Resource Catalogs.

Table 16-1   Built-in Resource Catalogs

Default Portal Catalog	Default Home Portal Catalog	Default Page Template Catalog
The Default Portal Catalog is assigned to portal pages by default. It contains resources to add to pages and task flow assets in a portal.	The Default Home Portal Catalog is assigned to pages in the Home portal by default. It contains resources to add to a personal or business role page. For more information about the Home portal, see Exploring WebCenter Portal in *Using Portals in Oracle WebCenter Portal*.	The Default Page Template Catalog is assigned to page templates and page styles by default. It contains a Navigations folder and a Portal Components folder, which provide access to resources specifically used in page templates and page styles. For more information about page templates and page styles, see Working with Page Templates and Working with Page Styles.

Table 16-1   (Cont.) Built-in Resource Catalogs

Default Portal Catalog	Default Home Portal Catalog	Default Page Template Catalog
The Integration category is available in the Default Portal Catalog only when one or more business objects and/or data controls have been created.		

Table 16-2 provides a description of each category in the default resource catalogs.

Table 16-2   Resources in the Built-In Resource Catalogs

Folder	Description
Alerts and Updates	Includes task flows to track alerts and notifications: • **Activity Stream** and **Activity Stream - Quick View** to view activities of your connections, actions taken in portals, and business activities. For more information, see Adding an Activity Stream to a Portal. • **RSS** to view feeds from external sources and WebCenter Portal tools and services. For more information, see Adding RSS Feeds to a Portal. • **Subscription Viewer** to display the current user's subscriptions and enable the user to unsubscribe from particular notifications, as shown on the Current Subscriptions tab of the Subscriptions preferences page. For more information, see Adding Notifications to a Portal.
Analytics	Includes task flows to help to track and display different metrics, such as response times and usage behavior. • **Blog Metrics** • **Document Metrics** • **Login Metrics** • **Page Traffic** • **Portal Response Time** • **Portal Traffic** (summary) • **Portal Traffic** (detailed) • **Portlet Instance Response Time** • **Portlet Instance Traffic** • **Portlet Response Time** • **Portlet Traffic** • **Search Metrics** • **Wiki Metrics** For more information, see Adding Analytics to a Portal.
Application Integration This category is not available in the Default Page Template Catalog.	Includes the Data Presenter Visualization component, which is the default starting point for an empty data visualization. • **Data Presenter Visualization** For more information, see Working with Data Visualizations.
Content Management	Includes task flows to access, add, and manage folders and files, or display content in a predefined template: • **Content Manager** to view and manage documents in a configurable manner. This resource is not available in the Default Page Template Catalog. • **Content Presenter** to select documents and display them in a predefined template. • **Image** to enable users to contribute an image. • **Styled Text** to enable users to contribute styled text. • **Text** to enable users to contribute richly formatted text. For more information, see Working with Content in a Portal.
Integration This category is available in the Default Portal Catalog only when one or more business objects and/or data controls have been created.	Includes business objects and data controls created as portal assets: • **Business Objects** folder, which contains business objects available on the portal **Assets** page. Select a business object to display it on the current page. For more information, see Working with Business Objects. • **Data Controls** folder, which contains data controls available on the portal **Assets** page. Select a data control to display it on the current page. For more information, see Working with Web Service Data Controls.

Table 16-2   (Cont.) Resources in the Built-In Resource Catalogs

Folder	Description
Navigation This category is available only in the Default Page Template Catalog.	Includes built-in navigation task flows that you can add to page templates: • **Navigation Breadcrumb** to display a series of horizontal or vertical links that show users their current position in the navigation hierarchy. Breadcrumbs are particularly useful for deep hierarchies, and when users might want to get back to a specific place. • **Navigation Menu** to display navigational links as a series of tabs, menus, bars, buttons, choices, or as a list. Menu navigation is appropriate when the number of items is known, such that there is enough room to display all the options. • **Navigation Tree** to display navigational links in a hierarchical structure. Tree navigations can provide relatively simple access to a complex structure and often appear in a left pane in page templates. For more information, see Adding Navigation to a Page Template.
Portal Components This category is available only in the Default Page Template Catalog.	Includes portal components that are available to add to portal pages, page templates, and page styles. For more information and descriptions of all available portal components, see Portal Components.
Social and Communication	Includes resources to enable social networking and communication among users: • **Lists** folder, which contains portal lists that have been created. Select a list to display it on the current page. For more information, see Adding Lists to a Portal. This folder is available in the Default Portal Catalog only when Lists are enabled in the portal (see Enabling and Disabling Tools and Services Available to a Portal). • **Connections**, **Connections - Card**, **Connections - Detailed View**, and **Connections - Quick View** to view and manage connections, and create connections lists. For more information, see Adding Connections to a Portal. • **Events** and **Events - Mini View** to add a calendar or list for scheduling personal meetings, appointments, and other events. Add the Mini View to create and manage portal events. For more information, see Adding Events to a Portal. • **Mail** to view, respond to, and manage personal mail. For more information, see Adding Mail to a Portal. This resource is not available in the Default Portal Catalog. • **Members** lists all members in the current portal. For more information, see Working with the Portal Members Task Flow. This resource is not available in the Default Home Portal Catalog. • **Message Board** and **Message Board - Quick View** to view and manage messages. For more information, see Adding Messages and Feedback to a Portal. • **Organization View** to show the current user's position within the organization's hierarchy—that is, a detail of the overall organization chart, showing the current user's Profile information, address, current time in the user's locale, and a summary About Me statement, with a link to the full profile of the current user. For more information, see Adding Profiles to a Portal. • **Profile**, **Profile - Gallery**, and **Profile - Snapshot** to display a user's profile details, upload a photo, and (if enabled) edit Profile details. For more information, see Adding Profiles to a Portal. • **Publisher** to publish messages, documents, and URLs to the Activity Stream. For more information, see About Publisher.

Table 16-2   (Cont.) Resources in the Built-In Resource Catalogs

Folder	Description
Tagging and Searching	Includes task flows to enable effective searching of WebCenter Portal and other sources: • **Saved Searches** folder, which contains saved searches that have been created. Select a saved search to display the results of the search on the current page. • **All Saved Searches** to display a list of saved searches. For more information, see Saving the Search Results . • **Similarly Tagged Items** to display items that have at least one tag in common with the current page. For more information, see Adding Tagging to a Portal. • **Tag Cloud** to display the tags that have been created by all users. For more information, see Adding Tagging to a Portal. • **Tag Cloud Related Resources** to display resources for a tag selected in the Tag Cloud task flow. For more information, see Adding Tagging to a Portal. • **Tags** to display tags created by the current user. For more information, see Adding Tagging to a Portal.
UI Components	Includes the following resources: • **Portlets** folder, which contains portlets for presenting data from multiple sources in a meaningful and related way, and administrator-level tools for registering and managing portlet producers. Select a portlet to display it on the current page. • **Task Flows** folder, which contains task flows created in the **Assets** or **Shared Assets** page at runtime. These are visualizations created by gathering data from various data sources and publishing to different layouts such as charts, tables, and graphs. Select a task flow to display it on the current page. For more information, see About Task Flows.
Web Development	Includes components that add dynamic content to a page, such as images, HTML, and links, as well as components that end users can modify at runtime, such as language selection and areas to add their own content: • **Box** • **Change Language** • **HTML Markup** • **Hyperlink** • **Links** • **Movable Box** • **Separator** • **Web Page** For more information about these components, see Working with Web Development Components on a Page.

About the Resource Registry

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.

In the Edit dialog for a custom resource catalog (Figure 16-2), click the **Add** menu and select **Add From Library** to open the Resource Registry (Figure 16-3).

Figure 16-2   Add From Library Option to Access the Resource Registry
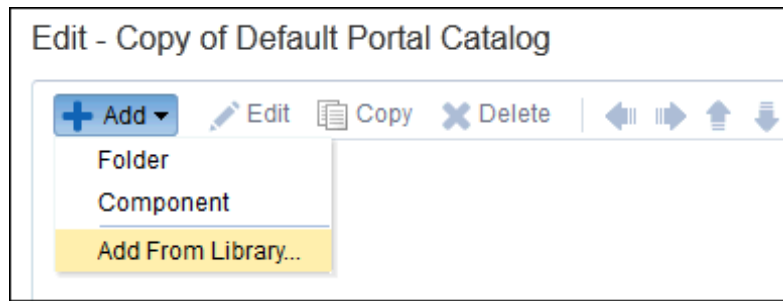
Figure 16-3   Add Resource Catalog Item Dialog (Resource Registry)
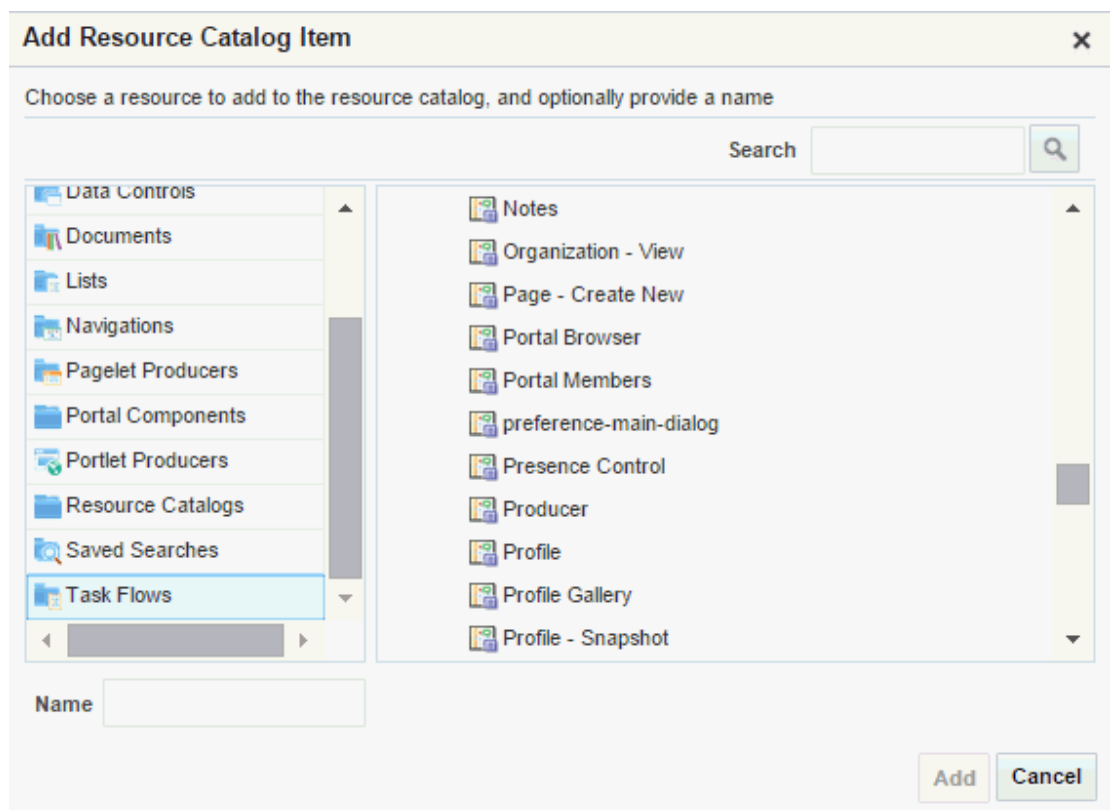
Table 16-3 describes the folders in the Resource Registry.

Table 16-3   Folders in the Resource Registry

Resource Folder	Description
Analytics	Displays all the Analytics task flows. These task flows help to track and display different metrics, such as response times and usage behavior, for WebCenter Portal. For more information, see Adding Analytics to a Portal.

Table 16-3   (Cont.) Folders in the Resource Registry

Resource Folder	Description
Components	Lists a selection of components that can be used to design pages, page templates, page styles, and task flows. For more information, see Working with Web Development Components on a Page.
Connections	Lists all available repository connections. Many resources, such as portlets, external applications, and some WebCenter Portal tools and services, require a connection to a database schema where relevant information is stored.
	The chapters describing the various resources provide information about whether a connection is required for that resource.
Data Controls	Lists all data controls available in WebCenter Portal. This includes data controls created at runtime and data controls deployed from JDeveloper.
	• **Design Time:** At a minimum, this folder displays the built-in WebCenter Portal tools and services data controls. In addition, it also displays data controls that an application developer may have created in JDeveloper and deployed to WebCenter Portal.
	For information about the data controls available for WebCenter Portal tools and services, refer to the appropriate chapter in this guide.
	To expose a custom data control created in JDeveloper, you must deploy the application containing the data control as a shared library to the WebCenter Portal instance. The data control is then included automatically in the Resource Registry. You can add the data control to custom catalogs from the Resource Registry.
	WebCenter Portal provides a template specifically for deploying and undeploying WebCenter Portal shared libraries. You must use that workspace to deploy data controls to WebCenter Portal. For more information, see Developing Shared Libraries in *Developing for Oracle WebCenter Portal*.
	• **Runtime:** When you add runtime data controls in a resource catalog, you enable users to consume them in task flows using different visualizations such as tables, graphs, buttons, and so on.
	For more information, see Working with Web Service Data Controls.
	This folder is empty if there are no runtime data controls in your WebCenter Portal instance.
Documents	Lists all documents to which the current user has access. For more information, see Working with Content in a Portal
Lists	Displays all available lists. For more information, see Adding Lists to a Portal.
Navigations	Lists all available navigation models. These resources are available in the Default Page Template Catalog. For more information, see Adding a Built-in Navigation Task Flow to a Page Template.
Portal Components	Lists components, such as menus, links, copyright message, and so on, that are typically used in page templates. These resources are available in the Default Page Template Catalog, in a folder named Template Development.
	For more information, see Portal Components.
Portlet Producers	Lists all registered portlet producers.

Table 16-3   (Cont.) Folders in the Resource Registry

Resource Folder	Description
Resource Catalogs	Lists all available resource catalogs. You can embed multiple resource catalogs inside a catalog.
Saved Searches	Displays all saved searches. For more information, see Configuring Elasticsearch in a Portal.
Task Flows	Lists all task flows available in WebCenter Portal. This includes task flows created at runtime and data controls deployed from JDeveloper.

Task Flows (continued):

- **Design Time:** At a minimum, this folder displays the built-in WebCenter Portal tools and services task flows. In addition, it also displays task flows that an application developer may have created in JDeveloper and deployed to WebCenter Portal.

  For information about the WebCenter Portal task flows, refer to the appropriate chapter in this guide.

  To expose a custom task flow created in JDeveloper, you must deploy the application containing the task flow as a shared library to the WebCenter Portal instance. The task flow is then included automatically in the Resource Registry. You can add the task flow to custom catalogs from the Resource Registry.

  WebCenter Portal provides a workspace specifically for deploying and undeploying WebCenter Portal shared libraries. You must use that workspace to deploy task flows to WebCenter Portal. For more information, see Developing Shared Libraries in *Developing for Oracle WebCenter Portal*.

- **Runtime:** For more information, see About Task Flows.

  This folder is empty if there are no runtime task flows in your WebCenter Portal instance.

Setting the Default Resource Catalogs

When a user creates a new page, page template, page style, or task flow asset, the default resource catalogs determine what can be added to it.

This section includes the following topics:

- Setting the Default Resource Catalogs for a Portal
- Setting the Default Resource Catalog for All Portals

Setting the Default Resource Catalogs for a Portal

> ✏️ **Permissions:**
>
> To perform this task, you must be a portal manager or member with `Administration: Manage Security and Configuration` or `Administration: Manage Configuration` permission in the portal.
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Every portal has a set of default assets, including default resource catalogs. When you create a portal, it initially inherits the application-level default resource catalog settings.

If you create a custom resource catalog for your portal, you can set it to be the default resource catalog available to pages, page templates, page styles, and task flows assets in the portal. For more information, see Changing the Resource Catalogs in a Portal.

Setting the Default Resource Catalog for All Portals

> **Note:**
>
> To perform this task, you must be a system administrator (have the `Administrator` role, or the `Portal Server: Manage All` or `Portal Server: Manage Configuration` permission).

Default resource catalogs can be set at the application level for the following:

- Pages in all portals
- Pages in the Home portal
- Business role pages
- Page templates in all portals
- Page templates in the Home portal

System administrators can change the application-level default resource catalog settings, as described in Choosing Default Resource Catalogs in *Administering Oracle WebCenter Portal*.

Creating a 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. Navigate to one of the following:
   - To create an application-level resource catalog, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.
   - To create a portal-level resource catalog, go to the **Assets** page for the portal in which you want to create it. For more information, see Accessing Portal Assets.
2. In the left panel, under **Structure**, click **Resource Catalogs**.
3. In the toolbar, click **Create** to open the Create New Resource Catalog dialog.

Figure 16-4   Creating a Resource Catalog
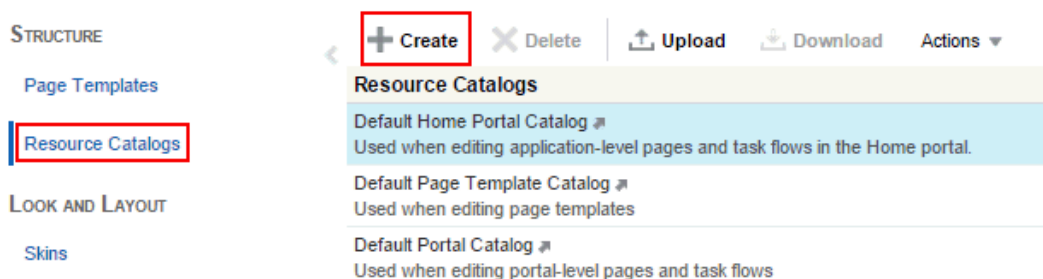
4. In the **Name** field, enter a name for the resource catalog.

    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.

Figure 16-5   The Create New Resource Catalog Dialog

5. 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.

6. 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.

    > 💡 **Tip:**
    >
    > You can also create a copy of an existing resource catalog as described in Copying an Asset.

7. 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.

8. To use the new resource catalog to add components to the pages, page templates, page styles, or task flow assets in your portal, see Setting the Default Resource Catalogs.

Editing a 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.

This section includes the following topics:

- Adding a Resource to a Resource Catalog
- Creating a Custom Component
- Creating a Folder
- Setting Properties on a Resource
- Rearranging Resources
- Copying a Resource
- Deleting a Resource
- Previewing a Resource Catalog

Adding a Resource to a Resource Catalog

You can add different types of resources to a resource catalog as described in the following sections:

- Saving a Task Flow to a Resource Catalog
- Adding a Resource from the Resource Registry

Saving a Task Flow to a Resource Catalog

To save a customized task flow to a resource catalog while editing a page, see Saving a Customized Task Flow to a Resource Catalog.

Adding a Resource from the Resource Registry

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. Navigate to one of the following:
   - To add a resource to an application-level resource catalog, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.
   - To add a resource to a portal-level resource catalog, go to the **Assets** page for the portal that owns it. For more information, see Accessing Portal Assets.
2. In the left panel, under **Structure**, click **Resource Catalogs**.

3. Click the **Edit** quick link in the row for the resource catalog that you want to edit. If you need to create a new resource catalog first, see Creating a Resource Catalog.

4. 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**.

5. 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.

6. In the right panel, navigate to the resource you want to add to the resource catalog.

> 💡 **Tip:**
>
> You can select multiple resources using the multi-select shortcut keys appropriate to your operating system (such as Ctrl+click).

7. 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.

8. 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.

9. Click **Save and Close**.

10. To use the edited resource catalog to add resources to the pages or page templates in your portal, see Setting the Default Resource Catalogs.

Creating a Custom 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.

You may want to create a custom component to:

- Create seeded layouts that can be added to a page. You can add a layout component and include a combination of design and container components inside it. The container components provide empty content areas that can be filled later.

- Add external content by including the raw HTML code.

- Define seeded layouts in which to consume data controls. You can then bind the data control to the layout.

To create a custom component:

1. Navigate to one of the following:

   - To add a custom component to an application-level resource catalog, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

   - To add a custom component to a portal-level resource catalog, go to the **Assets** page for the portal. For more information, see Accessing Portal Assets.

2. In the left panel, under **Structure**, click **Resource Catalogs**.

3. Click the **Edit** quick link in the row for the resource catalog that you want to edit.

4. In the Edit dialog, from the **Add** menu, select **Component**.

5. 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.

Figure 16-6   The Edit Resource Catalog Item - Component Dialog

6. In the **Description** field, enter a brief description of the component.

7. 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']}
   ```

   If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

8. 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.

9. 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.

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

You can also add custom parameters.

11. Click **OK**.

12. Click **Save and Close**.

Creating a 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. Navigate to one of the following:

    • To add a folder to an application-level resource catalog, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

    • To add a folder to a portal-level resource catalog, go to the **Assets** page for the portal. For more information, see Accessing Portal Assets.

2. In the left panel, under **Structure**, click **Resource Catalogs**.

3. Click the **Edit** quick link in the row for the resource catalog that you want to edit.

4. In the Edit dialog, from the **Add** menu, select **Folder**.

5. 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.

6. In the **Description** field, enter a brief description of the contents of the folder.

7. 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']}
   ```

   If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

8. 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.

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

   You can also add custom parameters.

10. Click **OK**.

11. 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.

Setting Properties on a Resource

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

To set properties on a resource:

1. Navigate to one of the following:

   • To set properties on a resource in an application-level resource catalog, go to the WebCenter Portal **Shared Assets** page. For more information, see Accessing Shared Assets.

   • To set properties on a resource in a portal-level resource catalog, go to the **Assets** page for the portal. For more information, see Accessing Portal Assets.

2. In the left panel, under **Structure**, click **Resource Catalogs**.

3. Click the **Edit** quick link in the row for the resource catalog that you want to edit.

4. Select the resource that you want to edit.

> 💡 **Tip:**
>
> If the resource you want to edit is inside a folder in the catalog, expand the folder first.

5. In the toolbar, click **Edit** to open the Edit Resource Catalog Item dialog.

6. On the **Target** tab, in the **Name** field, edit the name of the resource as it should appear in the resource catalog.

7. In the **Description** field, enter a brief description to display below the resource name in the resource catalog.

8. 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']}
   ```

   If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

9. 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.TaskFlowResource Factory` • **Portlet:** `oracle.webcenter.portalframework. sitestructure.rc.PortletResourceF actory` • **Content:** `oracle.webcenter.content.model.rc .ContentUrlResourceFactory` • **Data control:** `oracle.webcenter.datacomposer.int ernal.adapter.datacontrol.DataCon trolContextFactory`

10. 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.

11. 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.

12. Click **OK**.

13. Click **Save and Close**.

Rearranging Resources

To move a resource within a folder, select the resource and click the **Move Up** or **Move Down** icons as many times as necessary until the resource is in the desired location.

To indent a resource under another, move the child resource so that it is immediately below the parent resource and click the **Indent** icon.

To move an indented resource so that it is no longer indented below another resource, select the indented resource and click the **Outdent** icon.

Copying a Resource

You can create a copy of an existing resource by selecting it in the catalog and clicking **Copy**. A copy of the resource is placed just below it in the resource hierarchy. You can select the copy and alter its attributes and parameters as described in Setting Properties on a Resource.

Deleting a Resource

You can delete resources from a resource catalog by selecting it in the catalog and clicking **Delete**. In the Delete dialog, click **Delete** to confirm that you want to delete the resource from the catalog.

Previewing a Resource Catalog

Click the **Preview** tab in the Edit dialog to see how the resource catalog appears to users. The preview shows the order in which the resources are displayed. It also shows how dynamic folders are executed.

Managing a Resource Catalog

The following options are available on the **Assets** or **Shared Assets** page to enable you to manage resource catalogs:

> ✎ **See Also:**
>
> Accessing Portal Assets and Accessing Shared Assets

- **Create**—For more information, see Creating a Resource Catalog.
- **Delete**—You can delete a resource catalog when it is no longer required.

  For more information, see Deleting an Asset.

- **Upload**—You can upload an archive file that contains a resource catalog that has been developed using JDeveloper.

  For more information, see Uploading an Asset.

- **Download**—You can download a resource catalog into an archive file for further development in JDeveloper.

  For more information, see Downloading an Asset.

- **Actions**

  – **Copy**—You can create a copy of a resource catalog.

    For more information, see Copying an Asset.

  – **Security Settings**—You can control whether all users or only specific users or groups can access a resource catalog.

    For more information, see Setting Security for an Asset.

  – **Show Properties**—Each resource catalog has an associated Show Properties dialog that summarizes useful information about it.

    For more information, see Viewing Information About an Asset.

  – **Edit Source**—You can directly edit the source code of a resource catalog.

    For more information, see Editing the Source Code of an Asset.

  – **Edit Properties**—Each resource catalog has certain properties associated with it that control how it is displayed in the portal. You can edit these properties through the Edit Properties dialog.

    For more information, see Setting Properties on an Asset.

- **Available**—You can control whether or not a resource catalog is available for use in a portal by selecting or deselecting this check box.

  For more information, see Showing and Hiding Assets.

> **Tip:**
>
> In addition to showing or hiding a page template, you can also control whether a shared page template is available to any, all, or selected portals in WebCenter Portal. For more information, see Setting Properties on a Resource.

- **Edit**—For more information, see Editing a Resource Catalog.

17

Working with Skins

A skin defines colors, fonts, and other aspects of components in a portal. Use skins to give portals a distinct personality or to apply specific branding. WebCenter Portal provides several built-in skins, and you can create new custom skins to meet specific requirements.

> **✎ Permissions:**
>
> To perform the tasks in this chapter on shared skins, you must have the application-level `Create, Edit, and Delete Skins` permission. Users with the `Application Specialist` role have this permission by default. For more information about application-level permissions, see About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> *   `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
>
> *   `Skins: Create, Edit, and Delete Skins` or `Create Skins` and `Edit Skins` (advanced permissions)
>
> See About Roles and Permissions for a Portal.

> **✎ See Also:**
>
> For information about defining a portal's look and feel how using skins in conjunction with other assets, see Creating a Look and Feel for Portals.

Topics:

*   About Skins
*   Setting the Default Skin
*   Creating a Skin
*   Editing a Skin
*   Managing a Skin

About 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. As such, 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.
>
> For more information, see Developing Skins in *Developing for Oracle WebCenter Portal*.

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.

> **See Also:**
>
> Working with Page Templates

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.

> ✏️ **See Also:**
>
> Setting the Preferred Skin for a Page Template

About the Built-In Skins

WebCenter Portal provides the following built-in skins to get you started.

- Alta
- Skyros
- WebCenter Portal

> ✏️ **Note:**
>
> Beginning with Release 12c (12.2.1.4.0), Oracle WebCenter Portal has deprecated the support for the built-in skins Mosaic and Unicorn. However, if you have upgraded from a prior release, these skins remain available in your upgraded instance.

You can change the appearance of a specific portal or the entire application by using one of these built-in skins. These built-in skins are designed to work with specific built-in page templates. For more information, see About the Built-In Page Templates.

You cannot directly edit any of the built-in skins. If you want to alter one of these skins to make it match your requirements, you must create a new skin, selecting the built-in skin from the **Copy From** list, and then make the required adjustments in the new skin.

> ✏️ **See Also:**
>
> Creating a Skin

Setting the Default Skin

When a user creates a page, the default skin is used to determine the appearance of the page and its components. This helps to ensure that all pages in a portal have a consistent appearance.

Skins work in combination with page templates to determine the look and feel of the pages in a portal. When you set the default page template, the default skin is automatically set to the preferred skin for that page template, if it has one.

> **Note:**
>
> If you change the default skin to something other than the page template's preferred skin, the pages in your portal may not look as expected. For more information, see Setting the Preferred Skin for a Page Template.

This section includes the following subsections:

- Setting the Default Skin for a Portal
- Setting the Default Skin for All Portals
- Setting the Default Skin for the Home Portal

Setting the Default Skin for a Portal

> **Note:**
>
> To perform this task, you must be a portal manager or member with `Administration: Manage Security and Configuration` or `Administration: Manage Configuration` permission in the portal.
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Every portal has a set of default assets, including a default skin. A portal's default skin is applied to all the pages of the portal except the administration pages. Administration pages always use the `Alta` skin. When you create a portal, by default, the portal inherits the preferred skin of the page template defined for the portal template used when the portal was created. If the portal template does not define a default page template, the preferred skin of the system default page template is used instead.

To set a different default skin for the pages in your portal, see Changing the Skin for a Portal.

Setting the Default Skin for All Portals

> **Note:**
>
> To perform this task, you must be a system administrator (have the `Administrator` role, or the `Portal Server: Manage All` or `Portal Server: Manage Configuration` permission).

System administrators can select a skin to use as the system, or application-level, default skin. The system default skin is applied to pages in the Home portal and to pages in portals where the portal template used to create the portal did not define a default skin.

The system default skin is not applied to existing portals for which a specific skin has already been set. Also, the system default skin is not applied to the administration pages. Administration pages always use the `Alta` skin.

For information about how to set the system default skin, see Choosing a Default Skin in *Administering Oracle WebCenter Portal*.

Setting the Default Skin for the Home Portal

By default, the appearance of the Home portal is determined by the system default skin. However, users can change the skin applied to their view of the Home portal through user preference settings. For more information, see Changing the Look and Feel of Your View in *Using Portals in Oracle WebCenter Portal*.

Creating a 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.
>
> For more information, see Developing Skins in *Developing for Oracle WebCenter Portal*.

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. Navigate to one of the following:

    - To create an application-level skin, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

    - To create a portal-level skin, go to the **Assets** page for the portal in which you want to create it. For more information, see Accessing Portal Assets.

2. In the left panel, under **Look and Layout**, click **Skins**.

3. In the toolbar, click **Create** (Figure 17-1).

Figure 17-1   Creating a Skin
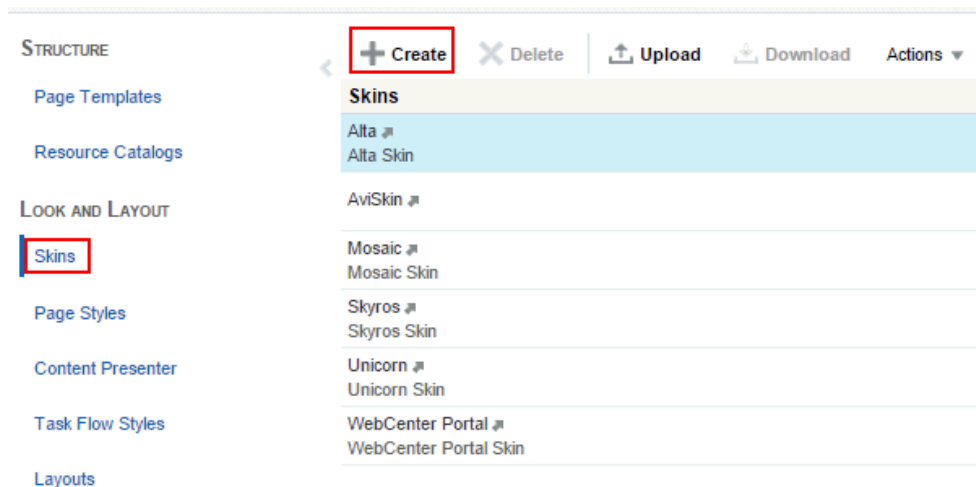
4. In the Create New Skin dialog (Figure 17-2), in the **Name** field, enter a name for the skin.

    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.

Figure 17-2   Create New Skin Dialog
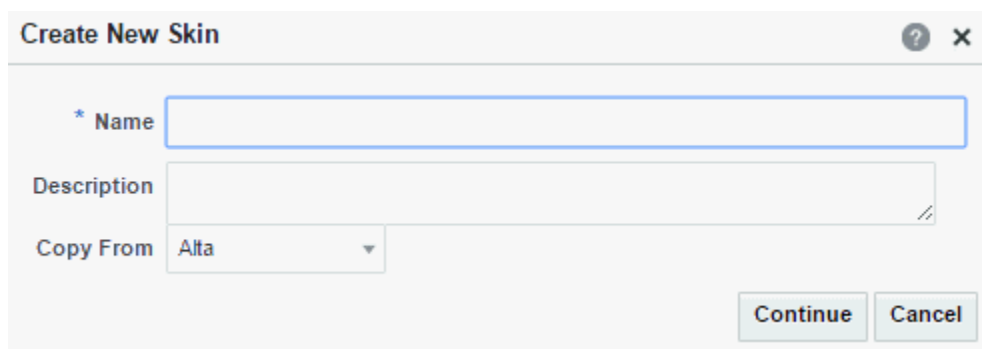
5. In the **Description** field, enter a description for the skin.

   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.

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

   > **Tip:**
   >
   > You can also create a copy of an existing skin as described in Copying an Asset.

7. Click **Create**.

   The newly created skin is listed on the **Assets** or **Shared Assets** page. The empty check box next to the skin indicates that it is not yet published and hence is not available to other users. For information about publishing a skin, see Showing and Hiding Assets.

   After initial creation, the new skin is identical to the skin selected in the **Copy From** list. The next step in creating a skin is to edit it to meet your requirements. For more information, see Editing a Skin.

Editing a 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.
>
> For more information, see Developing Skins in *Developing for Oracle WebCenter Portal*.

A skin must define the required ADF Faces skin selectors for the components in your portal. For example, you can use the `.ADFDefaultFontFamily:alias` selector to specify the font family for your portal as follows:

```
.AFDefaultFontFamily:alias {
font-family: Tahoma, Verdana, Helvetica, sans-serif;
}
```

For information about:

- ADF Faces skin selectors in general, see Working with ADF Skin Selectors in *Developing ADF Skins*. Also refer to JDeveloper's online help for information about the selectors that you can use in a skin. These are documented in the "Skin Selectors for Fusion's ADF Faces Components" and "Skin Selectors for Fusion's Data Visualization Tools Components" topics in JDeveloper's online help.

- Defining ADF Faces component style selectors, see Properties in the ADF Skinning Framework in *Developing ADF Skins* and Changing the Style Properties of a Component in *Developing Web User Interfaces with Oracle ADF Faces*.

In addition to ADF skin selectors, a skin's CSS file contains three WebCenter Portal-specific selectors. These are:

- `.WCPageTemplate:alias` - Defines the background color and the image and its position for the main area of the page template below the top banner, as shown in the example below:

```
.WCPageTemplate:alias
{
  background-image:url(/afr/fusion/dbd_centerGradient.png);
  background-repeat:repeat-y;
  background-position:top center;
  background-color: #024296;
  color: white;
}
```

- `.WCContent` - Defines the background color of the area of the page template containing the actual page content.

```
.WCContent
{
  background-color:#EEF3F8;
  border-top:1px solid #BECFE2;
}
```

- `.WCPortletContentMedium:alias` - Defines the background color and image of task flows and portlets in `showDetailFrame` components.

```
.WCPortletContentMedium:alias
{
  background-image:url(/adf/images/gradient-275x275-fcfcfc.png);
  background-repeat:no-repeat;
}
```

WebCenter Portal provides an Edit dialog to edit a skin's basic appearance settings by mapping target areas to the WebCenter Portal-specific skin selectors available in the CSS file.

To edit other skin selectors in the CSS file, you must edit the source code of the skin. While editing the source code of a skin, you can add, edit, or delete any skin selector to suit your requirements. For example, if you want to override the default font size, then in your skin's CSS file you can specify the required size in the skin selector, as follows:

```
.AFDefaultFont:alias
{
font-size:12px;
}
```

When you edit the source code of a skin using the Edit Source dialog, the format of the code is validated and an error message is displayed if you miss any tags or add them incorrectly.

> **See Also:**
>
> Editing the Source Code of an Asset

> **Note:**
>
> You must have a thorough understanding of CSS specification about selectors if you plan to edit skin selectors in the source code of your skin. You might get into a situation where your style is not getting picked up because the skin you are extending has a selector that is more specific than your selector.

To edit the basic appearance settings of a skin:

1. Navigate to one of the following:

   • To edit an application-level skin, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

   • To edit a portal-level skin, go to the **Assets** page for the portal that owns it. For more information, see Accessing Portal Assets.

2. In the left panel, under **Look and Layout**, click **Skins**.

3. Click the **Edit** quick link in the row for the skin that you want to edit to open the Edit dialog.

4. 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.

Figure 17-3   Editing Skin Properties
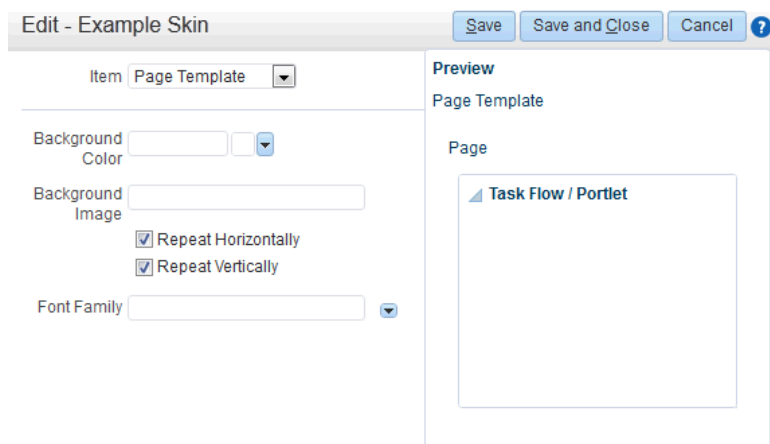
5. From the **Background Color** list, select the background color you want to use for the target area.

   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.

6. 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.
>
> For more information, see Working with Folders and Files in *Using Portals in Oracle WebCenter Portal*.

7. 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.

   Figure 17-4   Repeating an Image Horizontally Across a Target Area
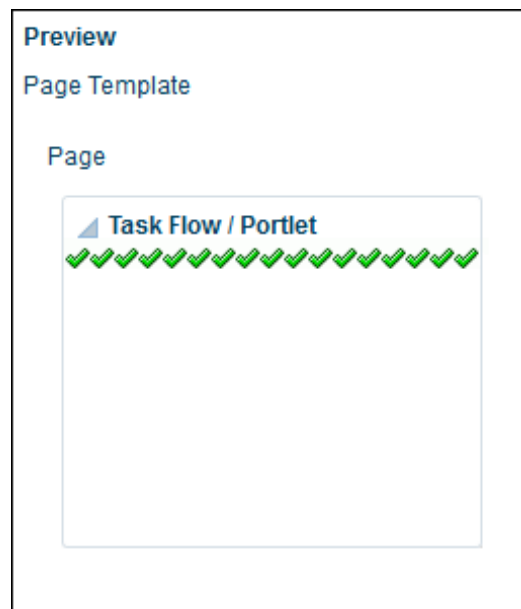
   - **Repeat Vertically**—Displays the background image aligned vertically on the left side of the page, with the image repeated across the vertical bar.

Figure 17-5   Repeating an Image Vertically Across a Target Area
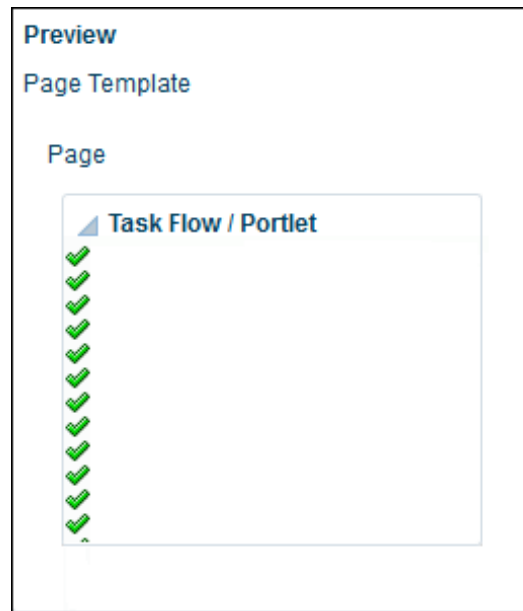
Select **Repeat Horizontally** and **Repeat Vertically** to repeat the selected image across the entire target area.

Figure 17-6   Repeating an Image Across the Entire Target Area
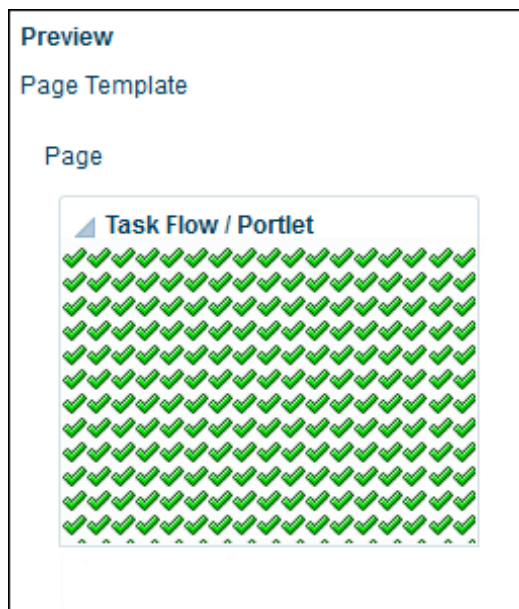
8. From the **Font Family** list, select the font you want to use for the Page Template area.

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

9. Click **Save and Close**.

Managing a Skin

The following options are available on the **Assets** or **Shared Assets** page to enable you to manage skins:

> ✎ **See Also:**
>
> Accessing Portal Assets and Accessing Shared Assets

- **Create**—For more information, see Creating a Skin.
- **Delete**—You can delete a skin when it is no longer required.

  For more information, see Deleting an Asset.
- **Upload**—You can upload an archive file that contains a skin that has been developed using JDeveloper.

  For more information, see Uploading an Asset.
- **Download**—You can download a skin into an archive file for further development in JDeveloper.

  For more information, see Downloading an Asset.
- **Actions**
  - **Copy**—You can create a copy of a skin.

    For more information, see Copying an Asset.
  - **Security Settings**—You can control whether all users or only specific users or groups can access a skin.

    For more information, see Setting Security for an Asset.
  - **Show Properties**—Each skin has an associated Show Properties dialog that summarizes useful information about it.

    For more information, see Viewing Information About an Asset.
  - **Edit Source**—You can directly edit the source code of a skin.

    For more information, see Editing the Source Code of an Asset.
  - **Edit Properties**—Each skin has certain properties associated with it that control how it is displayed in the portal. You can edit these properties through the Edit Properties dialog.

    For more information, see Setting Properties on an Asset.

    Skins also define three default attributes:

    * `skinId` specifies the unique identifier of a skin. Typically, it is a combination of the skin family and the render kit, for example, `BrightBlue.desktop`.

    * `skinFamily` specifies the family to which a skin belongs. It is an identifier that can be used by a number of skins with different render kits. For

example, you could have a family named `BrightBlue`. It can be used with renderkit `desktop` or `mobile`.

* `skinExtends` specifies the ID of the skin being extended. For example, suppose you like the `midnight` skin, but want a different font size in that skin. You can configure your skin to extend the `midnight.desktop` skin and then you can edit the source code of your skin to override the font size.

You can add, edit, or delete these attributes. For more information, see Setting Asset Attributes.

- **Available**—You can control whether or not a skin is available for use in a portal by selecting or deselecting this check box.

  For more information, see Showing and Hiding Assets.

  > **Tip:**
  >
  > In addition to showing or hiding a skin, you can also control whether a shared skin is available to any, all, or selected portals in WebCenter Portal. For more information, see Setting Properties on an Asset.

- **Edit**—For more information, see Editing a Skin.

18
Working with Page Styles

A page style defines the initial layout for a newly created page, and may also dictate the type of content that the page supports. WebCenter Portal provides several built-in page styles, and you can create new custom page styles to meet specific requirements.

> ✎ **Permissions:**
>
> To perform all of the tasks in this chapter on shared page styles, you must have the application-level `Create, Edit, and Delete Page Styles` permission. Users with the `Application Specialist` and `Portal Creator` roles have this permission by default. For more information about application-level permissions, see About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> - `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
>
> - `Page Styles: Create, Edit, and Delete Page Styles` or `Create Page Styles` and `Edit Page Styles` (advanced permissions)
>
> See About Roles and Permissions for a Portal.
>
> At both the application level and portal level, the `Create Page Styles` and `Edit Page Styles` permissions allow you to perform a subset of the tasks in this chapter.

Topics:

- About Page Styles
- Applying a Page Style to a Portal Page
- Creating a Page Style
- Editing a Page Style
- Copying a Page Style as a Shared Asset
- Managing a Page Style

About 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.
>
> For more information, see Developing Page Styles in *Developing for Oracle WebCenter Portal*.

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.

Figure 18-1   Sample Page and Page Style
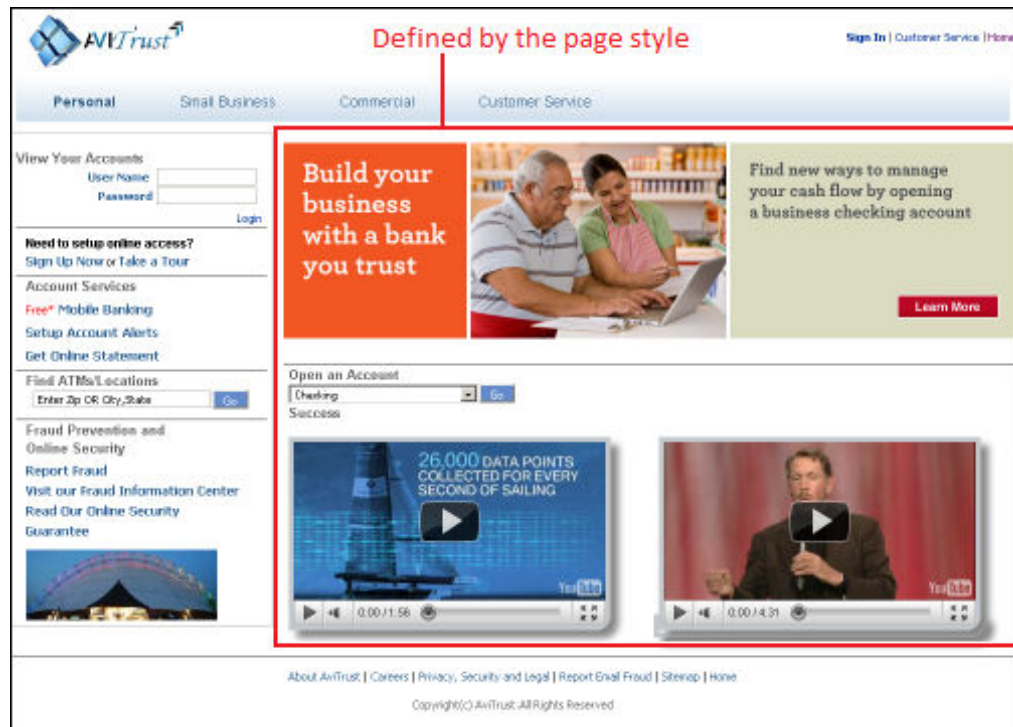
When users create a page, they are provided with selection of page styles to use.

Figure 18-2   Selecting a Style for a New Page
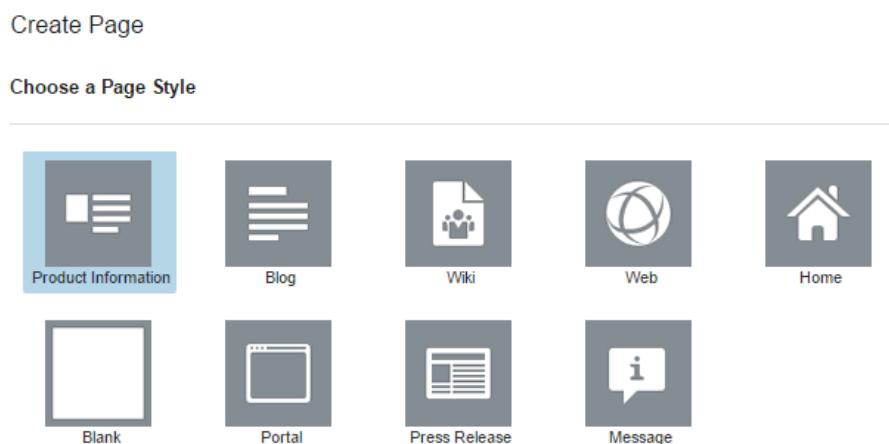
> **Note:**
>
> If you create the initial pages for a new portal in the Create Portal wizard, there is no opportunity to select a page style for the pages. If the portal template includes a page style called Default Page Style, then that is the page style used for all pages created in this way. Otherwise, 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.

About the Built-In Page Styles

Table 18-1 lists and describes the built-in page styles provided with WebCenter Portal.

Table 18-1   Built-In Page Styles

Name	Icon	Description
Blank		A one-column blank page on which you can add vertically stacked content, including additional layout components.
		To change the page layout in the page editor, see Changing Page Layout.

Table 18-1   (Cont.) Built-In Page Styles
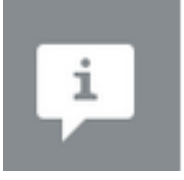
Name	Icon	Description
Blog		A page preconfigured with areas for a blog header, blog posts, archives, and recent posts. This page style becomes available when the Documents tool is configured and enabled for the portal.
		Built-in page parameters: **Left Width**, **Center Width**, **Right Width**, **Show Header**, **Show Footer**
		For more information, see Understanding the Blog Page Style in *Using Portals in Oracle WebCenter Portal*.
Home		A one-column preseeded home page on which you can add vertically stacked content, including additional layout components.
		To change the page layout in the page editor, see Changing Page Layout.
Message		A full page containing a header, a message box to display messages to users, and a background image.
		To change the page layout in the page editor, see Changing Page Layout.
		Built-in page parameter: **Background Image**
Portal		A page with standard layout typical of a generic portal page with header and footer areas, a wide column, and a narrow column. To change the page layout in the page editor, see Changing Page Layout.

Table 18-1   (Cont.) Built-In Page Styles

Name	Icon	Description
Press Release		A page for publishing a press release with header, title, and details.
Product Information		A page with standard layout typical of a generic product information page with product overview and details. To change the page layout in the page editor, see Changing Page Layout.
Web		A page with a built-in page parameter for a URL, enabling you to expose inline web pages and external applications in your portal. Built-in page parameter: **Web Page URL**
Wiki		A page preconfigured for a default wiki document with in-place editing controls. This page style becomes available when the Documents tool is configured and enabled for the portal. For more information, see About Wikis in *Using Portals in Oracle WebCenter Portal*.

You cannot directly edit any of the built-in page styles. If you want to use a different layout for your pages, you can either:

- Save a page as a new page style, creating a new page style or replacing an existing custom page style.

- Copy an existing page style and then edit the source code.

For more information, see Creating a Page Style.

Applying a Page Style to a Portal Page

When you create a new page, the first page of the wizard enables you to apply a page style to the page (Figure 18-3).

> ✎ **See Also:**
>
> Creating Pages or Subpages in a Portal

Figure 18-3   Selecting a Style for a New Page

Create Page

Choose a Page Style
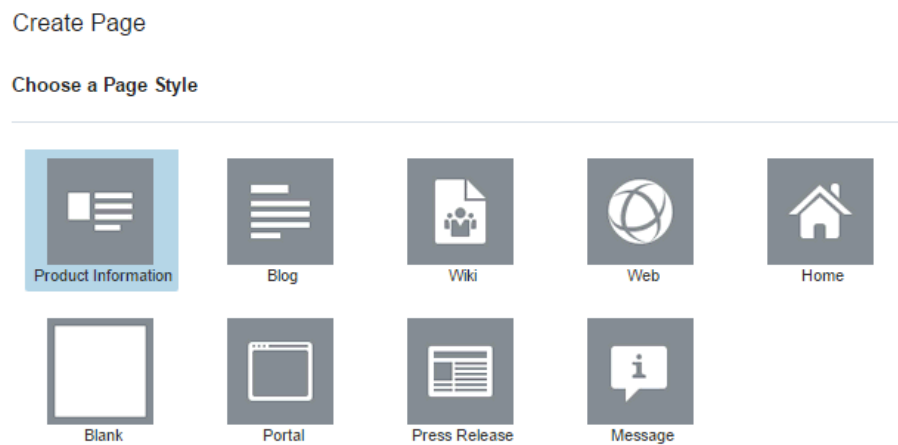
The page styles offered depend on which styles have been made available to the portal in which you are creating the page. The portal manager determines which page styles are available to a portal through the following considerations:

- Should the page style be shown or hidden to the portal?

  For more information, see Showing and Hiding Assets.

- Should the page style be configured to appear only in selected portals (custom shared page styles only)?

  For more information, see Setting Properties on an Asset.

- Should the page style be configured to appear only to selected users or roles (custom page styles only)?

  For more information, see Setting Security for an Asset.

> **Note:**
>
> You cannot apply a different page style to a page after the page has been created. However, if you update a page style, you can apply those updates to pages that already use the page style (see Refreshing a Page with Page Style Updates).

Creating a Page Style

If none of the available page styles meet your requirements, you can create your a new custom page style.

> **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 a page style to a file and upload it to WebCenter Portal later.
>
> For more information, see Developing Page Styles in *Developing for Oracle WebCenter Portal*.

There are two ways to create a page style in WebCenter Portal:

- Copy an existing page style (see Copying an Asset), then edit it to create a new page style (see Editing a Page Style).
- Save a page as a new page style (see Saving a Page As a Page Style).

Creating custom page styles enables you to:

- **Create well formed and controlled layouts**

  Using layout components, you can create fixed and reliable layouts where the geometry is predictable.

  > **See Also:**
  >
  > Working with Layout Components

- **Seed parameters**

  If you seed parameters in the page style, then on page creation the user creating the page is prompted for values.

  For example, when users create a page using the built-in Blog page style, they can change parameters for the page on the **Page Settings** page in the Create Page wizard (Figure 18-4).

Figure 18-4   Settings Page in Create Page Wizard

Settings

The following information must be provided in order to create the page.

Left Width	0%
Center Width	80%
Right Width	20%
Show Header	true
Show Footer	false

- **Create common areas, logos, images, or links**

   If you want all the pages in your portal to include certain elements, such as logos or links, you can create those in your page style. Adding a task flow, that holds images or links, to the top of a page style means that all pages created from that page style will have a common area where, if you edit the task flow, you can update in all those pages in one step.

   > ✎ **See Also:**
   >
   > Working with Resource Catalog Components on a Page

Saving a Page As a Page Style

You can create a new page style or replace an existing custom page style by saving a page as a page style.

> **✎ Permissions:**
>
> To perform this task in a portal, you must have the additional portal-level `Pages:`
> `Edit Page Access, Structure, and Content` permission. Users with the
> `Application Specialist` and `Portal Creator` roles have this permission by
> default.
>
> For more information about portal-level permissions, see About Roles and
> Permissions for a Portal.

> **✎ Note:**
>
> The most recently published version of the page is used to create the page style. If
> there are any changes pending in a draft of the page, those changes will not be
> available in the page style.

To save a page as a page style:

1. Open the page in the page editor.

2. Click the page **Actions** icon (▶) and select **Page Information**.

3. Beneath the page title, click **Save As Page Style**.

Figure 18-5   Saving a Page As a Page Style
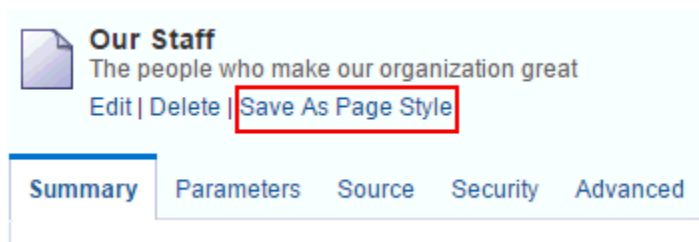
4. In the Save Page As Page Style dialog, select either:

   • **Create a new page style**, then enter a name and description for the new page style.

   • **Replace an existing page style**, then select an existing custom page style from the
     drop-down list.

Figure 18-6   Save Page As Page Style Dialog

5. To show the new page style for selection when creating a new page, select **Make available for selection**.

   You can later change this setting on the **Assets** page in portal administration.

   See Showing and Hiding Assets.

6. Click **Save**.

   To work with the new page style, see Creating, Editing, and Managing Portal Assets.

Editing a Page Style

In a portal, you can edit a page style using the page editor to meet your requirements. Note that you can not edit built-in page styles; you can copy a built-in page style to create a new custom page style for a portal, then edit that copy (see Copying an Asset).

> **✎ 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.
>
> For more information, see Developing Page Styles in *Developing for Oracle WebCenter Portal*.

In WebCenter Portal, you can edit a page style to change the appearance and content to match your requirements in the following ways:

- Editing a Page Style in the Page Editor
- Editing the Source Code of a Page Style

> **Note:**
>
> Users with sufficient privileges to edit page styles may see the message `The page style cannot be edited`, when attempting to edit the custom page styles based on Wiki and/or Blog. This message appears when the Documents tool is not enabled.
>
> Enable the Documents tool and try editing the page style based on the Blog or Wiki . For more information, see Enabling and Disabling Tools and Services Available to a Portal.

Editing a Page Style in the Page Editor

Page styles contain seeded content, which is copied when a new page is created using a particular page style. You can use the page editor to easily edit a page style to modify its seeded components. For example, you can edit a user-created page style in the page editor to seed it with newer lightweight content components that offer simplified customization and faster performance. Note that you cannot edit a built-in page style but you can create a copy of the built-in page style and edit the page style.

If a page style is based on the built-in Blog or Wiki page styles, then the Documents tool must be enabled in order to edit it.

> **Tip:**
>
> If you prefer, you can edit the source code of the page style directly. For more information, see Editing the Source Code of a Page Style .

To edit a page style using the page editor:

1. Navigate to one of the following:

    - To edit an application-level page style, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

    - To edit a portal-level page style, go to the **Assets** page for the portal that owns it. For more information, see Accessing Portal Assets.

2. In the left panel, under Look and Layout, click **Page Styles**.

3. Click the **Edit** quick link in the row for the page style that you want to edit.

4. In the page editor, edit the content of the page style as desired. The resource catalog used for editing page styles is the resource catalog for page templates, as set in the application-level or portal-level administration settings (see Changing the Resource Catalogs in a Portal).

Editing the content of a page style is the same as editing the content of a page. For more information, see:

- Working with Resource Catalog Components on a Page

- Working with Web Development Components on a Page

- Creating a Page Style for Content Contribution and Publishing

5. To change the page style layout, click **Change Layout** and select one of the available layouts. The selections show both built-in and custom layouts that are listed on the **Assets** page for the portal, and the application-level **Shared Assets** page.

6. Click **Save** to save your changes.

Editing the Source Code of a Page Style

> **✎ Note:**
>
> Although you can edit the source code of a page style in WebCenter Portal using the Edit Source dialog, it is recommended that you download the page style and edit it in JDeveloper to take advantage of the richer editing experience.
>
> Editing a page style is a fairly complex task. As such, page style editing should be completed by an experienced Web Developer.

There are several scenarios for working with page style source code in WebCenter Portal:

- Copy a built-in page style and make adjustments to the copy's source code.

- Copy a built-in page style, download the copy, import it into JDeveloper for enhancement, upload it back into WebCenter Portal, and edit the source code for further minor adjustments.

- Create a completely new page style by copying another page style and replacing its code with your own original code. Note however that, due to the heavy hand-coding requirement, this scenario is not recommended.

In the Edit Source dialog, the page style source is presented on two tabs: **Page** and **Page Definition**. The code in the **Page** tab defines the page layout, content, and style. The code in the **Page Definition** tab holds parameter definitions and task flow and data control bindings. Each represents the underlying JSF page and page definition file that comprise the page style.

For the steps to access the Edit Source dialog, see Editing the Source Code of an Asset.

h b

Copying a Page Style as a Shared Asset

> **Note:**
>
> To perform this task, you must have the application-level `Create, Edit, and Delete Page Styles` permission.

You can copy a custom page style to the application-level **Shared Assets**, so that it can be used by pages in other portals. The original page style remains in the portal-level **Assets**, while a copy is created in the application-level **Shared Assets**. Any change to the shared page style is reflected by portals referencing the shared page style.

To copy a page style as a shared asset:

1. In the portal administration, open the **Assets** page.

2. In the left pane, under **Look and Layout**, click **Page Styles**.

3. Select the page style that you want to use to copy to application-level **Shared Assets**.

4. From the **Actions** menu, select **Copy to Shared Assets** (Figure 18-7).

> **Tip:**
>
> If the **Copy To Shared Assets** action is disabled, this means that the page style is already a shared asset, or you do not have the application-level `Create, Edit, and Delete Page Styles` permission. For more information about application-level permissions, see About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.

Figure 18-7   Copy Page Style to Shared Assets
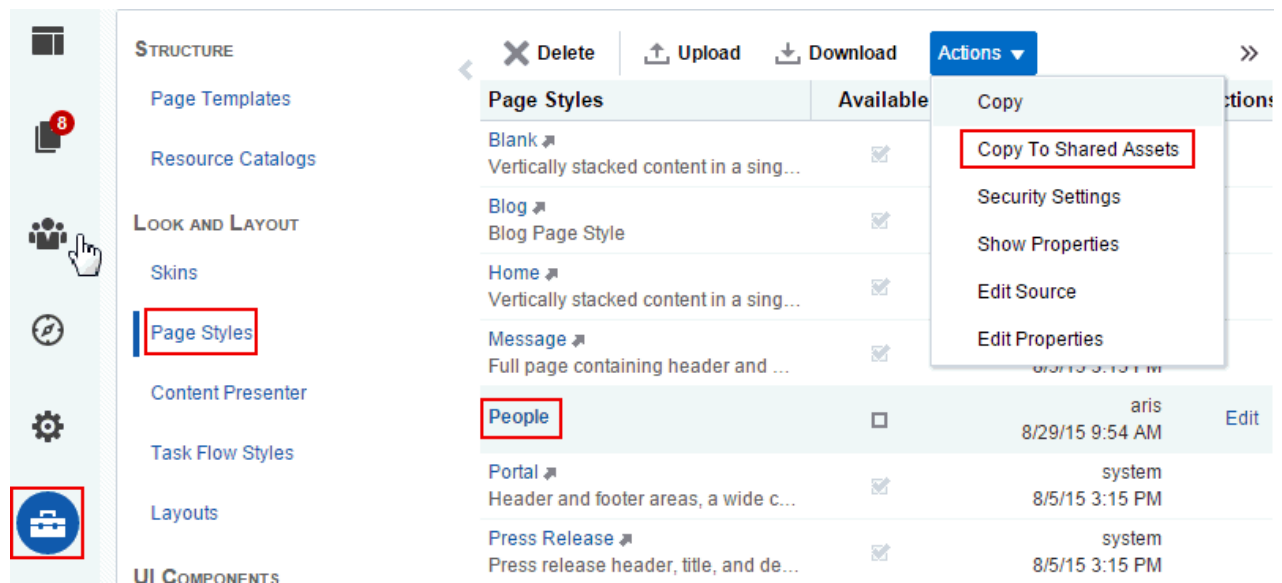
5. In the Copy to Shared Assets dialog (Figure 18-8), enter a new Display Name for the shared page style and, optionally, a description.

Figure 18-8   Copy to Shared Assets Dialog

6. Click **OK**.

7. To confirm that the page style was successfully copied, go to the **Shared Assets** page (see Accessing Shared Assets). By default, the page style is not available to users to select when creating a new page. To make it available, select the **Available** check box for the page style on the **Shared Assets** page.

   On the portal **Assets** page, you will see both the original portal-level page style, and the new shared asset, identified by the **Shared** icon (Figure 18-9) next to the asset's name. The new shared asset can be edited only at the application level on the **Shared Assets** page.

Figure 18-9   Shared Icon

Managing a Page Style

The following options are available on the **Assets** or **Shared Assets** page to enable you to manage page styles:

> ✎ **See Also:**
>
> Accessing Portal Assets and Accessing Shared Assets

- **Delete**—You can delete a page style when it is no longer required.

  For more information, see Deleting an Asset.

- **Upload**—You can upload an archive file that contains a page style that has been developed using JDeveloper.

  For more information, see Uploading an Asset.

- **Download**—You can download a page style into an archive file for further development in JDeveloper.

For more information, see Downloading an Asset.

- **Actions**

  – **Copy**—You can create a copy of a page style. This is the only way to create a new page style in WebCenter Portal.

    For more information, see Copying an Asset.

  – **Copy to Shared Assets** —You can copy a portal page style to application-level shared assets for use by other portals.

    For more information, see Copying a Page Style as a Shared Asset.

  – **Security Settings**—You can control whether all users or only specific users or groups can access a page style.

    For more information, see Setting Security for an Asset.

  – **Show Properties**—Each page style has an associated Show Properties dialog that summarizes useful information about it.

    For more information, see Viewing Information About an Asset.

  – **Edit Source**—You can directly edit the source code of a page style.

    For more information, see Editing a Page Style.

  – **Edit Properties**—Each page style has certain properties associated with it that control how it is displayed in the portal. You can edit these properties through the Edit Properties dialog.

    For more information, see Setting Properties on an Asset.

- **Preview**—You can preview how the page style looks, enabling you to make adjustments quickly, if required.

  For more information, see Previewing an Asset.

- **Available**—You can control whether or not a page style is available for use in a portal by selecting or deselecting this check box.

  For more information, see Showing and Hiding Assets.

- **Edit**—For more information, see Editing a Page Style in the Page Editor.

19

Working with Content Presenter Display Templates

Use Content Presenter display templates to define how selected content renders on a portal page. WebCenter Portal provides several built-in Content Presenter display templates, and a developer can create custom display templates in JDeveloper to meet specific requirements.

✎ Permissions:

To perform the tasks in this chapter on shared Content Presenter display templates, you must have the application-level `Create, Edit and Delete Content Presenter Templates` permission. Users with the `Application Specialist` role have this permission by default. For more information about application-level permissions, see About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.

To perform the tasks in this chapter, you need one of the following portal-level permissions:

- `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)

- `Content Presenter Templates: Create, Edit, and Delete Content Presenter Templates` or `Create Content Presenter Templates` and `Edit Content Presenter Templates` (advanced permissions)

See About Roles and Permissions for a Portal.

Topics:

- About Content Presenter Display Templates
- Creating a Content Presenter Display Template
- Managing Content Presenter Display Templates

About Content Presenter Display Templates

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.
>
> For more information, see Working with Portal Assets in JDeveloper and Developing Content Presenter Display Templates in *Developing for Oracle WebCenter Portal*.

About the Built-in Content Presenter Display Templates

Oracle WebCenter Portal provides several built-in Content Presenter display templates.

Table 19-1 lists the built-in Content Presenter display templates provided for displaying single content items.

Table 19-1   Built-in Templates for Displaying Single Content Items

Single Content Item Display Templates	View ID	Description
Default Document Details View	`oracle.webcenter.content.templates.default.document.details`	Displays detailed information about any single content item including creation date, modification date, created by username, modified by username, path and any comments.
Default List Item View	`oracle.webcenter.content.templates.default.list.item`	Used by multiple content item views to display each individual item. Displays a single line with an icon and item name as a link that either displays or downloads the item when clicked.
Default List Item View for Folders	`oracle.webcenter.content.templates.default.list.item`	Used by a single content item view to display a single line with an icon and item name as a link that either displays or downloads the item when clicked.
Default View (default when no template is selected)	`oracle.webcenter.content.templates.default.detail`	Displays any single content item, either directly in the browser (images, HTML, text) or as a link that downloads the associated file when clicked.

Table 19-1   (Cont.) Built-in Templates for Displaying Single Content Items

Single Content Item Display Templates	View ID	Description
Full Article View	`oracle.webcenter.content.templates.sitestudio.fullarticle`	Displays a full article, including the Title, Image, and Body of an article.
		This is a responsive template, meaning that it uses CSS3 media queries to produce a layout that adjusts to the width of the browser.
		This template requires Site Studio to be enabled on the Content Server, as it uses the `RD_ARTICLE` Site Studio region definition.

Table 19-2lists the built-in Content Presenter display templates provided for displaying multiple content items.

Table 19-2   Built-in Templates for Displaying Multiple Content Items

Multiple Content Item Display Templates	View ID	Description
Accordion View	`oracle.webcenter.content.templates.default.list.panel.accordion`	Displays multiple content items in an accordion format, where each item can be expanded to display its details.
Articles View (under the Site Studio Template category)	`oracle.webcenter.content.templates.sitestudio.articles`	Displays the summaries of multiple articles, including the Title, Image, and Summary of articles.
		This is a responsive template, which means that it uses CSS3 media queries to produce a layout that adjusts to the width of the browser.
		This template requires Site Studio to be enabled on the Content Server, as it uses the `RD_ARTICLE` Site Studio region definition.
Bulleted View	`oracle.webcenter.content.templates.default.list.bulleted`	Displays multiple content items in a bulleted list format. Only content items will be displayed; folder items will be omitted.

Table 19-2   (Cont.) Built-in Templates for Displaying Multiple Content Items

Multiple Content Item Display Templates	View ID	Description
Bulleted with Folder Label View	`oracle.webcenter.content.templates.default.list.bulleted.label`	Displays multiple content items in a bulleted list format. The name of the folder containing the first item in the list will display as a label above the list. This template is intended to be used when `datasourceType` is set to `dsTypeFolderContents` to ensure that all items have the same parent folder. Only content items are displayed; folder items are omitted.
Carousel View	`oracle.webcenter.content.templates.default.list.carousel`	Displays multiple content items in a carousel format, where items can be browsed by moving a slider left or right.
Icon View	`oracle.webcenter.content.templates.default.list.tile`	Displays multiple content items in a tiled format with large icons and file names.
List View (default when no template is selected)	`oracle.webcenter.content.templates.default.list.simple`	Displays multiple content items in a simple list.
List with Details Panel View	`oracle.webcenter.content.templates.default.list.details.panel`	Displays multiple content items in a list on the left, with a panel to the right displaying the details of a selected item.
Sortable Table View	`oracle.webcenter.content.templates.default.list.tabular`	Displays multiple content items in a sortable table that includes the document name, date created, and date modified.
Tabbed View	`oracle.webcenter.content.templates.default.list.panel.tabbed`	Displays multiple content items as tabs that can be selected to display item details. content items in a simple list.

Creating a Content Presenter Display Template

If the available Content Presenter display templates do not meet your needs, a developer can create new custom templates.

Creating a Content Presenter display template is a complex task that requires a good understanding of Application Development Framework (ADF) and the performance implications of using Content Presenter. For this reason, custom Content Presenter display templates must be created by developers using JDeveloper.

A developer can publish a custom Content Presenter display template directly to WebCenter Portal (the portal server) as a shared asset or to a specific portal for immediate use and testing.

For more information, see Working with Portal Assets in JDeveloper and Developing Content Presenter Display Templates in *Developing for Oracle WebCenter Portal*.

Managing Content Presenter Display Templates

The following options are available on the **Assets** and **Shared Assets** page to enable you to manage Content Presenter display templates:

- **Delete**—You can delete a custom Content Presenter display template when it is no longer required.

  For more information, see Deleting an Asset.

  > **Note:**
  >
  > You cannot delete built-in Content Presenter display templates.

- **Upload**—You can upload an archive file that contains a custom Content Presenter display template that has been developed using Oracle JDeveloper.

  For more information on uploading a template, see Uploading an Asset.

  Developers can create custom Content Presenter display templates as described in Creating Content Presenter Display Templates in *Developing for Oracle WebCenter Portal*.

- **Download**—You can download a custom Content Presenter display template into an archive file for further development in JDeveloper.

  For more information see Downloading an Asset.

  > **Note:**
  >
  > You cannot download built-in Content Presenter display templates.

- **Actions**

  - **Security Settings**—You can control whether all users or only specific users or groups can access a Content Presenter display template.

    For more information, see Setting Security for an Asset.

    > **Note:**
    >
    > You cannot change the security settings of built-in Content Presenter display templates.

  - **Show Properties**—Each Content Presenter display template has an associated Show Properties dialog that summarizes useful information about it.

    For more information, see Viewing Information About an Asset.

  - **Edit Source**—You can directly edit the source code of a custom Content Presenter display template.

For more information, see Editing the Source Code of an Asset.

> **✎ Note:**
>
> You cannot edit the source code of built-in Content Presenter display templates.
>
> Editing Content Presenter display templates is a fairly complex task. For this reason, unless the change is simple, it is recommended that editing templates should be carried out by developers in JDeveloper.

- **Available**—You can control whether or not a Content Presenter display template is available for use in a portal by selecting or deselecting this check box.

  For more information, see Showing and Hiding Assets.

20
Working with Task Flow Styles

Use a task flow style as a starting point for creating new custom task flows. WebCenter Portal provides two built-in task flow styles, and you can create new custom task flow styles to meet specific requirements.

Task flow styles are useful if you want to reuse a custom visualization in different task flows in your portal. When you create a task flow, the Create Task Flow dialog displays all available task flow styles.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> - `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
> - `Task Flow Styles: Create, Edit, and Delete Task Flow Styles` or `Create Task Flow Styles` and `Edit Task Flow Styles` (advanced permissions)
>
> For more information about portal-level permissions, see About Roles and Permissions for a Portal.

Topics:

- About Task Flow Styles
- Creating a Task Flow Style
- Editing a Task Flow Style
- Managing Task Flow Styles

About 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.

Creating a Task Flow Style

You can create a new task flow style by copying an existing task flow style and then editing the source code to meet your requirements.

For more information, see Copying an Asset and Editing the Source Code of an Asset

Editing a Task Flow Style

Use the **Edit Source** option to edit the source code of a task flow style's task flow definition file, view fragment, or the fragment's page definition file.

If you wish to edit a task flow style to alter its layout, you can create a custom visualization with the required UI components and use a dummy EL value, `#{dataPresenter.dummyData.collectionModel}`, as a placeholder for the real data. When you create a task flow using this style, you can replace the dummy EL value with the real binding.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

For information about how to edit a task flow style's source files, see Editing the Source Code of an Asset.

Managing Task Flow Styles

The following options are available on the **Assets** and **Shared Assets** page to enable you to manage task flow styles.

> ✏ **See Also:**
>
> Accessing Portal Assets and Accessing Shared Assets

- **Delete**—You can delete task flow styles when they are no longer required. You cannot delete built-in task flow styles.

  For more information, see Deleting an Asset.

- **Upload**—You can upload a task flow style that has been created or edited in another portal or in Oracle JDeveloper.

For more information, see Uploading an Asset.

- **Download**—You can download a task flow style into an archive file for uploading into another portal or for importing into JDeveloper.

  For more information, see Downloading an Asset.

- **Actions**

  – **Copy**—You can create a copy of a task flow style. Copying a task flow style enables you to replicate an existing style to use as the starting point for a new style. As there is no option to create a task flow style from scratch, you can create a copy of an existing style and replace its code with that of a custom style that you want to create.

    For more information, see Copying an Asset.

    For information about editing the source code of a copied task flow style, see Editing the Source Code of an Asset.

  – **Security Settings**—You can control whether all users or only specific users or groups can access the task flow that you created.

    For more information, see Setting Security for an Asset.

  – **Show Properties**—Each task flow style has certain properties associated with it that control how it is displayed in a portal. These properties are summarized in the Show Properties dialog.

    For more information, see Viewing Information About an Asset.

  – **Edit Source**—For more information, see Editing the Source Code of an Asset.

  – **Edit Properties**—Each task flow style has certain properties associated with it. You can edit these properties through the Edit Properties dialog.

    For more information, see Setting Properties on an Asset.

- **Preview**—You can preview how the task flow style appears when it is applied to a task flow.

  For more information, see Previewing an Asset.

- **Available**—You can control whether or not a task flow style is included in the Create New Task Flow dialog, and therefore whether or not it is available for use in a portal.

  For more information, see Showing and Hiding Assets.

  > **Tip:**
  >
  > In addition to showing or hiding a task flow style in the Create New Task Flow dialog, you can also control whether a shared task flow style is available to any, all, or selected portals in WebCenter Portal. For more information, see Setting Properties on an Asset.

21
Working with Layouts

Use layouts to define how content is organized on a page. WebCenter Portal provides several built-in layouts, and you can create new custom layouts to meet specific requirements.

> ✏ **Permissions:**
>
> To perform all of the tasks in this chapter on either portal-level or shared layouts, you must have at least the default permissions assigned to the `Administrator` or `Application Specialist` role. See About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.

Topics:

- About Layouts
- Creating a Layout
- Editing a Layout
- Managing a Layout

About 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.
>
> For more information, see Developing Layouts in *Developing for Oracle WebCenter Portal*.

Figure 21-1   Assets: Layouts

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.

Creating a Layout

While WebCenter Portal provides several built-in layouts on the **Assets** and **Shared Assets** pages, you may want to create your own to meet the specific design requirements of your portal's pages or page styles.

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

> **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.
>
> For more information, see Developing Layouts in *Developing for Oracle WebCenter Portal*.

To create a custom layout in WebCenter Portal:

- Copy an existing layout (see Copying an Asset), then edit its source code in the source code editor (see Editing the Source Code of an Asset).

Editing a Layout

In a portal, you can edit a layout to meet your requirements. Note that you can not edit built-in layouts; you can copy a built-in layout to create a new custom layout for a portal, then edit that copy (see Copying an Asset).

> **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.
>
> For more information, see Developing Layouts in *Developing for Oracle WebCenter Portal*.

To edit a custom layout in WebCenter Portal:

- Edit the layout source code in the source code editor (see Editing the Source Code of an Asset).

  In the Edit Source dialog, the layout source is presented on two tabs: **Component** and **CSS**. The code in the **Component** tab defines the XML that represents the layout component. The code in the **CSS** tab exposes the style sheet that describes the look and format for the layout.

Managing a Layout

The following options are available on the **Assets** or **Shared Assets** page to enable you to manage layouts:

> **See Also:**
>
> Accessing Portal Assets and Accessing Shared Assets

- **Delete**—You can delete a layout when it is no longer required. Note that you cannot delete a layout if it is currently in use by a page or page style.

  For more information, see Deleting an Asset.

- **Upload**—You can upload an archive file that contains a layout that has been developed using JDeveloper.

  For more information, see Uploading an Asset.

- **Download**—You can download a layout into an archive file for further development in JDeveloper.

  For more information, see Downloading an Asset.

- **Actions**

  – **Copy**—You can create a copy of a layout. This is the only way to create a new layout in WebCenter Portal.

  For more information, see Copying an Asset.

  – **Security Settings**—You can control whether all users or only specific users or groups can access a layout.

  For more information, see Setting Security for an Asset.

  – **Show Properties**—Each layout has an associated Show Properties dialog that summarizes useful information about it.

  For more information, see Viewing Information About an Asset.

  – **Edit Source**—You can directly edit the source code of a layout.

  For more information, see Editing a Layout.

  – **Edit Properties**—Each layout has certain properties associated with it that control how it is displayed in the portal. You can edit these properties through the Edit Properties dialog.

  For more information, see Setting Properties on an Asset.

- **Available**—You can control whether or not a layout is available for use in a portal by selecting or deselecting this check box.

  For more information, see Showing and Hiding Assets.

22
Working with Task Flows

Create custom task flows as containers for components such as data controls, portlets, content, and other task flows. You can reuse the same task flow on multiple portal pages.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> - `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
>
> - `Task Flows: Create, Edit, and Delete Task Flows` or `Create Task Flows` and `Edit Task Flows` (advanced permissions)
>
> See About Roles and Permissions for a Portal.

Topics:

- About Task Flows
- Creating a Task Flow
- Editing a Task Flow
- Consuming a Data Control in a Task Flow
- Controlling the Data Displayed in a Task Flow Using a Data Control
- Adding a Task Flow to a Portal Page
- Managing a Task Flow

About 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.

For example, 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.

The basic steps to accomplish this are:

1. Create a data control (see Creating a Web Service Data Control).

2. Create a custom task flow (see Creating a Task Flow).

3. Add the custom task flow component to a page, then add the data control you want to render on the page (see Consuming a Data Control in a Task Flow and Controlling the Data Displayed in a Task Flow Using a Data Control).

Creating a 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. Navigate to one of the following:

   • To create an application-level task flow, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

   • To create a portal-level task flow, go to the **Assets** page for the portal in which you want to create the task flow. For more information, see Accessing Portal Assets.

2. In the left pane, under **UI Components**, click **Task Flows**.

3. In the toolbar, click **Create** to open the Create New Task Flow dialog.

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

   The name is displayed in the resource catalog.

5. (Optional) In the **Description** field, enter a meaningful description for the task flow.

   The description is displayed in the resource catalog.

6. From the **Task Flow Style** drop-down list, select the task flow style to use for the task flow.

   For more information, see Working with Task Flow Styles.

7. 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.

   For more information, see Showing and Hiding Assets.

You can now edit the new task flow using the page editor and populate it with different resources, including data controls, that are available from the resource catalog. For more information, see Editing a Task Flow and Consuming a Data Control in a Task Flow.

Editing a Task Flow

When you first create a task flow, it contains only the content specified by the selected task flow style. To add more content to the task flow, you must edit the task flow's view
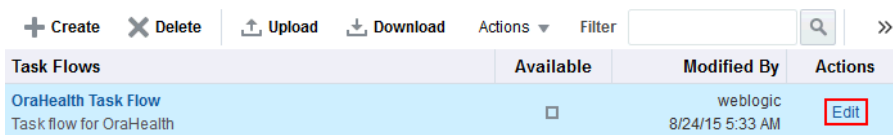
fragment. You can add a variety of resources to the view fragment from the resource catalog, including data controls. You may also want to edit your task flow to create or modify task flow parameters.

The most common way to edit a task flow is to use the page editor. However, if you prefer, you can edit the source code of the task flow directly. For example, you may want to clean up the page fragment and its page definition when you delete a referenced component, such as a data control, or make adjustments to the task flow's code. For more information, see Editing the Source Code of an Asset.

To edit a task flow in the page editor:

1. Navigate to one of the following, depending on where the task flow was created:

   - To edit an application-level task flow, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

   - To edit a portal-level task flow, go to the **Assets** page for the portal in which the task flow was created. For more information, see Accessing Portal Assets.

2. In the left pane, under **UI Components**, click **Task Flows**.

3. Click the **Edit** quick link for the task flow that you want to edit (Figure 22-1).

Figure 22-1   The Edit Quick Link for a Task Flow

4. In either Design view or Structure view of the page editor, add whatever resources you want to the task flow's view fragment.

   - For information about adding data controls to your task flow to determine what data you want to display, see Consuming a Data Control in a Task Flow.

   - For information about adding other content using the page editor, see Adding Components to a Page and Working in Structure View in the Page Editor.

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

Consuming a Data Control in a Task Flow

When published, a data control is automatically available in the resource catalog and can therefore be added to task flows. You can consume a data control in a task flow and render it in different presentations, such as a table, graph, or form.

If the data control defines parameters, you can also include a parameter form in the task flow so that users can specify a values for a data control parameter and display data based on that value.

> **Note:**
>
> Adding the same data control more than once to the same task flow may produce unexpected results. If you wish to use the same data control multiple times on a page, then the recommended approach is to create separate task flows for each instance.

This section includes the following topics:

- Supported Presentations
- Adding a Data Control to a Task Flow
- Presenting Data as a Table
- Presenting Data as a Form
- Presenting Data as a Graph
- Repairing a Task Flow with Broken References to a Data Control

Supported Presentations

Data retrieved using a web service data control can be rendered in a task flow in different ways. While editing a task flow, when you click **Add** against a data control's objects in the resource catalog, the **Add** menu displays different drop handlers. The drop handlers enable you to add a data control's objects as UI elements such as tables, graphs, forms, buttons, or labels. Depending on the type of object and the flavors supported, you can add different UI elements.

- **Table**—This option is displayed when you select a data control accessor that returns a collection of objects that can be displayed in the columns of a table. Select this option to display data in a tabular layout.

  For more information, see Presenting Data as a Table.

- **Form**—This option is displayed when you select a data control accessor that returns a collection of objects that can be displayed in a form. Select this option to display source data in a form.

  For more information, see Presenting Data as a Form.

- **Graph**—This option is displayed when you select a data control accessor that returns a collection of objects that can be displayed as a graph. This is useful for the purpose of analysis, when you want to generate a report. Select this option to display your data graphically, as a bar, pie, line, or an area chart.

  For more information, see Presenting Data as a Graph.

- **Button or Link**—The **ADF Button**, **ADF Link**, **ADF Image Link**, and **ADF Toolbar Button** options are displayed when you select a data control's methods or operations that perform an action. Select any of the button or link options while adding methods or operations such as `Create`, `Update`, `Delete`, `Commit`, `Rollback`, `Save`, or `Close`. Different options are available for different data controls depending on the methods exposed by the data source.

- **Text or Label**—The **ADF Output Text**, **ADF Output Text w/ Label**, **ADF Output Formatted**, **ADF Output Formatted w/ Label**, **ADF Input Text**, **ADF Input Text w/Label**, and **ADF Label** options are displayed when you select a data control's

attributes or methods that return a single object. An attribute can be a scalar parameter of an accessor, a method return, or an object member of a complex parameter. Select a text or label option depending on whether you want to display the value to users or want users to specify a value.

When you add a data control inside a task flow, you can wire data control parameters to task flow parameters so that the data control retrieves data based on a parameter value that you specify. For more information, see Binding a Data Control Parameter to a Task Flow Parameter.

Adding a Data Control to a Task Flow

When you add a data control, its accessors, or its methods to a task flow, you can select different options for visualizing the data.

Depending on the object you select and the presentations it supports, different options are listed in the **Add** menu. For more information, see Supported Presentations.

To add a data control to a task flow:

1. Edit the task flow in the page editor, as described in Editing a Task Flow.

2. In the resource catalog, navigate to the section that contains data controls.

> ### ♀ Tip:
>
> The location of data controls depends on the resource catalog used for editing pages. For example, in the default resource catalog, runtime-created data controls are located in the **Data Controls** folder, which is nested inside the **Integration** folder.

> ### ✎ See Also:
>
> Adding a Component to a Page.

3. Click the data control to display its content.

4. Drill down if necessary and click **Add** next to the data control accessor.

5. From the drop-down menu, select one of the following options, depending on how you want to visualize the data:

   • **Table**—For more information, see Presenting Data as a Table.

   • **Form**—For more information, see Presenting Data as a Form.

   • **Graph**—For more information, see Presenting Data as a Graph.

Presenting Data as a 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. Follow the steps in Adding a Data Control to a Task Flow, choosing **Table** from the drop-down menu.

2. On the Type page of the Create Table wizard, select **Read-only Table**.

3. (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.

      If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

      > **✎ 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.

4. Click **Next**.

5. 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.

6. 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.

7. Click **Next**.

8. 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.

9. 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.

10. Click **Create**.

Presenting Data as a Form

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

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. Follow the steps in Adding a Data Control to a Task Flow, choosing **Form** from the drop-down menu.

2. On the Type page of the Create Form wizard, select **Read-only Form**.

3. 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.

4. Click **Next**.

5. 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.

6. 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.

7. Click **Next**.

8. 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.

9. 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.

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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.

10. Click **Create**.

Presenting Data as a 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. Follow the steps in Adding a Data Control to a Task Flow, choosing **Graph** from the drop-down menu.

2. On the Type page of the Create Graph wizard, select the desired type of graph: **Area**, **Bar**, **Line**, or **Pie**, then click **Next**.

3. 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.

4. On the Layout page, select your desired layout of graph elements, such as the title, legend, and footnote, then click **Next**.

5. 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.

6. On the Format page, enter the text to use for each graph element, such as the title, legend, and footnote.

7. 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.

8. Click **Create**.

Repairing a Task Flow with Broken References to a Data Control

If you add a data control to a task flow, editing or deleting the data control at a later date may break the task flow. You can repair the task flow by removing references to the data control from the task flow's source files.

To repair a task flow with broken references to a data control:

1. Edit the source code of the task flow, as described in Editing the Source Code of an Asset.

2. Click each of the three tabs, **Taskflow Definition**, **Fragment**, and **Page Definition**, and remove any references to the edited or deleted data control from the source files.

> **Tip:**
>
> To ensure that you do not end up with an invalid task flow that does not render properly, edit the source code very carefully.

3. Click **OK**.

Controlling the Data Displayed in a Task Flow Using a Data Control

Data control parameters are used to restrict the data retrieved by a data control based on the criteria you specify. For more information, see Creating a Web Service Data Control.

If a data control provides parameters, there are several ways you can change the values of those parameters after you have added the data control to a task flow.

This section includes the following subsections:

- Adding a Parameter Form to a Data Presentation
- Editing Data Control Parameter Values
- Binding a Data Control Parameter to a Task Flow Parameter

Adding a Parameter Form to a Data Presentation

If you want end users to be able to change the data displayed in the task flow, you can include the data control's parameters in a parameter form in the task flow. Users can enter values for the data control parameters in the parameter form and the data displayed in the task flow reflects the values specified.

To add a parameter form to a task flow used to present data on a portal page:

1. Add the data control to a task flow as a table, form, or graph, as described in Consuming a Data Control in a Task Flow.

2. 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.

3. In the **Default Value** field, enter the default value to use for the parameter.

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.

4. 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.

5. Click **Create**.

Editing Data Control Parameter Values

If you can edit the task flow where the data control is visualized, you can edit the data control's parameter values in the Component Properties dialog of the table, form, or graph to control the display of data.

To edit data control parameter values:

1. Edit the task flow in the page editor, as described in Editing a Task Flow.

2. Click the table, form, or graph, and choose **Data** from the **View Actions** menu.

3. In the Data dialog, modify the values for any of the listed parameters.

4. Click **OK**.

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

The table, form, or graph now displays data specific to the parameter values provided.

Binding a Data Control Parameter to a Task Flow Parameter

You can bind a data control parameter to a task flow parameter so that the data control retrieves data based on the value specified for the task flow parameter.

You can bind a data control parameter to a task flow parameter so that the data control retrieves data based on the value specified for the task flow parameter.

For example, if your task flow contains an employee information data control with a bind parameter to limit the data retrieved to a specified job role only, you can create a corresponding job parameter on the task flow. Users who can edit the task flow can specify a job title for the task flow parameter so that the data control displays the employees with the specified job.

To bind a data control parameter to a task flow parameter:

1. Create the task flow parameter as follows:

   a. Edit the task flow in the page editor.

   See Editing a Task Flow.

   b. Click the **Task Flow Properties** icon.

Figure 22-2   The Task Flow Properties Icon
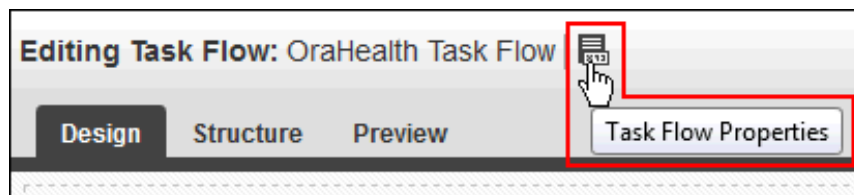
c. Enter a **Name**, **Type**, and **Storage** value for the task flow parameter.

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.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Table 22-1   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.

d. Make a note of the value in the **Storage** field.

e. Click **OK**.

2. Click the table, form, or graph that displays data from the data control, and choose **Data** from the **View Actions** menu.

3. In the Data dialog, paste the **Storage** value you copied earlier into the field for the data control parameter that you want to bind to the task flow parameter.

4. Click **OK**.

The data control parameter now uses the value of the task flow parameter to drive the content of the table, form, or graph.

> **Note:**
>
> If you are using a web service data control for which you have not defined a parameter value, you must set an initial value for the task flow parameter. If not, the task flow displays an empty presentation (table, form, or graph). Therefore, in the Data dialog for a web service data control, you must pass an initial value for the task flow parameter as shown in the following example:
>
> ```
> #{empty pageFlowScope.stock_Quote ? 'ORCL' : pageFlowScope.stock_Quote}
> ```

Adding a Task Flow to a Portal Page

When published (marked as **Available**), task flows are automatically available in the resource catalog for selection to add to a page in the page editor. For information about creating task flows that can be used on a page to present the data retrieved by data controls, see Creating a Task Flow.

To add a task flow to a portal page:

1. Open the page in which you want to present the data in the page editor.

    For more information, see Opening a Page in the Page Editor.

2. Click **Add Content** in the area of the page where you want to add the task flow to open the resource catalog and select the task flow. For more information, see Adding a Component to a Page.

    > **Tip:**
    >
    > The location of task flows in the resource catalog depends on the resource catalog being used by the page. For example, in the default resource catalog, task flows are present in the **Task Flows** folder which is nested inside the **UI Components** folder.

3. If the data control defines parameters that are bound to the task flow's parameters, the task flow parameters drive the data that is displayed. Select the task flow on the page, click its **View Actions** menu, then select Parameters to open the Parameters dialog for the task flow. Change parameters as desired.

4. Click **Save** to save your changes.

    If the data presentation includes a parameter form, users can enter values to change the data displayed on the page.

Managing a Task Flow

The following options are available on the **Assets** and **Shared Assets** page to enable you to manage task flows.

> **✎ See Also:**
>
> Accessing Portal Assets and Accessing Shared Assets

- **Create**—For more information, see Creating a Task Flow.

- **Delete**—You can delete task flows when they are no longer required.

  For more information, see Deleting an Asset.

- **Upload**—You can upload an archive file that contains a task flow from another portal.

  For more information, see Uploading an Asset.

  You cannot use the **Upload** option to upload a task flow that has been exported from Oracle JDeveloper.

  If the task flow that you are uploading consumes data controls, you must first upload those data controls. For more information, see Managing Web Service Data Controls.

- **Download**—You can download a task flow into an archive file for uploading into another portal or for importing into JDeveloper.

  Task flows created at runtime may contain components that are bound to data controls. When you download such a task flow, the referenced data controls are not downloaded. When you open the task flow in JDeveloper, you will not see a fully running task flow because the associated data controls are not available in JDeveloper. The task flow will work properly only when you upload it back into WebCenter Portal.

  For more information, see Downloading an Asset.

- **Actions**

  – **Copy**—You can create a copy of a task flow. The Copy feature enables you to replicate a local task flow in the runtime environment without having to actually export and upload the task flow.

    Fore more information, see Copying an Asset.

  – **Security Settings**—You can control whether all users or only specific users or groups can access the task flow that you created.

    For more information, see Setting Security for an Asset.

  – **Show Properties**—Each task flow has certain properties associated with it that control how it is displayed in a portal. These properties are summarized in the Show Properties dialog.

    For more information, see Viewing Information About an Asset.

  – **Edit Source**—For more information, see Editing the Source Code of an Asset. When editing the source code of a task flow, consider the following:

    * Do not refer to a Java bean that is not available on the portal server.

    * Do not refer to functions in JavaScript files that are not available on the portal server.

    * Do not refer to other task flows that are not available on the portal server.

* Do not add a data control that has been created in JDeveloper. The data control may not be available on the portal server, which will cause the rendition of the task flow to break.

– **Edit Properties**—Each task flow has certain properties associated with it that control how it is displayed in the portal. You can edit these properties through the Edit Properties dialog.

For more information, see Setting Properties on an Asset.

• **Preview**—You can preview how the task flow will appear when displayed on a page.

For more information, see Previewing an Asset.

• **Available**—You can control whether or not a task flow is included in the resource catalog, and therefore whether or not it is available for use in a portal.

For more information, see Showing and Hiding Assets.

> **Tip:**
>
> In addition to showing or hiding a task flow in the resource catalog, you can also control whether a shared task flow is available to any, all, or selected portals in WebCenter Portal. For more information, see Setting Properties on an Asset.

• **Edit**—For more information, see Editing a Task Flow.

23

Working with Data Visualizations

Create, configure, and manage data visualizations using visualization templates to explore retrieved data visually.

> ✏ **Permissions:**
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> - `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
>
> - `Application Integration Visualization: Manage Application Integration Visualization` (advanced permissions)
>
> See About Roles and Permissions for a Portal.
>
>
> ✏ **Note:**
>
> For a SQL data source, the database permissions required to view, update, or insert data using a data visualization are the same permissions that are required to view, update, or insert data into a table in the database. These permissions may include `CONNECT`, `SELECT`, `CREATE INDEXTYPE`, `CREATE SEQUENCE`, `CREATE SESSION`, and `CREATE TABLE`. At a minimum, you will need `CONNECT`, `RESOURCE`, `CREATE SESSION`, and `CREATE TABLE` permissions to view and update the visualization, but you may require additional permissions depending on your specific use case.

Topics:

- About Data Visualizations
- Adding a Data Visualization a Portal Page
- Configuring a Data Visualization
- Deleting a Data Visualization
- Managing Data Visualizations
- Troubleshooting a Data Visualization

About 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.

The basic steps to accomplish this are:

1. *Create data source*. Create a REST or SQL data source from which to retrieve the data to present on the page (see Creating a REST Data Source and Creating a SQL Data Source).

2. (Optional) *Create business object*. If you need to filter the attributes and methods retrieved from the data source, create a business object (see Creating a Business Object). If you do not create a unique business object, one is automatically created when a data source is selected in the Define Data Visualization wizard, and all the attributes and methods for the data source are added to the business object. Manually-created business objects are listed on the portal **Assets** page and in the Define Data Visualization wizard, but automatically-created business objects are internal and not exposed anywhere.

3. *Determine visualization template*. Decide if you can use one of the built-in visualization templates (see About the Built-In Visualization Templates), or if you need to work with a developer to create a custom visualization template. When a custom visualization template is uploaded to a portal, it is shown on the **Assets** page for the portal; it can also be made available as a shared asset, available to all portals.

4. *Configure data visualization*. Add a data visualization component (Data Presenter Visualization) to a page, then configure the component to define the data visualization that you want to render on the page (see Configuring a Data Visualization).

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).

Adding a Data Visualization a Portal Page

To add a data visualization to page, you start by adding the default Application Integration Visualization component to the page. Then, you can configure this component to create the unique data visualization that you require. For more information, see About Data Visualizations.

To add a data visualization to a portal page:

1. Open the page in which you want to present the data in the page editor.

    For more information, see Opening a Page in the Page Editor.

2. Click **Add Content** in the area of the page where you want to add the data visualization to open the resource catalog.

3. In the resource catalog, find and select **Data Presenter Visualization** to add the Application Integration Visualization component to the page (Figure 23-1).

> **Tip:**
>
> The location of Application Integration Visualization component in the resource catalog depends on the resource catalog being used by the page. For example, in the Default Portal Catalog, the Application Integration Visualization component is in the **Application Integration** folder.

Figure 23-1   New Application Integration Visualization Component
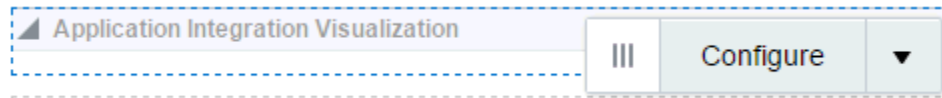
The new data visualization is shown on the portal **Assets** page, but you cannot edit, copy, or delete it from the **Assets** page. To make changes to the data visualization, you can edit the page and click **Configure** on the Application Integration Visualization component.

4. Configure the data visualization to create a unique data visualization that presents the data retrieved by a business object in a visualization template, as described in Configuring a Data Visualization.

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. Open the page that includes the data visualization in the page editor.

   For more information, see Opening a Page in the Page Editor.

2. Select the data visualization on the page, then click **Configure** (Figure 23-2 and Figure 23-3) to open the Define Data Visualization wizard (Figure 23-4).

Figure 23-2   Configure Data Visualization: New
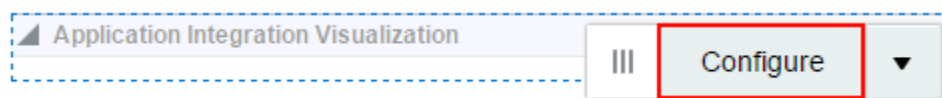
Figure 23-3   Configure Data Visualization: Existing
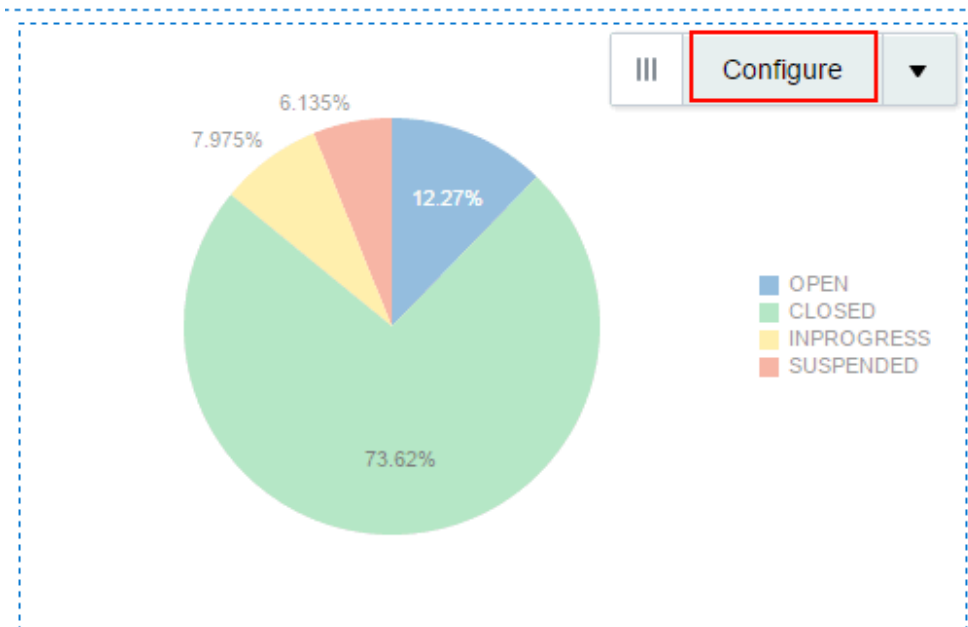
Figure 23-4   Define Data Visualization Wizard
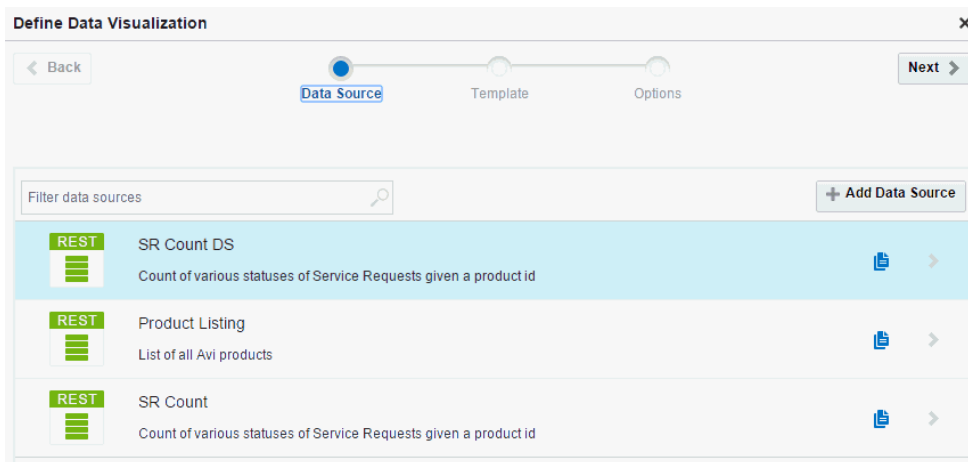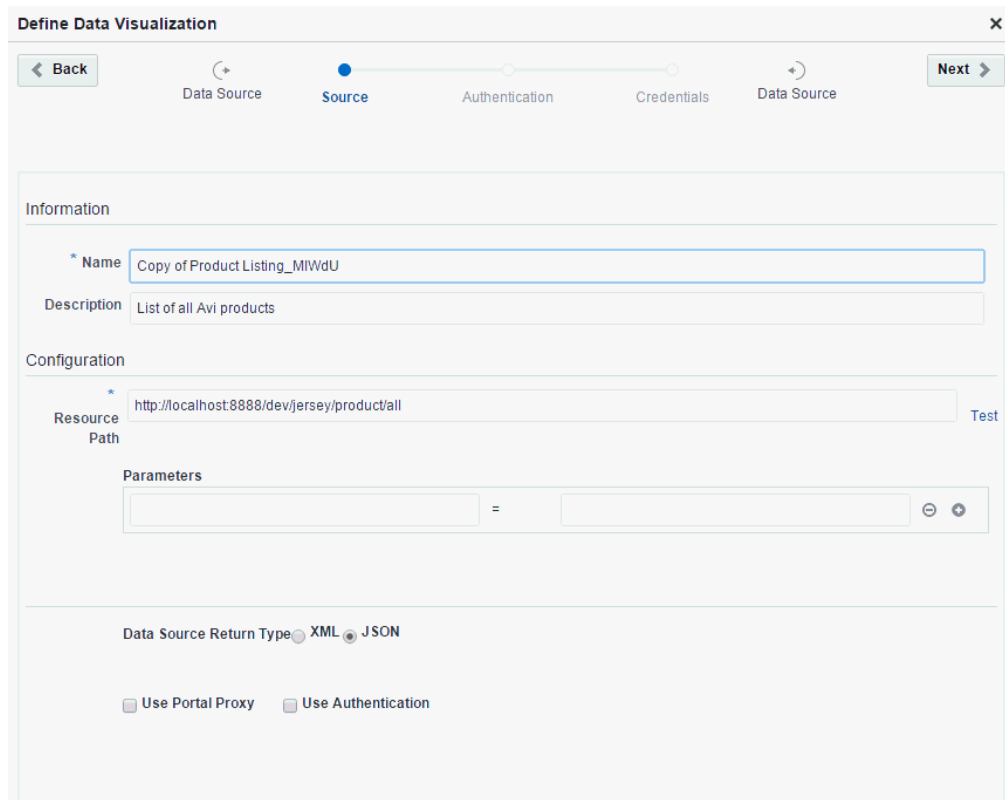
3. On the **Data Source** page, select an existing SQL or REST data source and go to the next step, or create a new REST data source with limited options as follows:

> **✎ 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.

Figure 23-5   Data Source Wizard: Source Page

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.

Figure 23-6   Data Source Wizard: Credentials Page

- 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.
4. Click **Next** to display the **Template** page.

Figure 23-7   Define Data Visualization Wizard: Template Page
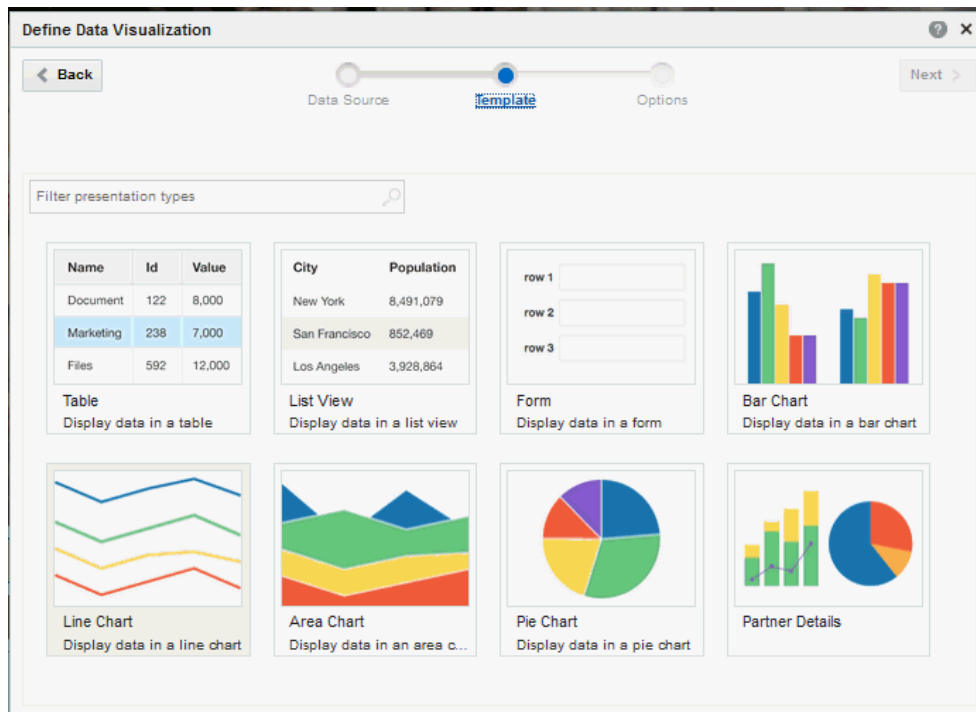
5. On the **Template** page:

   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.

   Figure 23-7 shows the built-in templates, along with one custom template named Partner Details. For more information about the built-in visualization templates, see About the Built-In Visualization Templates. Custom visualization templates are developed in JDeveloper and uploaded to a portal, as described in Creating or Editing a Visualization Template.

> **✎ 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**.

6. 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.

Table 23-1 shows the elements available for built-in and custom visualization templates.

Table 23-1   Visualization Template Settings
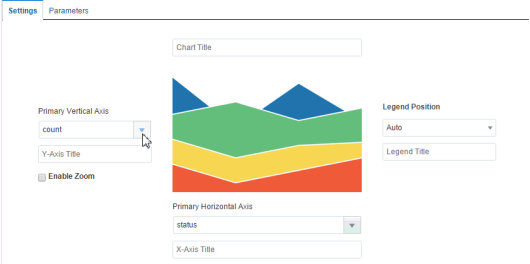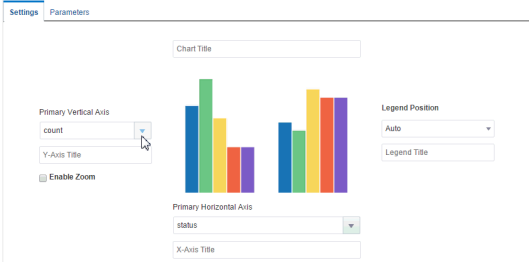
Template	Settings Page	Settings
Area Chart		Chart Title Primary Vertical Axis and Primary Horizontal Axis Y-Axis Title and X-Axis Title Enable Zoom Legend Position Legend Title
Bar Chart		Chart Title Primary Vertical Axis and Primary Horizontal Axis Y-Axis Title and X-Axis Title Enable Zoom Legend Position Legend Title

Table 23-1   (Cont.) Visualization Template Settings
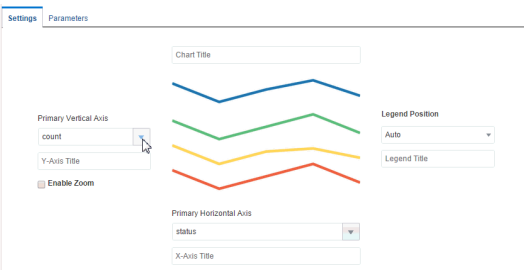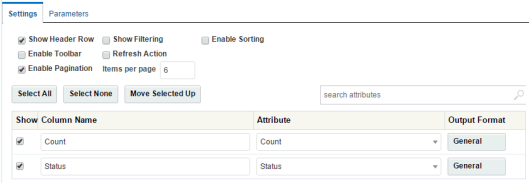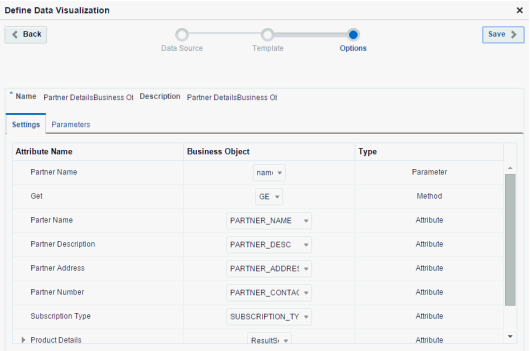
Template	Settings Page	Settings
Form		Include Navigation Controls Add Header Refresh Action Show Field Name Attribute (available business object and data source attributes) Output Format (see next step)
Line Chart		Chart Title Primary Vertical Axis and Primary Horizontal Axis Y-Axis Title and X-Axis Title Enable Zoom Legend Position Legend Title
List View		Fetch Size Show Column Name Attribute (available business object and data source attributes) Output Format (see next step)

Table 23-1 (Cont.) Visualization Template Settings

Template	Settings Page	Settings
Pie Chart		Chart Title Pie Enable 3D Effect Enable Sorting Slices Footnote for the chart Legend Position Legend Title
Table	 **Note**: If you select **Enable Filtering**, you can filter data in view mode. Filtering in edit mode does not generate expected results.	Show Header Row Show Filtering Enable Sorting Enable Toolbar Add Header Refresh Action Enable Pagination Items per page Show Column Name Attribute (available business object and data source attributes) Output Format (see next step)
Custom template example		Unique to custom template

7. 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')`

   Figure 23-8   Format Column Dialog
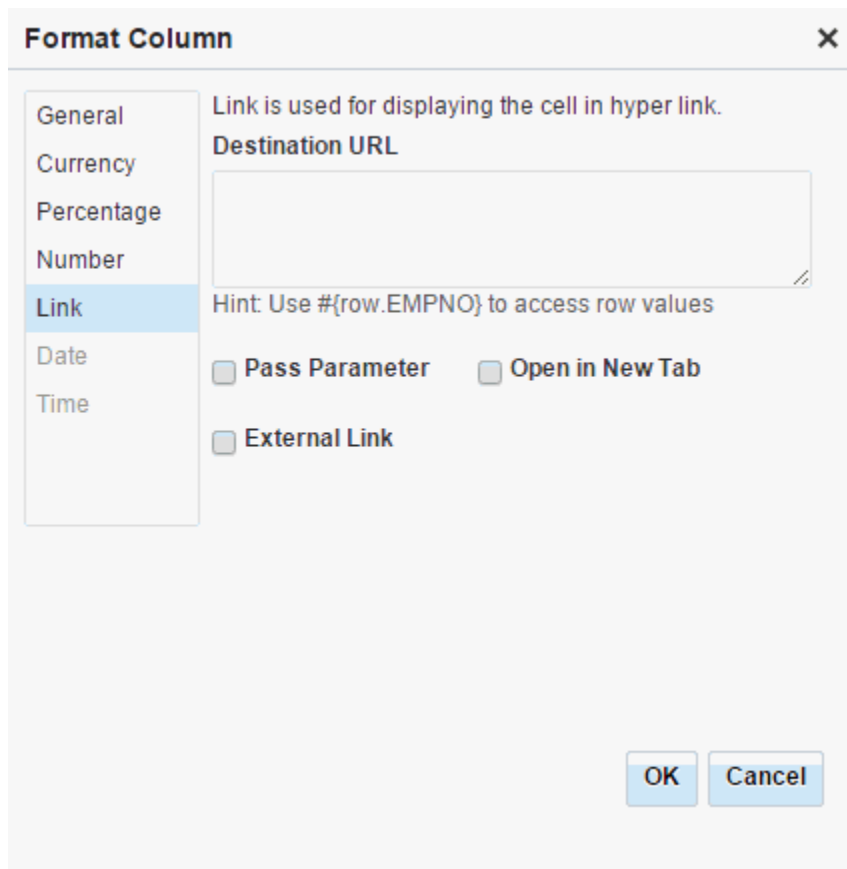
8. On the **Parameters** tab, define:

- **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.

Figure 23-9   Define Data Visualization Wizard: Options Page (Parameters Tab)

9. 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.
   Figure 23-10 shows an example for List View and Pie Chart built-in templates.

Figure 23-10   Data Visualization on a Portal Page
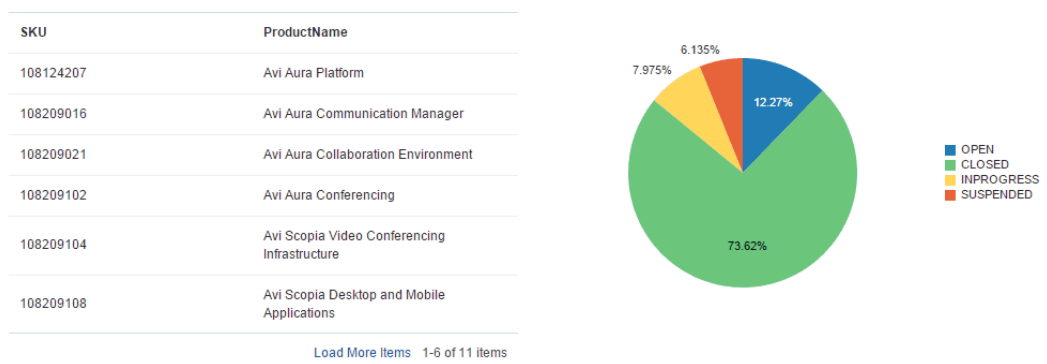
Deleting a Data Visualization

To delete a data visualization:

1. Open the page that includes the data visualization in the page editor.

   For more information, see Opening a Page in the Page Editor.

2. Select the data visualization on the page, then click the **View Actions** menu and select **Delete** (o).

   Figure 23-11   Deleting a Data Visualization
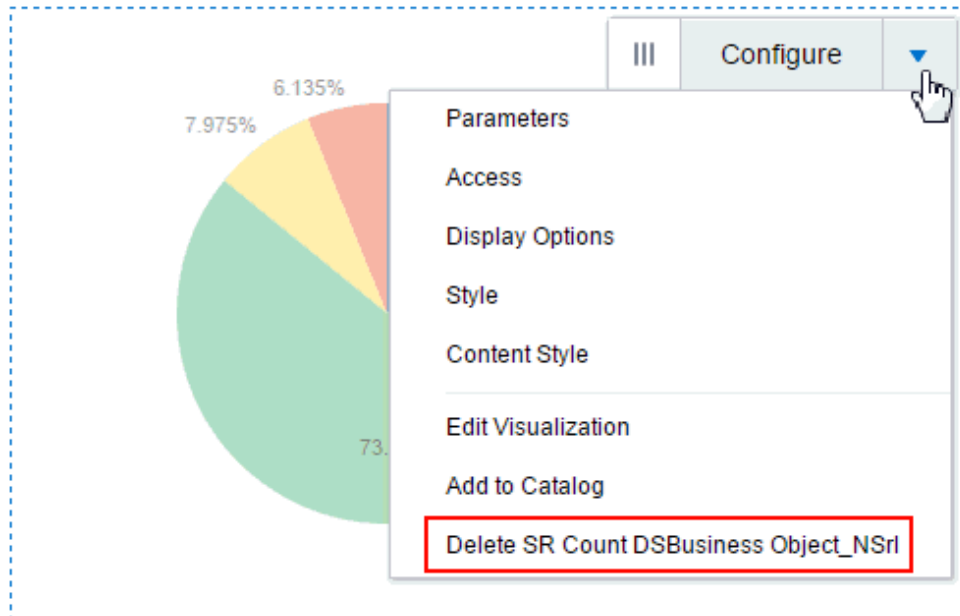
Managing Data Visualizations

The **Assets** page provides limited options for managing data visualizations. You cannot edit, copy, or delete a data visualization from the **Assets** page. To make changes to the data visualization, you can edit the page and click **Configure** on the Data Presenter Visualization component (see Configuring a Data Visualization).

> ✎ **See Also:**
>
> Accessing Portal Assets

,

The following options are available on the **Assets** page to enable you to manage Data Presenter Visualization:

*   **Upload**—You can upload an archive file that contains a data visualization.

    For more information, see Uploading an Asset.

*   **Download**—You can download a data visualization into an archive file.

    For more information, see Downloading an Asset.

*   **Actions**

- – **Edit Source**—You can directly edit the source code of a data visualization on the **Taskflow Definition**, **Fragment**, and **Page Definition** tabs. Editing the source code is not recommended unless you are making a minor edit.

  – **Show Properties**—Each data visualization has an associated Show Properties dialog that summarizes useful information about it.

    For more information, see Viewing Information About an Asset.

  – **Edit Properties**—Each data visualization has certain properties associated with it that control how it is displayed in the portal. You can edit these properties through the Edit Properties dialog.

    For more information, see Setting Properties on an Asset.

- • **Available**—You can control whether or not a data visualization is available for use in a portal by selecting or deselecting this check box.

  For more information, see Showing and Hiding Assets.

Troubleshooting a Data Visualization

While working with data visualizations, you might need to troubleshoot various issues if the data is not rendered as required.

Text Not Aligned in the List View Template

If you use a SQL data source that selects a column that has a long text value with no spaces, the output does not wrap and appears misaligned

Solution: Add spaces in the source data.

Template or Data Changes Not Shown in Data Visualization

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, the data visualization does not automatically update with the changes.

Solution: Configure a new data visualization, selecting the updated template or data source.

REST Data Source Changes Not Shown in Data Visualization

If the underlying data selected by a REST data source changes, the changes are not reflected in the data visualization on the page.

Solution: To update the data visualization with changes to the data selected by the REST data source, exist the wizard and go to the Assets page of the portal to edit the data source (see Editing a REST Data Source), where you can select Refresh Schema to refresh the data source and the 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.

Parameters Lost After Modifying Resource Path URL

If you modify the Resource Path URL in the Define Data Visualization wizard, the list of data source parameters will be refreshed, losing any parameters you may have specified earlier.

Solution: Respecify the required data source parameters in the Define Data Visualization wizard.

Expected Visualization Templates Not Shown for Selection

The templates available for selection in the Define Data Visualization wizard do not include all expected templates, such as Table and List.

Explanation: 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.

Solution: 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 (see Creating a REST Data Source), and provide a Response Payload that contains repeating data. Then, if you select that data source, the wizard will present all appropriate templates for selection, including List and Table.

New visualization Template Does Not Display After Selection

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.

Solution: Do not enter the page editor until after the custom visualization template is published.

Link URL Does Not Link to Target

When you define an Output Format of **Link** for retrieved data, the link does not display its target when clicked in the data visualization.

Solution: Specify a full URL (beginning with http://) or a URL relative to the portal's web address.

24

Working with Visualization Templates

Use visualization template to explore analytical data visually on a portal page. WebCenter Portal provides several built-in visualization templates, and a developer can create custom visualization templates in JDeveloper to meet specific requirements.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter on shared visualization templates, you must have the application-level `Manage Application Integration Visualization` permission. Users with the `Application Specialist` role have this permission by default. For more information about application-level permissions, see About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> - `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
>
> - `Application Integration Visualization: Manage Application Integration Visualization` (advanced permissions)
>
> See About Roles and Permissions for a Portal.

Topics:

- About Visualization Templates
- Creating or Editing a Visualization Template
- Managing a Visualization Template

About 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.

The basic steps to accomplish this are:

1. *Create data source*. Create a REST or SQL data source from which to retrieve the data to present on the page (see Creating a REST Data Source and Creating a SQL Data Source).

2. (Optional) *Create business object*. If you need to filter the attributes and methods retrieved from the data source, create a business object (see Creating a Business Object). If you do not create a unique business object, one is automatically created when

---

a data source is selected in the Define Data Visualization wizard, and all the attributes and methods for the data source are added to the business object. Manually-created business objects are listed on the portal **Assets** page and in the Define Data Visualization wizard, but automatically-created business objects are internal and not exposed anywhere.

3. *Determine visualization template*. Decide if you can use one of the built-in visualization templates (see About the Built-In Visualization Templates), or if you need to work with a developer to create a custom visualization template. When a custom visualization template is uploaded to a portal, it is shown on the **Assets** page for the portal; it can also be made available as a shared asset, available to all portals.

4. *Configure data visualization*. Add a data visualization component (Data Presenter Visualization) to a page, then configure the component to define the data visualization that you want to render on the page (see Configuring a Data Visualization).

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

> **✎ Notes:**
>
> • You cannot create or edit visualization 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. For more information, see Working with Portal Assets in JDeveloper and Developing Visualization Templates in *Developing for Oracle WebCenter Portal*.
>
> • If changes are made to a custom visualization template 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.

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.

About the Built-In Visualization Templates

The built-in visualization templates provided with WebCenter Portal are exposed in the Define Data Visualization wizard on the **Template** page (Figure 24-1). You cannot edit or manage the built-in visualization templates, so they are not exposed on the **Shared Assets** or portal **Assets** page.

Figure 24-1   Define Data Visualization Wizard: Template Page
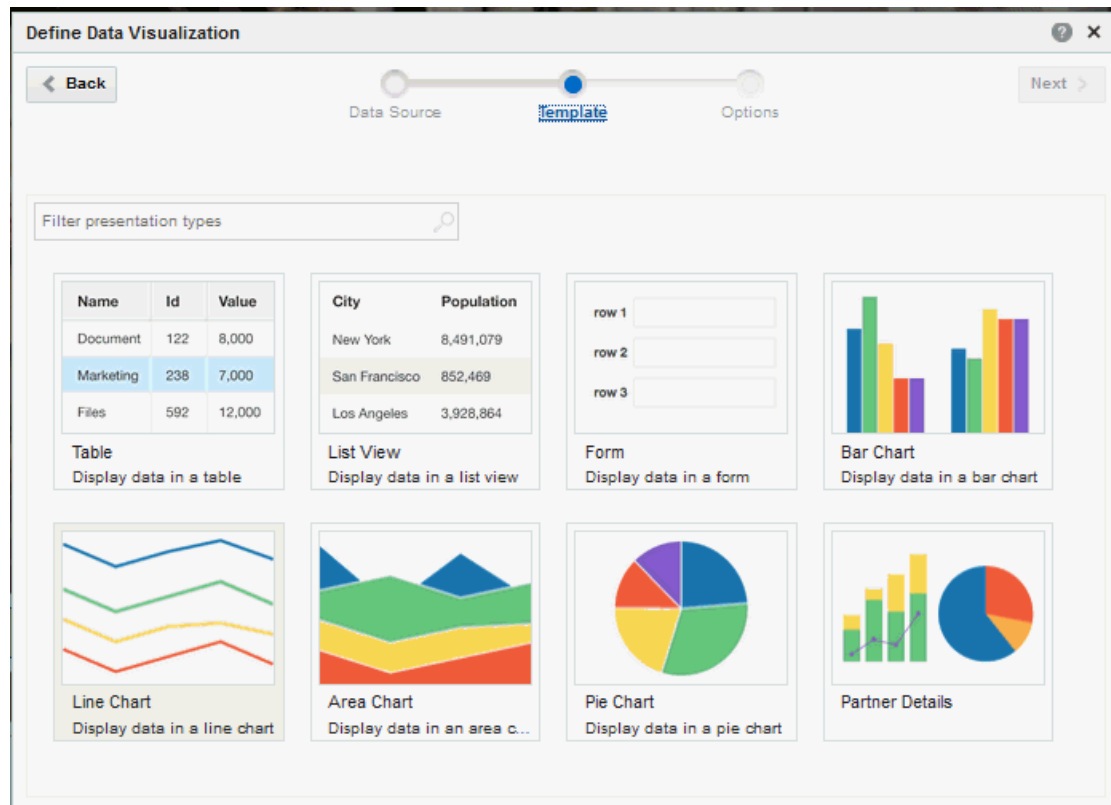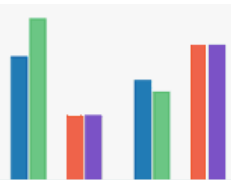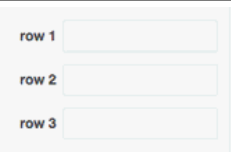
See Also:

Configuring a Data Visualization

The built-in visualization templates provide standard data presentation styles: table, form, list, or one of four types of charts. When you select a built-in visualization template in the Define Data Visualization wizard, you can set template-specific options, but you cannot make modifications to the look and feel of a built-in template. If none of the built-in visualization templates meet your needs for data presentation, a developer can create a custom visualization template, as described in Developing Visualization Templates in *Developing for Oracle WebCenter Portal*

Table 24-1 lists and describes the built-in visualization templates provided with WebCenter Portal.

Table 24-1   Built-In Visualization Templates

Name	Icon	Description
Area Chart		Displays data in an area chart, using options specified in the Define Data Visualization wizard for chart title, horizontal and vertical axes title and data, legend title and position, and zoom.
Bar Chart		Displays data in a bar chart, using options specified in the Define Data Visualization wizard for chart title, horizontal and vertical axes title and data, legend title and position, and zoom.
Form	row 1 / row 2 / row 3	Displays data in a form, using options specified in the Define Data Visualization wizard for navigation controls, header, refresh, and field attribute values to show.
Line Chart		Displays data in a line chart, using options specified in the Define Data Visualization wizard for chart title, horizontal and vertical axes title and data, legend title and position, and zoom.
List View	City / Population; New York 8,491,079; San Francisco 852,469; Los Angeles 3,928,864	Displays data in a list view, using options specified in the Define Data Visualization wizard for fetch size and and column attribute values to show.
Pie Chart		Displays data in a pie chart, using options specified in the Define Data Visualization wizard for chart title, pie data, 3D effect, sorting, number of slices, chart footnote, and legend position and title.
Table	Name / Id / Value; Document 122 8,000; Marketing 238 7,000; Files 592 12,000	Displays data in a table, using options specified in the Define Data Visualization wizard for header row, filtering, sorting, toolbar, header, refresh, paginations, items per page, and column attribute values to show.

.

Creating or Editing a Visualization Template

Creating or editing a visualization template is a complex task that requires a good understanding of Application Development Framework (ADF) and how to visualize

retrieved data. For this reason, custom visualization templates must be created and edited by developers using JDeveloper.

A developer can publish a custom visualization template directly to WebCenter Portal (the portal server) as a shared asset or to a specific portal for immediate use and testing.

For more information, see Working with Portal Assets in JDeveloper and Developing Visualization Templates in *Developing for Oracle WebCenter Portal*

Managing a Visualization Template

The following options are available on the **Assets** and **Shared Assets** page to enable you to manage visualization templates.

> ✎ **See Also:**
>
> Accessing Portal Assets and Accessing Shared Assets

- **Delete**—You can delete a visualization template when it is no longer required.

  For more information, see Deleting an Asset.

- **Upload**—You can upload an archive file that contains a visualization template that has been developed using JDeveloper.

  For more information, see Uploading an Asset.

- **Download**—You can download a visualization template into an archive file for further development in JDeveloper.

  For more information, see Downloading an Asset.

- **Actions**

  – **Edit Source**—You can directly edit the source code of a visualization template on the **Fragment** tab. Editing the source code is not recommended unless you are making a minor edit.

  – **Copy**—You can create a copy of a visualization template. This is the only way to create a new visualization template in WebCenter Portal. Once copied, you can download the template for customization in JDeveloper.

    For more information, see Copying an Asset.

  – **Copy To Shared Assets**—You can copy a visualization template to application-level shared assets for use by other portals.

  – **Show Properties**—Each visualization template has an associated Show Properties dialog that summarizes useful information about it.

    For more information, see Viewing Information About an Asset.

  – **Edit Properties**—Each visualization template has certain properties associated with it that control how it is displayed in the portal. You can edit these properties through the Edit Properties dialog.

    For more information, see Setting Properties on an Asset.

  – **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.

For an example of a custom visualization template with an icon assigned and available for selection on the **Template** page, see Figure 23-7 in Configuring a Data Visualization.

- **Available**—You can control whether or not a visualization template is available for select in the Define Data Visualization wizard by selecting or deselecting this check box.

  For more information, see Showing and Hiding Assets.

25

Working with Web Service Data Controls

Use a web service data control to retrieve data from a web service data source to display in your portal.

> ✏️ **Permissions:**
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> - `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
>
> - `Data Controls: Create, Edit, and Delete Data Controls` or `Create Data Controls` and `Edit Data Controls` (advanced permissions)
>
> See About Roles and Permissions for a Portal.

Topics:

- About Web Service Data Controls
- Creating a Web Service Data Control
- Editing a Web Service Data Control
- Managing Web Service Data Controls

About Web Service 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.

The basic steps to accomplish this are:

1. Create a data control (see Creating a Web Service Data Control).

2. Create a custom task flow (see Creating a Task Flow).

3. Add the custom task flow component to a page, then add the data control you want to render on the page (see Consuming a Data Control in a Task Flow and Controlling the Data Displayed in a Task Flow Using a Data Control).

A web service data control retrieves data from a web service that is accessed using standard protocols, such as SOAP and HTTP. You can use the objects in the data control (such as accessors, methods, and attributes) to create data-bound user interface components that you can include in a custom task flows.

To collect data from a web service, you must know the path to the Web Service Description Language (WSDL) file. The WSDL file describes the web service and specifies the methods that can be called, including the expected parameters. It also describes the returned data.

Based on the permissions you have on a web service data source, you can only provide values for the parameters specified by the methods of the web service. You cannot add or delete parameters. You can provide values for the following types of parameters:

- **Scalar parameters**—Simple parameters for which you can directly specify string or EL values to display data.

- **Complex parameters**—Derived parameters that take objects as parameters. They may also get their value from scalar parameters exposed by the method.

- **Array parameters**—Enable you to pass multiple values at a time, thereby updating multiple records in the data source simultaneously.

As well as querying the data source, a web service data control may also provide an option to update records, but only if the underlying web service allows data to be updated.

Creating a Web Service 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. Navigate to one of the following:

    - To create an application-level data control, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

    - To create a portal-level data control, go to the **Assets** page for the portal in which you want to create it. For more information, see Accessing Portal Assets.

2. In the left pane, under **Integration**, click **Data Controls**.

3. In the toolbar, click **Create**.

4. In the Create New Data Control dialog, in the **Name** field, enter a name for the data control.

    This name is displayed in the resource catalog.

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

    The description is displayed in the resource catalog.

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

7. 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
```

8. 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.

9. 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.

10. Click **Show Methods** to establish a connection to the web service using the specified WSDL and display the methods available for the web service.

11. From the **Service** drop-down list, select the service to use for the data control.

12. 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.

Figure 25-1   Adding Web Service Methods to a Data Control

13. 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 Table 25-1.

Table 25-1   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`.

For more information about security policies, see Testing OWSM Security Policies in *Administering Web Services*.

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

For more information about adding `csf-key` to the credential store, see Configuring the Credential Store in *Securing Web Services and Managing Policies with Oracle Web Services Manager*.

15. 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 more information, see About Web Service Data Controls.

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. For more information, see Editing Data Control Parameter Values.

16. Click **Create**.

The newly created data control is listed on the **Assets** or **Shared Assets** page. The empty check box in the **Available** column indicates that the data control is not yet published and hence is not available for users to add to their task flows. To publish the data control, select the check box to enable users to add the data control to a task flow in the page editor (see Creating a Task Flow).

Editing a Web Service Data Control

You can modify a web service data control by selecting it and choosing the **Edit** quick link. The Edit dialog enables you to modify the values that you provided while creating the data control.

> **Note:**
>
> When you edit a web service data control, the references to this data control in task flows may be broken. Therefore, use the **Edit** option on a data control with caution, after considering the impact on the consuming task flows.
>
> To fix references to edited data controls, you must edit the task flow's source files. For more information, see Editing the Source Code of an Asset.

To edit a web service data control:

1. Navigate to one of the following:

    • To edit an application-level data control, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

    • To edit a portal-level data control, go to the **Assets** page for the portal in which the data control was created. For more information, see Accessing Portal Assets.

2. In the sidebar, under Integration, click **Data Controls**.

3. Click the **Edit** quick link for the data control that you want to edit (Figure 25-2).

Figure 25-2   The Edit Quick Link for a Data Control

4. The fields in the Edit Data Control page are similar to those in the Create Data Control page.

   For information about these fields, see Creating a Web Service Data Control.

5. When you are done, click **Save and Close**.

Managing Web Service Data Controls

The following options are available on the **Assets** and **Shared Assets** page to enable you to manage web service data controls.

> ✏ **See Also:**
>
> Accessing Portal Assets and Accessing Shared Assets

- **Create**—For more information, see Creating a Web Service Data Control.

- **Delete**—You can delete a data control when it is no longer required.

  For more information, see Deleting an Asset.

  When you delete a data control, the references to this data control in task flows may be broken. Therefore use the **Delete** option on a data control with caution, after considering the impact on the consuming task flows. For information about how to fix broken data control references, see Repairing a Task Flow with Broken References to a Data Control.

- **Upload**—You can upload an archive file that contains a data control from another portal.

  For more information, see Uploading an Asset.

  You cannot use the **Upload** option to upload a data control that has been exported from JDeveloper.

  Your system administrator must ensure that a connection to the web service, complete with credentials, exists on the target instance.

  You can upload a web service connection used by the data control if the connection has been downloaded from the source instance. To upload a connection, use the `importWebCenterPortalConnections` WLST command. For command syntax and examples, see `importWebCenterPortalConnections` in *WebCenter WLST Command Reference Reference*. For information on how to run WLST commands, see Running Oracle WebLogic Scripting Tool (WLST) Commands in *Administering Oracle WebCenter Portal*.

- **Download**—You can download a data control into an archive file for uploading into another portal.

  For more information, see Downloading an Asset.

  You cannot import a data control that has been downloaded from WebCenter Portal into JDeveloper.

  You can also download any web service connection used by the data control so that the connection can also be uploaded into the target instance. To download a connection, use the `exportWebCenterPortalConnections` WLST command. For command syntax and examples, see `exportWebCenterPortalConnections` in *WebCenter WLST Command Reference Reference*. For information on how to run WLST commands, see Running Oracle WebLogic Scripting Tool (WLST) Commands in *Administering Oracle WebCenter Portal*.

- **Actions**

  - **Copy**—You can create a copy of a data control. You can use this feature when you want to back up a data control, or update a data control while keeping the original in use.

    Fore more information, see Copying an Asset.

  - **Security Settings**—You can control whether all users or only specific users or groups can access a data control.

    For more information, see Setting Security for an Asset.

- – **Edit Properties**—Each data control has certain properties associated with it that control how it is displayed in a portal. You can edit these properties through the Edit Properties dialog.

    For more information, see Setting Properties on an Asset.

- – **Show Properties**—Each data control has certain properties associated with it that control how it is displayed in a portal. These properties are summarized in the Show Properties dialog.

    For more information, see Viewing Information About an Asset.

- **Available**—You can control whether or not a data control is included in the resource catalog, and therefore whether or not it is available for use in a portal.

    For more information, see Showing and Hiding Assets.

> 💡 **Tip:**
>
> In addition to showing or hiding a data control in the resource catalog, you can also control whether a shared data control is available to any, all, or selected portals in WebCenter Portal. For more information, see Setting Properties on an Asset.

- **Edit**—For more information, see Editing a Web Service Data Control.

26

Working with Business Objects

Create a business object to filter the attributes and methods retrieved from a data source and render the retrieve data on your portal page using data visualization.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> - `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
>
> - `Application Integration Visualization: Manage Application Integration Visualization` (advanced permissions)
>
> See About Roles and Permissions for a Portal.

Topics:

- About Business Objects
- Creating a Business Object
- Editing a Business Object
- Managing a Business Object

About 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 basic steps to accomplish this are:

1. *Create data source*. Create a REST or SQL data source from which to retrieve the data to present on the page (see Creating a REST Data Source and Creating a SQL Data Source).

2. (Optional) *Create business object*. If you need to filter the attributes and methods retrieved from the data source, create a business object (see Creating a Business Object). If you do not create a unique business object, one is automatically created when a data source is selected in the Define Data Visualization wizard, and all the attributes and methods for the data source are added to the business object. Manually-created business objects are listed on the portal **Assets** page and in the Define Data Visualization wizard, but automatically-created business objects are internal and not exposed anywhere.

3. *Determine visualization template*. Decide if you can use one of the built-in visualization templates (see About the Built-In Visualization Templates), or if you need to work with a developer to create a custom visualization template. When a custom visualization template is uploaded to a portal, it is shown on the **Assets** page for the portal; it can also be made available as a shared asset, available to all portals.

4. *Configure data visualization*. Add a data visualization component (Data Presenter Visualization) to a page, then configure the component to define the data visualization that you want to render on the page (see Configuring a Data Visualization).

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).

Creating a Business Object

Before creating a business object, read About Business Objects.

You can use an automatically-created business object that includes all the attributes and methods from the data source, or manually create a business object that retrieves only the data that you specify. If a data source contains multiple levels of hierarchy and data at various levels, you can select only one level to create visualizations. For example, if a data source returns two iterators (repeating data, such as phone numbers), then even though a business object can contain both iterators, a data visualization will use only the first iterator. If you wish to use both iterators, then you must create two separate business objects. Manually-created business objects should be simple.

A business object is associated with a specific portal, and therefore can be created only at the portal level (as a portal asset), not at the application level (as a shared asset). When you create a business object to filter the attributes and methods retrieved from a data source, you can build it from scratch or create a copy of an existing business object and edit it. To build a new business object from scratch, follow the steps in the section. To copy an existing business object and edit the new copy, see:

• Copying an Asset

- Editing a Business Object

To create a business object:

1. Navigate to the **Assets** page for the portal in which you want to create the business object.

   For more information, see Accessing Portal Assets.

2. In the left pane, under **Integration**, click **Business Objects**.

3. In the toolbar, click **Create** (Figure 26-1) to open the Create New Business Object wizard, where you will define the data elements to include in the business object.

Figure 26-1   Creating a Business Object
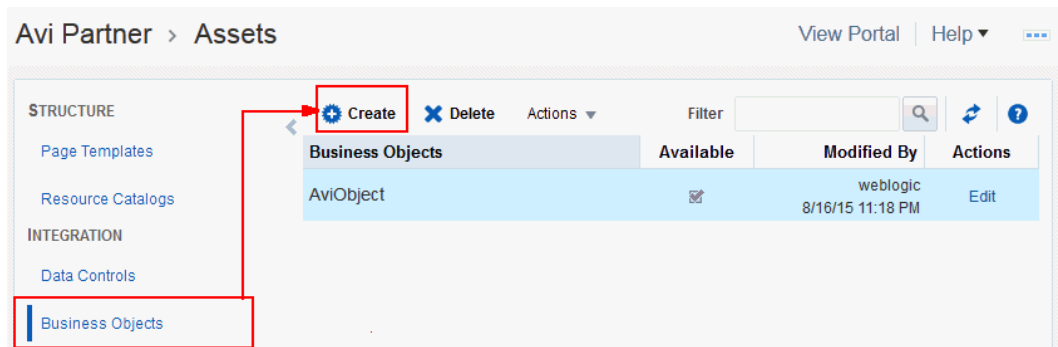
4. In the **Name** field, enter a name for the business object.

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

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

Figure 26-2   Create New Business Object Wizard

5. (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.

6. 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.

Figure 26-3   Create New Business Object: Attributes
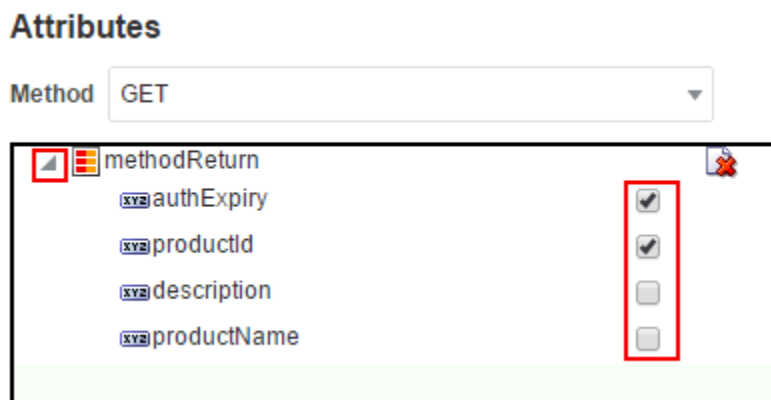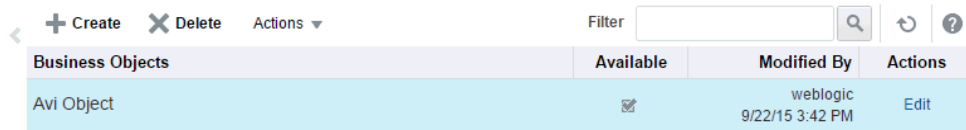
7. On the **Configuration** tab:

    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.

8. 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.

9. On the **Preview** tab, click **Test** to preview the data retrieved from the data source based on your selections.

10. 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.

See Configuring a Data Visualization.

Figure 26-4   New Business Object on Assets Page
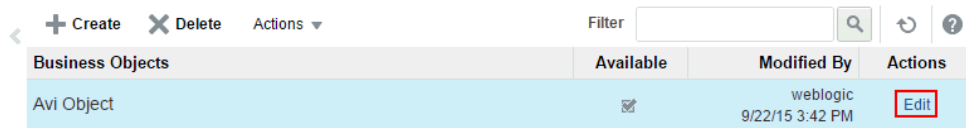
Editing a Business Object

You can edit a business object to change its configuration settings.

To edit a business object:

1. Navigate to the **Assets** page for the portal that owns the business object. For more information, see Accessing Portal Assets.

2. In the left pane, under **Integration**, click **Business Objects**.

3. In the **Actions** column for the business object that you want to edit, click the **Edit** quick link (Figure 26-5) to open the Edit Business Object wizard.

Figure 26-5   Edit Business Object Asset

4. In the Edit Business Object wizard (Figure 26-6), make required modifications to the **Name**, **Description**, and settings on the **Data Sources**, **Configuration**, and **Parameters** tabs. For more information about the settings, see Creating a Business Object.

Figure 26-6   Edit Business Object Wizard

5. Click **Save** to save your changes to the business object and close the wizard.

Managing a Business Object

The following options are available on the **Assets** page to enable you to manage business objects.

> ✎ **See Also:**
>
> Accessing Portal Assets

,

- **Create**—You can create a new business object in the Create Business Object wizard.

    For more information, see Creating a Business Object.

- **Delete**—You can delete a business object when it is no longer required.

    For more information, see Deleting an Asset.

- **Actions**

- **Copy**—You can create a copy of an existing business object, to use as the basis for a new business object.

  For more information, see Copying an Asset.

- **Edit Properties**—Each business object has certain properties associated with it that control how it is displayed in the portal. You can edit these properties through the Edit Properties dialog.

  For more information, see Setting Properties on an Asset.

- **Show Properties**—Each business object has an associated Show Properties dialog that summarizes useful information about it.

  For more information, see Viewing Information About an Asset.

- **Available**—You can control whether or not a business object is available for use in a portal by selecting or deselecting this check box.

  For more information, see Showing and Hiding Assets.

- **Edit**—You can edit an existing business object in the Edit Business Object wizard.

  For more information, see Editing a Business Object.

27

Working with Data Sources

Register and manage REST and SQL data sources so that other users can access remote data in their portals.

> ✎ **See Also:**
>
> Presenting Application Data in a Portal

> ✎ **Permissions:**
>
> To perform the tasks in this chapter on shared data sources, you must have the application-level `Manage Application Integration Visualization` permission. Users with the `Application Specialist` role have this permission by default. See About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.
>
> To perform the tasks in this chapter, you need one of the following portal-level permissions:
>
> - `Assets: Create, Edit, and Delete Assets` or `Create Assets` and `Edit Assets` (standard permissions)
>
> - `Application Integration Visualization: Manage Application Integration Visualization` (advanced permissions)
>
> See About Roles and Permissions for a Portal.

Topics:

- About Data Sources
- Using REST Data Sources
- Using SQL Data Sources

About Data Sources

WebCenter Portal supports two types of data sources from which to retrieve data to present on a portal page:

- **REST Data Sources**: You can configure a REST data source in the Data Source wizard or the Define Data Visualization wizard, providing either an internal URL (does not require proxy details) or an external URL (requires proxy details). See Using REST Data Sources.

- **SQL Data Sources**: You can configure a SQL data source in the weblogic console to provide specific database details (such as user name, password, service ID, and host name). See Using SQL Data Sources.

Using REST Data Sources

This section includes the following topics:

- Creating a REST Data Source
- Editing a REST Data Source
- Managing a REST Data Source

Creating a REST Data Source

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.

You can create a REST data source in two ways in WebCenter Portal:

- **In the Define Data Visualization wizard**: Supports basic REST data source creation and editing. Available when you add and configure a data visualization on a portal page to present data from a REST data source in a selected visualization template. For more information, see Configuring a Data Visualization.

- **On the Assets or Shared Assets page**: Supports more advanced REST data source creation and editing, providing more options. This method is described in this section.

To create a REST data source:

1. Navigate to one of the following:

    - To create an application-level REST data source, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

    - To create a portal-level REST data source, go to the **Assets** page for the portal in which you want to create it. For more information, see Accessing Portal Assets.

2. In the left panel, under **Data Sources**, click **REST Data Sources**.

3. In the toolbar, click **Create** (Figure 27-1) to open the Create New REST Data Source wizard..

Figure 27-1   Creating a REST Data Source
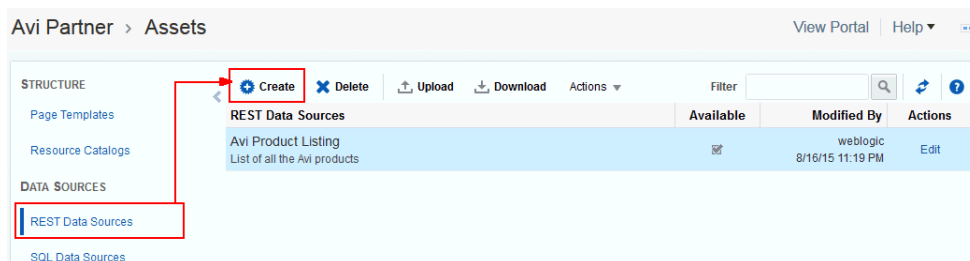
4. Enter a **Name** and optional **Description** for the data source.

Figure 27-2   Create New REST Data Source Wizard

5. 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`).

6. 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.

7. 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.

8. Select or deselect **Use Portal Proxy** and **Use Authentication** as required. For an external REST URL, select **Use Portal Proxy**.

9. Select or deselect **Enable Caching** as required, and enter values for **Time To Live (ms)** and **Max Weight**.

10. From the **Methods** list, select the method to assign to the REST data source: GET, PUT, POST, or DELETE.

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

12. 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>
```

13. 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.

Figure 27-3   Create REST Data Source Wizard: Credentials Page

   - 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.

14. 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.

For information about publishing a data source, see Showing and Hiding Assets.

Editing a REST Data Source

You can edit a REST data source in two ways in WebCenter Portal:

- **In the Define Data Visualization wizard**: Supports basic REST data source creation and editing. Available when you add and configure a data visualization on a portal page to present data from a REST data source in a selected visualization template. For more information, see Configuring a Data Visualization.

- **On the Assets or Shared Assets page**: Supports more advanced REST data source creation and editing, providing more options. This method is described in this section.

To edit a REST data source:

1. Navigate to one of the following:

   - To edit an application-level REST data source, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

   - To edit a portal-level REST data source, go to the **Assets** page for the portal to which it belongs. For more information, see Accessing Portal Assets.

2. In the left panel, under **Data Sources**, click **REST Data Sources**.

3. Click the **Edit** quick link in the row for the REST data source that you want to edit to open the Edit REST Data Source wizard (Figure 27-4).

Figure 27-4   Edit REST Data Source Wizard

4. Modify the entries in the wizard as required.

   If the underlying data changes, 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.

   For more information about other field values and selections, refer to Creating a REST Data Source or the online help for the wizard.

5. Click **Save**.

Managing a REST Data Source

The following options are available on the **Assets** or **Shared Assets** page to enable you to manage REST data sources:

> ✏ **See Also:**
>
> Accessing Portal Assets and Accessing Shared Assets

- **Create**—For more information, see Creating a REST Data Source.
- **Delete**—You can delete a REST data source when it is no longer required.

  For more information, see Deleting an Asset.

- **Upload**—You can upload an archive file that contains a REST data source.

  For more information, see Uploading an Asset.

- **Download**—You can download a REST data source into an archive file.

  For more information, see Downloading an Asset.

- **Actions**

  - **Copy**—You can create a copy of a REST data source.

    For more information, see Copying an Asset.

  - **Copy to Shared Assets** —You can copy a REST data source to application-level shared assets for use by other portals.

  - **Show Properties**—Each REST data source has an associated Show Properties dialog that summarizes useful information about it.

    For more information, see Viewing Information About an Asset.

  - **Edit Properties**—Each REST data source has certain properties associated with it that control how it is displayed in the portal. You can edit these properties through the Edit Properties dialog.

    For more information, see Setting Properties on an Asset.

- **Available**—You can control whether or not a REST data source is available for use in a portal by selecting or deselecting this check box.

  For more information, see Showing and Hiding Assets.

- **Edit**—For more information, see Editing a REST Data Source.

Using SQL Data Sources

This section includes the following topics:

- Creating a SQL Data Source
- Editing a SQL Data Source
- Managing a SQL Data Source

Creating a SQL Data Source

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"`

To create a SQL data source:

1. Navigate to one of the following:

   - To create an application-level SQL data source, go to the **Shared Assets** page. For
     more information, see Accessing Shared Assets.

   - To create a portal-level SQL data source, go to the **Assets** page for the portal in
     which you want to create it. For more information, see Accessing Portal Assets.

2. In the left panel, under **Data Sources**, click **SQL Data Sources**.

3. In the toolbar, click **Create** (Figure 27-5) to open the Create New SQL Data Source
   wizard.

Figure 27-5   Creating a SQL Data Source
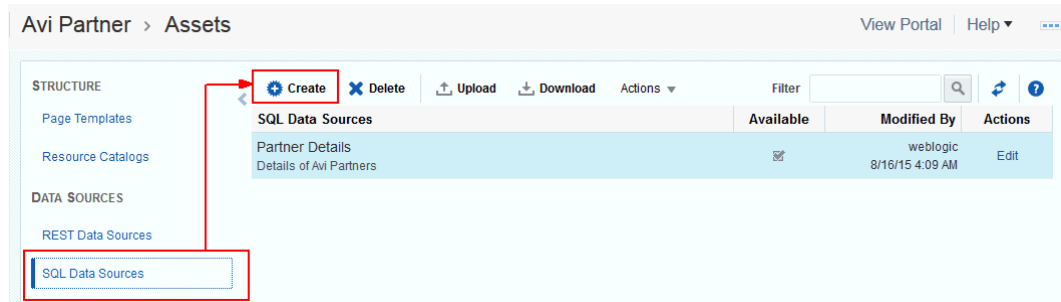
4. In the wizard, enter a **Name** and optional **Description** for the data source.

Figure 27-6   Create New SQL Data Source Wizard

5. 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.

6. 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
> ```

7. 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.

8. Click **Test** to confirm whether required entries are complete and valid.

9. 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. For information about publishing a data source, see Showing and Hiding Assets.

Editing a SQL Data Source

To edit a SQL data source:

1. Navigate to one of the following:

   • To edit an application-level SQL data source, go to the **Shared Assets** page. For more information, see Accessing Shared Assets.

   • To edit a portal-level SQL data source, go to the **Assets** page for the portal to which it belongs. For more information, see Accessing Portal Assets.

2. In the left panel, under **Data Sources**, click **SQL Data Sources**.

3. Click the **Edit** quick link in the row for the SQL data source that you want to edit to open the Edit SQL Data Source wizard (Figure 27-7).

Figure 27-7   Edit SQL Data Source Wizard

4. Modify the entries in the wizard as required. For more information about the field values and selections, refer to Creating a SQL Data Source or the online help for the wizard.

5. Click **Save**.

Managing a SQL Data Source

The following options are available on the **Assets** or **Shared Assets** page to enable you to manage SQL data sources:

> ✎ **See Also:**
>
> Accessing Portal Assets and Accessing Shared Assets

*   **Create**—For more information, see Creating a SQL Data Source.

*   **Delete**—You can delete a SQL data source when it is no longer required.

    For more information, see Deleting an Asset.

*   **Upload**—You can upload an archive file that contains a SQL data source.

    For more information, see Uploading an Asset.

*   **Download**—You can download a SQL data source into an archive file.

For more information, see Downloading an Asset.

- **Actions**

    – **Copy**—You can create a copy of a SQL data source.

    For more information, see Copying an Asset.

    – **Copy to Shared Assets** —You can copy a SQL data source to application-level shared assets for use by other portals.

    – **Show Properties**—Each SQL data source has an associated Show Properties dialog that summarizes useful information about it.

    For more information, see Viewing Information About an Asset.

    – **Edit Properties**—Each SQL data source has certain properties associated with it that control how it is displayed in the portal. You can edit these properties through the Edit Properties dialog.

    For more information, see Setting Properties on an Asset.

- **Available**—You can control whether or not a SQL data source is available for use in a portal by selecting or deselecting this check box.

    For more information, see Showing and Hiding Assets.

- **Edit**—For more information, see Editing a SQL Data Source.

Part V

Working with Portal Roles, Permissions, and Members

This part of *Building Portals with Oracle WebCenter Portal* provides information for the portal manager about managing roles, permissions, and members in a portal.

- Managing Roles and Permissions for a Portal
- Managing Members and Assigning Roles in a Portal
- Working with the Portal Members Task Flow

28

Managing Roles and Permissions for a Portal

Use built-in portal roles and permissions or create custom roles to secure a portal.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you need the `Portal Manager` role or a custom role that includes the portal-level `Manage Membership` permission. Users with this permission can manage portal members and their role assignments.
>
> See About Roles and Permissions for a Portal.

Topics:

- About Roles and Permissions for a Portal
- Defining Custom Roles for a Portal
- Viewing and Editing Permissions of a Portal Role
- Using Advanced Permissions
- Deleting Roles in a Portal

About Roles and Permissions for a Portal

Out-of-the-box,WebCenter Portal includes default roles and permissions:

- Application-level roles are `Administrator`, `Application Specialist`, `Portal Creator`, `Authenticated-User`, and `Public-User`. These roles are managed by the system administrator, as discussed in About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.

- There is one portal-level role out-of-the-box: `Portal Manager`.

  A portal manager can modify the permissions of the `Portal Manager` role, create a **Delegated Manager** for the portal, create the seeded `Viewer` or `Participant` roles by creating it using the Create Roles menu, or create new custom roles to control what members can do in the portal, manage permission assignments for existing custom roles, and delete roles that are no longer required. Additionally, a portal manager can grant the `Authenticated-User` (assigned to any user logged into portal) and `Public-User` roles permissions in the portal.

Understanding the Default Roles for a Portal

Table 28-1 describes the default roles in a portal.

> **✎ Note:**
>
> These default roles are always available for portals based on out-of-the-box portal templates. Portals based on user-defined templates may offer a different set of default roles. The default permissions assigned to the default roles are shown in Table 28-2.
>
> The `Delegated Manager`, `Viewer`, and `Participant` roles are *not* created by default when the portal is created. These seeded roles are available if the portal manager decides to create these roles for the portal and assign them to portal members.

Table 28-1   Default Roles for Portals

Portal Role	Description	Modify Permissions	Delete Role
Portal Manager	The `Portal Manager` role is automatically assigned to the creator of a portal. This role is automatically granted the highest level of permissions, as shown in Table 28-2. The portal manager or anyone with the portal level `Manage Security and Configuration` permission can modify permissions as necessary and appropriate.	Yes (except for `Manage Security and Configuration`)	No
Authenticated-User	The `Authenticated-User` role is given to authenticated users of WebCenter Portal, with no access to portal information by default. After logging in, users assigned this role always inherit any permissions granted to the `Public-User` role at the application level and in public portals. To grant access to a portal, additional permissions must be granted by the portal manager or anyone with the portal level `Manage Security and Configuration` permission (see Viewing and Editing Permissions of a Portal Role).	Yes	No
Public-User	Any user with access to WebCenter Portal who is not logged in assumes the `Public-User` role. Users with the `Public-User` role have no access to portal information by default. Such users are anonymous, and portal permissions must be granted explicitly by the portal manager or anyone with the portal level `Manage Security and Configuration` permission (see Viewing and Editing Permissions of a Portal Role).	Yes	No

Understanding Permissions and Permission Models in a Portal

Members can perform actions within a portal as specified by the permissions assigned to their role.

When assigning permissions to roles, portal managers can choose to assign standard permissions, or switch to advanced permissions:

- **Standard permissions**:

- *Administration* permissions allow a portal manager to assign the `Manage Security and Configuration`, `Manage Configuration`, or `Manage Membership` permission to a selected role.

- *Basic Services* permissions collectively control access to pages, lists, events, links and notes. With additional permissions granted on specific tools or services (such as Documents in standard permissions), or others through advanced permissions (see Table 28-3), also create, edit, and delete associated task flows and portlets on a page in the portal. For example, working with documents in a portal requires Documents permissions.

- *Documents* permissions allow aportal manager to control access to documents in the portal when these tools are enabled (see Enabling and Disabling Tools and Services Available to a Portal).

- *Assets* permissions collectively control access to all assets, including page templates, skins, resource catalogs, and so on.

See Table 28-2 for detailed information about standard permissions.

- **Advanced permissions**:

  Advanced Permissions provide a more granular set of permissions by replacing the collective set of Basic Services permissions with individual tools, services, and assets permissions.

  - *Administration* permissions allow a portal manager to assign the `Manage Security and Configuration`, `Manage Configuration`, or `Manage Membership` permission to a selected role.

  - Separate categories allow a portal manager to control the levels of access (for example, have full access by granting `Create, Edit, and Delete` permissions or some access by granting one or more of the following permissions: `Create`, `Edit`, `Delete`, or `View`) to the individual tools, services, and assets listed in Table 28-3.

  While advanced permissions give you more flexibility over role assignments, they can become complex to manage and maintain.

  See Table 28-3 for detailed information about advanced permissions.

It is the portal template that determines the default permission model for a portal. Portals that are based on out-of-the-box portal templates adopt the standard permissions by default, but portal managers can switch to advanced permissions if required. However, if you switch to using advanced permissions for a portal, you cannot revert to standard permissions. For more information, see Using Advanced Permissions.

> **✎ Note:**
>
> Permissions do not inherit the privileges of "lesser" permissions. Therefore, be careful to assign the appropriate set of permissions to allow users to perform required actions. For example, whenever you assign the `Create` permission, select the `View` permission too.

Table 28-2 lists the permission categories and permissions that are available with standard permissions.

Table 28-2   Portal Permissions - Standard Permissions

Permission Category	Permissions	Portal Roles Granted Permission By Default
Administration	**Manage Security and Configuration** - Enable access to all Portal Administration pages, except Pages and Assets. • To access portal pages, page and asset permissions must be granted. • To access portal assets, asset permissions must be granted. Includes `Manage Configuration` and `Manage Membership` permissions. **Note:** The `Delegated Manager` role does not include `Manage Security and Configuration` permission by default. This means that the `Delegated Manager` role includes all of the portal administration permissions, but this role cannot access portal security, including roles and members and cannot delete portals.	`Portal Manager`
Administration	**Manage Configuration** - Same as the `Manage Security and Configuration` permission, but excludes security privileges. Users with this permission cannot access the Roles and Members pages. • To access portal pages, page and asset permissions must be granted. • To access portal assets, asset permissions must be granted. Users with this permission must be allowed to view the portal. **Note:** The `Delegated Manager` role has only `Manage Configuration` permissions by default.	`Delegated Manager`
Administration	**Manage Membership** - Enables access to the Roles and Members pages in portal administration. On these pages, users can create, edit, and delete members and roles for the portal. **Note:** The `Delegated Manager` role does not include `Manage Membership` permissions by default.	`Portal Manager`

Table 28-2   (Cont.) Portal Permissions - Standard Permissions

Permission Category	Permissions	Portal Roles Granted Permission By Default
Basic Services (Lists, Events, Links, and Notes)	**Edit Page Access, Structure, and Content** - Create, edit, contribute content to, publish, and delete pages in the portal. Manage page access and edit page properties. Create, edit, and delete list data, events, links, and notes. With permissions on specific tools or services (Table 28-3), also create, edit, and delete associated task flows and portlets. For example, working with documents in a portal requires `Documents` permissions. Specifically, users with this permission can perform the following operations on a portal page: • Lists - Create, edit, and delete list data. • Events - Create, edit, delete, and view events. • Links - Create and delete links. • Notes - Create, edit, delete, and view notes.	`Portal Manager` `Delegated Manager`[1]
Basic Services (Lists, Events, Links, and Notes)	**Edit Page Access and Structure** - Manage page access and edit properties of pages in the portal. With permissions on specific tools or services (Table 28-3), also create, edit, and delete associated task flows and portlets. Create, edit, and delete list data, events, links, and notes.	`Portal Manager` `Delegated Manager`

Basic Services (Lists, Events, Links, and Notes)	**Customize Pages** - Add and remove list data, events, links, and notes.	`Portal Manager`
		`Delegated Manager`
		`Participant`[2]

Basic Services (Lists, Events, Links, and Notes)	**View Pages and Content** - View pages, lists, events, and notes. With permissions on specific tools or services (Table 28-3), view associated task flows and portlets.	`Portal Manager`
		`Delegated Manager`
		`Participant`[3]
		`Viewer`[4]
		`Public-User` (in public portals)

Basic Services (Lists, Events, Links, and Notes)	**Contribute Page Content** - Contribute text, images, and video to pages using contribution mode. Edit and delete any content contributed to pages. Includes `View Pages and Content` permission.	`Portal Manager` `Delegated Manager`
Assets (Portal Assets)	**Create, Edit, and Delete Assets** - Create, edit, and delete assets owned by the portal, such as page templates, resource catalogs, skins, page styles, Content Presenter templates, task flow styles, task flows, and data controls.	`Portal Manager` `Delegated Manager`

Table 28-2   (Cont.) Portal Permissions - Standard Permissions

Permission Category	Permissions	Portal Roles Granted Permission By Default
Assets (Portal Assets)	**Create Assets** - Create new assets for the portal.	None **Note**: Permissions needs to be explicitly granted
Assets (Portal Assets)	**Edit Assets** - Edit assets owned by the portal.	None **Note**: Permissions needs to be explicitly granted
Documents (available when the Documents tool is enabled)	**Administration** - Configure document workflows and access control settings. For more information, see Enabling Document Management.	`Portal Manager`
Documents (available when the Documents tool is enabled)	**Delete Documents** - Delete any folder and any file in the portal. Users with this permission can also move folder and files. Users with this permission must be allowed to create and view folders and files.	`Portal Manager`
Documents (available when the Documents tool is enabled)	**Create and Edit Documents** - Create files and folders, and upload files. Edit and delete files and folders that you create, if Content Server configuration has `Allow author to delete revision` enabled. For more information, see Modifying Content Security Configuration Using Fusion Middleware Control in *Administering Oracle WebCenter Content*. Users with this permission must be allowed to view folders and files.	`Portal Manager`
Documents (available when the Documents tool is enabled)	**View Documents** - Browse files, folders, wikis, and blogs.	`Portal Manager`

1   This role is seeded, but not created by default

2   This role is seeded, but not created by default.

3   This role is seeded, but not created by default.

4   This role is seeded, but not created by default.

Table 28-3 lists the permission categories and permissions that are available with advanced permissions.

Table 28-3   Portal Permissions - Advanced Permissions

Permission Category	Permissions	Portal Roles Granted Permission By Default
Administration	**Manage Security and Configuration** - Enable access to all portal Administration pages, except Pages and Assets. • To access portal pages, page and asset permissions must be granted. • To access portal assets, asset permissions must be granted. Includes `Manage Configuration` and `Manage Membership` permissions.	`Portal Manager`
Administration	**Manage Configuration** - Same as the `Manage Security and Configuration` permission but excludes security privileges. Users with this permission cannot access the Roles and Members pages. • To access portal pages, page and asset permissions must be granted. • To access portal assets, asset permissions must be granted. Users with this permission must be allowed to view the portal.	`Delegated Manager`
Administration	**Manage Membership** - Enables access to the Roles and Members pages in the portal administration settings. Through these pages, users can create, edit and delete members and roles for the portal. For more information, see Managing Members and Assigning Roles in a Portal.	`Portal Manager`
Pages	**Create, Edit, and Delete Pages** - Create, edit, contribute to, and delete pages in the portal. Manage page access and edit page properties. Create, edit, and delete lists, events, links, and notes. With permissions on specific tools or services, also create, edit, and delete associated task flows and portlets.	`Portal Manager` `Delegated Manager`
Pages	**Create Pages** - Create pages in the portal.	None **Note:** Permissions needs to be explicitly granted
Pages	**Publish Pages** - 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.	`Portal Manager` `Delegated Manager`

Table 28-3   (Cont.) Portal Permissions - Advanced Permissions

Permission Category	Permissions	Portal Roles Granted Permission By Default
Pages	**Edit Pages** - Edit page properties and content for any page in the portal. This includes adding, rearranging, and deleting content; contributing content to pages; renaming pages; and changing page properties.	`Portal Manager` `Delegated Manager`
Pages	**Delete Pages** - Delete pages in the portal.	`Portal Manager` `Delegated Manager`
Pages	**View Pages** - View pages, lists, events, and notes. With permissions on specific tools or services, view associated task flows and portlets.	`Portal Manager` `Delegated Manager` `Public-User` (in public portals) `Viewer` `Participant`
Pages	**Contribute Page Content** - Contribute text, images, and video to pages using contribution mode. Edit and delete any content contributed to pages. Includes `View Pages` permission.	`Portal Manager` `Delegated Manager`
Application Integration Visualization	**Manage Application Integration Visualization** - Create, edit, and delete application integration assets: SQL Data Sources, REST Data Sources, Business Objects, Data Visualization, and Visualization Templates.	None **Note:** Permissions needs to be explicitly granted
Content Presenter Templates	**Create, Edit, and Delete Content Presenter Templates** - Create, edit and delete Content Presenter display templates for the portal.	None **Note:** Permissions needs to be explicitly granted
Content Presenter Templates	**Create Content Presenter Templates** - Create Content Presenter display templates for the portal.	None **Note:** Permissions needs to be explicitly granted
Content Presenter Templates	**Edit Content Presenter Templates** - Edit portal-level Content Presenter display templates. For more information, see Working with Content Presenter Display Templates.	None **Note:** Permissions needs to be explicitly granted
Data Controls	**Create, Edit, and Delete Data Controls** - Create, edit and delete data controls for the portal. **Create Data Controls** - Create data controls for the portal. **Edit Data Controls** - Edit portal-level data controls. For more information, see Working with Web Service Data Controls.	None **Note:** Permissions needs to be explicitly granted

Table 28-3 (Cont.) Portal Permissions - Advanced Permissions

Permission Category	Permissions	Portal Roles Granted Permission By Default
Documents (available when the Documents tool is enabled)	**Administration** - Configure document workflows and access control settings. For more information, see Enabling Document Management.	`Portal Manager`
Documents (available when the Documents tool is enabled)	**Delete Documents** - Delete any folder and any file in the portal. Users with this permission can also move folder and files.Users with this permission must be allowed to create and view folders and files.	`Portal Manager`
Documents (available when the Documents tool is enabled)	**Create and Edit Documents** - Create files and folders, and upload files. Edit and delete files and folders that you create, if portal configuration has `Allow author to delete revision` enabled. For more information, see Modifying Content Security Configuration Using Fusion Middleware Control in *Administering Oracle WebCenter Content*. Users with this permission must be allowed to view folders and files.	`Portal Manager`
Documents (available when the Documents tool is enabled)	**View Documents** - Browse files, folders, wikis, and blogs.	`Portal Manager`
Events (available when the Events tool is enabled)	**Create, Edit, and Delete Events** - Create, edit and delete events for the portal. **Create Events** - Create events. **Edit Events** - Edit any event. **Delete Events** - Delete any event.	None **Note:** Permissions needs to be explicitly granted
Events (available when the Events tool is enabled)	**View Events** - View events. For more information, see Adding Events to a Portal.	None **Note:** Permissions needs to be explicitly granted
Links	**Create and Delete Links** — Create and delete links between assets. **Create Links** —Create new links between assets. **Delete Links**—Delete links between two assets. For more information, see Linking Information in *Using Portals in Oracle WebCenter Portal*.	None **Note:** Permissions needs to be explicitly granted
Lists (available when the Lists tool is enabled)	**Create, Edit, and Delete Lists** - Create, edit, and delete lists and list data. **Create Lists** - Create lists. **Edit Lists** - Edit list column definitions. **Delete Lists** - Delete any list. **Edit List Data** - Add, edit, and delete list data.	None **Note:** Permissions needs to be explicitly granted

Table 28-3   (Cont.) Portal Permissions - Advanced Permissions

Permission Category	Permissions	Portal Roles Granted Permission By Default
Lists (available when the Lists tool is enabled)	**View Lists** - View lists and list data. For more information, see Adding Lists to a Portal.	None **Note:** Permissions needs to be explicitly granted
Task Flow Styles	**Create, Edit, and Delete Task Flow Styles** - Create, edit, and delete task flow styles for the portal. **Create Task Flow Styles** - Create task flow styles for the portal. **Edit Task Flow Styles** - Edit portal-level task flow styles. For more information, see Working with Task Flow Styles.	None **Note:** Permissions needs to be explicitly granted
Notes	**Create, Edit, and Delete Notes** - Create, edit and delete notes for the portal. **Create Notes** - Create notes for the portal. **Edit Notes** - Edit portal-level notes. **Delete Notes** - Delete notes in the portal.	None **Note:** Permissions needs to be explicitly granted
Notes	**View Notes** - View notes in the portal. For more information, see Adding Personal Notes to a Portal.	None **Note:** Permissions needs to be explicitly granted
Page Styles	**Create, Edit, and Delete Page Styles** - Create, edit, and delete page styles for the portal. **Create Page Styles** - Create page styles for the portal. **Edit Page Styles** - Edit portal-level page styles. For more information, see Working with Page Styles.	None **Note:** Permissions needs to be explicitly granted
Page Templates	**Create, Edit, and Delete Page Templates** - Create, edit, and delete page templates for the portal. **Create Page Templates** - Create page templates for the portal. **Edit Page Templates** - Edit portal-level page templates. For more information, see Working with Page Templates.	None **Note:** Permissions needs to be explicitly granted

Table 28-3   (Cont.) Portal Permissions - Advanced Permissions

Permission Category	Permissions	Portal Roles Granted Permission By Default
Resource Catalogs	**Create, Edit, and Delete Resource Catalogs** - Create, edit and delete resource catalogs for the portal. **Create Resource Catalogs** - Create resource catalogs for the portal. **Edit Resource Catalogs** - Edit portal-level resource catalogs. For more information, see Working with Resource Catalogs.	None **Note:** Permissions needs to be explicitly granted
Skins	**Create, Edit, and Delete Skins** - Create, edit, and delete skins for the portal **Create Skins** - Create skins for the portal. **Edit Skins** - Edit portal-level skins. For more information, see Working with Skins.	None **Note:** Permissions needs to be explicitly granted
Task Flows	**Create, Edit, and Delete Task Flows** - Create, edit, and delete task flows based on a task flow style for the portal. **Create Task Flows** - Create task flows for the portal. **Edit Task Flows** - Edit portal-level task flows. For more information, see About Task Flows.	None **Note:** Permissions needs to be explicitly granted

Defining Custom Roles for a Portal

The default role of `Portal Manager` provided by WebCenter Portal contains administrative rights to the portal, but the `Portal Manager` can also delegate a portal member to be the delegated manager, create `Viewer` or `Participant` roles (using the Create Roles dialog), or define custom roles that are tailored to meet the purpose of the portal and help members accomplish their tasks in the portal.

Before you create custom roles, think about the purpose of the portal and how members would use the portal. For example, you might want members to:

- edit the portal by adding pages or editing an existing page structure, or by adding task flows. See Table 28-2 for more information about basic permissions that you can grant users.

- edit content within a page, while you might want other users to only view content. See Table 28-2 for more information about basic permissions that you can grant users.

- work with specific tools or services, such as lists, documents, and so on. To allow portal members to do so, you will need to assign advanced permissions. See Table 28-3 to better understand the permissions you can grant users.

> **✏ Note:**
>
> Take care to assign appropriate access rights when assigning permissions for new roles. Do not allow users to perform more actions than are necessary for the role but at the same time, try not to restrict them from activities they must perform. To assign roles to portal members and groups, see Adding Members to a Portal.
>
> To remove a portal role, see Deleting Roles in a Portal.

This section contains the following topics:

- Creating a Custom Role for a Portal
- Creating a Delegated Manager Role for a Portal
- Creating Viewer and Participant Roles for a Portal

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.

> **💡 Tip:**
>
> You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 28-1   Portal Administration: Roles Page
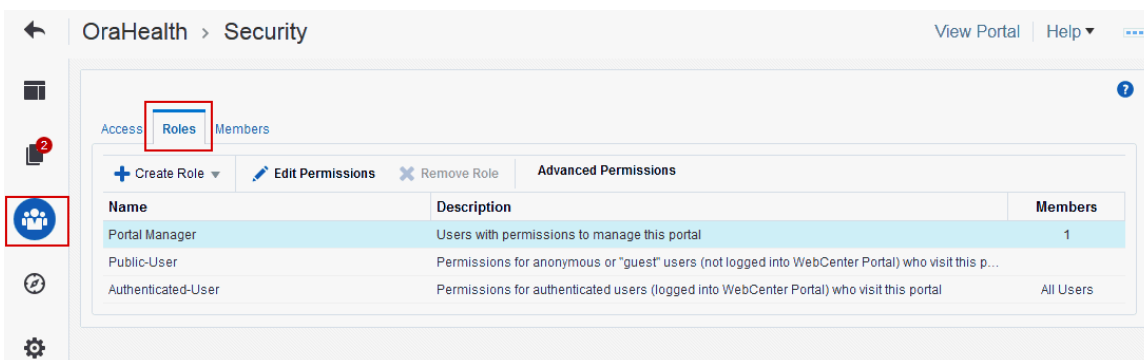
2. To define a new role for this portal, click the **Create Role** drop-down and select **Custom Role** to open the Create Role dialog.

Figure 28-2   Creating a New Role for a Portal

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.

To remove a portal role, see Deleting Roles in a Portal.

7. To modify permissions for the role, click **Edit Permissions**, and then select or deselect each permission check box.

To assign the custom role to portal members and groups, see Adding Members to a Portal.

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.
>
> The `Delegated Manager` role is assigned the default permissions described in Table 28-2 and advanced permissions, described in Table 28-3.

To create a Delegated Manager role:

1. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Roles** subtab (Figure 28-1).

> **💡 Tip:**
>
> You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

2. Click the **Create Role** drop-down and select **Delegated Manager** (see Figure 28-3).

Figure 28-3   Creating a Delegated Manager for a Portal
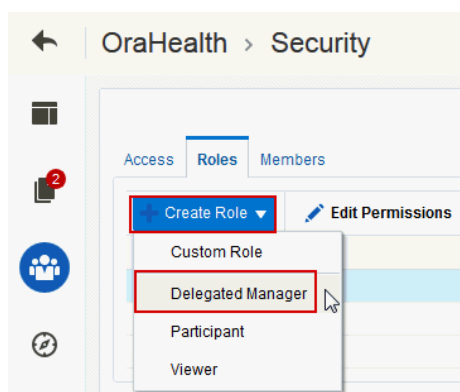
The `Delegated Manager` role is created and appears as a row in the table (see Figure 28-4).

Figure 28-4   Delegated Manager Role in Portal Administration

3. To modify permissions for the role, select the row and click **Edit Permissions**, and then select or deselect each permission check box.

    For details, see Viewing and Editing Permissions of a Portal Role.

    For the default permissions assigned to the `Delegated Manager` role, see Table 28-2 and Table 28-3 for more information.

4. To assign the `Delegated Manager` role to a portal member, see Adding Members to a Portal.

> **✎ Note:**
>
> Be sure to remove or reassign the member from the `Delegated Manager` role if it is no longer necessary for the member to administer the portal. For more information, see Assigning or Changing Member Role Assignments.

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.

Viewer and Participant roles are assigned the default permissions (described in Table 28-2) and advanced permissions (described in Table 28-3).

To create a Viewer or Participant role:

1. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Roles** subtab (Figure 28-1).

   > **Tip:**
   >
   > You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

2. To create a `Viewer` or `Participant` role for this portal, click the **Create Role** drop-down (Figure 28-3) 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.

   For details, see Viewing and Editing Permissions of a Portal Role.

   For the default permissions assigned to the Viewer or Participant role, see Table 28-2 and Table 28-3 for more information.

4. To assign the Viewer or Participant role to a portal member, see Adding Members to a Portal.

Viewing and Editing Permissions of a Portal Role

If the permissions assigned to a user role are not sufficient for the tasks that users in the role will perform in the portal, or you want to change previously assigned permissions, you can modify the permissions to better suit your role requirements.

> **Note:**
>
> - The `Portal Manager` role permission `Manage Security and Configuration` cannot be modified.
>
> - To accommodate the different tasks that a specific member can do in a portal, you can assign more than one role to a member. See Assigning or Changing Member Role Assignments.

To change the permissions assigned to a role:

1. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Roles** subtab (Figure 28-5).

> 💡 **Tip:**
>
> You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 28-5   Portal Administration: Roles Page
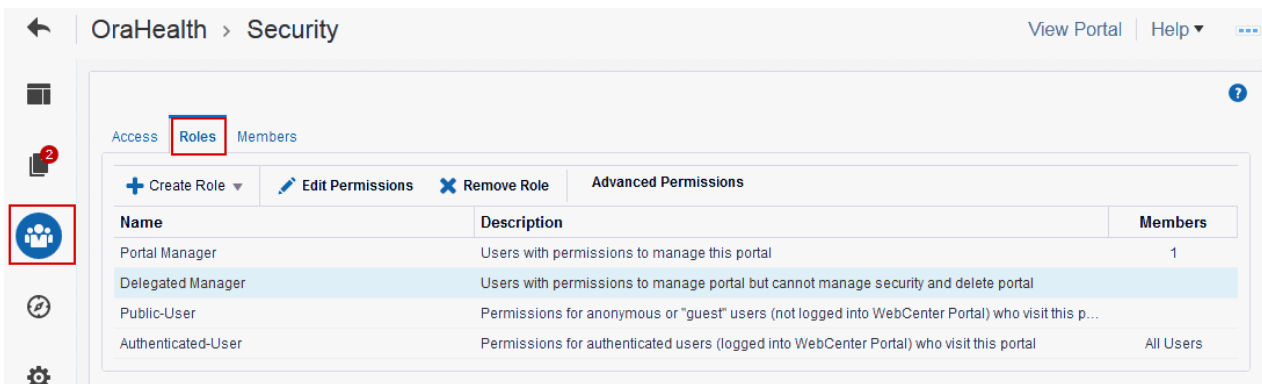
2. To view permissions, select the role and then click **Edit Permissions** to open the Edit Permissions dialog for the selected role.

3. To edit permissions, in the Edit Permissions dialog, select or deselect the check boxes to enable or disable permissions for a role (Figure 28-6).

   See Table 28-2 for more information. For more granular settings, see Using Advanced Permissions.

> ✏️ **Note:**
>
> 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 need to perform.

Figure 28-6   Modifying Permissions for a Portal (Standard Permissions)
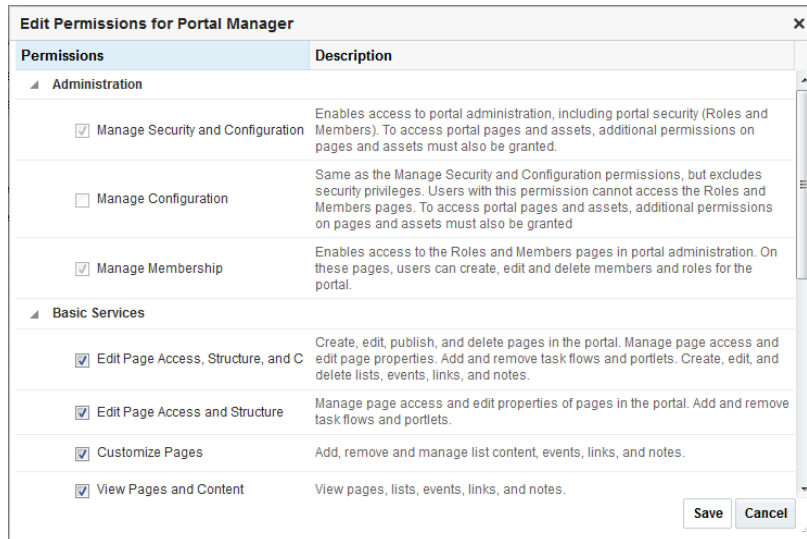
If you want to allow portal members to view content or edit and create content, you must give them some standard permissions, described as follows.

To give members *edit* permissions, at a minimum, select the following options in the Edit Permissions dialog:

Permission Category	Permissions
Basic Services	**Customize Pages** - Add and remove list content, events, links, and notes.
.	**View Pages and Content** - View pages, lists, events, links, and notes in the portal.
Pages (Advanced)	**Edit Pages** - Add and remove list content, events, links, and notes.
.	**View Pages** - View pages in the portal.

To give members *view* permissions, at a minimum, select the following options in the Edit Permissions dialog:

Permission Category	Permissions
Basic Services	**View Pages and Content** - View pages, lists, events, links, and notes in the portal.
Pages (Advanced)	**View Pages** - View pages in the portal.

4. Click **Save**.

   New permissions are effective immediately.

> **Note:**
>
> For information about granting access to individual pages in a portal, refer to Setting Page Security.

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). See Creating a New Portal Template.

> **Note:**
>
> If you switch to using advanced permissions, you cannot revert to standard permissions. For more information, see Understanding Permissions and Permission Models in a Portal.

To use advanced permissions:

1. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Roles** subtab (Figure 28-7).

   > **Tip:**
   >
   > You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 28-7   Portal Administration: Roles Page

2. Click **Advanced Permissions**.

   A warning message displays (Figure 28-8).

Figure 28-8   Switching to Advanced Permissions
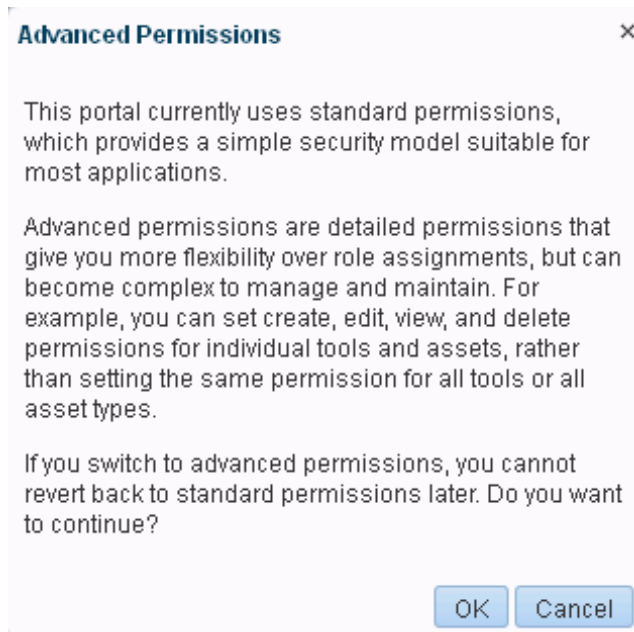
3. Click **OK** to continue.

    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 (Figure 28-9).

    See Table 28-3 for more details about advanced permissions.

    > **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.

Figure 28-9   Modifying Permissions for a Portal (Advanced Permissions)

5. Click **Save**.

New permissions are effective immediately.

> **Note:**
>
> For more detailed information about granting access permissions to a portal, and to individual pages within a portal, refer to Granting Users Access to a Portal.

Deleting Roles in a Portal

When a role is no longer required, the portal manager can remove it from the portal. This helps maintain a current (and valid) role list and prevents inappropriate role assignments.

To delete a role in a portal:

1. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Roles** subtab (Figure 28-10).

> **Tip:**
>
> You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 28-10   Portal Administration: Roles Page
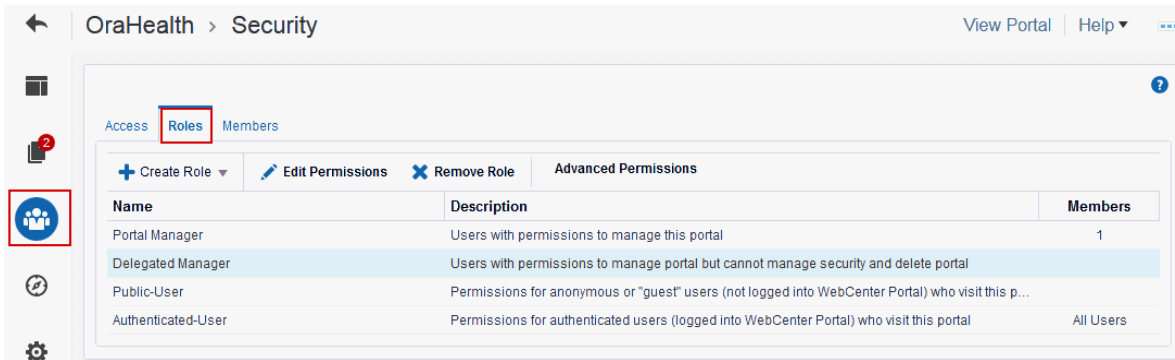
2. Select the role you want to delete, then click **Remove Role**.

> ✎ **Note:**
>
> The `Portal Manager`, `Public-User`, and `Authenticated-User` roles cannot be deleted.

3. In the Delete Role confirmation dialog, click **Delete** to confirm that you want to delete the role.

29
Managing Members and Assigning Roles in a Portal

Manage who can access a portal and what tasks individual portal members can perform.

> **Permissions:**
>
> To perform the tasks in this chapter, you need the `Portal Manager` role or a custom role that includes the portal-level `Manage Membership` permission. Users with this permission can manage portal members and their role assignments.
>
> See About Roles and Permissions for a Portal.

Topics:

- About Portal Membership
- Viewing the Members of a Portal
- Setting Up Membership Options for a Portal
- Composing Messages to New Members
- Adding Members to a Portal
- Assigning or Changing Member Role Assignments
- Approving Requests for Membership of a Portal
- Communicating with Managers and Members of a Portal
- Revoking Membership to a Portal

About Portal Membership

Member participation is central to any portal. It is the portal manager's responsibility to manage membership and determine member participation through the permissions assigned to the various roles defined for the portal. Members can be added to a portal in several ways:

- If a portal is discoverable (see Making a Portal Known (Discoverable)), it can be made known to anyone logged in to WebCenter Portal through searches and the **Portals** page. Users can join or request membership, depending on the self-service settings established by the portal manager (see Managing Self-Service Membership for a Portal).

- If a portal is made public (see Granting Public Access to a Portal), it is available to anyone with access to WebCenter Portal, provided the `Public-User` role is granted appropriate permissions (see Viewing and Editing Permissions of a Portal Role).

- portal managers can add or invite individual members or groups at the time a portal is created, or later (see Adding Members to a Portal).

Viewing the Members of a Portal

To review the current membership for a portal:

1. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Members** subtab (Figure 29-1).

> **Tip:**
>
> You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 29-1   Portal Administration: Members Page
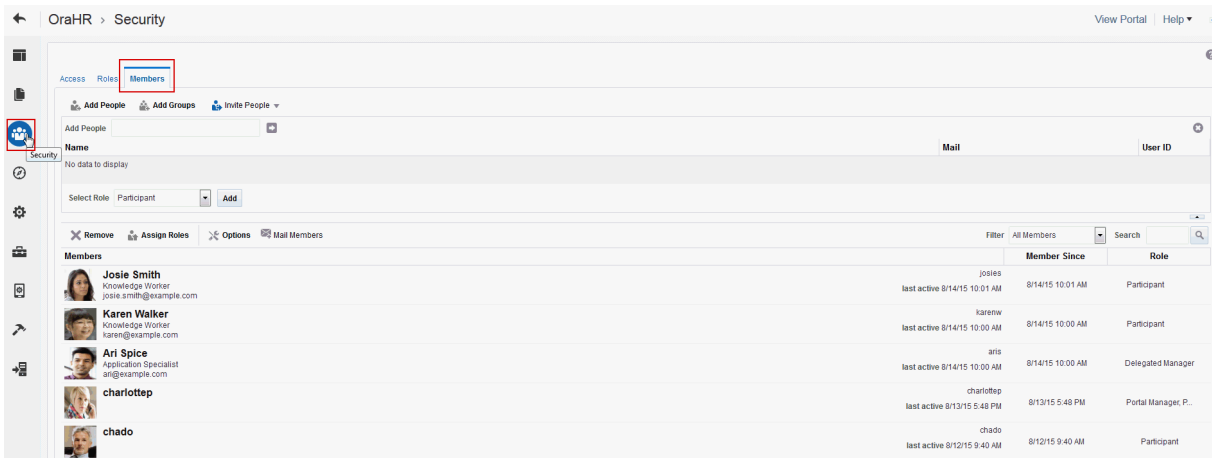
2. In the **Members** area, review the current list of members and the roles to which they are currently assigned.

3. Using the **Filter** drop-down list, select **All Members** to see a full list or select the name of a role to list members with a particular role.

Setting Up Membership Options for a Portal

Portal managers determine the membership policy for their portal, choosing between an "invitation only" membership policy, allowing users to join themselves by subscribing to (and unsubscribing from) the portal, adding new members directly, or using any combination of these membership options.

Enabling self-service does not necessarily mean that users automatically gain access to a portal. Portal managers can still control who joins (or leaves) the portal through an approval process.

Default membership permissions are derived from the template used to create the portal. Portal managers can change these settings at any time. This section describes:

- Managing Self-Service Membership for a Portal
- Managing Self-Service Membership Removal from a Portal

Managing Self-Service Membership for a Portal

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. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Members** subtab.

   > **Tip:**
   >
   > You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

2. Click **Options** to open the Membership Options dialog.

Figure 29-2   Membership Options Dialog

3. 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.
>
> See Managing the SOA Connection for WebCenter Portal in *Administering Oracle WebCenter Portal*.

4. 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 .
>
> See Making a Portal Known (Discoverable).

When you select this option:

– Any WebCenter Portal user can join the portal.

  See Joining a Portal in *Using Portals in Oracle WebCenter Portal*.

– After joining the portal, members can change their roles in the portal, or cancel their membership

  See Changing Your Role in a Portal and Cancelling Your Portal Membership in *Using Portals in Oracle WebCenter Portal*.

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.
>
> See Managing the SOA Connection for WebCenter Portal in *Administering Oracle WebCenter Portal*.

- To specify which roles users see on Request Membership and Change Membership pages, select **Allow Self-Service Membership or Self-Service Membership Change (Selected Roles Available)** to display a table showing all the roles available.

Figure 29-3   Choosing Roles Available on Self-Service Membership

– 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.
>
> See Managing the SOA Connection for WebCenter Portal in *Administering Oracle WebCenter Portal*.

5. Click **Save**.

Managing Self-Service Membership Removal from a Portal

If portal manager approval is required to unsubscribe from a portal, a request to unsubscribe is sent to the portal manager's worklist (if a SOA connection to Oracle BPM Worklist is configured) when a member leaves, which the portal manager can choose to either accept or reject.

To configure approval options for cancelling portal membership:

1. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Members** subtab (Figure 29-4).

> ### 🔆 Tip:
>
> You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 29-4   Portal Administration: Members Page
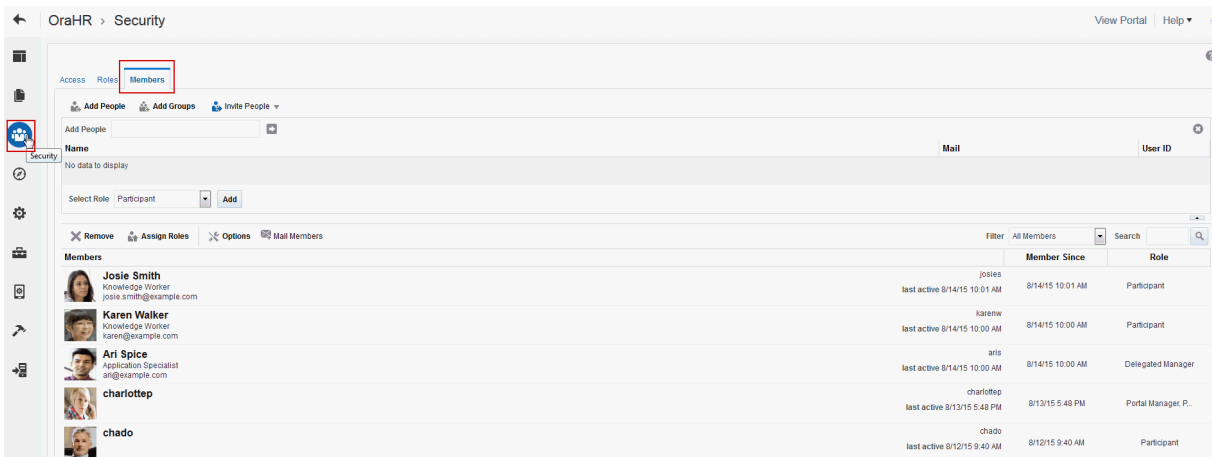
2. Click **Options** to open the Membership Options dialog.

3. Under **Membership Self-Service** (Figure 29-5):

   - To specify that portal manager approval is required to leave a portal, select **Portal Manager Approval Required for Self-Service Membership Removal**.

   - To allow members to leave without approval, deselect **Portal Manager Approval Required for Self-Service Membership Removal**.

> ### 🔆 Tip:
>
> This check box displays only when WebCenter Portal workflows are configured. Refer your system administrator to Troubleshooting WebCenter Workflows in *Administering Oracle WebCenter Portal*.

Figure 29-5   Specifying Unsubscribe Request Approval Requirements

4. Click **Save**.

Composing Messages to New Members

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. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Members** subtab.

    > **Tip:**
    >
    > You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

2. Click **Options** to open the Membership Options dialog.

Figure 29-6   Portal Administration: Members Page
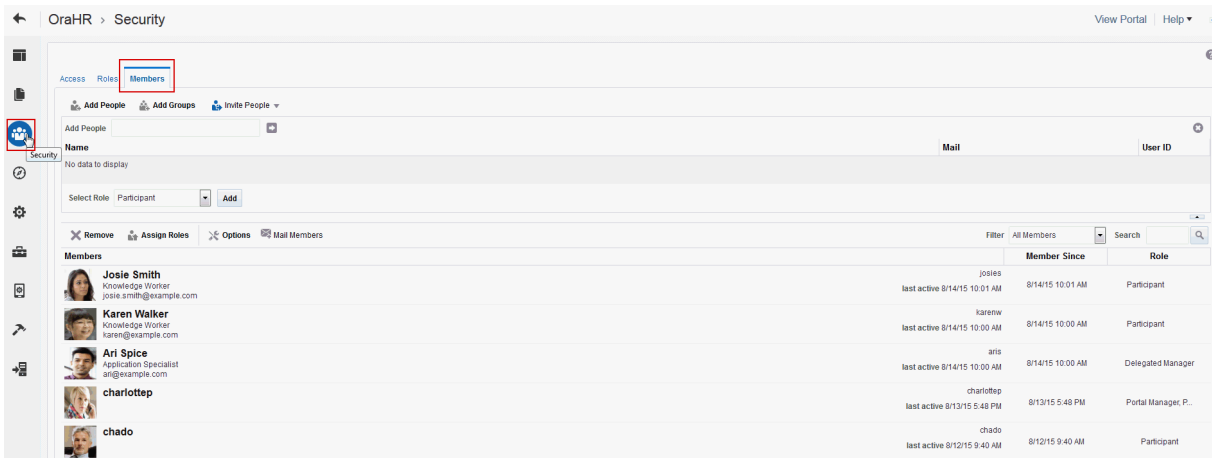
3. Under **Membership Notification Messages**, enter messages in the appropriate sections:

   • **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.
   >
   > Refer your system administrator to Troubleshooting WebCenter Portal Workflows in *Administering Oracle WebCenter Portal*.

   • **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.

4. Click **Save**.

Adding Members to a Portal

This section describes various ways that a portal manager can enlist members for your portal:

- [Searching for a User or Group in the Identity Store](#)
- [Adding Registered Users and Groups](#)
- [Inviting a Registered User](#)
- [Allowing a Registered User to Self-Subscribe](#)
- [Inviting a Non-Registered User](#)

Searching for a User or Group in the Identity Store

For any task that requires searching for a user or group, use the information in this section to contruct your search string. For example, the following tasks require you to specify a user or group name:

- Setting Personal Page Security in *Using Portals in Oracle WebCenter Portal*
- Composing and Sending Mail Messages in *Using Portals in Oracle WebCenter Portal*
- [Setting Up Access to a Portal Template](#)
- [Setting Page Security](#)
- [Setting Security for an Asset](#)
- [Adding Registered Users and Groups](#)
- [Inviting a Registered User](#)
- [Setting Up Access to a Portal Template](#)

The search mechanism used by WebCenter Portal to locate users and groups in the identity store follows specific rules. Keep the following tips in mind when you construct your search string:

- The search operates on First Name, Last Name, Mail Address, User ID, and Common Name. For example, in Oracle Internet Directory (OID), the search operates on `givenname`, `sn`, `mail`, `uid`, and `cn`.

  For information about mapping user attributes to their corresponding names in different LDAP directory servers, see Mapping User Attributes to LDAP Directories in *Securing Applications with Oracle Platform Security Services*.

- Specify a wildcard (`*`) character anywhere in the search string to substitute for preceding or following characters.

- The search is *not* case-sensitive.

- Leave the search term blank to list all users (or groups) in the identity store.

- To search for a First Name, Last Name, Mail Address, User ID, or Common Name, specify one search term, specifying at minimum the first letter in any of these values.

- To search for First Name or Last Name, specify two search terms separated by a space to search in First Name and Last Name, respectively. Specify at minimum the first letter in each value.

- To search for a First Name or Last Name, either of which have multiple names, specify multiple search terms separated by spaces. The multiple names are treated as a single field, including the space character. The first search term specifies the search on the First Name field and the last search term specifies the

search on the Last Name field. The intervening search terms are ignored. Specify at minimum the first letter of each value.

For example, the following entry in the identity store defines a WebCenter Portal user:

First Name (`givenname`)=`James Robert`
Last Name (`sn`)=`van Order`
Mail Address (`mail`)=`jim.van.order@example.com`
User ID (`uid`)=`jimbo`
Common Name (`cn`)=`Jim`

Table 29-1 lists search terms that will show this user in the search results. For search terms that will *not* show this user in the search results, see Table 29-2.

Table 29-1   Search Terms That Find James Robert van Order

Search Terms	Search Results
`Jam`	All found in First Name (`James Robert`).

`jam*`
`*ames`
`*bert`
	Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.

`van`	Both found in Last Name (`van Order`).
`*Order`	Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.
`jimbo`	`jimbo` found in User ID (`jimbo`).
`Jimbo` `*imbo`	Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.
`jim` `Jim`	`jim` found in Mail Address (`jim.van.order@example.com`), User ID (`jimbo`), and Common Name (`Jim`).
	Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.
`James Order` `james order`	`James` found in First Name (`James Robert`); `Order` not found in Last Name (`van Order`).
	Results show all users where first search term begins the First Name, **or** second search term *begins* the Last Name.
`Robert van` `robert Van`	`Robert` not found in First Name (`James Robert`); `van` found in Last Name (`van Order`).
	Results show all users where first search term begins the First Name, **or** second search term *begins* the Last Name.
`James van Order` `james Van order`	`James` found in First Name (`James Robert`), `Order` not found in Last Name (`van Order`).
	Results show all users where first search term begins the First Name, **or** last search term *begins* the Last Name. Intervening term is ignored.
`James Robert van Order` `james robert Van order`	`James` found in First Name (`James Robert`); `Order` not found in Last Name (`van Order`).
	Results show all users where first search term begins the First Name, **or** last search term begins the Last Name. Intervening terms are ignored.

Table 29-2 lists search terms that will *not* show this user in the search results.

Table 29-2   Search Terms That Do Not Find James Robert van Order

Search Terms	Search Results
`ames`	`ame` not found in First Name (`James Robert`), Last Name (`van Order`), Mail Address (`jim.van.order@example.com`), User ID (`jimbo`), or Common Name (`Jim`). Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.
`Order` `order`	`Order` not found in First Name (`James Robert`), Last Name (`van Order`), Mail Address (`jim.van.order@example.com`), User ID (`jimbo`), or Common Name (`Jim`). Results show all users where search term begins the First Name, Last Name, Mail Address, User ID, or Common Name.
`Robert Order` `robert order`	`Robert` not found in First Name (`James Robert`), and `Order` not found in Last Name (`van Order`). Results show all users where first search term begins the First Name, **or** second search term begins the Last Name.

Adding Registered Users and Groups

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 (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Members** subtab (Figure 29-7).

    > 💡 **Tip:**
    >
    > You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 29-7   Portal Administration: Members Page
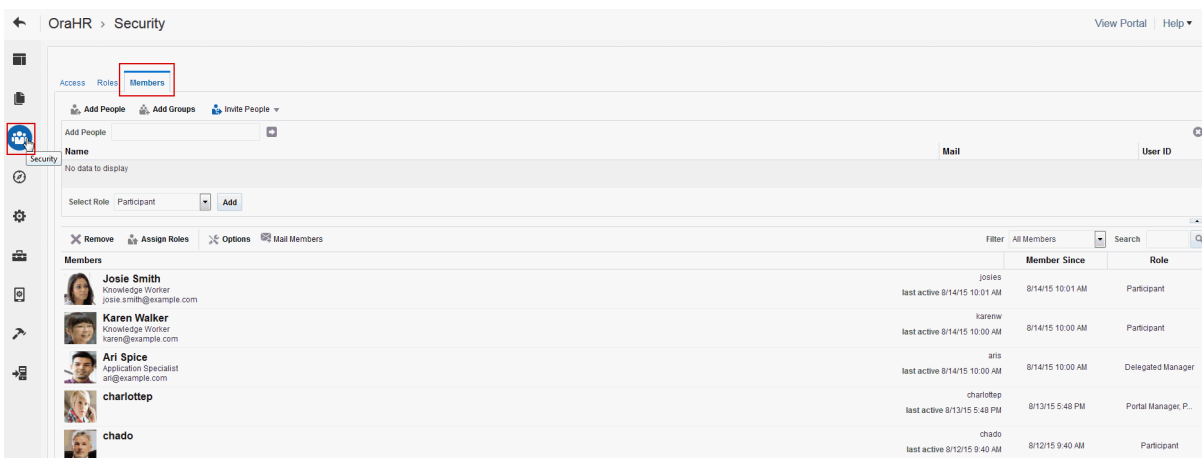
2. (Optional) On the **Members** page, click **Options** to edit the greeting messages sent to new members (see Composing Messages to New Members). Click **Save** to close the Membership Options dialog.

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 (Figure 29-8).

    If you are not sure of the name, you can search the identity store. See Searching for a User or Group in the Identity Store.

Figure 29-8   Adding a New Member
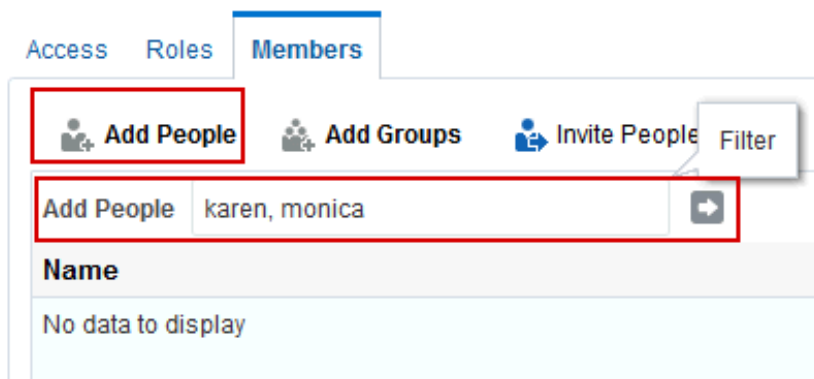
5. Select one or more user names from the list.

6. From the **Select Role** list, select a role for the selected members or groups.

    If the role you want is not listed, you can create a new role that meets your requirements (see Defining Custom Roles for a Portal).

> **✐ Note:**
>
> If necessary, you can assign more than one role to a member or group. See Assigning or Changing Member Role Assignments.

7. Click **Add**.

All the users and groups you select display in the **Members** section.

> **✐ Note:**
>
> When adding groups, keep the following in mind:
>
> • Names of user groups are clickable, enabling you to drill down to see individual user names of group members.
>
> • A list of members does not display for dynamic groups based on Oracle Entitlements Server (OES) roles, since OES roles are based on dynamic attributes and therefore do not have any static members. For more information, see Configuring the Identity Store in *Administering Oracle WebCenter Portal*.
>
> • For WebCenter Portal to properly maintain enterprise group-to-role mappings, back-end servers, such as the content server, must support enterprise groups too. When back-end servers do not support enterprise groups, the message "`Group [name] not found in the Identity Store`" displays. For more information, see Troubleshooting Issues with Users and Roles in *Administering Oracle WebCenter Portal*.

Inviting a Registered User

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).

To invite someone to become a member of your portal:

1. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Members** subtab (Figure 29-9).

> **♡ Tip:**
>
> You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 29-9   Portal Administration: Members Page
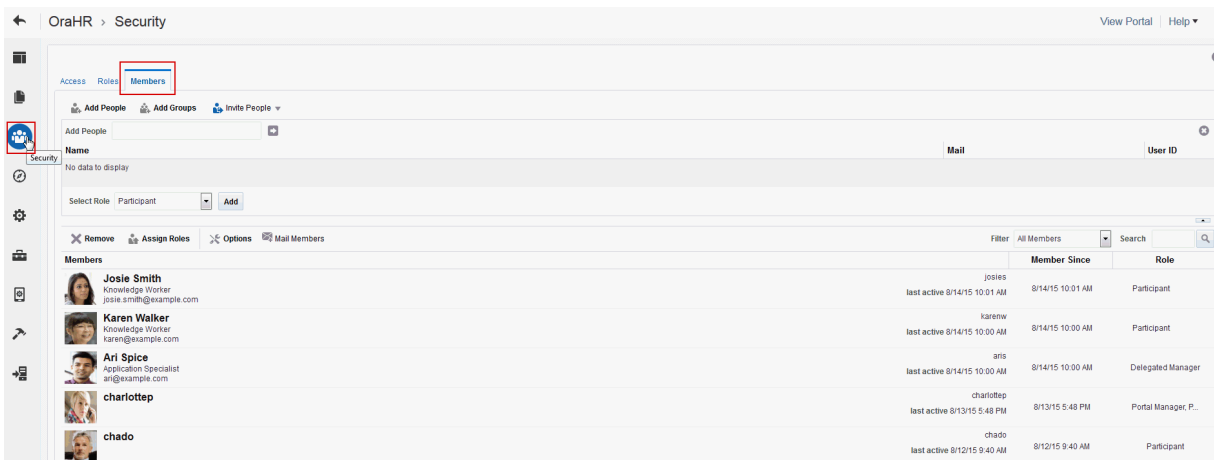
2. (Optional) On the **Members** page, click **Options** to edit the greeting message sent to invited members (see Composing Messages to New Members) and then click **Save** to close the Membership Options dialog.

3. Click **Invite People**, then select **Invite Registered Users** to invite individual users to become a member of the portal.

> ### 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 (see Managing Self-Service Membership for a Portal) .

4. If you know the exact name of the user, enter the name in the box provided, separating multiple names with a comma (Figure 29-10).

   If you are not sure of the name you can search the identity store. For search tips, see Searching for a User or Group in the Identity Store.

Figure 29-10   Inviting a New Member
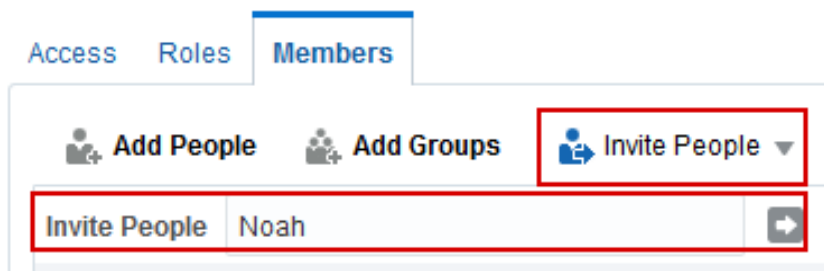
5. Select one or more user names from the list.

6. Select a role for the invited members. If the role you want is not listed, create a role that meets your requirements (see Defining Custom Roles for a Portal).

7. Click **Invite**.

If you want to cancel an invitation, delete the invited member from the list.

Invited users receive an invitation to join the portal through a mail message (if SOA server is configured to send mail) and through their BPM worklist (if the SOA server is configured to use Oracle BPM Worklist) with the message you composed in Step 2. The invitation includes a secure URL that the invited party must click to register with WebCenter Portal before gaining access to your portal.

Inviting a Non-Registered User

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.

To invite someone outside the WebCenter Portal community to join your portal:

1. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Members** subtab (Figure 29-11).

> **Tip:**
>
> You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 29-11   Portal Administration: Members Page

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 (see Composing Messages to New Members) and then click **Save** to close the Membership Options dialog.

3. Click **Invite People**, then select **Invite Non-Registered Users**.

> **Note:**
>
> **Invite People** is available when WebCenter Portal workflows are configured *and* the portal manager has selected **Enable Invite Portals Users** in the Membership Options dialog (see Managing Self-Service Membership for a Portal). **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, as described in Enabling Self-Registration in *Administering Oracle WebCenter Portal*.

4. Enter the **Email Address(es)** for one or more prospective members, separated by commas.

5. Select a **Role** for the prospective members. If the role you want is not listed, create a role that meets your requirements (see Defining Custom Roles for a Portal).

6. Click **Invite**.

Prospective members receive a mail invitation (if SOA server is configured to send mail) to join the portal with the message you composed in Step 2. The invitation includes a secure URL that the invited party must click to register with WebCenter Portal before gaining access to your portal. If invited users experience no response when they attempt to register with WebCenter Portal, they should refresh their browser and try again.

Allowing a Registered User to Self-Subscribe

Self-subscription enables existing WebCenter Portal users to request membership without an invitation from the portal manager. Certain types of portals, especially interest-based communities, are particularly suited to this form of member enrollment as the portal often reaches a wider audience.

The capabilities of self-service members depends on which roles you decide to offer on the Request Membership page. For more information, see Managing Self-Service Membership for a Portal.

If a user's self-subscription request is pending approval by the portal manager, the user's attempt to access the portal opens the Home portal. When a user is a member of a portal, the user's attempt to access the portal opens the first accessible page of the portal.

Assigning or Changing Member Role Assignments

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:

> **Note:**
>
> Before assigning roles, you must create roles, as described in Defining Custom Roles for a Portal.

1. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Members** subtab (Figure 29-12).

> **Tip:**
>
> You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 29-12   Portal Administration: Members Page
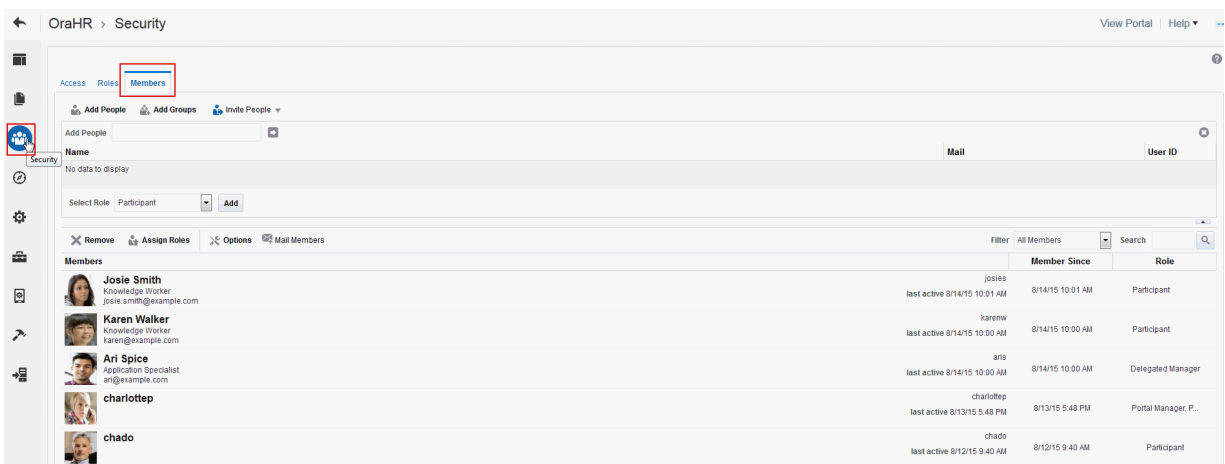
2. On the **Members** page, select one or more members (Ctrl+click to select multiple members), and then click **Assign Roles**.

   The Assign Roles dialog shows the current roles available in the portal.

3. In the **Assign Roles** dialog (Figure 29-13), select one or more roles to assign or click to deselect the current roles assignment.

Figure 29-13   Assign Roles Dialog
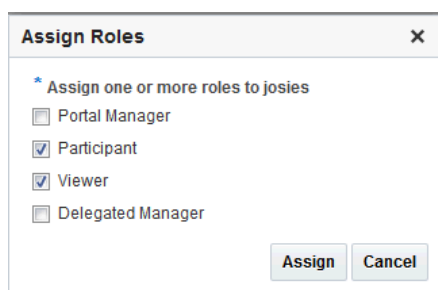
- If you are not sure which roles to select, click the **Roles** tab to determine the range of actions that current roles allow (see Viewing and Editing Permissions of a Portal Role).

- If the existing roles do not meet your requirements, consider creating a new role (see Defining Custom Roles for a Portal).

4. Click **OK**.

   The Roles column next to the member's name shows the roles to which the member is assigned (Figure 29-14).

Figure 29-14   Assigned Roles

Approving Requests for Membership of a Portal

> **Note:**
>
> To view and use worklist notifications, WebCenter Portal must be configured to a SOA server and you must be set up to use Oracle BPM Worklist. For more information about approving requests using Oracle BPM Worklist, see Approving Tasks in *Administering Oracle SOA Suite and Oracle Business Process Management Suite*

If you want to approve a membership request, you must select the option **Portal Manager Approval Required** in the Membership Options dialog (see Managing Self-Service Membership for a Portal). As a portal manager, notifications appear in your BPM Worklist to approve or reject requests for portal membership or a new role in the portal.

For more information, see Managing the SOA Connection for WebCenter Portal in *Administering Oracle WebCenter Portal*.

The person making the request receives notification of your decision. If you reject a request, you can enter the reason for the rejection.

Communicating with Managers and Members of a Portal

You can send messages to individual members, and also to the portal manager(s) or all the members of a portal. WebCenter Portal creates a default distribution list for every portal if the Mail server is Microsoft Exchange and active directory connection details (LDAP) are provided in the mail server connection settings. As members leave or join the portal, the default distribution list updates automatically.

For information about setting up a custom portal mail distribution list, see Configuring the Mail Distribution List for a Portal.

Any user can send mail to the members or the portal managers of a portal from the portal browser or when viewing a portal, as described in Sending Mail to Portal Members or Managers in *Using Portals in Oracle WebCenter Portal*.

Portal managers can also send mail to all members or individual members of a portal from the **Members** page:

1. In the portal administration (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Members** subtab (Figure 29-15).

> ### Tip:
>
> You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 29-15   Portal Administration: Members Page
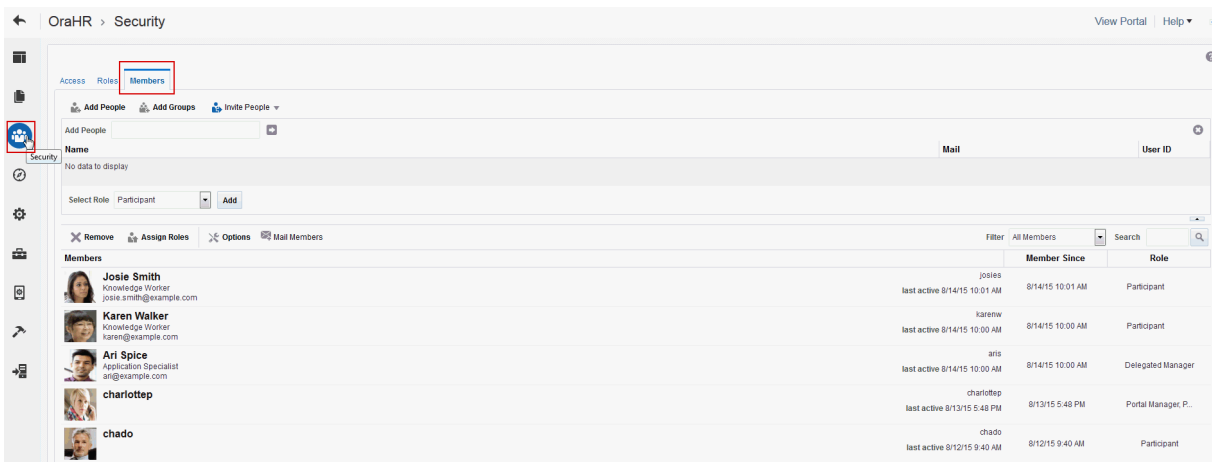
2. Under **Members**:

    *   To send a message to all members of the portal, right-click in the Members table, and select **Mail Members**.

    *   To send a message to an individual member, click the member's icon, and then click **Mail Members** from the toolbar.

    For information about the mail service, see Adding Mail to a Portal.

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 (see Accessing Portal Administration), click **Security** in the left navigation pane, then click the **Members** tab (Figure 29-16).

> **Tip:**
>
> You can also navigate to this page using the direct URL provided in Pretty URLs for Pages in a Specified Portal.

Figure 29-16   Portal Administration: Members Page
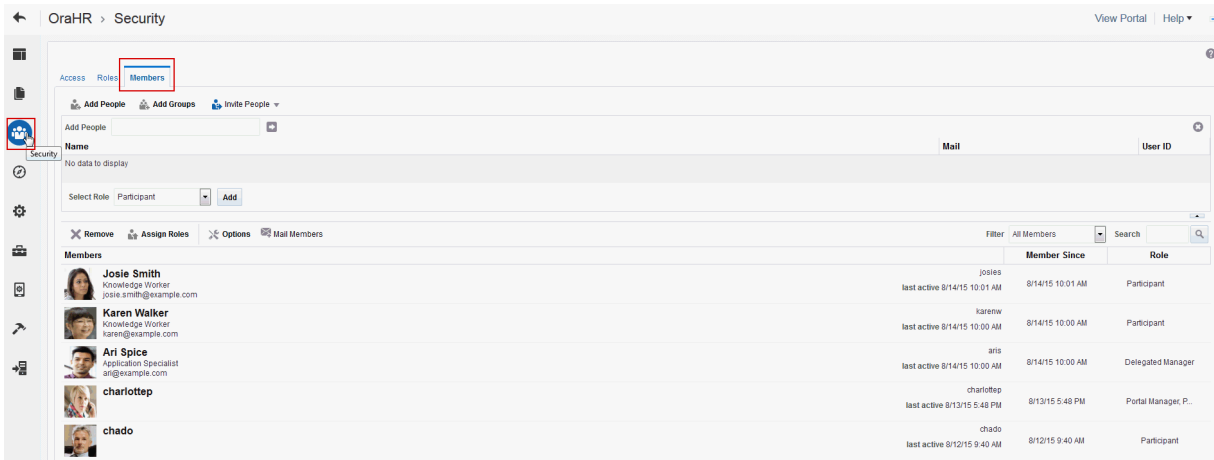
2. In the **Members** area, select one or more users or groups (Ctrl+click to select multiple members), then click **Remove**.

3. In the Remove Members dialog, click **Remove** to confirm.

30

Working with the Portal Members Task Flow

Add the Portal Members task flow to a portal page to allow portal users to view and add new members, send mail messages to all members, filter the list by role, and search for members.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you need the `Portal Manager` role or a custom role that includes the portal-level `Manage Membership` permission. Users with this permission can manage portal members and their role assignments.
>
> See About Roles and Permissions for a Portal.

Topics:

- About the Portal Members Task Flow
- Adding a Portal Members Task Flow to a Page
- Managing Portal Membership Through the Portal Members Task Flow
- Contacting All Portal Members
- Contacting Individual Members of a Portal
- Sorting Portal Members
- Filtering Portal Members
- Working with Portal Members Task Flow Properties

About the Portal Members Task Flow

WebCenter Portal provides two portal task flows that you can add to a page:

- **Portal Browser** task flow: Adds an area that operates identically to the **Portals** page (portal browser) in the Home portal. For more information about this task flow, see Working with the Portal Browser Task Flow.

- **Portal Members** task flow (Figure 30-1): Shows the portal members and provides controls to add new members, send a mail message to all members, filter the list by role, and search for members. It also provides a quick way of getting to the portal administration **Members** page where you can manage portal membership, if you have the appropriate permissions.

Figure 30-1   Portal Members Task Flow
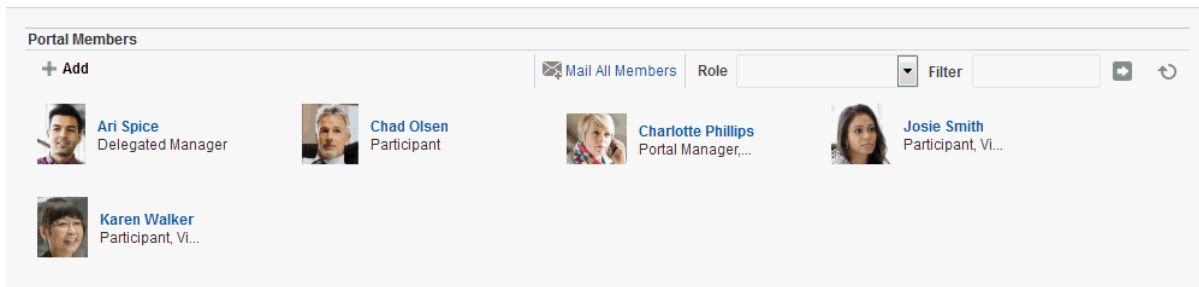
Adding a Portal Members Task Flow to a Page

Adding a Portal Members task flow to a page is the same as adding any other component to a page. See Adding a Component to a Page.

> **Note:**
>
> The Portal Members task flow is not available in the Default Portal Catalog provided with WebCenter Portal, so you will only see an entry for it if it has been added to a custom resource catalog that has been made available to the page.
>
> For more information, see Adding a Resource from the Resource Registry (in the Add Resource Catalog Item dialog, select **Task Flows**, then **Design Time**, then **Portal Members**). To use the custom resource catalog for editing portal pages, make sure it is **Available**, and set for use by pages in the portal, as described in Changing the Resource Catalogs in a Portal.

Managing Portal Membership Through the Portal Members Task Flow

Portal managers can quickly access the tools for managing portal membership from the Portal Members task flow.

To manage portal membership:

1. In the Portal Members task flow, click the **Add** icon (Figure 30-2).

   The **Add** icon displays only to portal managers or members with `Manage Membership` permission in the portal.

Figure 30-2   The Add Icon in the Portal Members Task Flow
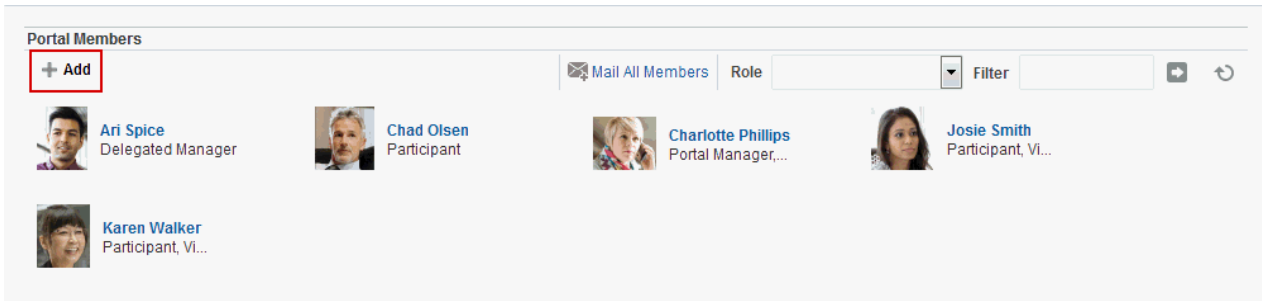
2. On the **Security** page, click the **Members** tab (Figure 30-3), where you can add members as described in Adding Registered Users and Groups.

Figure 30-3   Portal Administration: Members Page

3. On the **Members** tab, you can also remove members, invite users to join the portal, and edit exiting member roles.

For more information, see Managing Members and Assigning Roles in a Portal.

Contacting All Portal Members

From the Portal Members task flow, you can send a message to all portal members.

To contact all portal members:

1. In the Portal Members task flow, click **Mail All Members** in the toolbar (Figure 30-4).

If you are presented with a login window, enter your user name and password for your mail application. If your preferences are set up to deliver your login credentials automatically, then you can start your message right away. For more information about login credentials and preferences, see Setting Your Personal Preferences in *Using Portals in Oracle WebCenter Portal*.

Figure 30-4   Mail All Members Icon in the Portal Members Task Flow
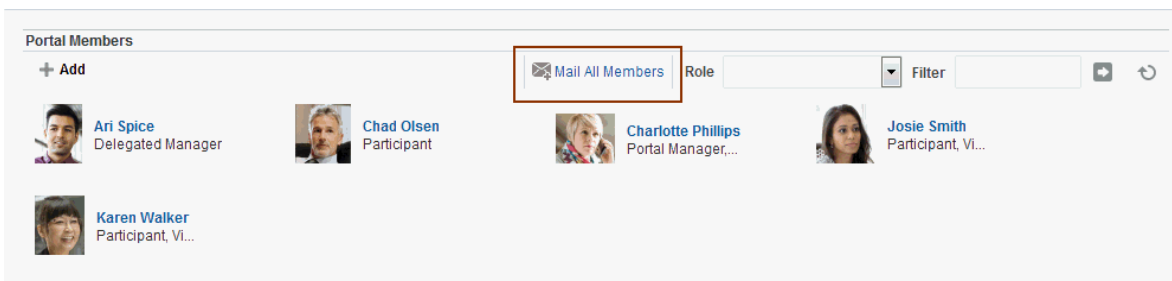
2. Compose your message and click **Send**.

Contacting Individual Members of a Portal

It's easy to contact a portal member from the Portal Members task flow:

To contact a member:

*   In the Portal Members task flow, click the name of the member you want to contact (Figure 30-5).

Figure 30-5   Contacting a Member Using the Portal Members Task Flow
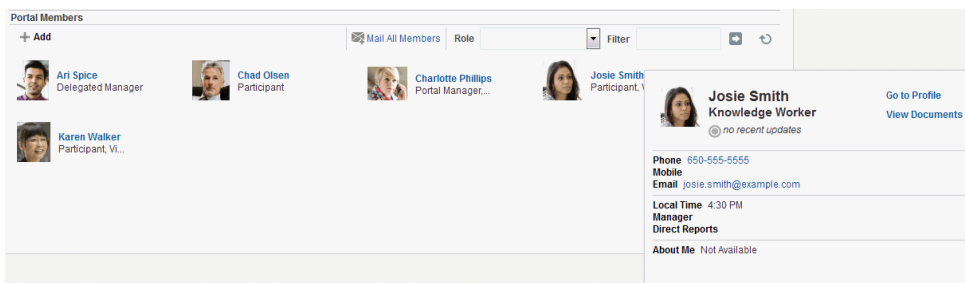
By default, when you click a member's name their profile summary displays. From here, you can contact the member by mail, send them an instant message, and so on. For more information, see Viewing a Profile in *Using Portals in Oracle WebCenter Portal*.

The profile does not display if the **Profile Launched on Selection** parameter is disabled, for details see Portal Members Task Flow Parameter.

Sorting Portal Members

You can sort the list of members by name or by recent activity.

To sort portal members:

*   Use the **Sort Criteria** parameter described in Portal Members Task Flow Parameter.

Filtering Portal Members

Use filtering to help find a particular member in the Portal Members task flow.

To filter the list of members:

1. In the Portal Members task flow, enter a full or partial name in the **Filter** field (Figure 30-6), and then click the Filter arrow icon to the right of the field.

Figure 30-6   Filter Field in the Portal Members task flow

2. The list of members refreshes, displaying only those members that match the search term.

   Filtering searches against a listed member's user name. For example, if your search criteria is "c", the search results might include members named "chris", "vicki", or "monica".

3. To return the list of members to its default display, click the **Clear Filter** icon (Figure 30-7).

Figure 30-7   Clear Search Icon in the Portal Members task flow

4. Alternatively, filter the members by role by selecting a **Role** from the drop-down list (Figure 30-8).

Figure 30-8   Filtering Options in the Portal Members Task Flow
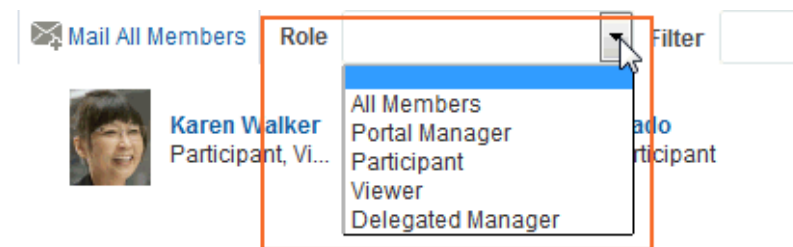
To return the list of members to its default display, select **All Members** from the **Role** dropdown list.

Working with Portal Members Task Flow Properties

The Portal Members task flow has associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu. For example, select **Parameters** to display the Parameters dialog (Figure 30-9).

Figure 30-9   Portal Members Task Flow Component Properties

> **See Also:**
>
> Setting Properties on a Component

The following sections provide information about properties of the Portal Members task flow and describe the task flow parameter:

- Setting Portal Members Task Flow Properties
- Portal Members Task Flow Parameter

Chapter 30
Working with Portal Members Task Flow Properties

Setting Portal Members Task Flow Properties

The **View Actions** menu in the toolbar of the Portal Members task flow in the page editor provides access to the properties dialogs: Parameters, Access, Display Options, Style, and Content Style.

Figure 30-10   Portal Members Task Flow View Actions Menu
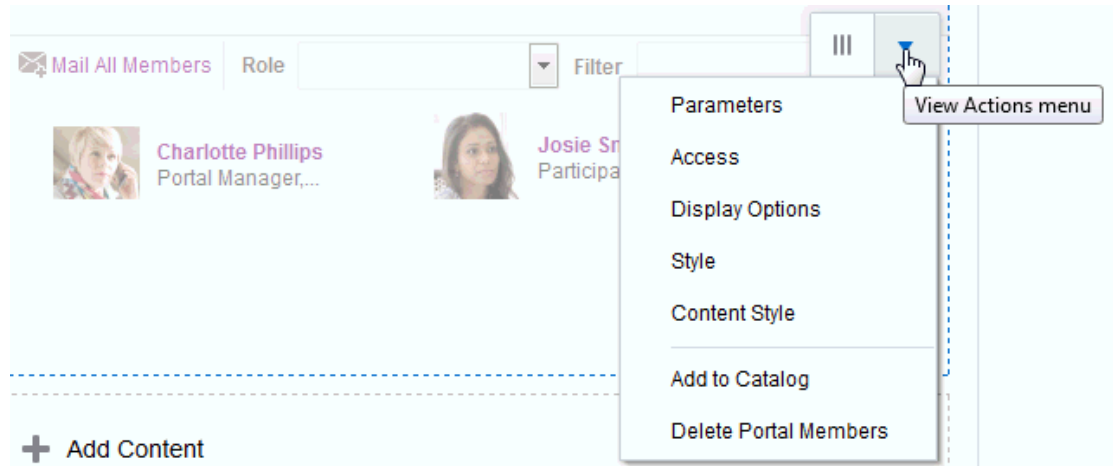
To set Portal Members task flow component properties:

1. Open the page in the page editor (see Opening a Page in the Page Editor).

2. In the component toolbar, click the **View Actions** menu and select the properties you want to set:

    •   Parameters control the default task flow content. For descriptions of each parameter, see Portal Members Task Flow Parameter Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

    •   Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

    •   The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

    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.

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> **Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Portal Members Task Flow Parameter

Table 30-1 describes the parameters that are unique to the Portal Members task flow.

Table 30-1   Portal Members Task Flow Parameters

Parameter	Description
`Number of Columns`	The number of columns used to display members. The default is null which means 'no limit' and in this case member details wrap to fill the entire width of the task flow.
	To fix the number of members displayed in each row, enter the number of 'columns' you require. Horizontal scroll bars display if there is not enough space to display the number of members specified here.
	Express values using the following formats:
	• **Constant**—Express a constant value, such as `2` or `5`.
	• **Page parameter**—Enter a page parameter to fetch the value from the page on which the task flow is placed. For more information, see Wiring Pages and Components.
	• **EL expression**—Enter an Expression Language (EL) expression.
`Number of Rows`	The number of rows used to display members. The default is null which means that member details wrap to fill the space available. Vertical scroll bars display if there is not enough space to display all the members.
	To fix the maximum number of rows displayed, enter the number of 'rows' you require. Previous and Next buttons automatically display if more member details are available.
	Express values using the following formats:
	• **Constant**—Express a constant value, such as `2` or `5`.
	• **Page parameter**—Enter a page parameter to fetch the value from the page on which the task flow is placed. For more information, see Wiring Pages and Components.
	• **EL expression**—Enter an Expression Language (EL) expression.
`Profile Launched on Selection`	Determines whether to launch a profile popup when you select a member's name.
	Deselect this option if you do not want to launch profile details.
`Sort Criteria`	The order in which to sort the members.
	Specify `LAST_ACTIVITY_TIME` to sort the members in descending order of date/time at which they were last involved in any activity. If not specified, members are sorted by name, alphabetically.

Table 30-1   (Cont.) Portal Members Task Flow Parameters

Parameter	Description
Portal Name	The name of the portal for which to display members. The default value is the current portal. Use this parameter to display member details for a different portal.
	You can obtain a portal's name from its About this Portal dialog.
	Express values using the following formats:
	• **Constant**—Express a constant value, such as `Marketing`.
	• **Page parameter**—Enter a page parameter to fetch the value from the page on which the task flow is placed. For more information, see Wiring Pages and Components.
	• **EL expression**—Enter an Expression Language (EL) expression.

Part VI

Working with Content in a Portal

This part of *Building Portals with Oracle WebCenter Portal* provides information about working with content in a portal, including contributing and publishing content, using Content Presenter, adding and configuring the Content Manager task flow, establishing workflow on documents, and adding wikis and blogs to a portal.

- Introduction to Working with Content in a Portal
- Enabling Content Contribution and Publishing
- Publishing Content Using Content Presenter
- Enabling Document Management
- Working with Workflow-Enabled Content
- Presenting Application Data in a Portal
- Integrating with Oracle Content and Experience Cloud
- Enabling Wikis in a Portal
- Enabling Blogs in a Portal

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Introduction to Working with Content in a Portal

WebCenter Portal provides several different containers in which to display and manage content, enabling end users with appropriate permissions to manipulate and display that content in a variety of ways.

In WebCenter Portal, there are several ways to work with portal content:

- **Content Contribution and Publishing**. Enables users to quickly add images, text, and video to a portal page. When an Image, Text, or Styled Text component is present on a page, a user who is granted `Edit Page` or `Contribute Page Content` permission can contribute images, text, or video to the page at runtime.

  > ✏️ **Learn More:**
  >
  > For more information about contributing and publishing content, see Enabling Content Contribution and Publishing.

- **Sophisticated Content**. Design portal pages and add components to portal pages, such as calendars, activity streams, data visualizations, message boards, tag clouds, and portlets.

  > ✏️ **Learn More:**
  >
  > For more information about designing portal pages, see Working with Portal Pages.

- **Content Presenter**. Enables users to precisely customize the selection and presentation of content in a portal. When a Content Presenter task flow is present on a page, a user who is granted `Edit Page` permission can select content from the Oracle WebCenter Content Server (a single item of content, contents under a folder, a list of items, or content query), and then select a template to render the content on a page in a portal. The Content Presenter task flow is available only when the system administrator has completed the prerequisite WebCenter Content Server configuration, but Content Presenter has no dependency on the Documents tool for adding or managing the content it displays.

  > ✏️ **Learn More:**
  >
  > For more information about Content Presenter, see Publishing Content Using Content Presenter.

- **Content Manager**. Enables users to work with libraries, folders, and files in the connected WebCenter Content Server repository. It offers an easy and intuitive user interface with sophisticated searching capabilities. When a Content Manager task flow is available on a page, a user who is granted `Edit Page` permission can configure the task flow to present a customized view, called a *pin*, of the content, rather than the default view listing folders and files. The Content Manager task flow is available only when the system administrator has completed the prerequisite WebCenter Content Server configuration and the portal manager has enabled the Documents tool.

  > **Learn More:**
  >
  > For information about the Content Manager task flow, see Enabling Document Management.

- **Data Presentation**. Retrieves and presents data on a portal page in a variety of visualizations, such as a bar graph, pie chart, or list. For information about the methods to create data presentations, see Presenting Application Data in a Portal.

- **Oracle DOCS Content Manager**. Enables users to access content in Oracle Content and Experience Cloud. For more information, see Integrating with Oracle Content and Experience Cloud.

- **Wikis**. Enable multiple users to collaborate on content that is relevant, useful, and up-to-date. Wikis are available only when the portal manager has enabled the Documents tool.

  > **Learn More:**
  >
  > For information about including wikis in a portal, see Enabling Wikis in a Portal.

- **Blogs**. Enable users to create and manage personal blogs to record experiences and opinions, and group related blog posts. Blogs are available only when the portal manager has enabled the Documents tool.

  > **Learn More:**
  >
  > For information about including blogs in a portal, see Enabling Blogs in a Portal.

After a portal manager has provided access to content by adding task flows or components to a page, end users can create and edit content at runtime, work with documents, and collaborate on wikis and blogs in a portal. The tasks for end users are described in Adding Content to a Portal in *Using Portals in Oracle WebCenter Portal*.

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Enabling Content Contribution and Publishing

Enable portal users with the appropriate permissions to quickly add text, images, and videos components to portal pages.

> **See Also:**
>
> For an overview of the different options available in WebCenter Portal for working with portal content and adding content to a portal, see Introduction to Working with Content in a Portal.

> **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permission `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Create, Edit, and Delete Pages` (advanced permissions).
>
> See About Roles and Permissions for a Portal.

Topics:

- About Content Contribution and Publishing
- Creating a Page for Content Contribution and Publishing
- Creating a Page Style for Content Contribution and Publishing
- Adding Content Contribution and Publishing Components to a Page Style or Page
- Setting Content Contribution and Publishing Component Properties
- Changing the Contribution Mode Key Sequence

About Content Contribution and Publishing

Content contribution and publishing enables users to quickly add text, images, and videos to pages in a portal.

Providing content contribution and publishing in your portal enables you to distribute the creation of content to a wider audience, while still maintaining control over the general appearance of that content. For example, you can enable members of your HR department to create and update content regarding HR policies, using page styles that control exactly how the content should be laid out on the page.

A page that has been created for content contribution and publishing includes one or more Image, Text, or Styled Text components, to which users can add a particular type of content.

For example, a page could contain an Image component, followed by a Styled Text component for a headline, and then a Text component for the main content of the page. Figure 32-1 shows an example of a page created using content publishing.

Figure 32-1   Example Page for Content Publishing
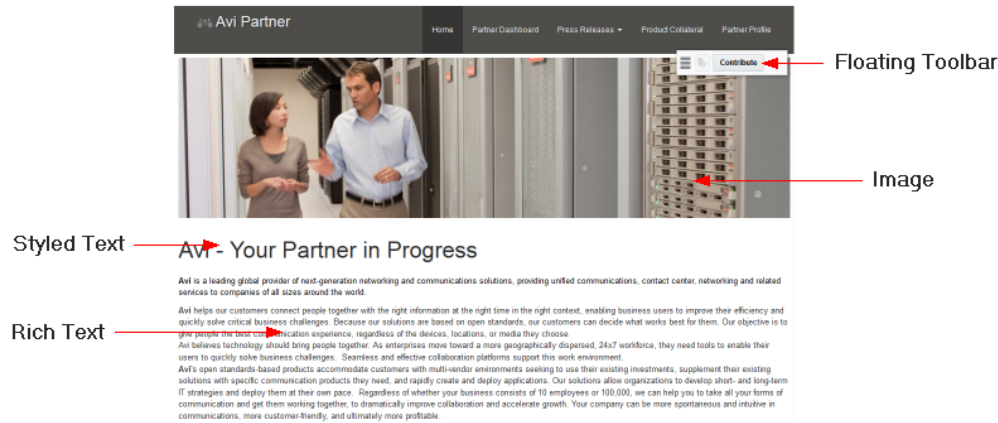
Users with the appropriate permissions, can enter contribution mode to add the following types of content to a portal page:

- If a page includes an Image component, contributors can place a picture on the page, for example, a logo, banner, photograph, or diagram.

- If a page includes a Styled Text component, contributors can place a small piece of text on the page, for example, a title, heading, byline, or caption. You, the page designer, determine the style to be used for the text; contributors cannot change any of the formatting.

- If a page includes a Text component, contributors can place a larger piece of text on the page, for example, the body of a news article; press release; or review, the description of an event, or a list of instructions. Contributors can use the rich text editor provided with the Text component to apply their own formatting and add hyperlinks to the text. Contributors can also use the source code mode of the rich text editor to embed video on the page.

To be able to enter contribution mode, users must either:

- be a member of a role that has been granted the portal-level permission `Edit Page` or `Contribute Page Content`. For more information, see Viewing and Editing Permissions of a Portal Role.

- have been granted the `Edit` or `Contribute` permission on an individual page. For more information, see Setting Page Security.

> **✎ See Also:**
>
> Steps for contributors to add text, images, and video to the predefined contribution areas that you create are covered in Contributing and Publishing Content in *Using Portals in Oracle WebCenter Portal*.

When page drafts are enabled in the portal administration settings, you can refine your page updates before making them available to others who view 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. For more information, see About Page Drafts and Publishing a Portal Page.

Components for Content Contribution and Publishing

To support content contribution and publishing, a page must include at least one Image, Text, or Styled Text component.

When users edit a page that contains Image, Text, or Styled Text components, they can specify the content to publish in those components. Each component enables the contribution and publishing of a specific type of content: text or image. The component provides the appropriate editing tools for working with that particular type of content. For example, a Text component provides text formatting tools and a text entry area, and an Image component provides access to fields for specifying the location of the desired image.

Table 32-1 describes the different components.

Table 32-1   Content Contribution and Publishing Components

Component	Description
Image	Enables content contributors to publish images, such as pictures, photos, diagrams, or logos, to a page.
	Users can publish any web-compatible image from the connected Oracle WebCenter Content Server repository or a URL. Users cannot publish images from external sources that require authentication.
	For more information, see Adding an Image Component to a Page Style or Page.
Styled Text	Enables content contributors to publish short pieces of text, such as headings, titles, and captions, that use predefined formatting. You specify the formatting when you add the component to the page. Contributors cannot change the way the text looks, only the text itself.
	For more information, see Adding a Styled Text Component to a Page Style or Page.
Text	Enables content contributors to publish longer pieces of text, such as a statement, information, or instructions, to a page.
	Using a simple rich text editor, contributors can make their text visually compelling by applying text formatting, including hyperlinks.
	The source code editing mode of the rich text editor enables contributors to enter HTML and embed video.
	For more information, see Adding a Text Component to a Page Style or Page.

Page Styles for Content Contribution and Publishing

The easiest way to create a page for content contributors to use to publish content is to use a page style that already includes Image, Text, or Styled Text components.

Table 32-2 lists the built-in page styles that include Image, Text, and Styled Text components.

Table 32-2   Content Contribution and Publishing Components in Built-in Page Styles

Name	Description
Press Release	A page for publishing a press release. This page style includes an Image component at the top of the page for a banner, a Styled Text component for a heading, and a Text component for the main content of the press release.
Message	A full page containing a header and a message box to display messages to users. This page style includes a single Text component to publish the message.
Home	A one-column preseeded home page on which you can add vertically stacked content, including additional layout components. This page style includes an Image component at the top of the page for a banner and a Text component to publish a welcome message or some brief introductory text.

If the built-in page styles do not completely meet your requirements, you can create your own. For more information, see Creating a Page Style for Content Contribution and Publishing.

You can also add Image, Text, and Styled Text components directly to a page, by adding the component in the same way as any other component in the resource catalog. For more information, see Adding a Component to a Page.

> 💡 **Tip:**
>
> You can find the Image, Text, and Styled Text components in the default resource catalog under the **Content Management** folder.

Creating a Page for Content Contribution and Publishing

If you want to enable users to contribute and publish content to your portal, you can create pages that include components specifically for that purpose.

Before creating a page for content contribution and publishing, you should think about what kind of content you want the page to contain and how that content should be laid out. This will help you to select an appropriate page style.

The process for creating a page for content publishing is much the same as the process for creating any other type of page, the easiest method being to use a page style that already includes the components that you need. A page style that supports content contribution and publishing includes Image, Text, and Styled Text components that identify the type of content that can be published on the page. Oracle WebCenter Portal provides several built-in page styles that are designed to cover some common use cases for content contribution and publishing (see Table 32-2). Your portal manager or application specialist may have also created custom page styles to address use cases more specific to your portal's particular requirements. For more information about creating page styles that support content contribution and publishing, see Creating a Page Style for Content Contribution and Publishing.

> **Note:**
>
> You can create your page using any page style and then add Image, Text, and Styled Text components directly to the page in the page editor. For more information, see Adding Content Contribution and Publishing Components to a Page Style or Page. You can find Image, Text, and Styled Text components in the default resource catalog under the **Content Management** folder.
>
> However, before doing this, consider creating a page style with your particular configuration of components so that other people within your organization can use it too.

To create a page for content contribution and publishing:

1. Open the Create Page wizard by selecting **Create Page** in the **Pages and Portals Actions** menu on any of the portal's pages (Figure 32-2).

Figure 32-2   The Create Page Action

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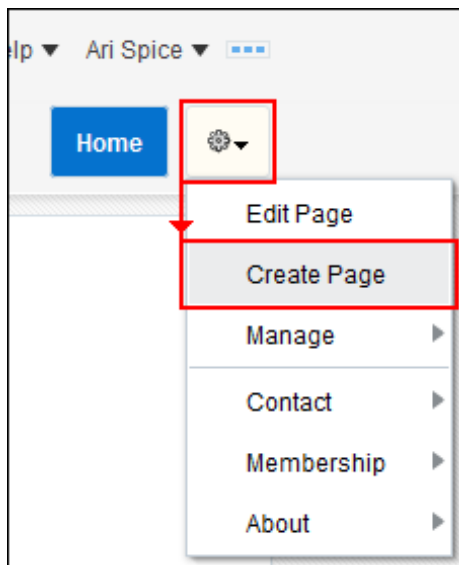
> ○ **Tip:**
>
> There are other ways of accessing the Create Page wizard, for example from the portal editor. For more information, see Creating a Page or Subpage When Editing a Portal.

2. Select the page style that you want to use for your page, using the right and left arrows to scroll through the available page styles if necessary.

   Make sure that you select a page style that supports content contribution and publishing.

3. For more information about creating pages, see Creating a Page or Subpage When Editing a Portal.

Creating a Page Style for Content Contribution and Publishing

A page style that supports content contribution and publishing contains at least one Image, Text, or Styled Text component.

> ✎ **Note:**
>
> To perform this task you must have the portal-level permission `Assets: Create, Edit, and Delete Assets` (standard permissions) or `Page Styles: Create, Edit, and Delete Page Styles` (advanced permissions) in addition to the `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Create, Edit, and Delete Pages` (advanced permissions).
>
> To create shared page styles, you must have the application-level permission `Page Styles: Create, Edit, and Delete Page Styles`.

Oracle WebCenter Portal provides several built-in page styles that include support for content contribution and publishing (see Table 32-2). These built-in page styles cover some of the more common page configurations for content contribution and publishing and provide an easy way to get started with content publishing in your portal. If the built-in page styles do not meet your particular requirements, you can build your own, adding Image, Text, and Styled Text components and other resource catalog components to create your preferred layout.

To create a page style for content contribution and publishing:

1. Follow the steps in Creating a Page Style to create the page style, either by copying an existing page style or saving an existing page as a page style.

2. Edit the page style in the page editor, as described in Editing a Page Style. However, as well as adding layout components and other resource catalog components, you must also add at least one of the content contribution and publishing components as listed and described in Table 32-1.

The steps for adding a content contribution and publishing component to a page style are the same as those for adding any other kind of component. For information, see Adding Content Contribution and Publishing Components to a Page Style or Page.

> **Tip:**
>
> You can find content contribution and publishing components in the default resource catalog under the **Content Management** folder.

3. When you are happy with the page style, click **Save.**

4. To make the page style available for use when creating pages, you must publish it. For more information, see Showing and Hiding Assets.

Adding Content Contribution and Publishing Components to a Page Style or Page

To create a page style intended for content contribution and publishing, you must add at least one Image, Text, or Styled Text component to it.

You can also add Image, Text, and Styled Text components to any existing page, whether or not that page was created using a page style that supports content contribution and publishing. For descriptions of Image, Text, and Styled Text components, see Table 32-1.

- Adding a Text Component to a Page Style or Page
- Adding an Image Component to a Page Style or Page
- Adding a Styled Text Component to a Page Style or Page

> **Note:**
>
> When page drafts are enabled in the portal administration settings, you can refine your page updates before making them available to others who view 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. For more information, see About Page Drafts and Publishing a Portal Page.

Adding a Text Component to a Page Style or Page

Use Text components to enable users to publish text, such as a brief statement, information, or instructions, to a page.

Content contributors can use the Text component's rich text editor to make their text visually compelling by applying text formatting, including hyperlinks. The rich text editor also provides a source code editing mode that enables users to enter HTML and embed video.

Depending on who will be contributing content to your page, you may want to include some placeholder text to provide guidance on what type of information to include.

To add a Text component to a page style or page:

1. Open the page style or page in the page editor:

   • Editing a Page Style

   • Opening a Page in the Page Editor

2. In the resource catalog, locate the Text component and add it to the page style or page in the same way as you would add any other component.

   For information, see Adding a Component to a Page.

   > **Tip:**
   >
   > You can find the Text component in the default resource catalog under the **Content Management** folder.

3. To provide your own text or some placeholder text:

   a. Click anywhere inside the Text component to select the component.

   b. In the component toolbar, click **Edit Content** (Figure 32-3).

   Figure 32-3   Component Toolbar for Content Publishing Component
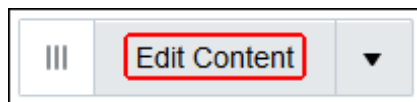
   > **Tip:**
   >
   > If you cannot see the component toolbar, it may help to hide the resource catalog by clicking **Hide Catalog.**

   c. Enter the text that you want to publish on the page, using the tools in the rich text editor to apply formatting or add hyperlinks as desired.

   For more information, see Contributing and Publishing Rich Text in *Using Portals in Oracle WebCenter Portal*.

   > **Note:**
   >
   > You can also use Text components for publishing video. For more information, see Contributing and Publishing a Video in *Using Portals in Oracle WebCenter Portal*.

4. When you are satisfied with your changes, click **Save**.

Adding an Image Component to a Page Style or Page

Image components enable users to contribute and publish images to a page. For example, users might want to publish a diagram to illustrate a concept in an technical article, a photograph to accompany a news item, or a stock image to enhance a press release.

When designing pages that will include published images, to maintain a consistent layout and appearance you may want to restrict the size of those images. You do this by setting the required size for the Image component in which contributors will publish the image. You can set the height or width of the image, or both.

If you set the image size for the Image component, when a contributor publishes an image, the display size of the image is set to that specified for the component. If the published image is larger or smaller than the specified size, it is shrunk or stretched as appropriate.

If you do not set the image size for the Image component, the display size of the published image is the actual image size. If the image is larger than the space allocated for the component, scrollbars enable users to view the entire image. If the image is smaller than the available space, the component is padded with whitespace.

If you specify just the height, the width of the image is scaled to maintain the aspect ratio of the image; similarly if you set just the width.

You can also set the alignment of an image so that it appears on the left or right side of the component, or in the center.

It is the responsibility of the content contributor to use an appropriate image when publishing. Therefore, depending on who will be contributing content to your page, you may want to include a placeholder image to provide guidance on what type or size of image to include (especially if you specify a particular height or width for the component). You can do this directly from the page editor as part of the page design process, without having to enter contribution mode.

To add an Image component to a page style or page:

1. Open the page style or page in the page editor:

   - Editing a Page Style
   - Opening a Page in the Page Editor

2. In the resource catalog, locate the Image component and add it to the page style or page in the same way as you would add any other component.

   For information, see Adding a Component to a Page.

   > ### Tip:
   >
   > You can find the Image component in the default resource catalog under the **Content Management** folder.

3. To set the size and alignment of the image:

   a. Click anywhere inside the Image component to select the component.

   b. In the Image component toolbar, click the **View Actions** menu and select **Parameters** (Figure 32-4).

Figure 32-4   Parameters Action in View Actions Menu
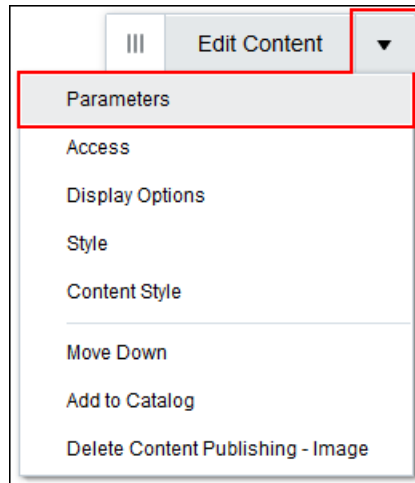
> ### 💡 Tip:
>
> If you cannot see the component toolbar, it may help to hide the
> resource catalog by clicking **Hide Catalog**.

c. In the Parameters dialog (Figure 32-5), from the **Horizontal Alignment** list,
select whether you want the image to be aligned on the **Left**, **Center**, or **Right**
of the component.

Default alignment is on the left.

Figure 32-5   Image Component Parameters Dialog
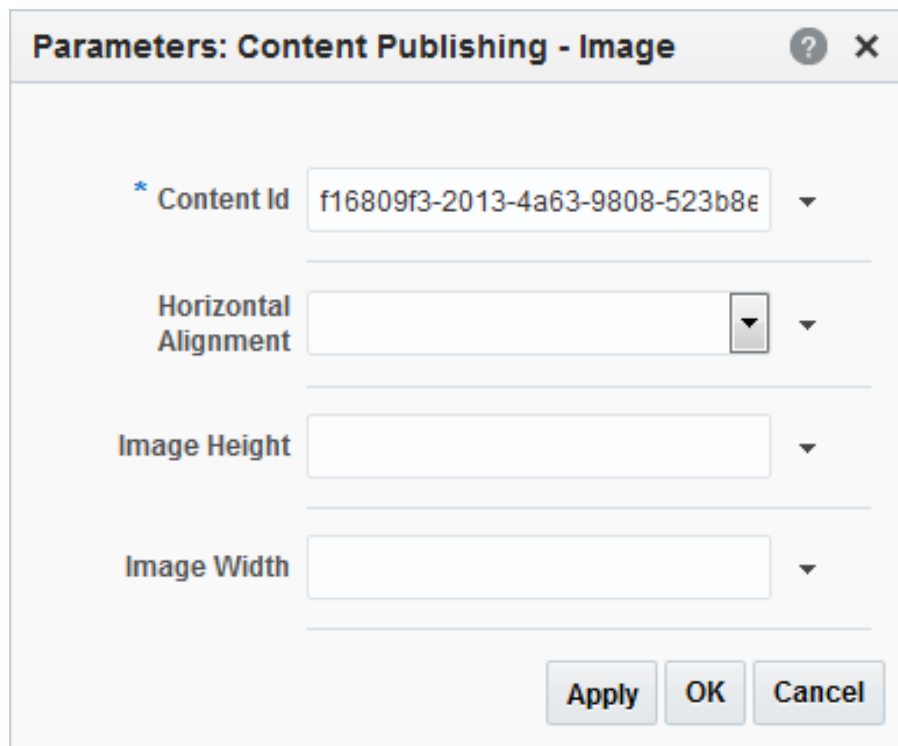
d. In the **Image Height** field, enter the required display height (in pixels) of the image within the component.

> **Tip:**
>
> You must specify the unit of measurement, `px`, otherwise the value in the **Image Height** field is ignored. Do not specify the image height as a percentage as this will have no effect.

e. In the **Image Width** field, enter the required display width (in pixels or as a percentage) of the image within the component.

You can specify the width either as a percentage of the width of the component, for example `80%`, or as an absolute size in pixels, for example, `150px`.

> **Tip:**
>
> You must specify the unit of measurement, `%` or `px`, otherwise the value in the **Image Width** field is ignored.

f. Click **OK**.

4. To provide your own image or a placeholder image:

a. Click anywhere inside the Image component to select the component.

b. In the component toolbar, click **Edit Content** (Figure 32-3).

> **Tip:**
>
> If you cannot see the component toolbar, it may help to hide the resource catalog by clicking **Hide Catalog.**

   c. In the Edit Image dialog, enter the image location either as a URL or browse for the image in the Oracle WebCenter Content Server repository.

You can also add a **Description** to use as alternate text.

> **Note:**
>
> If you want to use an image from WebCenter Content Server, that image must already exist in the repository. You cannot upload an image to the repository from within the Edit Image dialog.

You can turn the image into a link by specifying the portal page, external URL, or WebCenter Content Server item to display when the image is clicked. For more information, see Adding a Hyperlink to an Image in *Using Portals in Oracle WebCenter Portal*.

   d. Click **OK**.

5. When you are happy with the content, click **Save**.

Adding a Styled Text Component to a Page Style or Page

In some circumstances, you may want to enforce a particular CSS style on a piece of published text, for example a heading or title. To achieve this, you can use the Styled Text component.

You can specify the styling of the text using any of the following:

* **CSS inline style**

   This is intended for basic style changes, for example specifying the size, color, or font of the text. For example:

   ```
   font-size:16px; color:blue; font-weight:bold; font-family:Arial
   ```

* **CSS style class**

   A style class is a set of CSS styles bundled together and given a name. It can be defined in your JSF (`.jspx`) or skinning CSS file, for example:

   ```
   .ArticleHeading
   {
      color:red;
      font-size:20px;
      font-weight:bold;
      text-decoration:underline;
   }
   ```

* **HTML tag**

   For example, select **Heading1** to apply the `h1` tag.

You can use any combination of the above styling methods to determine the style of the text in the component. For example, you could specify a style class to use in combination with a particular HTML tag, or you could use a style class to specify the majority of the styling of the text, using an inline style to alter one particular aspect of the styling, such as the text color.

The order of precedence in which styling is applied, is as follows:

1. Inline Style

2. Style Class

3. Tag

So, for example, if the **Style Class** specifies a font size of `10px` and the **Inline Style** specifies `12px`, the inline style overrides the style class and the text will appear as `12px`.

Content contributors cannot alter the styling applied to the text in a Styled Text component.

To add a Styled Text component to a page style or page:

1. Open the page style or page in the page editor:

   • Editing a Page Style

   • Opening a Page in the Page Editor

2. In the resource catalog, locate the Styled Text component and add it to the page style or page in the same way as you would add any other component. For information, see Adding a Component to a Page.

> **Tip:**
>
> You can find the Styled Text component in the default resource catalog under the **Content Management** folder.

3. To set the text styling:

   a. Click anywhere inside the Styled Text component to select the component.

   b. In the Styled Text component toolbar, click the **View Actions** menu and select **Parameters** (Figure 32-4).

   > **Tip:**
   >
   > If you cannot see the component toolbar, it may help to hide the resource catalog by clicking **Hide Catalog**.

   c. In the Parameters dialog (Figure 32-6), specify the CSS styling to apply to the text in the Styled Text component using any combination of the following:

      • In the **Inline Style** field, enter one or more CSS styles, for example:

        ```
        font-size:16px; color:blue; font-weight:bold; font-family:Arial
        ```

      • In the **Style Class** field, enter the CSS style class to use to determine the styling of the text, for example:

        ```
        ArticleHeading
        ```

- From the **Tag** list, select the HTML tag that you want to apply to the text, for example, select **Heading1** to apply the `h1` tag.

Figure 32-6   Component Properties Dialog - Styled Text Component

d. Click **OK**.

4. To provide your own text or some placeholder text:

a. In the Styled Text component toolbar, click **Edit Content** (Figure 32-3).

b. Enter the text that you want to use.

This could be the actual text to be published, or some placeholder text to indicate to content contributors what type of text is expected.

For more information, see Contributing and Publishing Text with Predefined Formatting in *Using Portals in Oracle WebCenter Portal*.

5. When you are done with your changes, click **Save**.

Setting Content Contribution and Publishing Component Properties

This section includes the following topics:

- About Content Contribution and Publishing Component Properties
- Image Component Parameters
- Text Component Parameters
- Styled Text Component Parameters

About Content Contribution and Publishing Component Properties

Image, Text, and Styled Text components have associated properties that users with sufficient privileges can set to affect the content, appearance, and behavior of the components.

The **View Actions** menu in the toolbar of Image, Text, and Styled Text components in the page editor provides access to the properties dialogs: Parameters, Access, Display Options, Style, and Content Style.

Figure 32-7   View Actions Menu
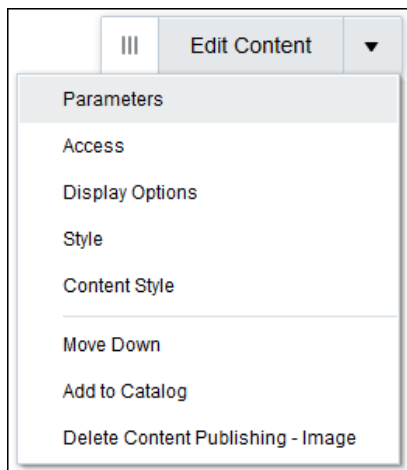
For example, select **Parameters** to display the Parameters dialog.

Figure 32-8   Image Component Parameters Dialog

Parameters control the default component content. For descriptions of each parameter, see Image Component Parameters, Text Component Parameters, and Styled Text Component Parameters. Parameters can be wired to events, and can be used to facilitate the wiring of the component to page parameters and page definition variables. For more information, see Wiring Pages and Components.

The Access, Display Options, Style, and Content Style properties affect the appearance and behavior of the components for all users. These properties are common to all components and task flows. For more information, see Modifying Component Properties.

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.

> **Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic display options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

> ✎ **See Also:**
>
> Setting Properties on a Component

Image Component Parameters

The Image component provides several associated parameters that affect the content, appearance, and behavior of the component.

Table 32-3 describes the parameters that are unique to the Image component.

Table 32-3   Image Component Parameters

Parameter	Description
Content Id	ID to uniquely identify the content in the Oracle WebCenter Content Server repository. **Note:** Do not change this value.
Horizontal Alignment	Specifies how to align the image within the region. Valid values are **Left**, **Center**, and **Right**.
Image Height	Specifies the height of the image when it is rendered on the page. Specify the height as an absolute value, for example 150px. **Note:** You must specify the unit of measurement (px) otherwise the value in the **Image Height** field is ignored. Do not specify the height as a percentage value.
Image Width	Specifies the width of the image when it is rendered on the page. Specify the width either as a percentage of the width of the component, for example 80%, or as an absolute value, for example 300px. **Note:** You must specify the unit of measurement (% or px) otherwise the value in the **Image Width** field is ignored.

For more information about using these parameters, see Adding an Image Component to a Page Style or Page.

Text Component Parameters

The Text component provides a single parameter that affects the content, appearance, and behavior of the component.

Table 32-4 describes the parameters that are unique to the Text component.

Table 32-4   Text Component Parameters

Parameter	Description
Content Id	ID to uniquely identify the content in the Oracle WebCenter Content Server repository. **Note:** Do not change this value.

Styled Text Component Parameters

The Styled Text component provides several associated parameters that affect the content, appearance, and behavior of the component.

Table 32-5 describes the parameters that are unique to the Styled Text component.

Table 32-5   Styled Text Component Parameters

Parameter	Description
Content Id	ID to uniquely identify the content in the Oracle WebCenter Content Server repository. **Note:** Do not change this value.
Inline Style	Specifies one or more CSS styles to apply to the text in the component. For example: `font-size:16px; color:blue; font-weight:bold; font-family:Arial`
Style Class	Specifies the CSS style class to apply to the text in the component.
Tag	Specifies the HTML tag to apply to the text in the component, for example: • **Paragraph** • **Heading 1** • **Heading 2**

You can use any combination of the style parameters to determine the style of the text in the component. For example, you could specify a style class to use in combination with a particular HTML tag, or you could use a style class to specify the majority of the styling of the text, using an inline style to alter one particular aspect of the styling, such as the text color. The order of precedence in which styling is applied is:

1. Inline Style

2. Style Class

3. Tag

So for example, if the specified **Style Class** defines a font size of `10px` and the **Inline Style** specifies `font-size:12px`, the inline style overrides the style class and the text is rendered as `12px`.

For more information about using these parameters, see Adding a Styled Text Component to a Page Style or Page.

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Publishing Content Using Content Presenter

Publish content from Content Server on a portal page using the Content Presenter task flow.

> ✏ **See Also:**
>
> For an overview of the different options available in WebCenter Portal for working with portal content and adding content to a portal, see Introduction to Working with Content in a Portal.

> ✏ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Basic Services: Edit Page Access and Structure`, `Assets: Edit Assets`, and `Documents: View Documents` (standard permissions) or `Pages: Edit Pages` and `Task Flows: Edit Task Flows`, and `Documents: View Documents` (advanced permissions).
>
> See About Roles and Permissions for a Portal.

Topics:

- About Content Presenter
- Adding a Content Presenter Task Flow to a Page
- Selecting Content
- Selecting a Display Template
- Previewing Content in the Content Presenter Configuration Dialog
- Using Responsive Templates
- Adding Links from Content to Navigation Nodes
- Authoring Site Studio Content to Optimize Presentation in Content Presenter
- Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog
- Creating and Editing Files In-Context in a Content Presenter Task Flow
- About Content Presenter and Workflow
- Working with Content Presenter Task Flow Properties

About Content Presenter

The Content Presenter task flow enables you to precisely customize the selection and presentation of content from Content Server.

The Content Presenter task flow is available only if your system administrator has completed the prerequisite Content Server configuration. For more information, see Managing Connections to Oracle WebCenter Content Server in *Administering Oracle WebCenter Portal*.

> **See Also:**
>
> "Creating and Using Templates for the Content Presenter Task Flow" tutorial (http://www.oracle.com/technetwork/middleware/webcenter/portal/learnmore/wcp-cp-templates-1555892.pdf) on the Oracle Technology Network

In the Content Presenter task flow, you can select a single item of content, contents under a folder, a list of items, or query for content, and then select a display template to render that content on a page in a portal.

> **Note:**
>
> • Content Presenter is intended to render (present) content; not to host HTML content. To host HTML content, use the Web Page component to render the HTML content from Content Server. For more information, see Working with the Web Page Component.
>
> • Content Server exposes a content item only after it has a revision status of Released. If a content item does not have Released status, you will not be able to configure Content Presenter to show the item. You can find the status of a content item in Content Server on the Content Information Page, as described in Revision Status in *Using Oracle WebCenter Content*.

In addition to displaying the folders and files in Content Server, Content Presenter integrates with Oracle Site Studio to allow you to create, access, edit, and display Site Studio contributor data files. For more information, see Understanding Site Studio Integration.

Content Presenter has no dependency on the Documents tool for adding or managing the content it displays.

Understanding Site Studio Integration

Oracle Site Studio is a powerful, flexible web development application suite that offers a comprehensive approach to designing, building, and maintaining enterprise-scale

web sites. Site Studio uses Oracle WebCenter Content Server as the main repository for a web site.

Content Presenter integrates with Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in a custom Content Presenter display template that makes use of region definitions.

> �💡 **Tip:**
>
> Although Content Presenter also supports Site Studio region templates, it is recommended that you use Content Presenter display templates (that use region definitions) to integrate Site Studio and Oracle WebCenter Portal. The region templates display the details of the contributor data file rather than the contributed content. For more information, see Developing Content Presenter Display Templates in *Developing for Oracle WebCenter Portal*.

Before you can display Site Studio contributor data files in Content Presenter, the system administrator must enable the following components in WebCenter Content Server:

- Site Studio components. The system administrator must also configure the cookie path to the context root of your application to prevent losing your session when editing Site Studio content. For more information, see Configuring Oracle WebCenter Content Server and Setting Up Site Studio in *Administering Oracle WebCenter Portal*

- `WebCenterConfigure` and `Portal VCRHelper` components. This allows for adding and editing Site Studio documents from within Content Presenter. For more information, see Enabling the WebCenterConfigure Component in *Administering Oracle WebCenter Portal*.

For proper surfacing in Content Presenter, the following link types can be used in a Site Studio contributor data file (or in a Site Studio region template):

- Links to nodes in the portal navigation (for more information, see Adding Links from Content to Navigation Nodes)
- Links to inline images
- Links to documents (except for absolute or relative path links)

  When clicking the link at runtime, it renders within the context of the application and displays the document using the Default View display template.

- Absolute HTTP links, whether created in Site Studio contributor mode or in Site Studio Designer region template HTML

The following Site Studio link types are *not* supported in Content Presenter:

- Links to Site Studio sections
- Absolute or relative path links to Site Studio documents

For guidelines on authoring recommendations for displaying a Site Studio contributor data file in Content Presenter, see Authoring Site Studio Content to Optimize Presentation in Content Presenter.

You can create and edit Site Studio contributor data files from the Content Presenter Configuration dialog (see Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog) or in-context when displayed in Content Presenter at runtime (see Creating and Editing Files In-Context in a Content Presenter Task Flow).

For more information about creating and using Site Studio contributor data files and Site Studio region templates, refer to the Oracle WebCenter Content documentation library (http://docs.oracle.com/cd/E28280_01/webcontent.htm).

About Content Presenter and Workflow

You can view content items displayed in Content Presenter while they are in a workflow, including Site Studio contributor data files displayed in a Site Studio region template.

In order for a content item in workflow to display in Content Presenter, it must have had Released status at some point. If the content item has never had Released status, it will not display in Content Presenter.

As long as the content item has at some point had Released status in Content Server, if a revision of the content item is pending in workflow, Content Presenter allows approvers for the content item to toggle between the published version and the version in workflow in the page editor (Figure 33-1) or in contribution mode, and also provides links to approve or reject the item in workflow, and view additional details about the item (including workflow name, steps performed, action performed, date of action, and who performed the action).

Figure 33-1   Preview File in Workflow to Approve or Reject in Content Presenter

For more information about working with files in workflow in Content Presenter, see Viewing Workflow Files in a Content Presenter Task Flow.

Working with the Content Presenter Task Flow

In the Content Presenter task flow, you can select a single item of content, contents under a folder, a list of items, or query for content, and then select a display template to render that content on a page in a portal.

• Adding a Content Presenter Task Flow to a Page

• Selecting Content

• Selecting a Display Template

• Previewing Content in the Content Presenter Configuration Dialog

Adding a Content Presenter Task Flow to a Page

To display content from your Content Server on a page, add and configure a Content Presenter task flow.

To add a Content Presenter task flow to a page:

1. Open the page in the page editor.

For more information, see Opening a Page in the Page Editor.

2. Click **Add Content** in the area of the page where you want to add the Content Presenter task flow to open the resource catalog.

3. In the resource catalog, navigate to the Content Presenter task flow, or search for it.

> 💡 **Tip:**
>
> The presence or location of this task flow depends on how the resource catalog is configured. For example, in the default resource catalog, open the **Content Management** folder to locate the Content Presenter task flow.

4. Add the Content Presenter task flow to the page in one of the following ways:

   • Click the task flow in the resource catalog to add it to the area where you clicked **Add Content**.

   • Drag the task flow from the resource catalog to the target location on the page.

   A new empty region appears on your page.

5. After adding the empty Content Presenter task flow to the page, edit it to select the content that you want to display.

   For more information, see Selecting Content.

Selecting Content

After you add a Content Presenter task flow to a page, you must configure it to select the content that you want to display.

> ✏️ **Note:**
>
> Content Presenter does not support non-ASCII characters in files that are encoded using non-UTF-8 character encoding. When users preview such files in Content Presenter, non-ASCII characters appear garbled.

This section includes the following topics:

• Displaying the Content Presenter Configuration Dialog

• Selecting a Single Content Item

• Selecting the Contents of a Folder

• Selecting Content Based on the Results of a Query

• Selecting a List of Content Items

Displaying the Content Presenter Configuration Dialog

The Content Presenter Configuration dialog enables you to easily configure the Content Presenter task flow to select or change content, or select a different display template.

To display the Content Presenter Configuration dialog:

1. Open the page in the page editor.

   For more information, see Opening a Page in the Page Editor.

2. Click anywhere in the Content Presenter task flow.

3. In the toolbar, click **Edit** (Figure 33-2).

Figure 33-2   Component Toolbar for Content Presenter Task Flow
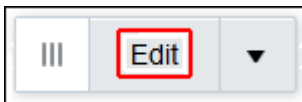
The Content Presenter Configuration dialog opens (Figure 33-3).

Figure 33-3   Content Presenter Configuration Dialog
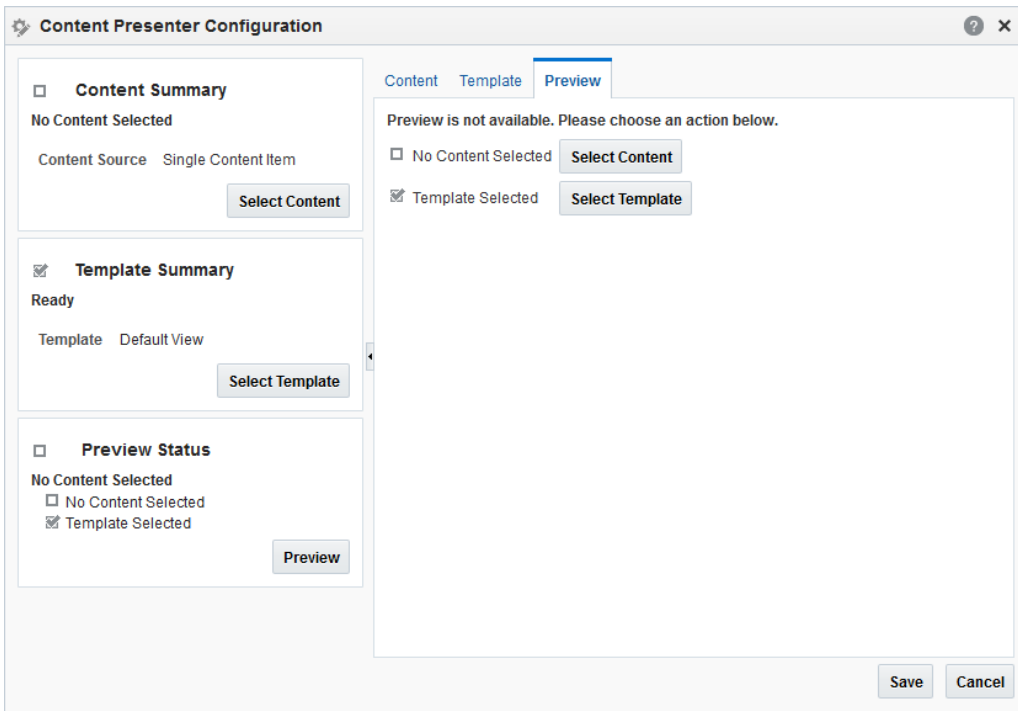
> **Tip:**
>
> A check mark alongside an item indicates that the required information is complete and valid.
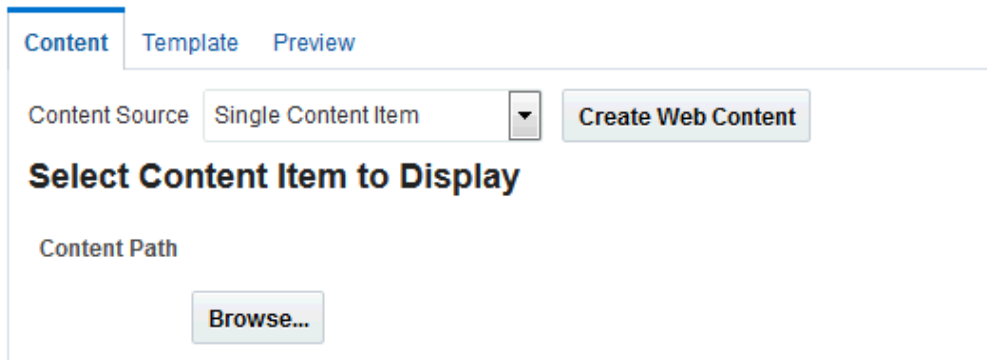
Selecting a Single Content Item

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. Open the Content Presenter Configuration dialog.

   For more information, see Displaying the Content Presenter Configuration Dialog.

2. Click **Select Content** or the **Content** tab.

3. On the **Content** tab, from the **Content Source** list, select **Single Content Item**.

Figure 33-4   Selecting the Content Source: Single Content Item

> **Tip:**
>
> For information on creating new content, see Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog.

4. 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.

Figure 33-5   Navigating to Other Content Repositories
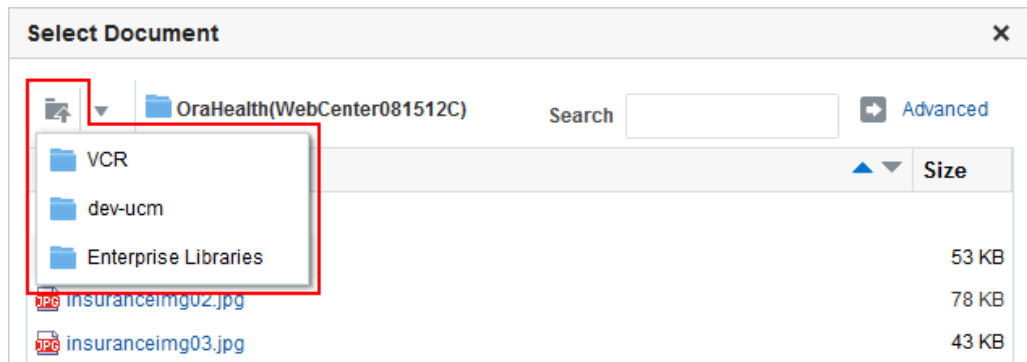
> **Notes:**
>
> • iFraming is supported only for the default Content Server connection. Therefore, you cannot select a non-default Content Server connection if the Content Presenter task flow will use iFrames to display content.
>
> • If the content repository includes an invalid type configuration, then no content displays when you click **Browse**. Instead, an error message reports `Unable to retrieve content type information`.

5. Select the item that you want to display and click **Select**.

After choosing your content, you must select a Content Presenter display template. For more information, see Selecting a Display Template.

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. Open the Content Presenter Configuration dialog.

   For more information, see Displaying the Content Presenter Configuration Dialog.

2. Click **Select Content** or the **Content** tab.

3. On the **Content** tab, from the **Content Source** list, select **Contents Under a Folder**.

Figure 33-6   Selecting the Content Source: Contents Under a Folder
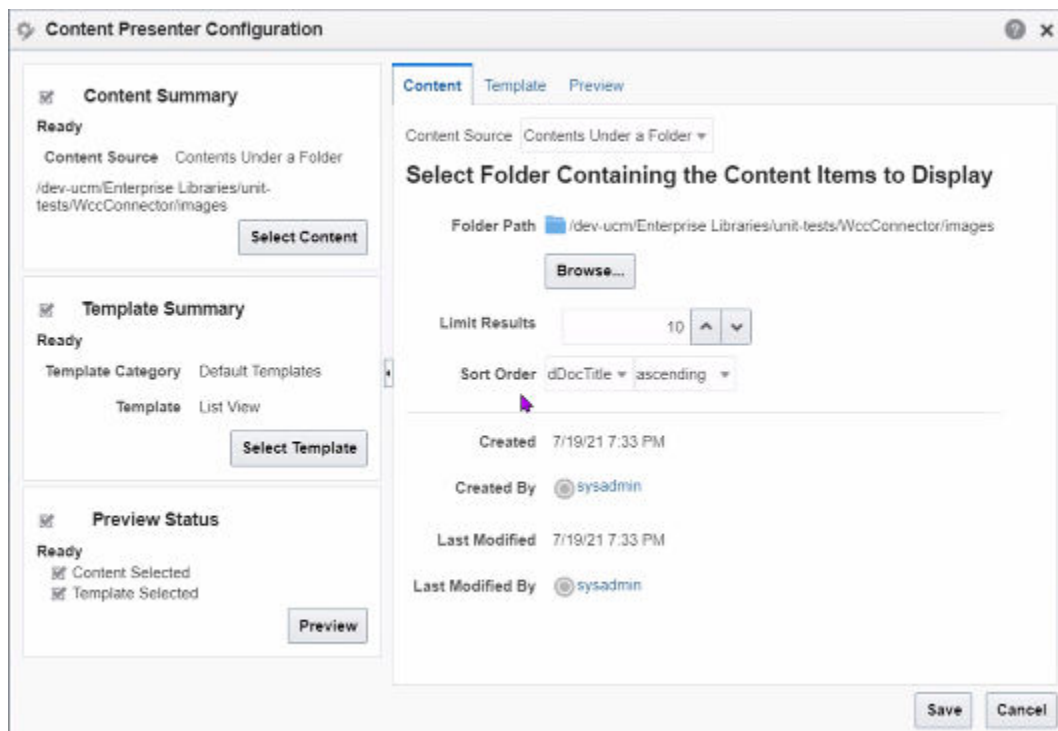
4. Click **Browse** to locate the folder in the content repository.

> **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 (Figure 33-5).

> **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`.

5. Select the folder whose contents you want to display and click **Select**.

6. In the **Limit Results** field, enter the maximum number of content items to be displayed. The maximum limit is 500.

7. In the **Sort Order** field, select the properties available from the drop-down list for the content type and then select whether to sort in ascending or descending order.

After choosing your content, you must select a Content Presenter display template. For more information, see Selecting a Display Template.

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 Oracle WebCenter Content Server repository.

All query criteria are optional. If you leave all options empty, all documents in the WebCenter 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, as described in Configuring OracleTextSearch for Content Server in *Administering Oracle WebCenter Content*.

To specify a content query:

1. Open the Content Presenter Configuration dialog.

   For more information, see Displaying the Content Presenter Configuration Dialog.

2. Click **Select Content** or the **Content** tab.

3. On the **Content** tab, from the **Content Source** list, select **Results of a Query**.

Figure 33-7   Selecting the Content Source: Results of a Query

4. 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.

5. In the **Keywords** field, enter any words or phrases that might be present in the content of the documents.

6. 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.

7. In the **Limit Results** field, enter the maximum number of content items to be returned by the query.

   The default is 500.

   > **Note:**
   >
   > The custom attribute wcpResultsOfAQueryMaxResults is introduced to handle the maximum range of results being displayed.

8. 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.

9.   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.

10. To retrieve content items based on who first uploaded them, in the **Created By** field, enter the user name.

If you are not sure of the user name, click the **Select user name** icon and browse for users. For tips on searching for a user in the identity store, see Searching for a User or Group in the Identity Store

11. To retrieve content items based on who last edited them, in the **Last Modified By** field, enter the user name name.

If you are not sure of the user name, click the **Select user name** icon and browse for users. For tips on searching for a user in the identity store, see Searching for a User or Group in the Identity Store

12. 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.

13. 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`.

After choosing your content, you must select a Content Presenter display template. For more information, see Selecting a Display Template.

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. Open the Content Presenter Configuration dialog.

   For more information, see Displaying the Content Presenter Configuration Dialog.

2. Click **Select Content** or the **Content** tab.

3. On the **Content** tab, from the **Content Source** list, select **List of Items**.

Figure 33-8   Selecting the Content Source: List of Items
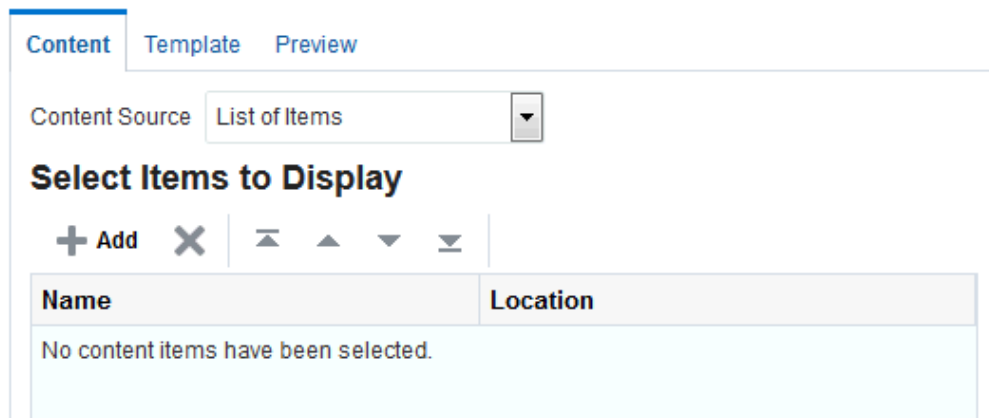
4. Under **Select Items to Display**, click **Add** to browse or search for any number of items to add to the list.

Figure 33-9   Selecting Items to Display
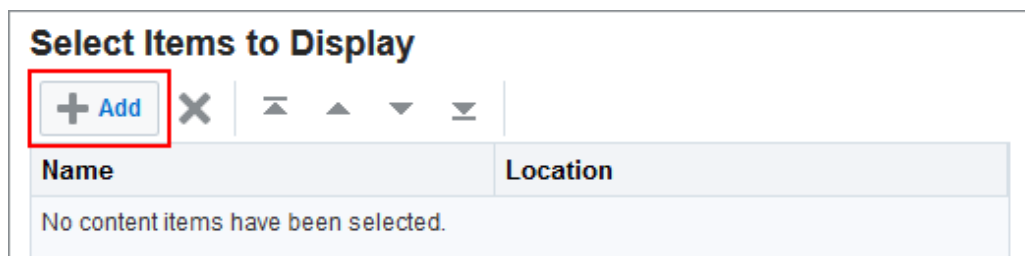
5. In the Select One or More Content Items dialog, select multiple content items using Ctrl+click or Shift+click.

> **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 the *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 (Figure 33-5).

> **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`.

6. 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.

7. 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.

After choosing your content, you must select a Content Presenter display template. For more information, see Selecting a Display Template.

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 (`http://docs.oracle.com/cd/E28280_01/webcontent.htm`).

To change the display template for the selected content:

1. Open the Content Presenter Configuration dialog.

   For more information, see Displaying the Content Presenter Configuration Dialog.

2. Click **Select Template** or the **Template** tab.

3. 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.

      See Table 19-1 and Table 19-2.

   • **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 as described in Creating Content Presenter Display Templates in *Developing for Oracle WebCenter Portal*.

Figure 33-10   Selecting the Template Category (for Multiple Content Items)
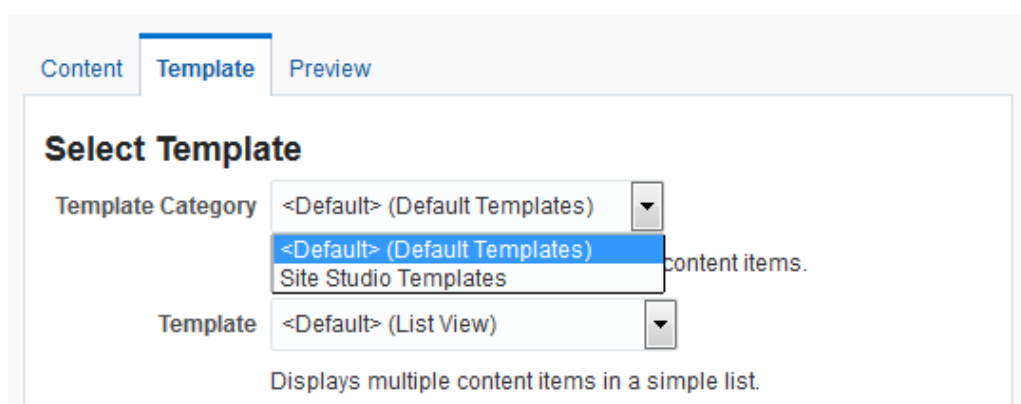
4. From the **Template** list, select the Content Presenter display template that you want to use.

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 (Figure 33-12).

Figure 33-11   Selecting the Display Template (for Single Content Items)
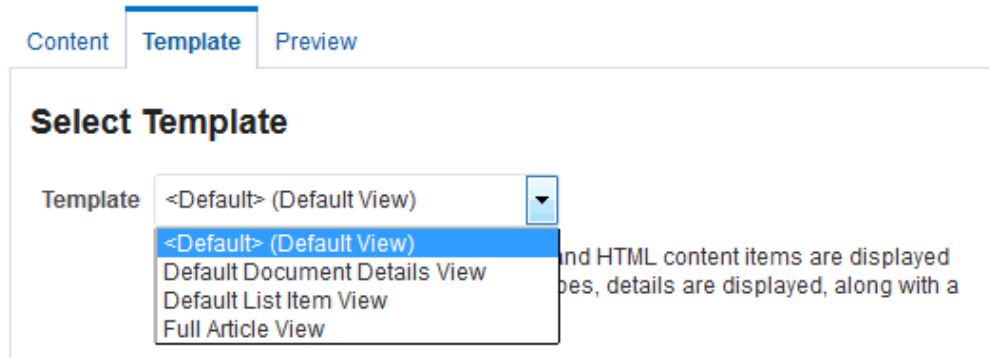
Figure 33-12   Selecting the Display Template (for Multiple Content Items)
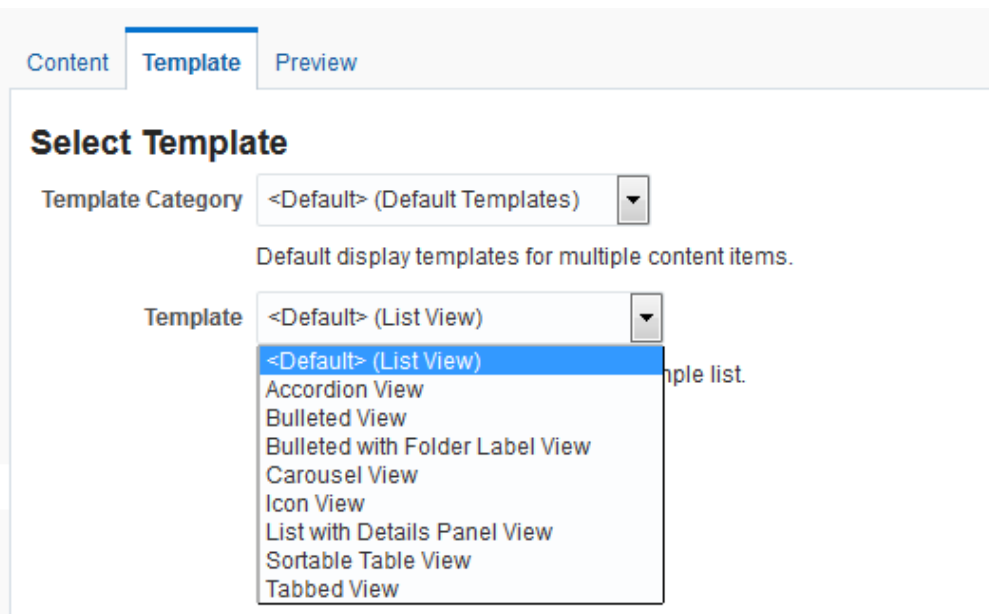
The **Template** list includes built-in display templates, custom display templates (created in JDeveloper and published to WebCenter Portal), and Site Studio region templates.

> **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.
>
> For more information, see Understanding Site Studio Integration.
>
> If you create a Site Studio contributor data file directly from the Content Presenter Configuration dialog, as described in Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog, the Site Studio region templates that match the region definition of the Site Studio contributor data file might not be immediately shown in the **Template** list. In this case, select the default template, and click **Save**. Then, open the Content Presenter Configuration dialog again to find the Site Studio region templates in the **Template** list.

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**.

See Setting Component Display Options Properties.

> **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.

If the file is in workflow, you will see a workflow notification area at the top, as described in About Content Presenter and Workflow.

Using Responsive Templates

The Articles View and Full Article View Content Presenter display templates use responsive layouts to display their content.

- About Responsive Templates
- Using a Responsive Template
- Optimizing Display on Mobile Devices

About Responsive Templates

Responsive templates enable you to display content that adjusts to the width of the browser.

Responsive templates include different layouts based on the width of the browser.

Oracle WebCenter Portal provides two built-in responsive Content Presenter display templates as samples for you to use as a starting point for creating your own:

- Articles View template—Use this template to display a list of articles, providing links that display the full article details.
- Full Article View template—Use this template to display a full article, including the title, image and body of the article.

Articles View Template

As well as providing different layouts, the Articles View template also uses different font and image sizes depending on the width of the browser.

If the browser is narrow (up to 480 pixels, for example, an iPhone), then the template lists the articles in a single column (Figure 33-13).

Figure 33-13   Articles View Single Column Layout
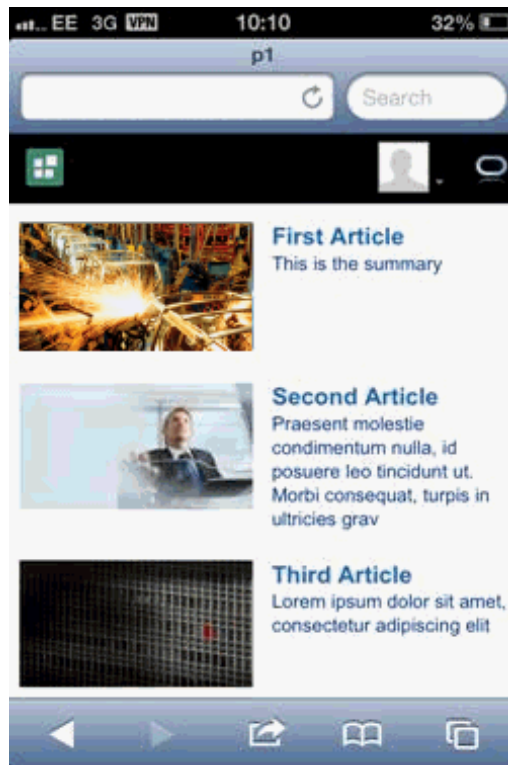
If the browser is slightly wider (up to 780 pixels, for example, an iPad in portrait orientation), then the template lists the articles in two columns (Figure 33-14).

Figure 33-14   Articles View Two Column Layout
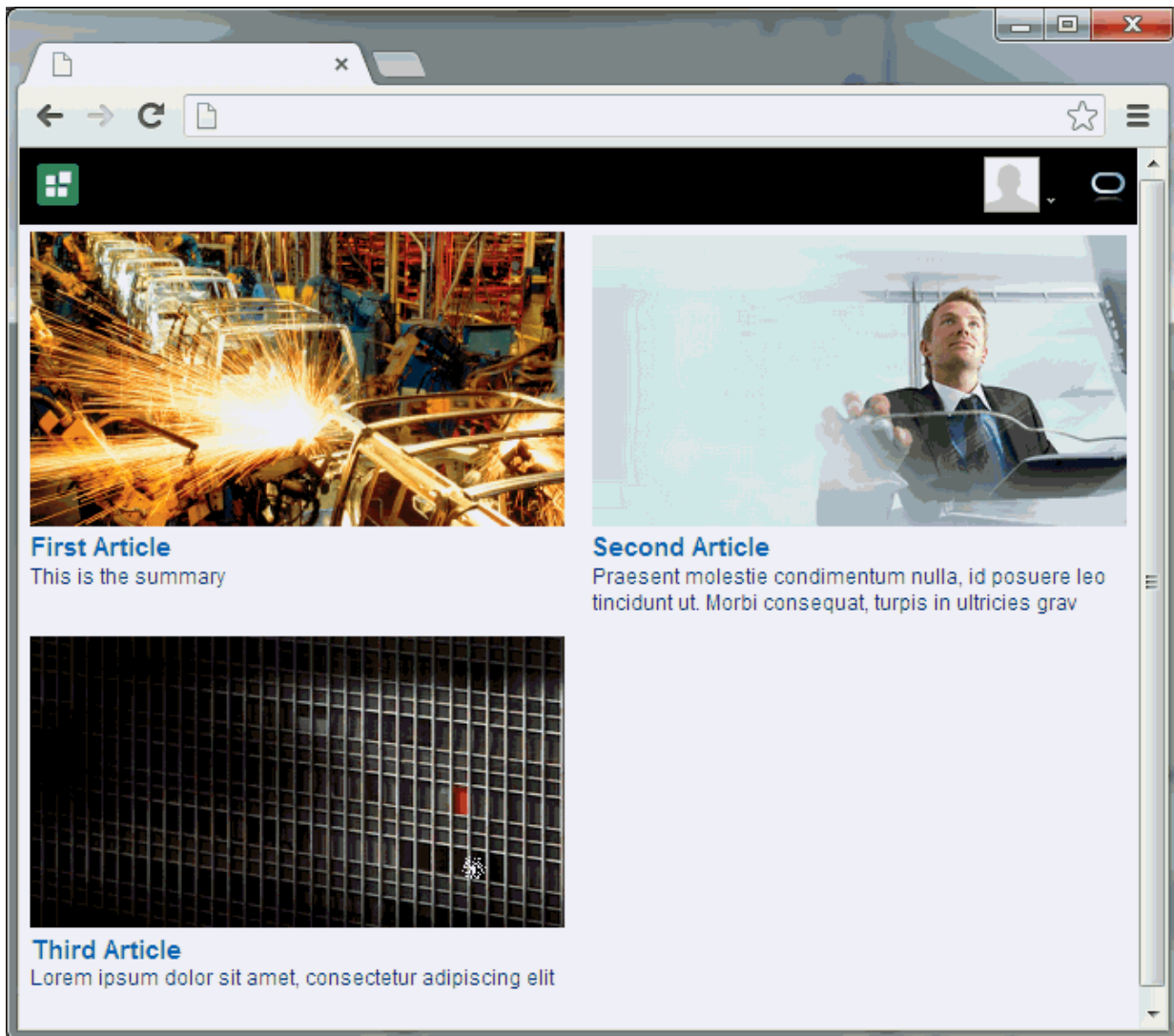
If the browser is wide (over 780 pixels), then the template lists the articles in three columns ().

Figure 33-15   Articles View Three Column Layout
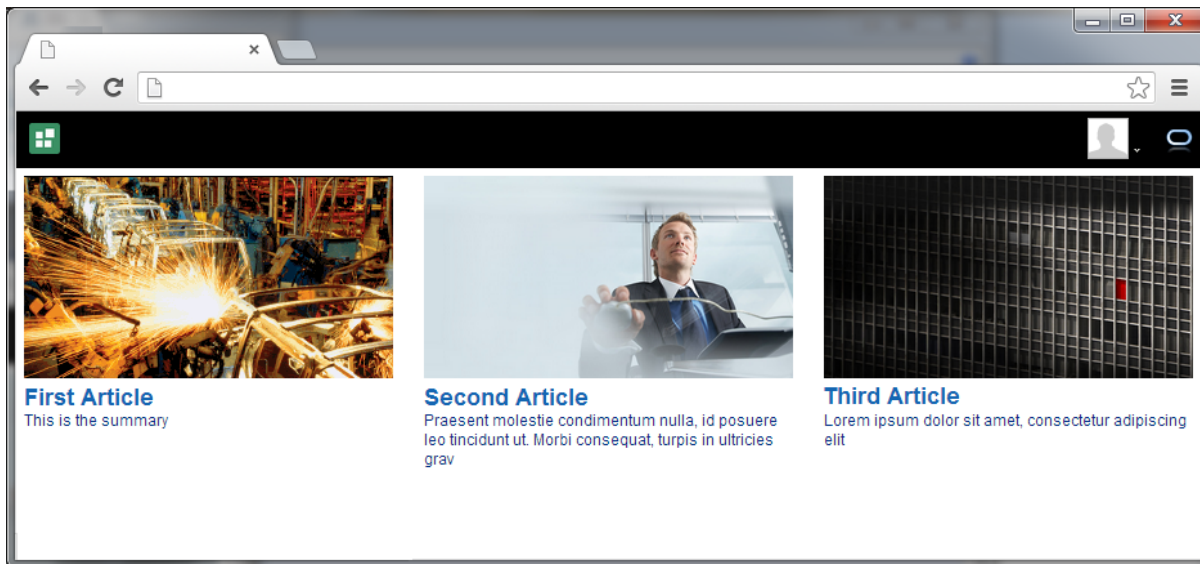
Full Article View Template

With the Full Article View template, if the browser is narrow (up to 480 pixels, for example, an iPhone), then the template displays an article with the image taking up the full width of the template (Figure 33-16).

Figure 33-16   Full Article View Template Narrow View
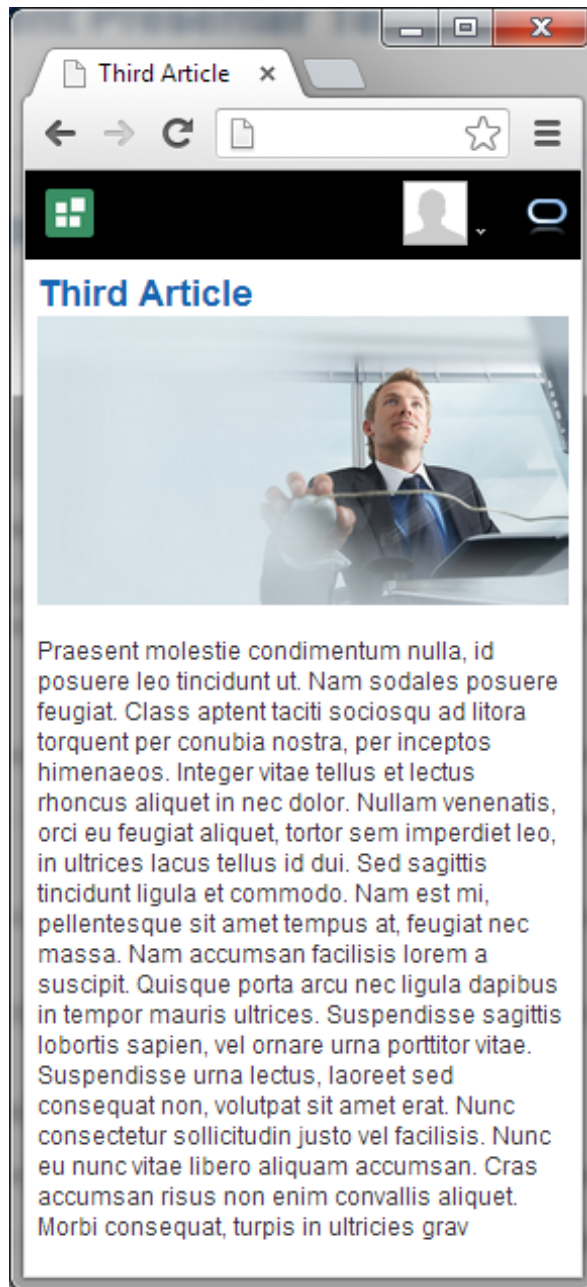
If the browser is wider (over 480 pixels), then the template displays an article with the image displayed to the right (Figure 33-17).

Figure 33-17   Full Article View Template Wide View
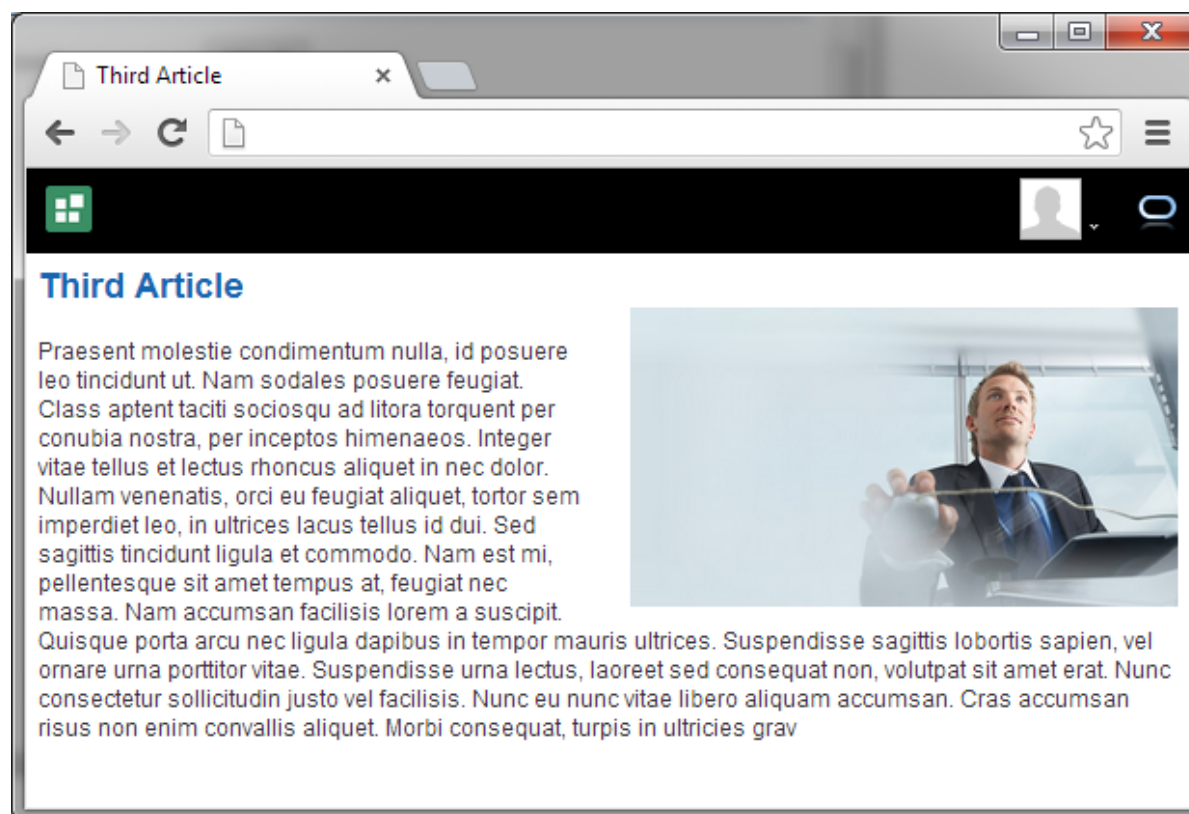
Using a Responsive Template

Use a responsive Content Presenter display template if you want the layout of your content to change depending on the size of the browser.

The following example shows how to use one of the built-in responsive templates, but you can use any custom template.

The Articles View and Full Article View templates rely on the Site Studio `RD_ARTICLE` region definition, so Site Studio must be enabled in Content Server to seed the `RD_ARTICLE` region definition:

1. Enable Site Studio on Oracle WebCenter Content Server (see Understanding Site Studio Integration).

2. Start (or restart) Oracle WebCenter Portal after Site Studio has been enabled (this will seed the `RD_ARTICLE` region definition).

> **Note:**
>
> To create appropriate content for the Articles View template, see Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog.

To use a responsive template:

1. Add the Content Presenter task flow to a page.

   See Adding a Content Presenter Task Flow to a Page.

2. Select the content.

   See Selecting Content.

   The **Content Source** should be **Single Content Item**, **Results of a Query**, or **List of Items**.

   If the **Content Source** is **Results of a Query**, then set **Content Type** to **WCM:RD:RD_ARTICLE** to restrict the query to just content created using the RD_ARTICLE region definition. If the **Content Source** is **Single Content Item**, then choose content that is based on the RD_ARTICLE region definition. If the **Content Source** is **List of Items**, then ensure that the content items chosen are based on the RD_ARTICLE region definition.

3. Select the display template.

   See Selecting a Display Template.

   • If the **Content Source** is **Single Content Item**, select the **Full Article View** template.

   • If the **Content Source** is **Results of a Query** or **List of Items**:

     a. Set the **Template Category** to **Site Studio Templates**.

     b. Select the **Articles View** template.

If you use the Articles View or Full Article View template on a page and want to optimize the layout for a mobile device, you must use a page template with the correct viewport. For more information, see Optimizing Display on Mobile Devices.

Optimizing Display on Mobile Devices

If you use the Articles View or Full Article View template on a page and want to optimize the layout for a mobile device, you must use a page template with the correct viewport.

You can use either the Skyros Top Navigation (Mobile) page template, Skyros Side Navigation (Mobile) page template, or a custom page template with the `viewport` parameter.

To set the `viewport` parameter for a page template:

1. Navigate to the **Assets** page for the portal.

2. Click **Page Templates**.

3. Select the page template.

   You cannot edit the out-of-the-box templates, but you can copy an out-of-the-box template and then edit the copy.

4. From the **Actions** menu, select **Edit Source**.

5. Click the **Page Definition** tab.

6. Within the `<parameters>` section, add the following:

```
<parameter id="viewport" value="width=device-width, initial-scale=1.0"/>
```

> **✎ Note:**
>
> The value of the `viewport` parameter will be used as the value for the content attribute of the `<meta name="viewport" content="..."/>` tag, so if you set it the recommended value of `"width=device-width, initial-scale=1.0"` then the following meta tag will be added to the page:
>
> ```
> <meta name="viewport" content="width=device-width, initial-scale=1.0"/>
> ```

7. Click **Save and Close**.

Adding Links from Content to Navigation Nodes

You can include links to portal navigation nodes in your content to enable users to quickly navigate from a piece of content to another part of the portal.

When the content displays in Content Presenter at runtime, an end user can click the links to navigate to the desired portal navigation node.

You can create a link in the following content items:

- a document of MIME type `text/html` (typically HTML files)
- a Site Studio contributor data file (in a Rich Text element)
- a Site Studio region template

To add a link to a node in the portal navigation from a content item:

1. Edit the content item, either directly or as described in:

    - Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog
    - Creating and Editing Files In-Context in a Content Presenter Task Flow

2. Add a link using the following syntax:

```
$wcUrl('externalId')
```

where *externalId* is the value of the External ID property of the navigation node (see Setting Navigation Properties and Display Options for a Page.

For example:

```
<a target="" href="$wcUrl('NEWCUSTOMERSLINK')">New Customers</a>
```

Authoring Site Studio Content to Optimize Presentation in Content Presenter

Content Presenter integrates with Oracle Site Studio to allow you to create, access, edit, and display Site Studio contributor data files in a Content Presenter display template.

For more information, see Understanding Site Studio Integration

> **Tip:**
>
> Although Content Presenter also supports Site Studio region templates, it is recommended that you use Content Presenter display templates (that use region definitions) to integrate Site Studio and Oracle WebCenter Portal. Site Studio region templates display the details of the contributor data file rather than the contributed content. For more information, see Creating Content Presenter Display Templates in *Developing for Oracle WebCenter Portal*.

To optimize the presentation of Oracle Site Studio content in Content Presenter, follow the guidelines provided in the following sections:

- Best Practices for Images
- Best Practices for Defining Styles
- Best Practices for JavaScript

Best Practices for Images

There are several guidelines to consider as you work with images in Site Studio contributor data files that will be displayed using Content Presenter.

- Store images in Content Server in a common location.

- Insert images into WYSIWYG elements using the Site Studio Contributor image wizard.

- Set the `src` attribute of the `image` tag to a relative link to an image file in Content Server. This attribute is rewritten by Content Presenter during rendering to use the `GET_FILE` service.

- For performance improvement, use web proxy to cache artifacts at URLs from Content Server, and set expiration based on tolerance for updates in Content Server.

  Example for Apache `mod_cache`:

  – `CacheEnable mem /cs`

  – `CacheDefaultExpire 3600 (one hour)`

- If WebCenter Portal and WebCenter Content Server do not share a Single Sign-On login mechanism, images which are stored in WebCenter Content Server will be visible to the user only if the image is publicly available, or if the user is logged

into WebCenter Content Server and has the correct permissions to view the image.

Best Practices for Defining Styles

There are several guidelines to consider as you work with style definitions in Site Studio contributor data files that will be displayed using Content Presenter.

- Define styles in CSS files.
- Store CSS files either in Content Server or in Oracle WebCenter Portal.
  - If stored in Content Server, add `<link>` in `<head>` of page template.
- Load style class names into WYSIWYG region element definitions.
- Select your CSS to format HTML in WYSIWYG elements.
- For performance improvement, use web proxy to cache artifacts at URLs from Content Server, and set expiration based on tolerance for updates in Content Server.

  Example for Apache `mod_cache`:
  - `CacheEnable mem /cs`
  - `CacheDefaultExpire 3600 (one hour)`

Best Practices for JavaScript

There are several guidelines to consider as you work with JavaScript in Site Studio contributor data files that will be displayed using Content Presenter.

Recommended: Do not use JavaScript within web content that is rendered within Oracle WebCenter Portal.

If your web content uses JavaScript, follow these guidelines:

- Add `<link>` in `<head>` of page template.
- For performance improvement, use web proxy to cache artifacts at URLs from Content Server, and set expiration based on tolerance for updates in Content Server.

  Example for Apache `mod_cache`:
  - `CacheEnable mem /cs`
  - `CacheDefaultExpire 3600 (one hour)`

Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog

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`.

For information on setting `webContextRoot`, see Registering Content Repositories in *Administering Oracle WebCenter Portal*.

To set `webContextRoot` through WLST, see `createContentServerConnection` and `setContentServerConnection` in *WebCenter WLST Command Reference Reference*.

Without this configuration, it is still possible to create or edit Site Studio content from within Content Presenter, but the create and edit actions launch new browser windows (or tabs) rather than opening within the Content Presenter task flow.

To create or edit Oracle Site Studio content in the Content Presenter Configuration dialog:

1. Open the Content Presenter Configuration dialog.

   See Displaying the Content Presenter Configuration Dialog.

2. Click **Select Content** or the **Content** tab.

3. On the **Content** tab, click **Create Web Content**.

Figure 33-18   Selecting the Content Source: Site Studio
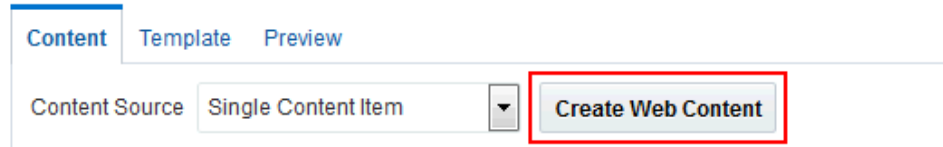
> **Tip:**
>
> The **Create Web Content** button displays only when the **Content Source** field displays **Single Content Item** and when at least one Content Server repository (11*g* or higher) has the Site Studio component installed.

The Oracle Site Studio Choose Region Content pane opens.

Figure 33-19   Adding Site Studio Content: Choose Region Content
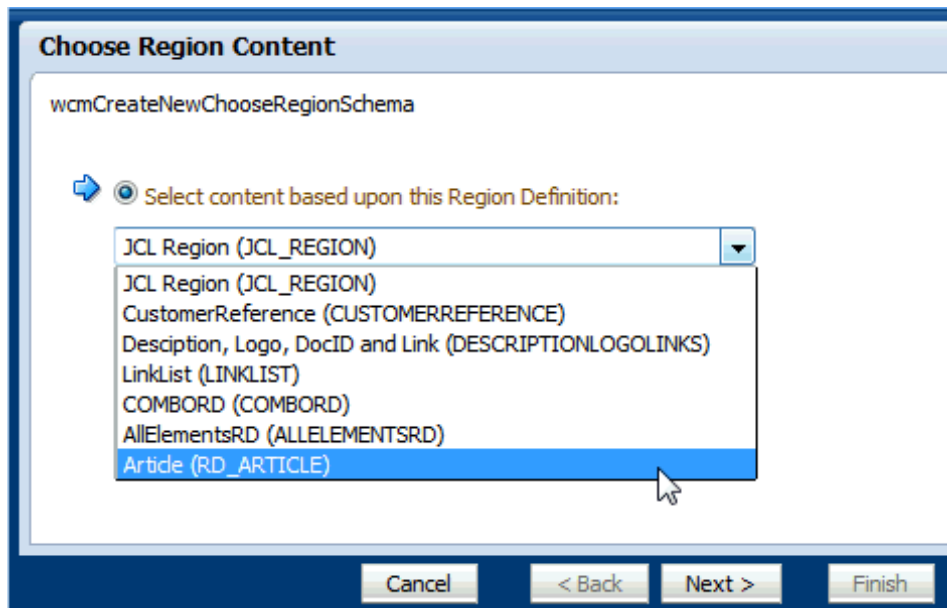
4. In the Choose Region Content pane, select a Site Studio region definition on which the content you want to create or edit is based.

> **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. For more information, see Using Responsive Templates.

5. Click **Next**.

The Choose content file pane opens.

Figure 33-20   Adding Site Studio Content: Choose Content File
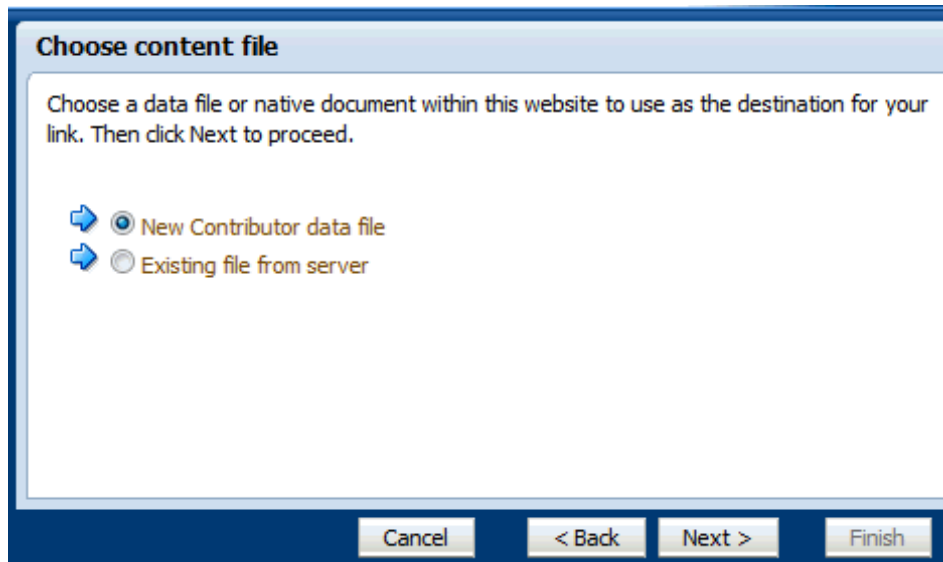
6. In the Choose content file pane, select one of the following:

    *   **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.

Figure 33-21   Adding Site Studio Content: Check-in Content
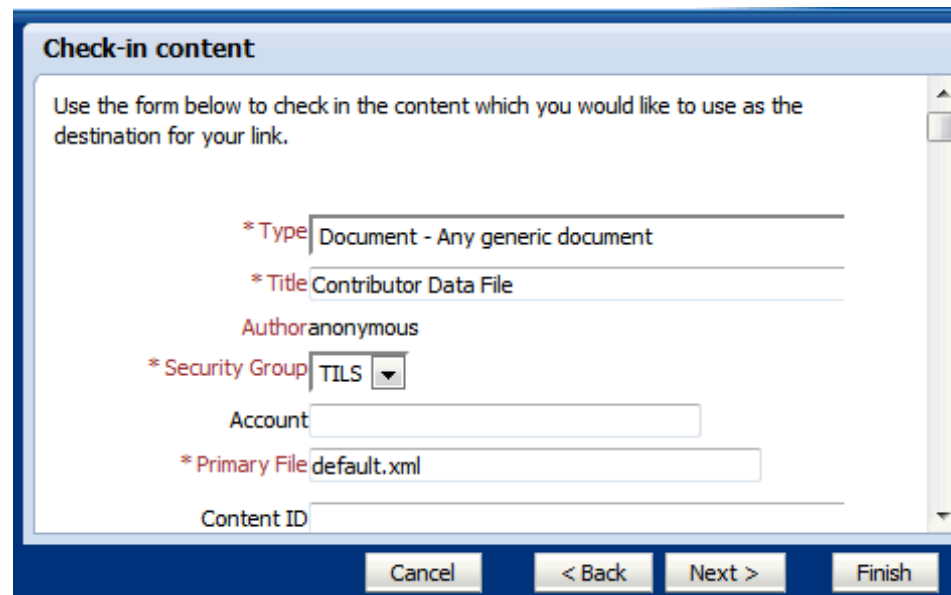
    *   **Existing file from server** to open Content Server, showing Site Studio contributor data files that are based on the selected region definition.

Figure 33-22   Content Server: Search Results
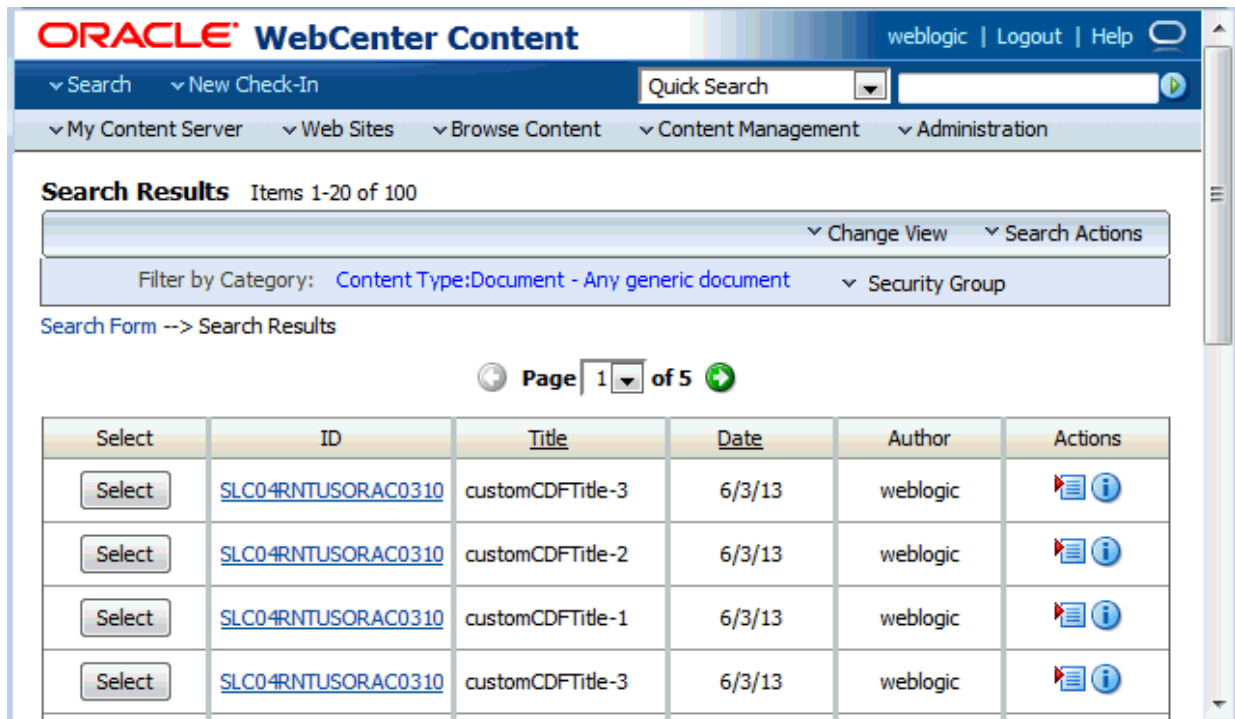
7. Make note of the file name, then click **Next**.

    The Check-in Confirmation pane opens.

Figure 33-23   Adding Site Studio Content: Check-in Confirmation
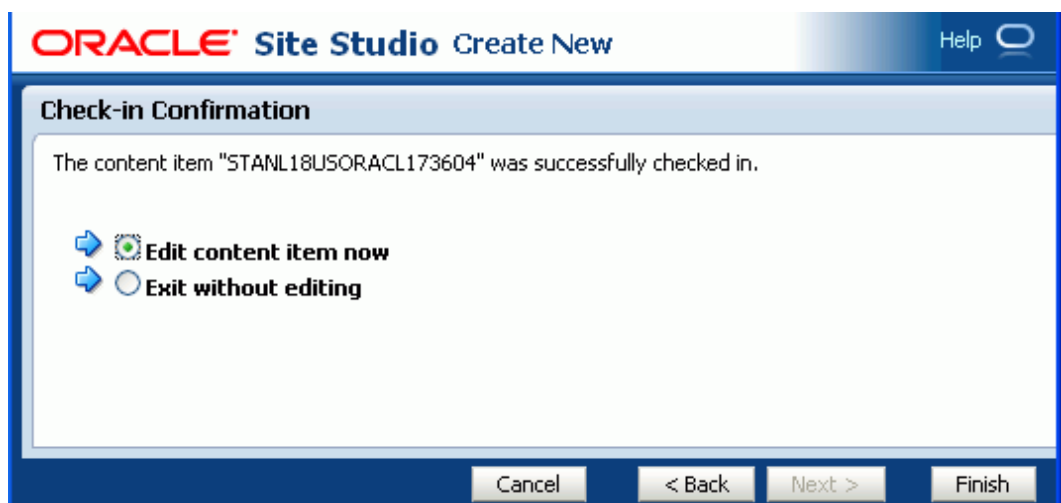
8. In the Check-in Confirmation pane, select one of the following:

    •   **Edit content item now** to open the Site Studio Contributor editor, where you can edit
        the content item as described in Editing Site Studio Files In-Context (beginning with
        Step 4).

        You start editing when you click **Finish**.

- **Exit without editing** to make no changes to the file.

9. 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.

10. In the Content Presenter Configuration dialog, click **Save**.

Creating and Editing Files In-Context in a Content Presenter Task Flow

With appropriate permissions, end users can edit HTML and Site Studio content in-context in a Content Presenter task flow.

In-context editing refers to editing content directly in Oracle WebCenter Portal at runtime, where the editor opens in a separate window.

> **✎ Note:**
>
> Users must have the `Contribute Page Content` portal-level permissions or the `Contribute` page-level permission on the portal or page containing the Content Presenter task flow, as well as being assigned a role with write permissions on Content Server. For more information, see Administering Security in a Portal and Managing Oracle WebCenter Portal Security in *Administering Oracle WebCenter Portal*.

The following sections describe how to perform in-context editing:

- Editing Site Studio Files In-Context
- Creating New Site Studio Content In-Context

Editing Site Studio Files In-Context

With appropriate permissions, end users can edit Site Studio contributor data files in-context in a Content Presenter task flow.

To edit a Site Studio file in-context:

1. In the floating toolbar, click **Contribute**.

> 💡 **Tip:**
>
> • By default, the floating toolbar appears in the top right of the page, but you can move it around on the page by using the handle on the left of the toolbar to drag it to the preferred location.
>
> • If you cannot see the floating toolbar or the **Contribute** option, you do not have permission to use contribution mode.
>
> • The keyboard shortcut to enter and exit contribution mode is **Ctrl+Shift+C**.
>
> You can change the key sequence to enter contribution mode. See Changing the Contribution Mode Key Sequence.

The editable areas of the page are highlighted with a dashed border.

2. Click the **Edit** icon in the upper right corner of the document chrome (Figure 33-24).

Figure 33-24   In-Context Edit Mode for a Site Studio File in a Content Presenter Task Flow

The file is opened in Site Studio Contributor.

3. In the Site Studio Contributor Data File editor, click a region to edit, as shown in Figure 33-25.

For information about editing files in Site Studio Contributor, see the Oracle Site Studio documentation.

Figure 33-25   Editing a File in Site Studio Contributor
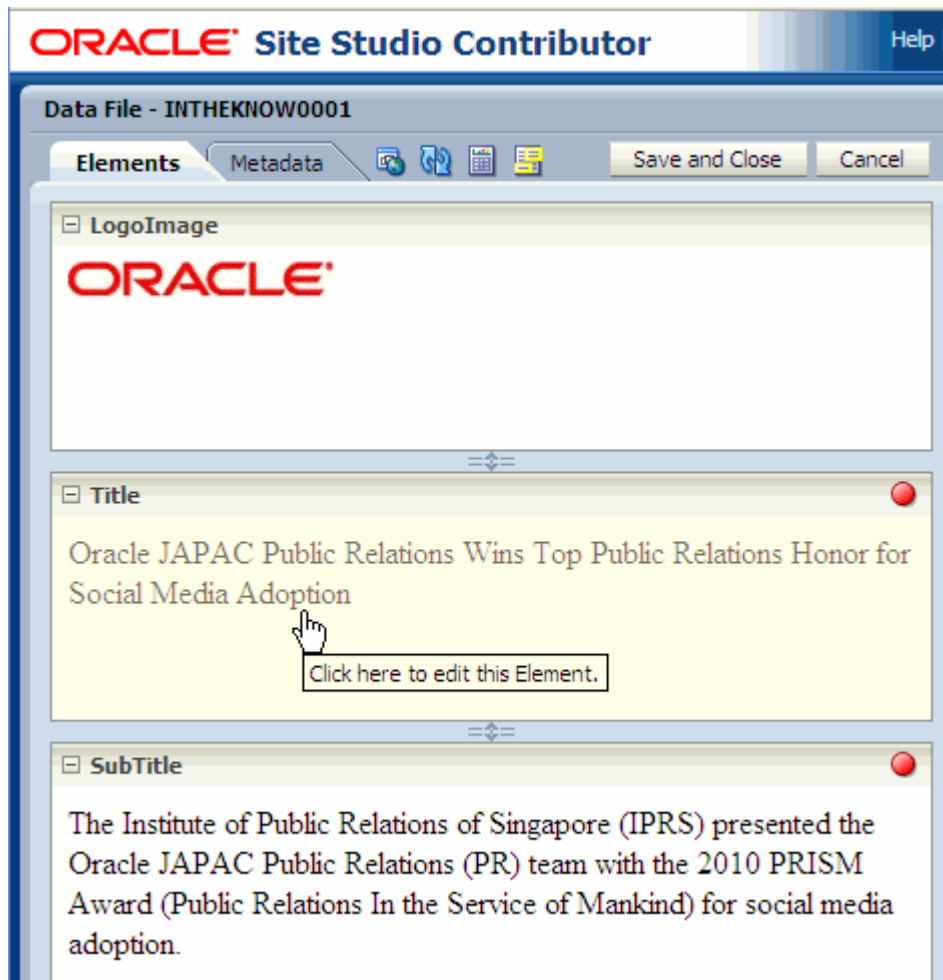
4. Click **Save and Close** to exit the Site Studio Contributor editor and return to the portal.

5. Click **Save** in the floating toolbar.

Creating New Site Studio Content In-Context

With appropriate permissions, users can create new web content in Site Studio during in-context editing in a Content Presenter task flow.

In-context creation of Site Studio files is slightly different than creating Site Studio files in the Content Presenter Configuration dialog, as described in Creating or Editing Site Studio Content in the Content Presenter Configuration Dialog. When creating a new Site Studio file in-context, you are limited to creating content that is of the same region definition, file location, security group, and document type as the content selected in the Content Presenter task flow. Additionally, the region definition must have been previously created in the Site Studio application.

To create a new Site Studio file in a Content Presenter task flow:

1. In the floating toolbar, click **Contribute**.

> **Tip:**
>
> • By default, the floating toolbar appears in the top right of the page, but you can move it around on the page by using the handle on the left of the toolbar to drag it to the preferred location.
>
> • If you cannot see the floating toolbar or the **Contribute** option, you do not have permission to use contribution mode.
>
> • The keyboard shortcut to enter and exit contribution mode is **Ctrl+Shift+C**.
>
> You can change the key sequence to enter contribution mode. See Changing the Contribution Mode Key Sequence.

The editable areas of the page are highlighted with a dashed border.

2. Click the **Create** icon in the upper right corner of the document chrome (Figure 33-26).

Figure 33-26   Create Icon for a Site Studio File in a Content Presenter Task Flow

3. In the Choose Content window, select **New Contributor data file**, then click **Next** (Figure 33-27).

Figure 33-27   Choose New Content File Window
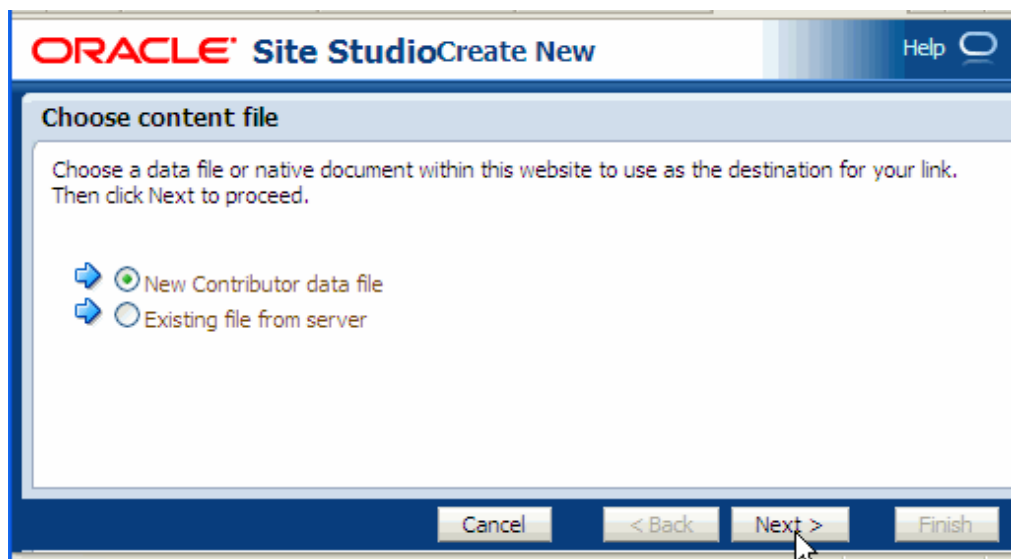
4. Fill out the Check-in Content form.

This form provides the metadata for the contributor data file and checks the file into Content Server. The file is empty until you (or another contributor) edits it. For more

information on filling out this form, see Uploading and Checking In Documents in *Using Oracle WebCenter Content*.

5. In the Check-in Confirmation window, select **Edit content item now**.

6. Click **Finish**.

   The Site Studio Contributor Data File editor opens ().

Figure 33-28   Site Studio Contributor File Editor

7. Edit the file, then click **Save and Close**.

8. Click **Save** in the floating toolbar.

Changing the Contribution Mode Key Sequence

You can change the key sequence used to enter contribution mode.

To change the key sequence used to enter contribution mode:

1. Open the `adf-config.xml` file.

2. Find the `content-contribution` element.

3. Change the `key-sequence` entry to the required key combination.

```
******** Content Contributor Mode adf-config.xml entries
***************

<page-editor-config xmlns="http://xmlns.oracle.com/adf/pageeditor/
config">
        <content-contribution>
          <enabled>true</enabled>
          <key-sequence>ctrl shift C</key-sequence>
```

```
            </content-contribution>
        </page-editor-config>
```

Working with Content Presenter Task Flow Properties

The Content Presenter task flow has associated properties, which users with sufficient privileges can access.

The following sections provide information about properties of the Content Presenter task flow and describe the task flow parameters.

• Setting Content Presenter Task Flow Properties

• Content Presenter Task Flow Parameters

Setting Content Presenter Task Flow Properties

The **View Actions** menu in the toolbar of the Content Presenter task flow in the page editor provides access to the properties dialogs: Parameters, Access, Display Options, Style, and Content Style.

> **Note:**
>
> The Content Presenter properties are intended for use by advanced users who want to bind a parameter to an EL expression. If you modify a property value in the properties dialogs, the new value overrides the value specified in the Content Presenter Configuration dialog, and that value becomes read-only in the Content Presenter Configuration dialog (Figure 33-29).

Figure 33-29   Read-Only Property Value in Content Presenter Configuration Dialog
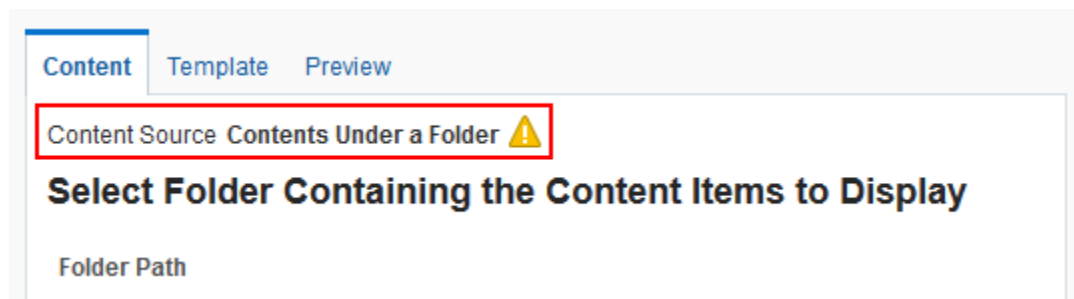
To set Content Presenter task flow component properties:

1. Open the page in the page editor.

   See Opening a Page in the Page Editor.

2. In the component toolbar, click the **View Actions** menu and select the properties you want to set:

Figure 33-30   Component Toolbar: View Actions Menu
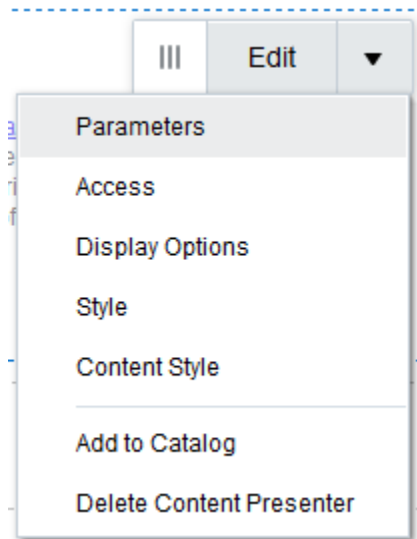
- Parameters control the default task flow content. For descriptions of each parameter, see Content Presenter Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

- Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

- The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

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.

> **Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Content Presenter Task Flow Parameters

There are several parameters that are unique to the Content Presenter task flow.

Table 33-1 describes the Content Presenter task flow parameters.

Table 33-1   Content Presenter Task Flow Parameters

Parameter	Description

`Data Source`	The data source of the content. The value depends on the value of **Data Source Type**:
	
	• When **Data Source Type** is **Single Node**, set **Data Source** to a single node identifier in the format:
	`connection_name#dDocName:content_id`
	
	For example:
	`myconnection.myco.com#dDocName:STAN_IDC-007619`
	
	• When **Data Source Type** is **Folder Contents**, set **Data Source** to a single node identifier in the format:
	`connection_name#dCollectionID:collection_id`
	
	For example:
	`myconnection.myco.com#dCollectionID:45535`
	
	• When **Data Source Type** is **Query Expression**, set **Data Source** to a CMIS (Content Management Interoperability Services) query expression.
	
	Notes:
	
	– Using a CMIS query as the **Data Source** requires a valid Task Flow Instance ID.
	
	Examples:
	`select * from cmis:document where cmis:name like 'test%'`
	
	`connectionName=connection_name#select * from cmis:document where cmis:createdBy = 'weblogic'`
	
	– If `connectionName` is not specified, then the primary connection will be used.
	
	For more information about how to format the query and examples, see Content Management REST API in *Developing for Oracle WebCenter Portal*.

Table 33-1   (Cont.) Content Presenter Task Flow Parameters

Parameter	Description
`Data Source` (cont)	• When **Data Source Type** is **Multi Node**, set **Data Source** to a set of comma-delimited node identifiers in the format:
	connection_name#dDocName:*content_id*, *connection_name*#dDocName:*content_id*,...
	For example: `myconn#dDocName:DOCUMENT_ID_12345,myconn#dDocName:DOCUMENT_ID_56789`
	where:
	• *connection_name* is the name of the content repository connection.
	Note: While WebCenter Portal allows specifying a different Content Server connection, iFraming is supported only for the default Content Server connection. Therefore, you cannot specify a non-default Content Server connection if the Content Presenter task flow will use iFrames to display content.
	• *content_id* is the Content ID for the content specified on the content information page for the item in Content Server, or the `CollectionID` value on the content server.
	• *collection_id* is the `dCollectionID` found in the URL for the folder information page in Content Server.
`Data Source Type`	The data source type of the content. Corresponds to the **Content Source** value in the Content Presenter Configuration dialog. Valid values are:
	• **Single Node**: A single content item.
	• **Folder Contents**: The contents of a folder.
	• **Query Expression**: The results of a query.
	• **Multi Node**: An ordered list of content items.
`Maximum Results`	The maximum number of results to display when **Data Source Type** is **Query Expression**.
	Default: `500`

> **Note:**
>
> The custom attribute `wcpResultsOfAQueryMaxResults` is introduced to handle the maximum range of results being displayed.

Table 33-1   (Cont.) Content Presenter Task Flow Parameters

Parameter	Description
`Region Template`	Specifies whether the display template is a Site Studio region definition template. This value is valid only with Content Server 11*g* or higher: • `${true}`: Display template is a Site Studio region definition template. The **TemplateView ID** value is set to the Content ID of the region template. • `${false}` (default): Display template is not a Site Studio region definition template. For information about creating and using Site Studio region templates, see Understanding Site Studio Integration and the Oracle WebCenter Content documentation library (`http://docs.oracle.com/cd/E28280_01/webcontent.htm`).
`Task Flow Instance ID`	The unique identifier of this task flow instance, used internally to maintain the association of the task flow instance with its customization and personalization settings. Do not edit this value. **Note**: Using a CMIS query as the **Data Source** requires a valid Task Flow Instance ID.
`Template Category ID`	The display template category ID to use in rendering results for multiple content items. This ID may reference the default template category for an out-of-the-box display template (Table 19-2) or a custom category created for a display template for multiple content items (see Creating a Content Presenter Display Template in *Developing for Oracle WebCenter Portal*).
`Template View ID`	The display template view ID to use in rendering results for single content items. Enter the view ID of a template that is configured in the Assets or Shared Assets page for a specific content type, or for list-based templates by category ID. This ID may reference one of the out-of-the-box display templates (Table 19-1), a custom display template (see Creating a Content Presenter Display Template in *Developing for Oracle WebCenter Portal*), or set to the contentID of a region template if the content is a region.

34
Enabling Document Management

Add the Content Manager task flow to a portal page to enable users to work with libraries, folders, and files in the Content Server repository.

> ✎ **See Also:**
>
> For an overview of the different options available in WebCenter Portal for working with portal content and adding content to a portal, see Introduction to Working with Content in a Portal.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the following portal-level permissions:
>
> - Standard permissions:
>   - `Basic Services: Edit Page Access, Structure, and Content` or `Basic Services: Edit Page Access and Structure`
>   - `Basic Services: View Pages and Content`
>   - `Documents: Create and Edit Documents`
>   - `Documents: View Documents`
> - Advanced permissions:
>   - `Pages: Edit Pages`
>   - `Documents: Create and Edit Documents`
>   - `Documents: View Documents`
>
> See About Roles and Permissions for a Portal.

Topics:

- About the Content Manager Task Flow
- Adding the Content Manager Task Flow to a Page
- Configuring the Content Manager Task Flow
- Working with Content Manager Task Flow Properties

About the Content Manager Task Flow

The Content Manager task flow enables you to work with libraries, folders, and files in the Content Server repository. It offers an easy and intuitive user interface with sophisticated searching capabilities. For information about the Content Manager interface and the features it offers, see Adding and Managing Documents in *Using Portals in Oracle WebCenter Portal*.

The **Documents** page in a portal and in the Home portal exposes the Content Manager task flow. You can access the Documents page by using the following syntax: `http://host:port/webcenter/portal_name/page_name/Documents`. The **Documents** page is not enabled in a portal by default. For information about enabling the **Documents** page in a portal, see Adding an Existing Page to the Portal Navigation.

You can also choose to add one or more instances of the Content Manager task flow to pages in your portal.

You can configure the Content Manager task flow to present a customized view to users, rather than the default view listing the folders and files. A customized view of the Content Manager task flow is called a *pin*. A pin is specific to an instance of the Content Manager task flow on a page, and is stored in the page definition. Whenever the page is rendered, it shows the pin, rather than the default view.

To enable portal members to work with the Content Manager task flow, ensure the Documents tool for the portal is enabled. If the Documents tool is *not* enabled in a portal, adding the Content Manager task flow to a page does not auto-populate the task flow with folders and files. If the Documents tool is enabled in a portal template and you create a portal based on that template, the Documents tool is also enabled in the new portal upon creation.

WebCenter Portal handles any necessary configuration with the back-end server at first use, not at portal creation. This is known as "lazy provisioning" and speeds the successful creation of a new portal by deferring the provisioning of tools until they are first used. Alternately, you can manually enable tools such as the Documents tool in a portal; in this case, WebCenter Portal immediately handles any necessary configuration with the back-end server.

The Content Manager task flow also supports Hybrid Enterprise Content Management (HECM), which helps portal members to easily and rapidly access enterprise content in Oracle Content and Experience Cloud.

Figure 34-1   Content Manager Task Flow with Cloud Folder
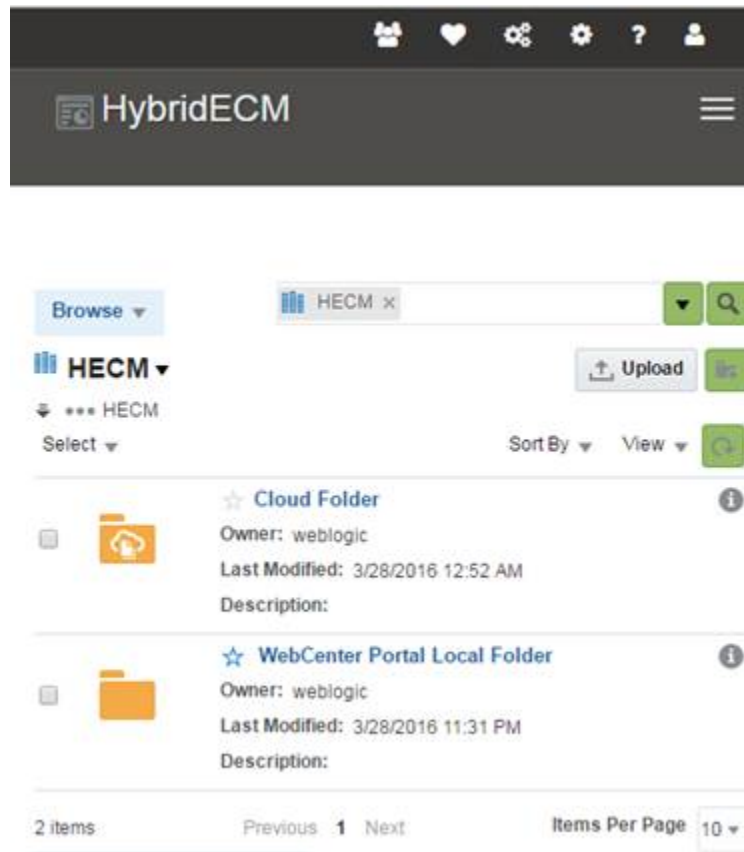
> **Note:**
>
> The permissions on WebCenter Portal are independent from the Oracle Content and Experience Cloud permissions and the WebCenter Portal roles cannot be paired with the Oracle Content and Experience Cloud roles. The following table lists the tasks you can perform with the specified WebCenter Portal document permissions.

Table 34-1   Permissions for Oracle Content and Experience Cloud Tasks

WebCenter Portal Document Permissions	Available Tasks on Oracle Content and Experience Cloud
`Document: View`	• View and download documents • View folders
`Document: View` `Document: Create and Edit`	• View, download and upload documents • View and create folders • Share documents and folders • Delete documents and folders • Copy and move documents and folders

Prerequisites for Working with the Content Manager Task Flow

For the Content Manager task flow to be available, ensure the following prerequisites are in place:

- Content Server is configured and all required components are enabled as described in Managing Connections to Oracle WebCenter Content Server in *Administering Oracle WebCenter Portal*.

- A Content Server connection is available for WebCenter Portal.

- Documents tool is enabled in the portal in which you want to add the Content Manager task flow. For information, see Enabling and Disabling Tools and Services Available to a Portal.

Adding the Content Manager Task Flow to a Page

To add the Content Manager task flow to a page:

1. Open the page in which you want to add the task flow in the page editor (see Opening a Page in the Page Editor).

2. Click **Add Content** to open the resource catalog.

3. Click **Content Management**.

> **Tip:**
>
> The presence or location of the section of the resource catalog that provides access to folders and files in the connected content repository depends on how the resource catalog is configured. In the default resource catalog, content selections are available under the Content Management section.

4. Click **Content Manager** to add the Content Manager task flow.

5. Save the page.

    To view your changes, publish the page draft as described in Publishing a Portal Page.

If the Documents tool is enabled in a portal, by default the Content Manager task flow displays the content of the root folder of the current portal. If the Documents tool is not enabled, the Content Manager task flow is added to the page and the following message is shown in the task flow.

```
Documents tool disabled.
```

```
Enable the Documents tool in Tools and Services, or contact the portal
manager.
```

For information about enabling the Documents tool, see Enabling and Disabling Tools and Services Available to a Portal.

Configuring the Content Manager Task Flow

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. Open the page containing the Content Manager task flow in the page editor.

2. Click anywhere inside the task flow, and then click **Configure**.

3. 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.

4. 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.

Figure 34-2   Creating a Customized View Using Content Manager Filters
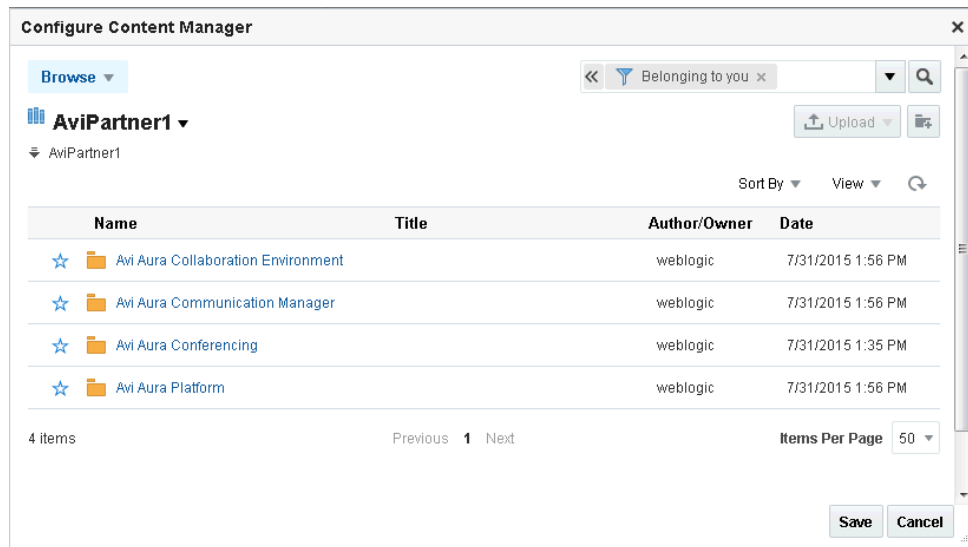
Working with Content Manager Task Flow Properties

The Content Manager task flow has associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu. For example, you select **Parameters** from the **View Actions** menu to set parameters in the Parameters dialog (Figure 34-3).

Figure 34-3   Content Manager Parameters
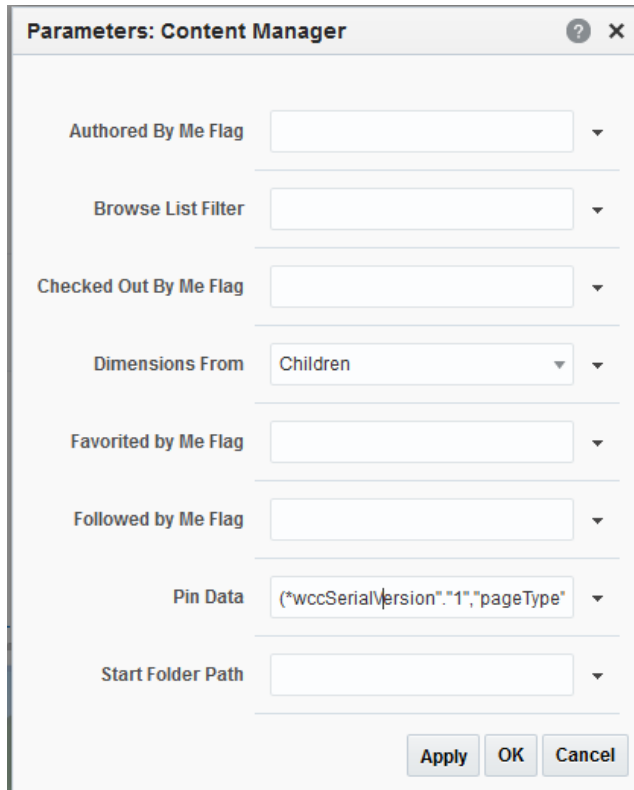
The following sections provide information about properties and parameters of the Content Manager task flow.

- Setting Content Manager Task Flow Properties
- Content Manager Task Flow Parameters

Setting Content Manager Task Flow Properties

The **View Actions** menu (Figure 34-4) in the toolbar of the Content Manager task flow in the page editor provides access to the following properties dialogs: Parameters, Access, Display Options, Style, and Content Style.

Figure 34-4   Content Manager Properties
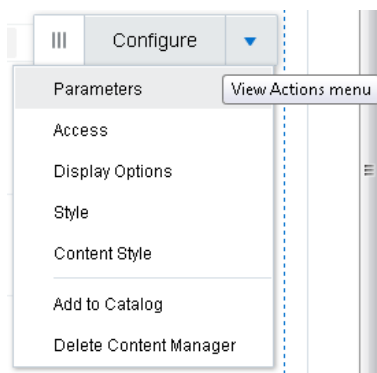
To set the Content Manager task flow component properties:

1. Open the page containing the Content Manager task flow in the page editor (see Opening a Page in the Page Editor).

2. In the component toolbar, click the **View Actions** menu and select the properties you want to set:

   - Parameters control the default task flow content. For descriptions of each parameter, see Table 34-2. Parameters can be wired to events, and can be used to facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

   > **Note:**
   >
   > If you use page parameter wiring, to ensure the Content Manager task flow displays the content correctly you need to edit the page definition of the page containing the task flow. In the page source code (Viewing and Modifying Page Source Code), on the **PageDef** tab, change the Content Manager task flow's refresh condition from `Refresh="IfNeeded"` to `RefreshCondition="IfNeeded"`.

   - Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

   - The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

     To support Hybrid Enterprise Content Management, ensure that you edit the following properties to stretch the DOCS embed UI:

     – **Display option**—Set `StretchContent` property to `true`.

     – **Content Style**—set the height of the container as required. For example, 800px.

       Alternatively, you can enable the **Allow Resize** properties in the **Display option** to increase the height of task flow.

     To override the customization or set the customization to support Hybrid Enterprise Content Management, do the following:

     a. Select the **Tools and Service** icon, then enable the **Documents** service and click **Customize the Tool Console**.

     b. Set the following document property in the system pages:

       – In the **Parameters** tab set `dimensionsFrom` to `parent`.

         To set the parameters, click the **Show the properties of region** icon.
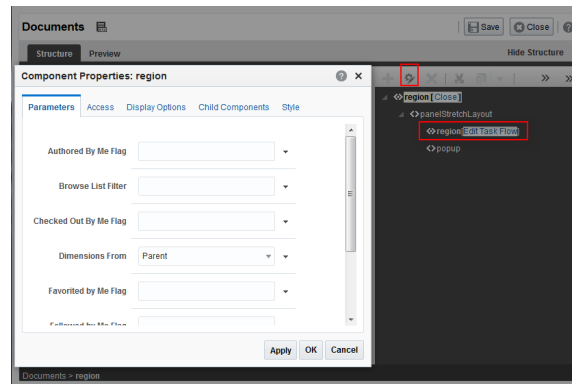
– In the **Display Options** tab, set `StretchContent` to `true`

To set the Display Options, select **showDetailFrame** node and click the **Show the properties of showDetailFrame** icon.
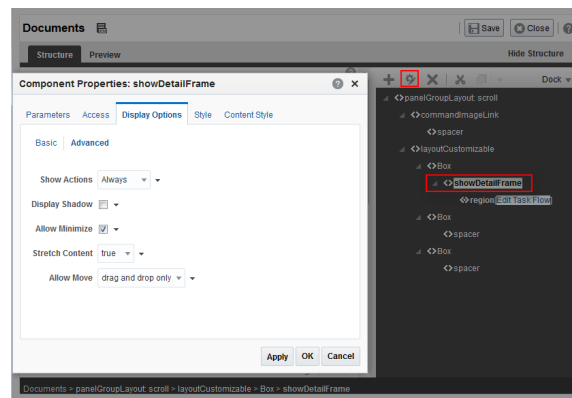
– In the **Content Style** tab, set the height as required. For example, 800px.

To set the Content Style, select **showDetailFrame** node and click the **Show the properties of showDetailFrame** icon.
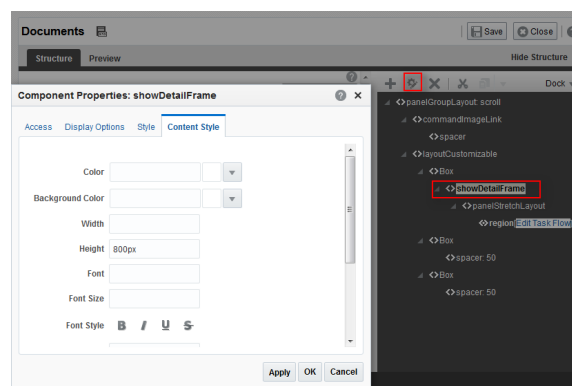
For more information about updating the properties in the Structure view, see Setting Component Properties in Structure View.

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.

> **Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

On the **View Actions** menu, the **Add to Catalog** action adds the task flow to a resource catalog, and the **Delete Content Manager** action removes the task flow from the page.

3. Save your changes.

Content Manager Task Flow Parameters

Table 34-2 describes the parameters that are unique to the Content Manager task flow.

Table 34-2   Content Manager Task Flow Parameters

Parameter	Description
`Authored By Me Flag`	Filter to show the items that are authored by the current user. The supported values are `true` and `false`.
`Browse List Filter`	Filter to indicate whether to list folders or files. The supported values are `documents` and `folders`.
`Checked Out By Me Flag`	Filter to show the items that are checked out by the current user. The supported values are `true` and `false`.
`Dimensions From`	Specifies whether the geometric dimensions of task flow should be inherited from its children or parent.
	The supported values are `children` and `parent`. The default value is `children`.
	We recommend to use `parent` for Hybrid Enterprise Content Management support and `children` for Non-Hybrid Enterprise Content Management support.
	If you specify `parent`, ensure that you edit the following properties:
	• **Display option** –Set `StretchContent` property to true.
	• **Content Style**–set the height of the container as required. For example, 800px. Alternatively, you can enable the **Allow Resize** properties in the **Display option** to increase the height of task flow.
	If you specify `children`, ensure that you reset the following properties to default values:
	• **Display option** –Set `StretchContent` property to `false`.
	• **Content Style** –Set default values.
	For more information, see Modifying Component Properties

Table 34-2   (Cont.) Content Manager Task Flow Parameters

Parameter	Description
Favorited By Me Flag	Filter to show the items that are favorited by the current user. The supported values are `true` and `false`.
Followed By Me Flag	Filter to show the items that are followed by the current user. The supported values are `true` and `false`.
Pin Data	Specifies the JavaScript Object Notation (JSON) string that defines a specific UI state that the task flow needs to display.
	Oracle recommends that you do not modify the Pin Data parameter. The value for this parameter is set when you configure the pin.
Start Folder Path	The name of the folder to be used as the root folder in the task flow content. Default is the root folder of the content repository for the current portal. Use the Search icon to locate the required folder.
	`Start Folder Path` is ignored when `fFolderGUID` in the Pin Data parameter is a system library.
	When you specify the Start Folder Path and if Pin Data value is present, the Pin Data value is used to render the view of the task flow.

35

Working with Workflow-Enabled Content

Workflow defines a review process, which can be manual or automatic. Assign files to a workflow, view files in a workflow, and approve or reject a file in workflow.

> **✐ Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Basic Services: Edit Page Access and Structure`, `Documents: Administration`, `Documents: Create and Edit Documents`, and `Documents: View Documents` (standard permissions) or `Pages: Edit Pages`, `Documents: Administration`, `Documents: Create and Edit Documents`, and `Documents: View Documents` (advanced permissions).
>
> See About Roles and Permissions for a Portal.

Topics:

- About Content Workflows
- Creating a Workflow on Content Server
- Assigning a File to a Workflow
- Configuring the Content Manager to Display Workflow Files
- Viewing Files in Workflow
- Participating in a Workflow

About Content Workflows

A workflow specifies how to route content for review and approval before it is released to the system. The workflow notifies approvers through mail messages when they have a file to review and approve.

Setting up workflows for a business process can provide several advantages:

- Workflows provide good reporting metrics. They can produce an audit trail of who signed off on content at various points of the life cycle of the content.
- Workflows help get the right information to the right person.
- Designing a workflow requires you to examine and understand your business processes, helping you find areas for improvement.

Workflows on WebCenter Portal content are available only when the connected content repository is Content Server and your system administrator has completed the prerequisite configuration. For information, see Configuring Oracle WebCenter Content Server in *Administering Oracle WebCenter Portal*. Workflows are supported for all documents uploaded to a portal, however workflows are not supported in a Home portal.

When a file is assigned to a workflow, it must be approved or rejected by one or more assigned approvers. The Content Manager task flow and Content Presenter provide access to the workflow-enabled content. In the Content Manager task flow, any user with privileges to view the contents of a file that is assigned a workflow can view the file while it is in a workflow, showing the pending changes. Content Presenter allows you to view both the published version of a content item (not showing the pending changes), and the pending changed version while it is in workflow. REST APIs show only the published version of a file, and do not show the pending changes in unreleased versions of files that are in workflow.

Only workflow approvers can perform actions on a file in workflow (such as upload new version, edit, rename, delete, copy/cut/paste). Non-approvers can view the file, but cannot perform any actions on the file.

The following sections provide conceptual information about workflow on files in WebCenter Portal:

- Understanding Workflow Types
- Understanding Workflow Steps
- Understanding Workflow Process

Understanding Workflow Types

Workflows are defined on Content Server. Content Server supports the following types of workflows:

- A *basic workflow* defines the review process for specific content items, and must be initiated manually.

- A *criteria workflow* is used for content that enters a workflow automatically based on metadata that matches predefined criteria.

> **✎ See Also:**
>
> For more information about working with workflows in the Content Server user interface, see Using Workflows in *Using Oracle WebCenter Content*.

For information about configuring Content Server to enable the built-in workflows, see Enabling the WebCenterConfigure Component in *Administering Oracle WebCenter Portal*.

Understanding Workflow Steps

Steps define the process and the functionality of a workflow. Each workflow can include multiple review and notification steps with multiple reviewers to approve or reject the content at each step. For each step in a workflow, a set of users and a step type are defined.

Table 35-1   Workflow Steps

Step Type	Description
Contribution	The initial step of a basic workflow. The workflow defines who the contributors are.
Auto-Contribution	The initial step of a criteria workflow. There are no predefined users involved in this step. The contributor who checks in a content item that enters the workflow process automatically becomes part of the workflow.
Review	Users can approve or reject the content; editing is not allowed.
Review/Edit Revision	Users can edit the content if necessary then approve or reject it, maintaining the revision.
Review/New Revision	Users can edit the content if necessary then approve or reject it, creating a new revision.

After a workflow is enabled, it goes through several specific stages. See also, Workflow Steps in *Managing Oracle WebCenter Content*

Understanding Workflow Process

For information about the workflow process, see Workflow Process in *Managing Oracle WebCenter Content*.

Creating a Workflow on Content Server

Workflows are used to set up a review process for individual documents that enter the workflow automatically when they match predefined criteria. System administrators define workflow criteria on Content Server. For information about setting up a workflow, see Managing Workflows in *Managing Oracle WebCenter Content*.

Assigning a File to a Workflow

To assign a file to a workflow:

1. Add the Content Manager task flow to a page. For information, see Adding the Content Manager Task Flow to a Page .

2. Navigate to the view mode of the portal.

3. Upload the file that you want to assign to the workflow.

    a. In the Content Manager task flow, click **Upload**. Click **Standard Check-In**.

    b. Use the **Browse** button to specify the location of the file that you want to add to the workflow.

    c. In the Document Upload dialog, expand the **Metadata** section.

    d. Scroll down to the field based on which the workflow criterion is defined on Content Server.

    e. Specify the workflow criteria.

You must specify the workflow criterion that was set during workflow creation on Content Server. For example, suppose the workflow criterion on the Content Server is defined on the Workflow Assignment field, and a file will enter a workflow when the value of Workflow Assignment is specified as `CustomSingleUserApproval`. To assign the file to this workflow, you need to type `CustomSingleUserApproval` in the Workflow Assignment field. For information about how to create a workflow on Content Server, see Managing Workflows in *Managing Oracle WebCenter Content*.

f. If you want to add another file to the workflow, use **Browse** to specify the location of the file. Then, select the file in the Documents section. In the Metadata section, scroll down to the workflow criterion field and click the Copy icon next to the field. For example, click the Copy icon next to the Workflow Assignment field, as shown in Figure 35-1.

Figure 35-1   Specifying the Workflow Criterion
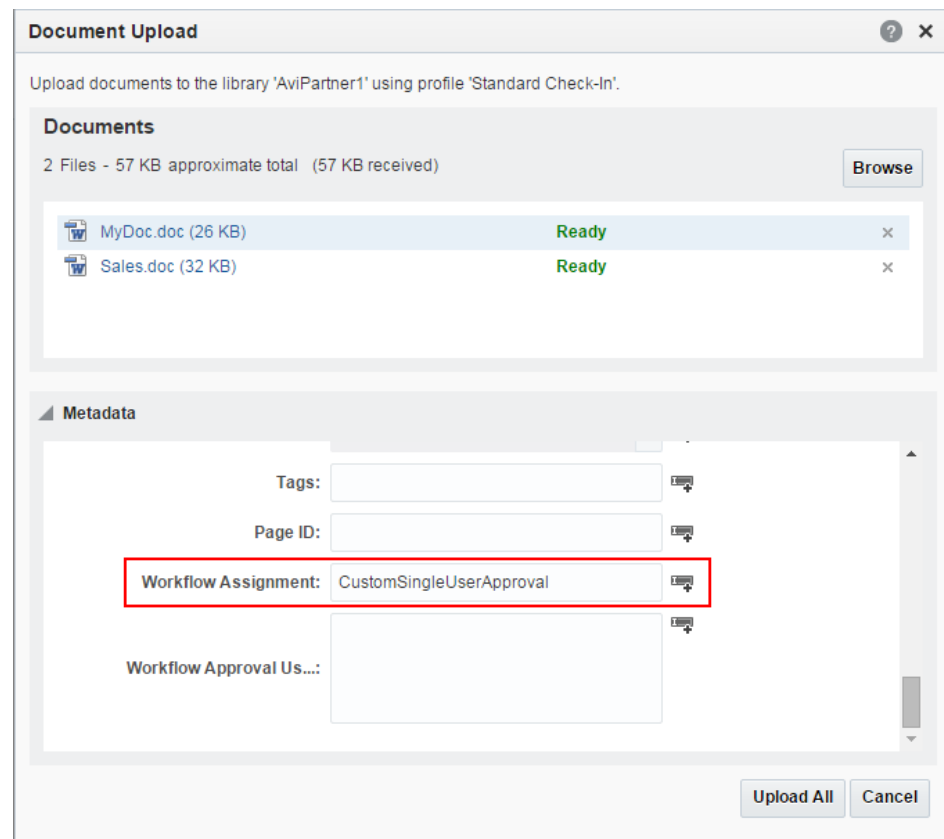
g. Click **Upload** or **Upload All**.

A message is displayed that the document has been submitted to the specified workflow for review.

Figure 35-2   Message Showing Document Assigned to a Workflow
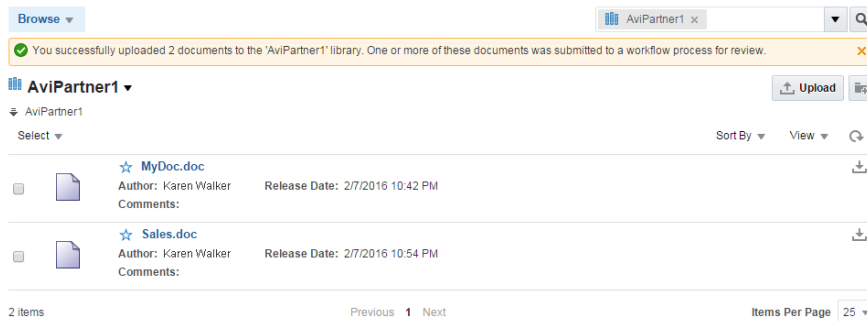
Configuring the Content Manager to Display Workflow Files

To view the files that are assigned to a workflow:

1. Add the Content Manager task flow to a page, as described in Adding the Content Manager Task Flow to a Page or navigate to the Content Manager task flow you want to configure.

2. While you are in the Page Edit mode, select the task flow. This displays the Configure action. Click **Configure**.

3. In the access selection area, click **Browse**, then select **Browse** from the list to display the Libraries page.

4. From the **Filter** drop-down list, select **System Libraries**.

Figure 35-3   Selecting System Libraries
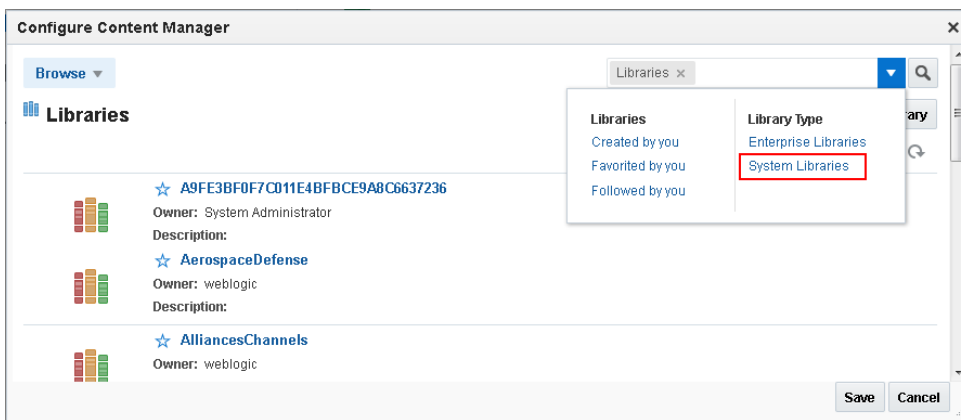
5. Click the **Content In Workflow** link.

Figure 35-4   Selecting Content In Workflow
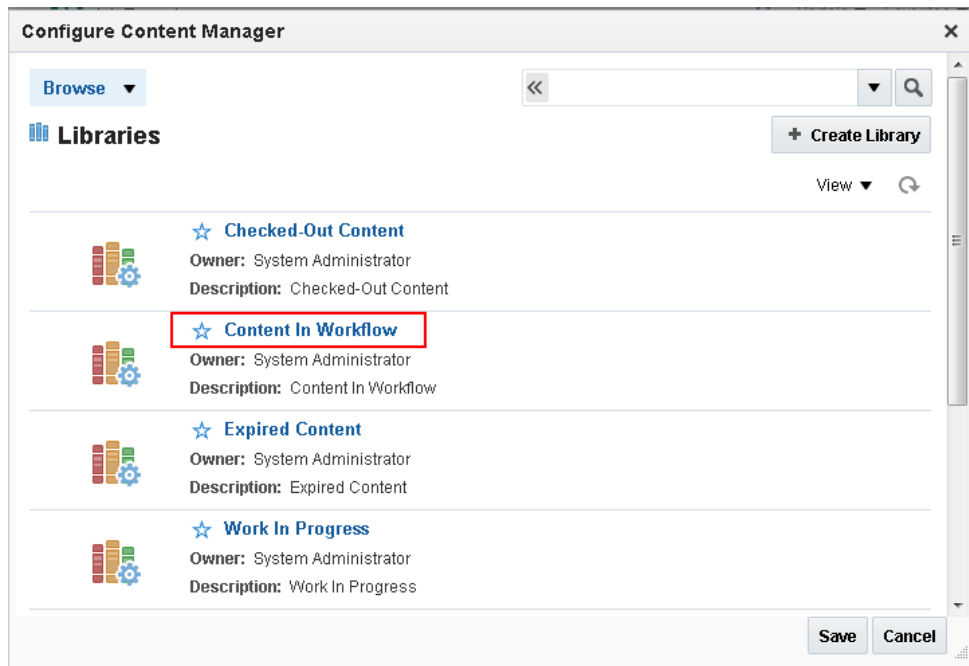
6. Click **Save**.

Viewing Files in Workflow

You can view files in a workflow and the workflow details by using the Content Manager task flow or the Content Presenter task flow:

*   Viewing Workflow Files in the Content Manager Task Flow

*   Viewing Workflow Files in a Content Presenter Task Flow

> **Note:**
>
> Only workflow approvers can perform actions on a file in a workflow (such as upload new version, edit, rename, delete, copy/cut/paste). Non-approvers can view the file, but cannot perform any actions on the file.

Viewing Workflow Files in the Content Manager Task Flow

To view a workflow file in the Content Manager task flow:

1. Navigate to the portal page that contains the Content Manager task flow. Click the name of the file that you want to open.

2. Click the **Summary** tab.

    The task flow displays a notification that the file is in workflow. If you are assigned as an approver of the workflow, you will see controls that allow you to approve, reject, or view workflow details of the file (Figure 35-5).

Figure 35-5   Content Manager Showing a File in a Workflow
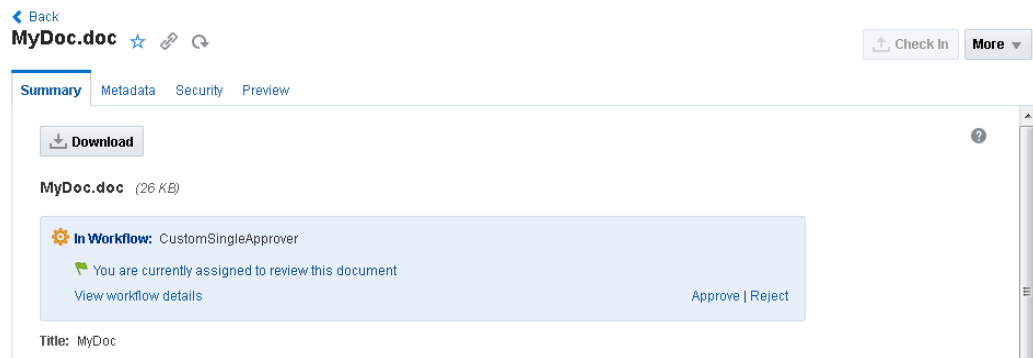
3. To view further details about the workflow, if you are an approver, click **View workflow details** to display the workflow information (Figure 35-6).

Figure 35-6   Workflow Information in Content Server

> **✎ Note:**
>
> To enable the availability of the workflow **Details** link in the preview pane, *both* of the following two requirements must be met:
>
> • You must access the WebCenter Portal application through Oracle HTTP Server (OHS) to expose Content Server and the WebCenter Portal application under the same host and port. For information about setting up OHS as the front-end to WebCenter Portal, see Configuring Oracle WebCenter Content Server in *Administering Oracle WebCenter Portal*.
>
> • WebCenter Portal must be connected to a Content Server repository, with the `webContextRoot` parameter set to a Content Server host name. For information on setting `webContextRoot`, see Creating a Connection to Oracle WebCenter Content Server in *Administering Oracle WebCenter Portal*. To set `webContextRoot` through WLST, see the `createContentServerConnection` and `setContentServerConnection` sections in *WebCenter WLST Command Reference Reference*.

Clicking the **View Workflow History** link in the Workflow Details dialog shows the details of all workflow process for the selected file (Figure 35-7).

Figure 35-7   Workflow History
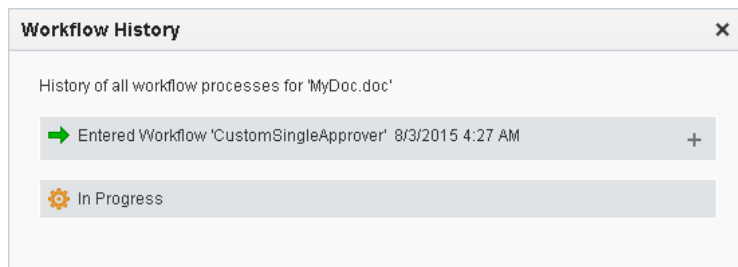
4. If you are an approver or reviewer for the file, click **Approve** or **Reject** to indicate the result of your review of the file. These links are active only when the file is pending approval. If you reject the file, enter the justification for your rejection. For other ways to approve or reject a file, see Approving or Rejecting a File in Workflow.

Viewing Workflow Files in a Content Presenter Task Flow

You can view content items displayed in Content Presenter while they are in a workflow, including Site Studio contributor data files displayed in a Site Studio region template. As long as the content item has at some point had Released status in Content Server, you can display the content item in Content Presenter. Then, if a revision of the content item is pending in workflow, Content Presenter allows approvers for the content item to toggle between the published version and the version in workflow in the page editor or in-context edit (contributor) mode, and also provides links to approve or reject the item in workflow, and view additional details about the item.

To view a file in workflow in Content Presenter:

1. Add a Content Presenter task flow to a page (see Adding a Content Presenter Task Flow to a Page), selecting a file that has been released from a workflow.

   If any changes are now made to the selected file, you can view the workflow state of the file in Content Presenter. For example, if a new version of the file is uploaded, you can review the changes and approve and reject the file using Content Presenter.

2. To view the current workflow state of the file in Content Presenter, view the page in the page editor (Figure 35-8), or view the file in in-context edit (contributor) mode (Figure 35-9).

   Content Presenter displays workflow controls to show that the file is in workflow. The initial view of the file shows the published version of the file.

   > **Note:**
   >
   > To view the page in the page editor, or view the file in in-context edit (contributor) mode, respectively, see:
   >
   > • Opening a Page in the Page Editor
   >
   > • Creating and Editing Files In-Context in a Content Presenter Task Flow
   >
   > See also, Entering Contribution Mode in *Using Portals in Oracle WebCenter Portal*.

Figure 35-8   Page Editor: Workflow Controls in Content Presenter
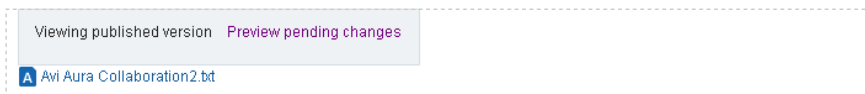
Figure 35-9   In-Context Edit (Contributor) Mode: Workflow Controls in Content Presenter
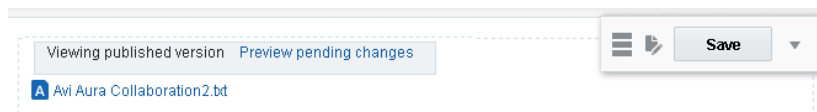
3. To view further details about the workflow, click **Details** to display the workflow information in Content Server (including workflow name, steps performed, action performed, date of action, and who performed the action).

> **Note:**
>
> To enable the availability of the workflow **Details** link in the preview pane, *both* of the following two requirements must be met:
>
> • You must access the WebCenter Portal application through Oracle HTTP Server (OHS) to expose Content Server and the WebCenter Portal application under the same host and port. For information about setting up OHS as the front-end to WebCenter Portal, see Configuring Oracle WebCenter Content Server in *Administering Oracle WebCenter Portal*.
>
> • WebCenter Portal must be connected to a Content Server repository, with the `webContextRoot` parameter set to a Content Server host name. For information on setting `webContextRoot`, see Creating a Connection to Oracle WebCenter Content Server in *Administering Oracle WebCenter Portal*. To set `webContextRoot` through WLST, see createContentServerConnection and setContentServerConnection in *WebCenter WLST Command Reference Reference*.

4. If you are a workflow approver, click **Preview pending changes** to preview the changes to the file, then **Approve** or **Reject** the changes in either the page editor (Figure 35-10), or in-context edit (contributor) mode (Figure 35-11). These links are active only when the file is pending approval. If you reject the file, enter the justification for your rejection. For other ways to approve or reject a file, see Approving or Rejecting a File in Workflow.

Figure 35-10   Page Editor: Preview File in Workflow to Approve or Reject in Content Presenter

Figure 35-11   In-Context Edit (Contributor) Mode: Preview File in Workflow to Approve or Reject in Content Presenter
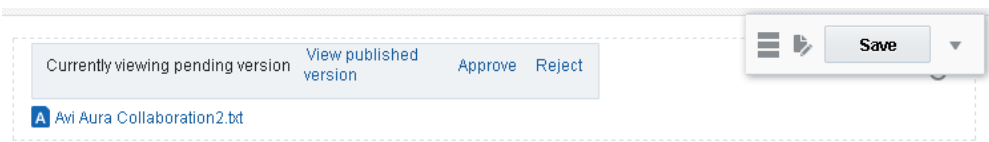
When a file in workflow is approved, it is released from workflow, and the workflow controls no longer display in Content Presenter. If you edit the file and make further changes, it will return to workflow and the workflow controls will display again.

When a file in workflow is rejected, it remains in workflow, returning to the `contribution` step. It must be updated by the file owner for the **Approve** and **Reject** controls to display.

Participating in a Workflow

The following sections describe how to work with a file through the workflow process:

- Approving or Rejecting a File in Workflow
- Working with a Rejected Revision

Approving or Rejecting a File in Workflow

As an assigned approver for a workflow, you will need to review and either approve or reject a file to which you are assigned. A file is released from workflow when it is approved in accordance with its workflow type (see Understanding Workflow Types).

To approve or reject a file in a workflow:

1. View the file for which you are an assigned approver, in either of the following ways:

   - In the Content Manager task flow, as described in Viewing Workflow Files in the Content Manager Task Flow.

   - In the Content Presenter task flow, as described in Viewing Workflow Files in a Content Presenter Task Flow.

2. Open the file, and click the **Summary** tab.

3. Click **Approve** or **Reject** to indicate the result of your review of the file. These links are active only when the file is pending approval. If you reject the file, enter the justification for rejection.

When a file in a workflow is approved, it is released from the workflow. If you edit the file and make further changes, it will return to the workflow.

When a file in a workflow is rejected, it remains in the workflow, but must be updated by the file owner for the **Approve** and **Reject** controls to display.

Working with a Rejected Revision

If a file in a workflow is rejected, it remains in the workflow and returns to the original submitter in the `contribution` workflow step. The contributor can then revise the file and save it. After saving, the file automatically moves back into the workflow approval step again to be approved or rejected by assigned approvers.

For information about editing a rejected file, see Working with a Rejected Revision in *Using Oracle WebCenter Content*.

36

Presenting Application Data in a Portal

Use portal assets to render data from an application on a portal page.

> ✏️ **Permissions:**
>
> To present data on a portal page, you must be a portal manager or a portal member with the portal-level permissions `Basic Services: Edit Page Access and Structure` (standard permissions) or `Pages: Edit Pages` (advanced permissions). You also need the permissions noted in the procedures for the specific tasks you will perform.
>
> See About Roles and Permissions for a Portal.

Topics:

- Presenting Data from a REST or SQL Data Source Using a Business Object
- Presenting Data from a Web Service Using a Data Control

Presenting Data from a REST or SQL Data Source Using a Business Object

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 basic steps to accomplish this are:

1. *Create data source*. Create a REST or SQL data source from which to retrieve the data to present on the page (see Creating a REST Data Source and Creating a SQL Data Source).

2. (Optional) *Create business object*. If you need to filter the attributes and methods retrieved from the data source, create a business object (see Creating a Business Object). If you do not create a unique business object, one is automatically created when a data source is selected in the Define Data Visualization wizard, and all the attributes and methods for the data source are added to the business object. Manually-created business objects are listed on the portal **Assets** page and in the Define Data Visualization wizard, but automatically-created business objects are internal and not exposed anywhere.

3. *Determine visualization template*. Decide if you can use one of the built-in visualization templates (see About the Built-In Visualization Templates), or if you need to work with a developer to create a custom visualization template. When a custom visualization

template is uploaded to a portal, it is shown on the **Assets** page for the portal; it can also be made available as a shared asset, available to all portals.

4. *Configure data visualization*. Add a data visualization component (Data Presenter Visualization) to a page, then configure the component to define the data visualization that you want to render on the page (see Configuring a Data Visualization).

> ✎ **See Also:**
>
> - Working with Business Objects
> - Working with Visualization Templates
> - Working with Data Visualizations
> - Working with Data Sources

Presenting Data from a Web Service Using a Data Control

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.

The basic steps to accomplish this are:

1. Create a data control (see Creating a Web Service Data Control).

2. Create a custom task flow (see Creating a Task Flow).

3. Add the custom task flow component to a page, then add the data control you want to render on the page as a table, form, or graph (see Consuming a Data Control in a Task Flow and Controlling the Data Displayed in a Task Flow Using a Data Control).

> ✎ **See Also:**
>
> - Working with Web Service Data Controls
> - Working with Task Flows

37

Integrating with Oracle Content and Experience Cloud

Integrate WebCenter Portal with Oracle Content and Experience Cloud to enable users to add, view, manage, and share documents and collaborate in Oracle Content and Experience Cloud securely from a portal.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Edit Pages` (advanced permissions).
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- About the Oracle DOCS Content Manager Task Flow
- Adding the Oracle DOCS Content Manager Task Flow to a Page
- Customizing the Oracle Content and Experience Cloud URL Connection
- Working with Oracle DOCS Content Manager Task Flow Properties

About the Oracle DOCS Content Manager Task Flow

The Oracle DOCS Content Manager task flow enables you to integrate Oracle Content and Experience Cloud with WebCenter Portal, so that end users can quickly access documents in Oracle Content and Experience Cloud. Users can add, view, manage, share documents and collaborate in Oracle Content and Experience Cloud with robust security within WebCenter Portal.

The Oracle DOCS Content Manager task flow:

- Provides convenient and secure access to Oracle Content and Experience Cloud within WebCenter Portal.

- Allows collaboration with external non-WebCenter Portal users.

  If external non-WebCenter Portal users want to share documents with WebCenter Portal users, they can use Oracle Content and Experience Cloud to allow access to those documents from within a portal in WebCenter Portal.

  For example, suppose marketing assets created by design agencies and some partner information need to be shared with WebCenter Portal users. However, the marketing agencies and partners have Oracle Content and Experience Cloud accounts but not

WebCenter Portal accounts. If marketing assets and partner documents are shared on Oracle Content and Experience Cloud, WebCenter Portal users can access the documents from a portal that includes the Oracle DOCS Content Manager task flow.

For more information on how to use Oracle Content and Experience Cloud in a portal, see Working with Oracle Content and Experience Cloud in *Using Portals in Oracle WebCenter Portal*.

Adding the Oracle DOCS Content Manager Task Flow to a Page

As an application specialist or portal manager, you can add the Oracle DOCS Content Manager task flow to a page, so that the end users can work with documents in Oracle Content and Experience Cloud.

To add the Oracle DOCS Content Manager task flow to a page:

1. Ensure that your system administrator has added the WebCenter domain in Oracle Content and Experience Cloud and registered Oracle Content and Experience Cloud with WebCenter Portal. For more information, see Integrating with Oracle Content and Experience Cloud in *Administering Oracle WebCenter Portal*.

2. Open the page in which you want to add the task flow in the page editor (see Opening a Page in the Page Editor).

3. Click **Add Content** to open the resource catalog.

4. Click **Content Management**, then **Oracle DOCS Content Manager** to add the task flow.

Figure 37-1   Oracle DOCS Content Manager Task Flow
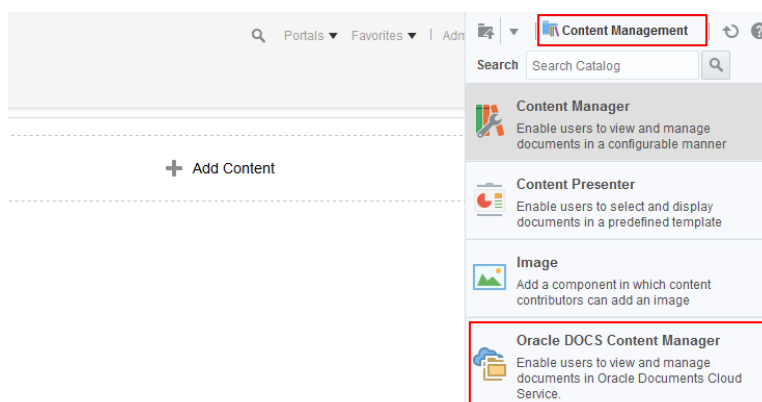
5. Save the page.

> **✎ Note:**
>
> If your system administrator has not configured the default Oracle Content and Experience Cloud URL connection, an error message is reported:
>
> ```
> To access Oracle Documents Cloud Service, you must specify a
> valid DOCS URL in taskflow parameters.
> ```
>
> Contact your system administrator to add a default Oracle Content and Experience Cloud connection or customize the URL as described in Customizing the Oracle Content and Experience Cloud URL Connection.

6. To view your changes, publish the page draft as described in Publishing a Portal Page.

Oracle Content and Experience Cloud is integrated with WebCenter Portal (see Figure 37-2).

Figure 37-2   Oracle Content and Experience Cloud Integrated with WebCenter Portal
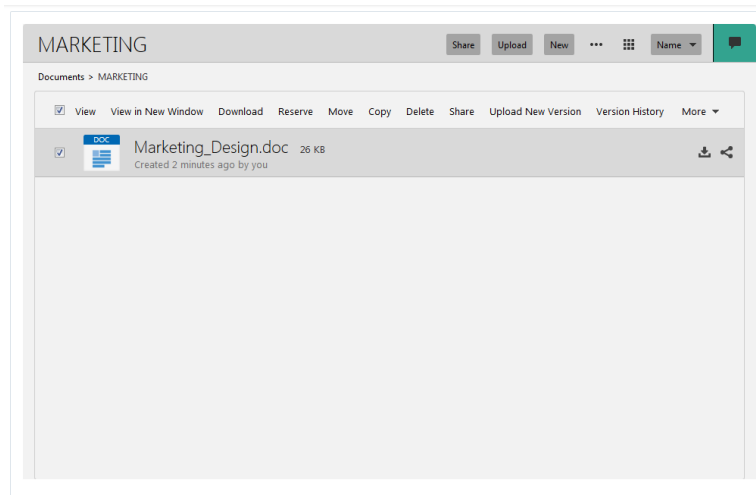
Customizing the Oracle Content and Experience Cloud URL Connection

Your system administrator defines a default URL connection. For more information, see Creating a Default Oracle Content and Experience Cloud Connection Using WSLT in *Administering Oracle WebCenter Portal*. If the Oracle Content and Experience Cloud URL connection is configured as the default connection, WebCenter Portal provides direct access to the Oracle Content and Experience Cloud home directory.

If you want to connect to a different URL, or access your favorite folder or preview a file directly from WebCenter Portal, you can customize the URL connection.

To customize the Oracle Content and Experience Cloud URL connection:

1. Open the page that contains an Oracle DOCS Content Manager task flow in the page editor (see Opening a Page in the Page Editor).

2. In the Oracle DOCS Content Manager task flow, click the **View Actions** menu, then select **Parameters** to open the Parameters dialog.

Figure 37-3   Oracle DOCS Content Manager View Actions Menu
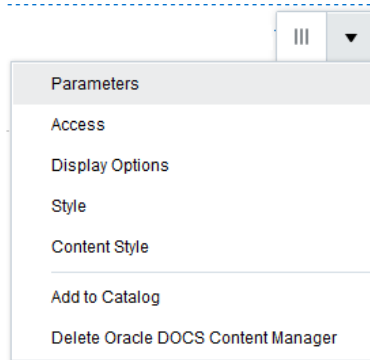
3. Set the parameters as required, then click **OK**. For descriptions of each parameter, see Oracle DOCS Content Manager Task Flow Parameters.

Figure 37-4   DOCS Content Manager Task Flow - Parameters
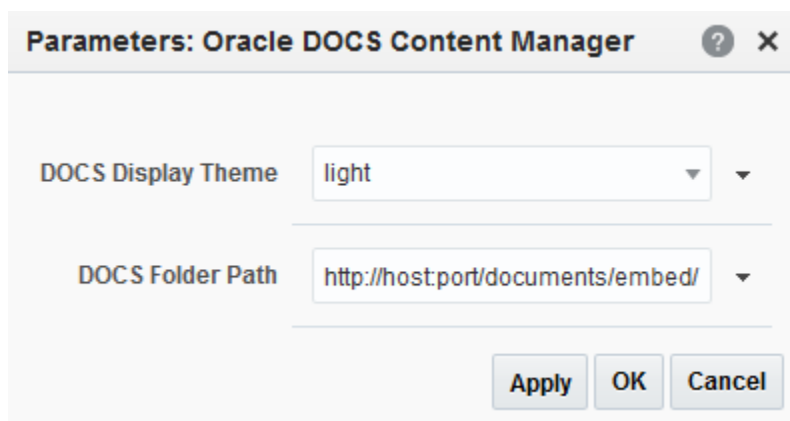
4. Click **Save**.

5. To view your changes, publish the page draft as described in Publishing a Portal Page.

Working with Oracle DOCS Content Manager Task Flow Properties

The Oracle DOCS Content Manager task flow has associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu (Figure 37-5).

Figure 37-5   Oracle DOCS Content Manager View Action Menu
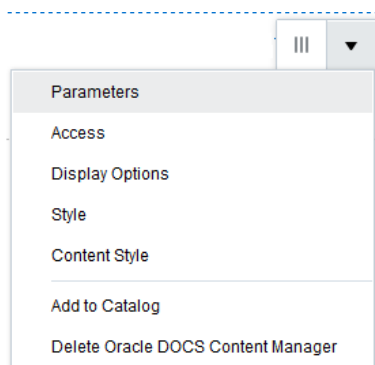
The following sections provide information about properties and parameters of the Oracle DOCS Content Manager task flow:

- Setting Oracle DOCS Content Manager Task Flow Properties
- Oracle DOCS Content Manager Task Flow Parameters

Setting Oracle DOCS Content Manager Task Flow Properties

The **View Actions** menu (Figure 37-5) in the toolbar of the Oracle DOCS Content Manager task flow in the page editor provides access to the following properties dialogs: Parameters, Access, Display Options, Style, and Content Style.

To set the Oracle DOCS Content Manager task flow component properties:

1. Open the page containing the Oracle DOCS Content Manager task flow in the page editor (see Opening a Page in the Page Editor).

2. In the component toolbar, click the **View Actions** menu and select the properties you want to set:

   - Parameters control the default task flow content. For descriptions of each parameter, see Oracle DOCS Content Manager Task Flow Parameters.

   - Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

   - The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

   On the **View Actions** menu, the **Add to Catalog** action adds the task flow to a resource catalog, and the **Delete Oracle DOCS Content Manager** action removes the task flow from the page.

3. Save your changes.

Oracle DOCS Content Manager Task Flow Parameters

Table 37-1 describes the parameters that are unique to the **Oracle DOCS Content Manager** task flow.

Table 37-1   Oracle DOCS Content Manager Task Flow Parameters

Parameter	Description
DOCS Display Theme	Specifies the background theme for the Oracle Content and Experience Cloud.
	The available values are:
	• light
	• dark
	• transparent light
	• transparent dark

Table 37-1   (Cont.) Oracle DOCS Content Manager Task Flow Parameters

Parameter	Description
`DOCS Folder Path`	Specifies the relative or absolute path of the document folder.
	To customize the Oracle Content and Experience Cloud URL connection, specify the folder path that you choose to connect.
	• You can specify absolute path of the folder starting with `http://` .
	Ensure that you add `/embed/folder/home` in the URL after `/documents` to navigate to the home directory of Oracle Content and Experience Cloud.
	For example:
	– URL for home directory: `http://<host>:<port>/documents/embed/folder/home`
	– URL for a folder: `http://<host>:<port>/documents/embed/folder/<folder_id>`
	– URL for a document: `http://<host>:<port>/documents/embed/fileview/<file_id>`
	Where, `<host>:<port>` is the host and port of the Oracle Content and Experience Cloud.
	Note: If you specify absolute folder path, the specified path is used for the Oracle Content and Experience Cloud connection and does not look for the default connection specified by your system administrator.
	• You can specify the relative path of the file in `DOCS Folder Path`.
	For example:
	– URL for a folder: `/folder/<folder_id>/<_Foldername>/nameasc`
	– URL for a file: `/fileview/<file_id>/<_filename.ext>`
	Note: If you specify the relative path, the specified path is relative to the default Oracle Content and Experience Cloud connection specified by your system administrator.
	• If you do not specify `DOCS Folder Path` and prefer to leave it blank, the default connection specified by your system administrator is used for the Oracle Content and Experience Cloud connection.

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38

Enabling Wikis in a Portal

Enable wiki functionality to allow portal users to create, edit, and manage wiki documents.

> ✏ **See Also:**
>
> For an overview of the different options available in WebCenter Portal for working with portal content and adding content to a portal, see Introduction to Working with Content in a Portal.

> ✏ **Permissions:**
>
> To perform the tasks in this chapter, you need the following permissions:
>
> - To enable the Documents tool to allow for wiki functionality in a portal, you must be the portal manager or member with `Manage Security and Configuration` or `Manage Configuration` permission in the portal.
>
> - To create a portal page using the Wiki page style, you must be the portal manager or member with `Basic Services: Edit Page Access, Structure, and Content`.
>
> Creating and editing a wiki document, viewing wikis, and creating a personal page using the Wiki page style are tasks available to the knowledge worker with permissions described in Working with Wikis in *Using Portals in Oracle WebCenter Portal*.
>
> See About Roles and Permissions for a Portal.

Topics:

- About Wikis
- Prerequisites for Enabling Wiki Functionality
- Adding an Existing Wiki to a Portal
- Creating a New Wiki In a Portal
- Working with Wikis
- Wiki Use Case Examples

About Wikis

Wikis are web pages that offer in-place editing using HTML or a simple mark-up language called wiki mark-up.

Wikis epitomize the concepts of community and collaboration by allowing all authorized community members to contribute their information to a body of knowledge. Users with sufficient permissions on a wiki can add, revise, or delete content. Wikipedia (`http://www.wikipedia.com`) is a widely-known example of the use of wikis. Users from all over the world collaborate to create and edit Wikipedia pages, resulting in a rich, dynamic knowledge base for everyone's benefit.

In Oracle WebCenter Portal, you create a wiki page using the Wiki page style, which supports a dedicated wiki page. The wiki page includes a default wiki document, with the same name as the page. The wiki page is automatically added to the portal's navigation.

Wiki and blog functionality in WebCenter Portal requires a connection to a Oracle WebCenter Content Server content repository. However, it is important to be aware that wikis and blogs are managed by WebCenter Portal, not by WebCenter Content Server. Thus, folder settings in WebCenter Content Server have no effect. For example, specifying a default profile on a WebCenter Content Server folder in which wikis or blogs are stored has no effect on the creation of new wiki or blog documents in that folder.

Prerequisites for Enabling Wiki Functionality

For wikis to be available in Oracle WebCenter Portal, several prerequisites must be met.

- Oracle WebCenter Content Server 12*c* must be installed and configured. Your system administrator can find information about installing and configuring WebCenter Content Server in Managing Connections to Oracle WebCenter Content Server in *Administering Oracle WebCenter Portal*.

- A connection to WebCenter Content Server must be established, as described in Creating a Connection to Oracle WebCenter Content Server in *Administering Oracle WebCenter Portal*.

- The Documents tool must be enabled for the portal in which you plan to create wiki documents. For information, see Enabling and Disabling Tools and Services Available to a Portal.

Adding an Existing Wiki to a Portal

If your organization has developed wikis that you want to add to a portal, you can make them accessible to the portal in a number of ways.

- Add a wiki to an area on an existing page, or on a new blank page to occupy the entire page. See Working with Content in a Portal

- Add a wiki to the portal navigation. See Adding Items to the Portal Navigation to add a wiki as a navigation item in either of the following ways:

  – If the wiki has been added to a page, add a *page link* to the portal navigation. When the wiki displays, the availability of editing controls for the end user depends on the container used to add the wiki to the page.

  – Or, add a *content item* to the navigation, selecting the wiki document from the connected Oracle WebCenter Content Server repository.

Creating a New Wiki In a Portal

In Oracle WebCenter Portal you create a wiki by creating a page based on the Wiki page style.

The Wiki page style is a dedicated wiki page with a default wiki document that offers a simplified user interface and a dedicated wiki experience. The Wiki page style is available when the Documents tool is enabled in the portal. You can use the Wiki page style to create either:

- A personal page in the Home portal. See Creating a Personal Page in *Using Portals in Oracle WebCenter Portal* and select **Wiki** as the page style.

- A portal page in a portal. See Creating a Page or Subpage When Editing a Portal and select **Wiki** as the page style.

Wikis in WebCenter Portal offer in-place editing features through the Rich Text Editor (RTE), described in Using the Rich Text Editor (RTE) in *Using Portals in Oracle WebCenter Portal*.

The initial wiki page, containing a default wiki document with default text, looks similar to Figure 38-1.

Figure 38-1   Default Wiki Document Created Using the Wiki Page Style
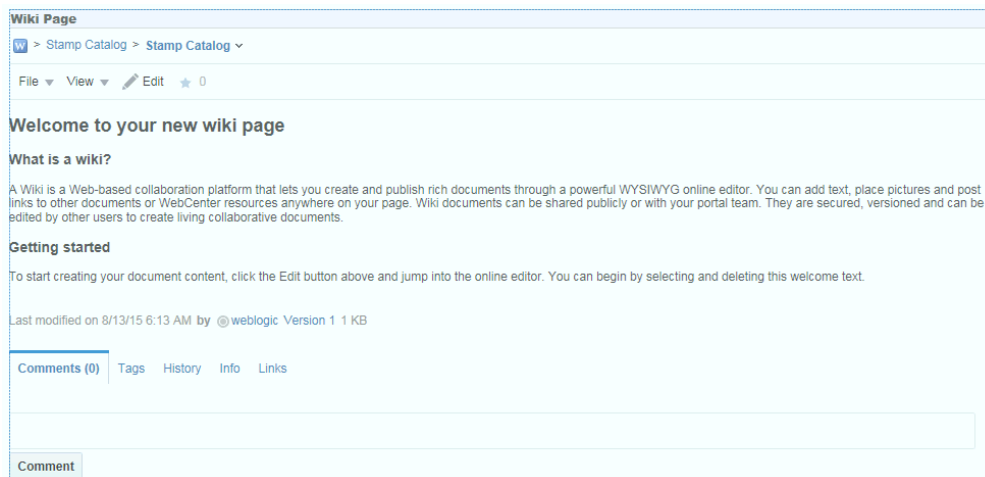
In the wiki document, you can replace the default text with the desired content. For information, see Editing a Wiki in *Using Portals in Oracle WebCenter Portal*. For information about the tasks that can be performed on a wiki besides editing it, see Managing Wiki Documents in *Using Portals in Oracle WebCenter Portal*.

The breadcrumbs at the top of the wiki document display where the document is created in the document hierarchy.

On the **Documents** page, you can find the newly created wiki document stored in a separate folder for the wiki page under the root folder, as shown in Figure 38-2. Both the folder and the default wiki document share the same name.

Figure 38-2   Default Wiki Document for a Wiki Page in the Document Hierarchy
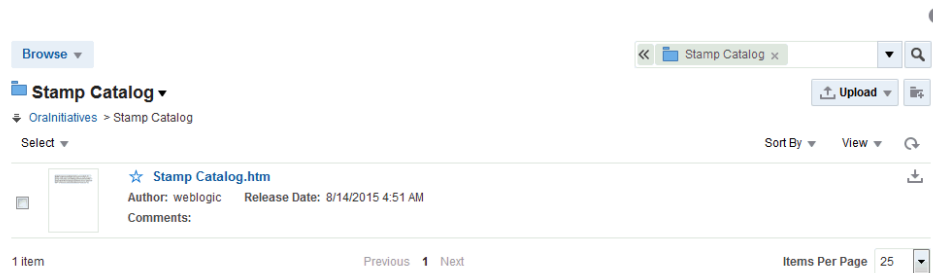
> 💡 **Tip:**
>
> You can find the **Documents** page for a portal by going to the following URL:
>
> `http://`*`host`*`:`*`port`*`/webcenter/portal/`*`portalName`*`/Documents`

Working with Wikis

For information about creating, editing, and managing wikis, see Working with Wikis in *Using Portals in Oracle WebCenter Portal*.

Wiki Use Case Examples

There are some common scenarios for including wikis in your portal.

Table 38-1 provides solutions to these common scenarios, and refers to documentation that provides the information you need.

Table 38-1 Common Wiki Use Cases

If I want to	What do I need to understand and do?
In my portal navigation, add a link to an existing wiki page in my portal	By default, *portal pages* (including wiki pages) are automatically added to the portal navigation when they are published (see Publishing a Portal Page). *Personal pages*, *system pages*, and *business role pages* are not automatically added to the portal navigation. For information about the different types of pages in WebCenter Portal, see What Are Pages? If a wiki page is not shown in the portal navigation, it has likely been hidden. To show the page, edit the properties of the page and select the **Visibility** property. See Showing or Hiding a Page in the Portal Navigation. If you want to add a wiki page to a second location in the portal navigation: • In the portal editor, select an existing navigation item, then click its **Actions** icon and select **Add**, then **Page Link**. • Select the wiki page to add the page to your navigation. The page is added to the portal navigation: See also, Adding an Existing Page to the Portal Navigation.

Table 38-1   (Cont.) Common Wiki Use Cases

If I want to	What do I need to understand and do?
In my portal navigation, add a link to an existing wiki page in another portal, choosing whether to show or hide the other portal's navigation when viewing the page	To create a link to a wiki page that exists in the connected content repository, outside of your portal:

- In the portal editor, select an existing navigation item, then click its **Actions** icon and select **Add**, then **Link**.

- Set the **Path** property to the URL of the target wiki page.

If you enter the URL of the target page as shown in the browser address field, the target page displays within its portal, as shown in this example using top navigation:

To hide the target portal navigation and show only the target page, edit the target page and copy the value of its Path property (on the Advanced tab of the page properties) into the Path field of the navigation item. When you click the navigation item, the page displays without its enclosing portal, as shown here:

Note: If you add a link to a wiki document rather than a page, you cannot use this method to hide the target portal navigation for the wiki. Instead, add a new page containing the wiki document, then edit the page and

Table 38-1   (Cont.) Common Wiki Use Cases

If I want to	What do I need to understand and do?
	copy the value of its Path property (on the Advanced tab of the page properties) into the Path field of the navigation item.
Add a new wiki page to my portal (make the entire page a wiki)	Create a new wiki page using the Wiki page style. See Creating a Page or Subpage When Editing a Portal.
Display an existing wiki document on a page in my portal	Edit the page on which you want to add the document. You may wish to add the document to an area on an existing page that includes other components, or to a new blank page to have the document occupy the whole page. See Enabling Document Management.
Add an existing wiki document to a page in my portal, without editing controls	To add an individual document to a page, without editing controls, add the document in a Content Presenter task flow. See Publishing Content Using Content Presenter.
	Note: You can expose the page in the portal navigation using a Page Link. Another way to expose a wiki document in the portal navigation, *without editing controls* when it is viewed, is to add it as a Content Item to the portal navigation. See Adding Items to the Portal Navigation.

39
Enabling Blogs in a Portal

Enable blog functionality to allow WebCenter Portal users to work with blogs and blog posts. Learn how to add and manage blog task flows.

> **✏ See Also:**
>
> For an overview of the different options available in WebCenter Portal for working with portal content and adding content to a portal, see Introduction to Working with Content in a Portal.

> **✏ Permissions:**
>
> To perform the tasks in this chapter, you need the following permissions:
>
> - To enable the Documents tool to allow for blog functionality in a portal, you must be the portal manager or member with `Manage Security and Configuration` or `Manage Configuration` permission in the portal.
>
> - To create a portal page using the Blog page style, you must be the portal manager or member with `Basic Services: Edit Page Access, Structure, and Content`.
>
> Viewing and managing blog posts, and creating a personal page using the Blog page style, are tasks available to the knowledge worker with permissions described in Working with Blogs in *Using Portals in Oracle WebCenter Portal*.
>
> See About Roles and Permissions for a Portal.

Topics:

- About Blogs
- Prerequisites for Enabling Blog Functionality
- Creating a New Blog in a Portal

About Blogs

Blogs provide a useful tool for discussing and/or evangelizing any type of idea, strategy, or point of view.

Blogs are typically personal records of an individual user's experience and opinions. The word *blog* is a contraction of the term *Web log*. It was coined to describe the online diaries spawned in the late 1990s.

Blogs may be projected out to a select group of people or to a wider audience. Typically, each blog contains various blog posts, with the most recently added blog post displayed at the top. Blogs invite readers to comment on the overall concepts.

In Oracle WebCenter Portal, you can create a blog by creating a page based on the Blog page style.

Wiki and blog functionality in WebCenter Portal requires that Oracle WebCenter Content Server is the content repository. However, it is important to be aware that wikis and blogs are managed by WebCenter Portal, not by WebCenter Content Server. Thus, folder settings in WebCenter Content Server have no effect. For example, specifying a default profile on a WebCenter Content Server folder in which wikis or blogs are stored has no effect on the creation of new wiki or blog documents in that folder.

Prerequisites for Enabling Blog Functionality

Blog functionality in Oracle WebCenter Portal relies on Oracle WebCenter Content Server, the content repository that stores the blogs.

For blogs to be available in WebCenter Portal, the following prerequisites must be met:

- WebCenter Content Server 12*c* must be installed and configured. Your system administrator can find information about installing and configuring WebCenter Content Server in Managing Connections to Oracle WebCenter Content Server in *Administering Oracle WebCenter Portal*.

- A connection to WebCenter Content Server must be established, as described in Creating a Connection to Oracle WebCenter Content Server in *Administering Oracle WebCenter Portal*.

- The Documents tool must be enabled for the portal in which you plan to create the blog. For information, see Enabling and Disabling Tools and Services Available to a Portal.

Creating a New Blog in a Portal

In Oracle WebCenter Portal, you can create blogs to group related blogs posts. For example, you can group posts by the same author or related topics.

Create a blog by creating a page using the Blog page style. A page that uses the Blog page style is a dedicated blog page that can be either:

- A personal page in the Home portal, selecting **Blog** as the page style. See Creating a Personal Page in *Using Portals in Oracle WebCenter Portal*.

- A portal page in a portal, selecting **Blog** as the page style. See Creating Pages or Subpages in a Portal.

The initial blog page you create looks similar to Figure 39-1. For more information, see Understanding the Blog Page Style in *Using Portals in Oracle WebCenter Portal*.

Figure 39-1   A New Blog Created Using the Blog Page Style

Part VII

Working with WebCenter Portal Tools and Services

This part of *Building Portals with Oracle WebCenter Portal* provides information about the tools and services that are offered by WebCenter Portal to include in your portals.

- Introduction to Portal Tools and Services
- Adding an Activity Stream to a Portal
- Adding Analytics to a Portal
- Adding Events to a Portal
- Adding Connections to a Portal
- Adding Lists to a Portal
- Adding Mail to a Portal
- Adding Messages and Feedback to a Portal
- Adding Notifications to a Portal
- Adding Personal Notes to a Portal
- Adding Polls to a Portal
- Adding Profiles to a Portal
- Adding RSS Feeds to a Portal
- Configuring Elasticsearch in a Portal
- Adding Tagging to a Portal

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40

Introduction to Portal Tools and Services

Learn about the tools and services available in WebCenter Portal, and how to enable or disable tools in a portal.

> ✏️ **Permissions:**
>
> To perform the tasks in this chapter, you must have one of the following roles or permissions:
>
> - `Portal Manager` or be a portal member with `Portals: Manage Security and Configuration` permission
> - `Delegated Manager` or a member with `Portals: Manage Configuration` permission in the portal
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- About Tools and Services
- Enabling and Disabling Tools and Services Available to a Portal

About 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.

The following table shows which tools and services are provided out-of-the-box and those that require additional configuration:

Table 40-1   Availability of Tools and Services in WebCenter Portal

WebCenter Portal (All Portals)	Tools and Services
Automatically available out-of-the-box	Portal events, links, lists, search, people connections, tags

Table 40-1   (Cont.) Availability of Tools and Services in WebCenter Portal

WebCenter Portal (All Portals)	Tools and Services
Only available when a valid connection exists to a back-end server or database	Analytics, documents*, calendar events, instant messaging and presence, mail, search (using Elasticsearch), worklists (using Oracle BPM Worklist)*
	* A default connection is set up at install time.
	The back-end configurations are done by the system administrator through Fusion Middleware Control or using the WLST command-line tool, as described in Managing Tools and Services in *Administering Oracle WebCenter Portal*.

If the necessary connections exist to make them available, the following table shows which tools and services are always available in a portal and those that need to be enabled by the portal manager:

Table 40-2   Enabling Tools and Services in a Portal

Individual Portals	Tools and Services
Always enabled (if available)	Analytics, links, people connections, tags
Portal manager can enable/ disable (if available)	Events, lists, documents

When a back-end server is not configured, a portal cannot consume the features or functionality related to the tool or service:

- Associated task flows are not available in the resource catalog.

- Existing task flows display a message indicating that the tool or service is unavailable.

- Tool or service is listed as unavailable on the Tools and Services page in the portal's administration settings.

The following tools and services require a connection to a database schema where relevant information (such as relationship mapping) is stored:

- Analytics

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

- Links

- Lists

- People Connections

- Tags

It is the portal template that is used to create a portal that defines whether tools are initially enabled or disabled in the portal:

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> **Note:**
>
> Mail is enabled upon portal creation, and, if it is configured by the system administrator, then it cannot be disabled for individual portals.

- If a tool is disabled in the portal template, portal managers can manually enable the tool from the portal's administration settings to make it available for use in the portal.
- If a tool is enabled in the portal template, portal managers can manually disable tools that are not required from the portal's administration settings.

See Enabling and Disabling Tools and Services Available to a Portal.

After enabling tools and services for a portal, the portal manager also must make sure that the portal members have the required permissions to work with some of these tools, such as lists, and so on. For more information about portal-level permissions, see About Roles and Permissions for a Portal.

The portal manager must also make sure that portal members can access tools and services in the following ways:

- By providing users with a pretty URL to access the tool page. See Pretty URLs for Pages in a Specified Portal.
- By adding the associated tool or service task flows to a portal page. See Adding a Component to a Page.
- By adding a page link to the tool page in the portal navigation, as described in Adding an Existing Page to the Portal Navigation.

> **Note:**
>
> For more information about the tools and services available in a portal, see Table 40-3.

Tools and Services Available in a Portal

Table 40-3 lists the tools and services available in a portal.

Table 40-3   Portal Tools and Services

Tools and Services	Description	For More Information
Activity Stream	Provides a streaming view of the activities of your connections, actions taken in portals, and business activities	Adding an Activity Stream to a Portal
Analytics	Enables you to display usage and performance metrics for your portal application	Adding Analytics to a Portal

Table 40-3   (Cont.) Portal Tools and Services

Tools and Services	Description	For More Information
Documents	Provides content management and storage capabilities, including file upload, file and folder creation and management, file check out, versioning, and so on. Exposes these capabilities through the Content Manager task flow. The documents tool also supports the wiki and blog functionality.	Enabling Document Management Working with Workflow-Enabled Content Enabling Wikis in a Portal Enabling Blogs in a Portal
Events	Provides the ability to create and maintain a schedule of events relevant to a wider group of authenticated users. Also provides access to your personal events from your Outlook calendar if the Exchange server is configured.	Adding Events to a Portal
Instant Messaging and Presence (IMP)	Provides the ability to observe the status of other authenticated users (online, offline, busy, or away) and to contact them instantly	Using Instant Messaging and Presence Viewer in *Using Portals in Oracle WebCenter Portal*
Links	Provides the ability to view, access, and associate related information; for example, you can link a document to a Note.	Linking Information in WebCenter Portal in *Using Portals in Oracle WebCenter Portal*
Lists	Provides the ability to create, publish, and manage lists	Adding Lists to a Portal
Mail	Provides easy integration with IMAP and SMTP mail servers to enable users to perform mail functions, such as reading messages, creating messages with attachments, replying to or forwarding messages, and deleting messages	Adding Mail to a Portal
Messages and Feedback	Provides the ability to post messages, attachments, and feedback for your connections and to the Activity Stream	Adding Messages and Feedback to a Portal
Notes	Provides the ability to "jot down" and retain bits of personally relevant information.	Adding Personal Notes to a Portal
Notifications	Provides a means of subscribing to services and application objects and, when those objects change, receiving notification across one or more messaging channels.	Adding Notifications to a Portal
People Connections	Provides the ability to establish a social network with business colleagues, allowing you to see their portal activity and contributions and them to see yours.	Adding Connections to a Portal
Polls	Enables you to survey your audience (such as their opinions and their experience level), check whether they can recall important information, and gather feedback.	Adding Polls to a Portal
Profiles	Provides views of users' contact information (such as email address, business address, phone number), department, manager, photo, portal activities, public documents, and connections.	Adding Profiles to a Portal
RSS	Provides the ability to access the content of many different web sites from a single location—a news reader.	Adding RSS Feeds to a Portal

Table 40-3   (Cont.) Portal Tools and Services

Tools and Services	Description	For More Information
Search	Provides search functionality.	Configuring Elasticsearch in a Portal
		Beginning with Release 12*c* (12.2.1.4.0), Oracle WebCenter Portal has deprecated the support for Oracle SES. If you have upgraded from a prior release, your upgraded instance might be configured to use Oracle SES. In this case, you must configure WebCenter Portal to use Elasticsearch to index and search objects.
Tags	Provides the ability to assign one or more personally-relevant keywords to a given page or document.	Adding Tagging to a Portal

Enabling and Disabling Tools and Services Available to a Portal

For an understanding of how tools and services are made available for use in a portal, see About Tools and Services.

To enable or disable a tool or service in your portal:

1. In the portal administration, click **Tools and Services** in the left navigation pane.

   You can also enter the following URL in your browser to navigate directly to the **Tools and Services** page:

   ```
   http://host:port/webcenter/portal/PortalName/admin/services
   ```

Figure 40-1 Tools and Services Page for a Portal
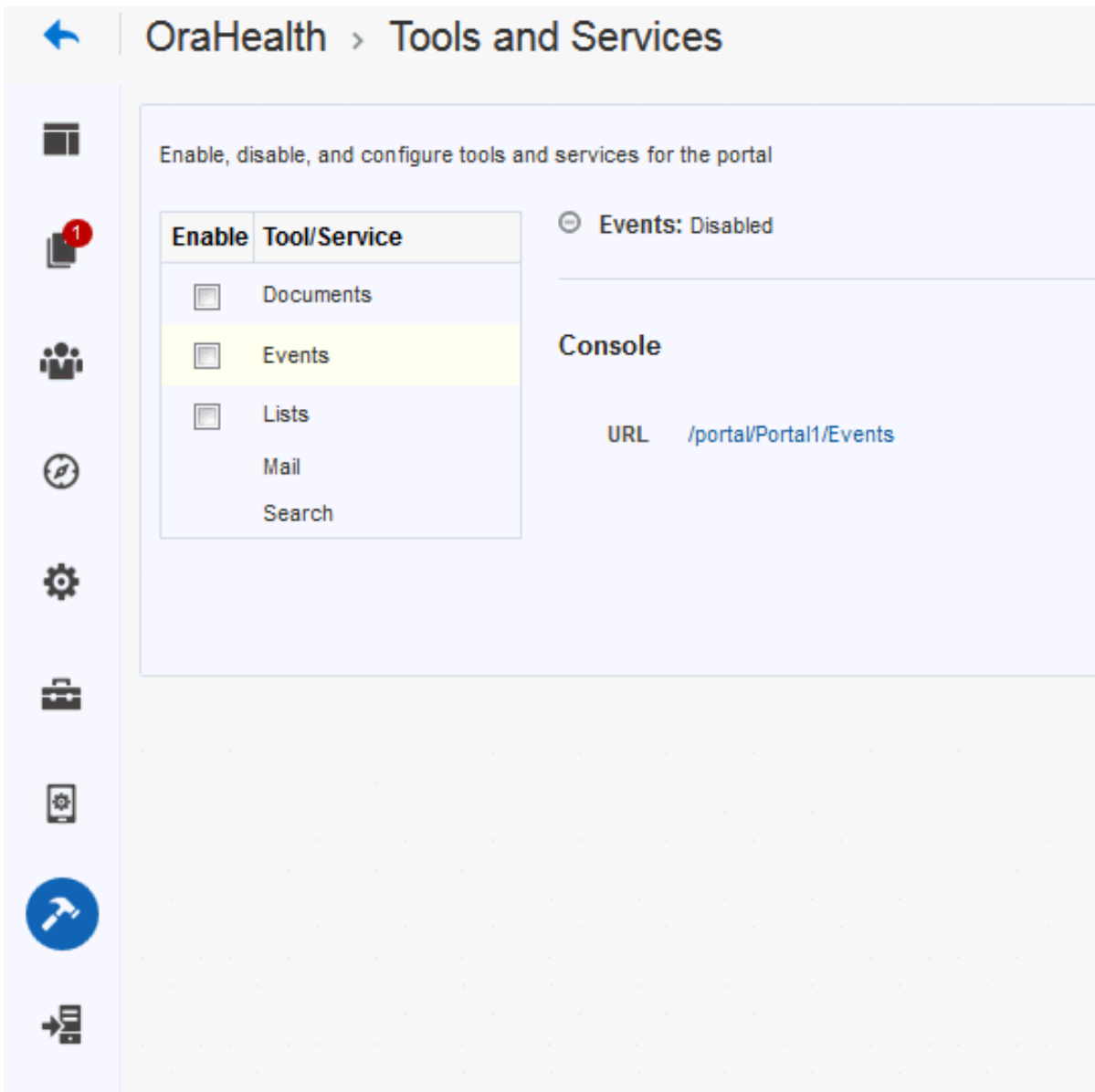
2. To enable a tool you want to use in the portal, select the check box next to it.

> ✏️ **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.
>
> See Managing Tools and Services in *Administering Oracle WebCenter Portal*.

3. 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.

For example, the following figure shows the Documents tool as Enabled when the check box is selected.

Figure 40-2   Events Tools and Services Page

4. Optionally, configure selected tools and services as required.

- Documents— see Working with Content in a Portal

- Events—create event categories, for grouping events, as described in Creating and Managing Portal Event Categories.

  See Adding Events to a Portal.

- Lists—For more information about working with lists, see Adding Lists to a Portal.

- Mail—although the default distribution list is created during portal creation, you can update the distribution list for the portal (see Configuring the Mail Distribution List for a Portal) and specify a shared distribution list for a portal (see Configuring the Send Mail Feature).

See Adding Mail to a Portal.

- Search—shows the search option that has been configured for WebCenter Portal.

  See Configuring Elasticsearch in a Portal.

5. 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.

6. Grant appropriate permissions for each member role on the **Roles** page to allow portal members to access the enabled services.

   See Viewing and Editing Permissions of a Portal Role.

7. Make sure that portal members have access to the tools and services in any of the following ways:

   - Provide users with a pretty URL to access the tool page. See Pretty URLs for Pages in a Specified Portal.

   - Add the associated tool or service task flows to a portal page.See Adding a Component to a Page.

   - Add a page link to the tool page in the portal navigation, as described in Adding an Existing Page to the Portal Navigation.

41
Adding an Activity Stream to a Portal

Add an Activity Stream to a portal to provide a streaming view of the actions performed by users' connections, actions taken in portals, business activities, and messages entered through the Publisher task flow.

> **✐ Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Basic Services: Edit Page Access and Structure` (standard permissions) or `Pages: Edit Pages` (advanced permissions).
>
> See About Roles and Permissions for a Portal.

Topics:

- About the Activity Stream
- Adding an Activity Stream Task Flow to a Page
- Working with Activity Stream Task Flow Properties
- Working with Activity Stream Task Flows
- About Publisher
- Adding a Publisher Task Flow to a Page
- Working with Publisher Task Flow Properties
- Working with the Publisher Task Flow

About the Activity Stream

In WebCenter Portal, Activity Stream provides a streaming view of the activities of users' connections, actions taken in portals, and business activities. For example, Activity Stream can note when a user posts feedback. Additionally, it streams messages and attachments entered through Publisher.

> **✐ Note:**
>
> Activity Stream shows file upload activity that occurs through Publisher. Activity Stream does not show file activity that occurs through Content Manager. For example, if you or your connections edit, upload, download, check out, or check in a file through Content Manager, this activity does not appear in the Activity Stream.

Through Activity Stream Preferences, users can select to show connection and portal activities. (The system administrator can disable users from overriding application-level settings.)

In addition to streaming messages, your Activity Stream can provide access to file attachments and web links added through Publisher. File attachments are rendered as links, which you can use to access the file.

Users can share a streamed activity and its attachments using a **Share** feature, available on each streamed item.

> **See Also:**
>
> For information about using the Publisher task flow, see Liking, Commenting On, and Sharing Items in *Using Portals in Oracle WebCenter Portal*.

Table 41-1 lists and describes the types of activities that are reported through Activity Stream.

> **Note:**
>
> Delete activities do not appear *per se* in the Activity Stream. But references to objects, such as *Joe Smith created the document file.xml*, are removed from the stream when such objects are deleted.

Table 41-1   Activities Tracked by Activity Stream

Tool/Service	Tracked Activities	Scope	Activities Shared or Private
Blogs	• Create blog • Update blog	• portal • Home portal	• Activities on portal blogs are shared with other portal members • Activities on Home portal blogs are shared with the blogger's connections
Connections	• Invite to connect • Connection invite accepted	• Home portal	Shared with inviter and invitee's connections
Documents	• Upload document through Publisher; document activities performed through Content Manager do not appear in the Activity Stream.	• portal • Home portal	• Activities on portal documents are shared with other portal members • Activities on Home portal documents are private to user
Feedback	• Leave feedback • Receive feedback	• Home portal	Shared with whomever is permitted to view such activities
Lists	• Create list	• portal	Shared with other portal members
Message Board	• Leave message • Receive message	• Home portal	Shared with whomever is permitted to view such activities

Table 41-1   (Cont.) Activities Tracked by Activity Stream

Tool/Service	Tracked Activities	Scope	Activities Shared or Private
Pages	• Create page • Edit page • Add tag • Remove tag	• portal • Home portal	• Activities on portal pages are shared with other portal members • Activities on Home portal pages are private to user
Profiles	• Update photo • Update profile • Update personal status	• Home portal	Shared with whomever is permitted to view such activities
Portal Events	• Create event • Edit event	• portal	Shared with other portal members
Portals Management	• Create portal • Change portal membership • Join portal • Post comment • Like item • Update portal configuration • Enable portal tool or service • Disable portal tool or service • Change custom portal attribute • Change portal role permissions • Change portal role assignment	• portal	Shared with other portal members
Tagging	• Add tag • Remove tag	• portal • Home portal	• Activities in a portal are shared with all portal members. • Activities in a Home portal are shared with whomever is permitted to view such activities

Users can use Activity Stream Preferences to specify who can view their individual Activity Stream and the types of activities to show. For more information about Preferences relating to Activity Stream task flows, see Setting Activity Stream Preferences in *Using Portals in Oracle WebCenter Portal*.

In the page editor, use Activity Stream task flow properties to hide or show various controls on everyone's view of a task flow instance and to limit the types of objects and the specific portals that are tracked. For more information about Activity Stream task flow properties, see Working with Activity Stream Task Flow Properties.

WebCenter Portal provides the following Activity Stream viewers:

• **Activity Stream** for viewing application activities and the activities of your connections and for providing access to the attachments added through the **Share** link.

Figure 41-1   Activity Stream Task Flow
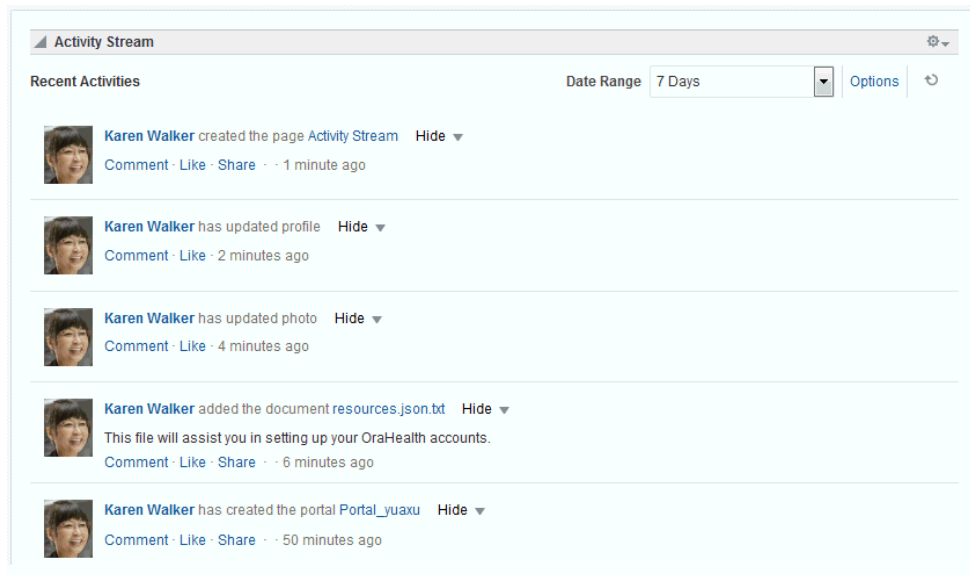
This full view of Activity Stream functionality includes options for liking and commenting on listed activities and for sharing different types of objects, such as images, URLs, documents, and the like. Activity Stream also provides a means of hiding the activities and posts of a given user. You can use Activity Stream Options to show those users you have hidden.

The **Activities** page in the Home portal combines an instance of the Publisher task flow with the Activity Stream task flow.

> ✎ **See Also:**
>
>   For information about Publisher, see About Publisher..

- **Activity Stream - Quick View** provides a summary view of application activities and the activities of your connections.

Figure 41-2   Activity Stream — Quick View
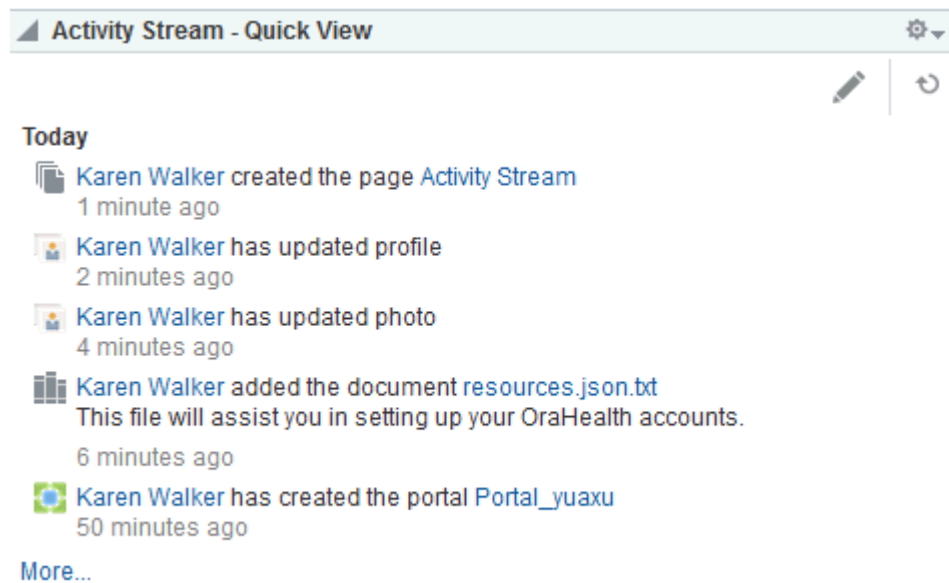
Unlike the full view of Activity Stream, Activity Stream - Quick View does not display **Like**, **comments**, and **Share** links. The Activity Stream - Quick View also combines similar activities into one entry. For example, if a user posts two documents, users see one entry that lists both documents; if a user posts two messages, user's see one entry that says the user "posted messages," but only the most recent message is shown.

When there are more streamed items than the Quick View can show, a **More** link appears at the bottom of the stream. Click **More** to open a full view of the Activity Stream. In the rare case where you have both the full Activity Stream and the Quick View on the same page, clicking **More** changes the focus from the Quick View to the full view, and the Quick View is hidden.

A hierarchy of configuration settings control what users can do with their view of the Activity Stream. The system administrator sets application-wide in WebCenter Portal Administration on the **Settings** page. Users can set their own personal values through People Connections Preferences. You can also set values on a given viewer instance in both the page editor, which affects all users' views of the instance (application customization), and users can set values in page view mode, which affects only their view of the instance (user customization).

> **Tip:**
>
> If users adjust a setting through Preferences that does not seem to affect the behavior of a task flow as expected, it may be because settings on the task flow itself override Preferences settings.

The Activity Stream task flow provides an **Options** link for accessing configuration settings for a given task flow instance (Figure 41-3).

Figure 41-3   Options Link for Activity Stream Options

The Activity Stream - Quick View task flow provides access to its own configuration settings through a pencil icon (**Change the source, filter, and display options**) (Figure 41-4).

Figure 41-4   Pencil Icon and Configure Dialog
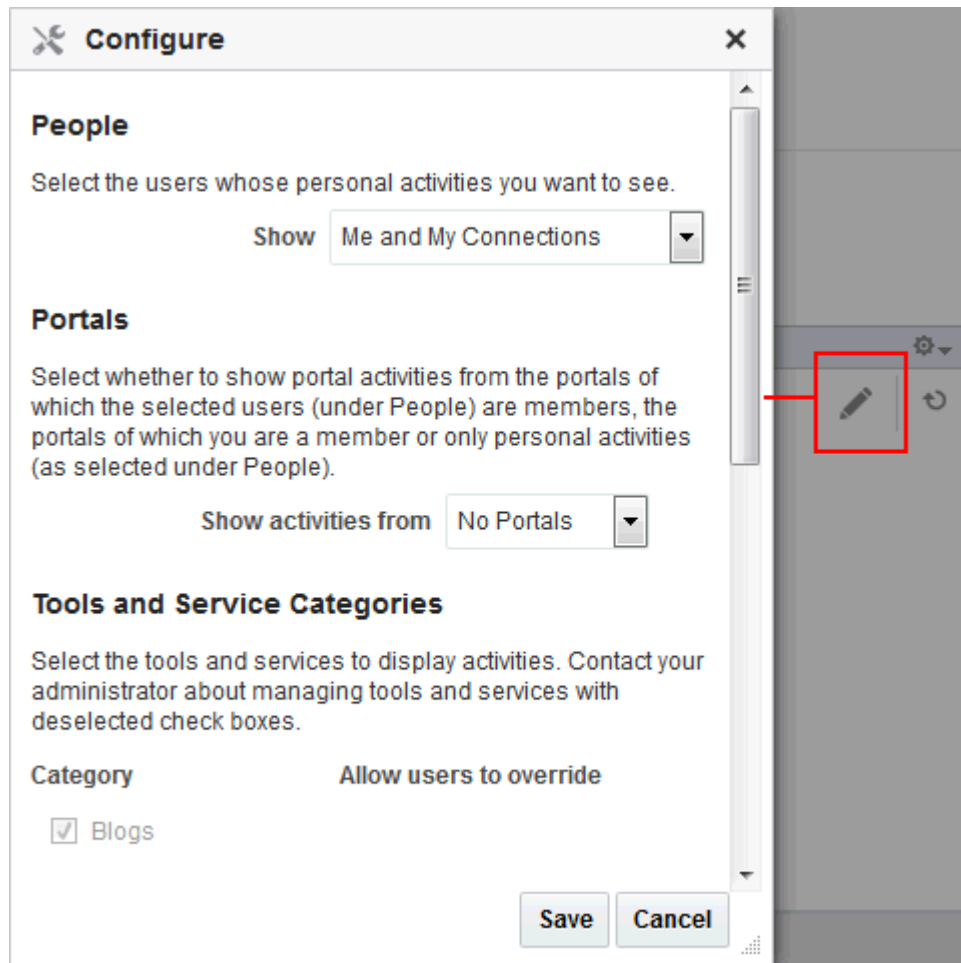
Use these controls to adjust an individual task flow instance with the same kinds of settings that are provided for all of views of Activity Stream through Activity Stream Preferences.

System administrators can archive streamed activities to relieve the burden on your storage and to maintain a record of past activities. For more information, see Activity Stream in *WebCenter WLST Command Reference Reference*.

Adding an Activity Stream Task Flow to a Page

For the steps to add an Activity Stream task flow to a page, see Adding a Component to a Page.
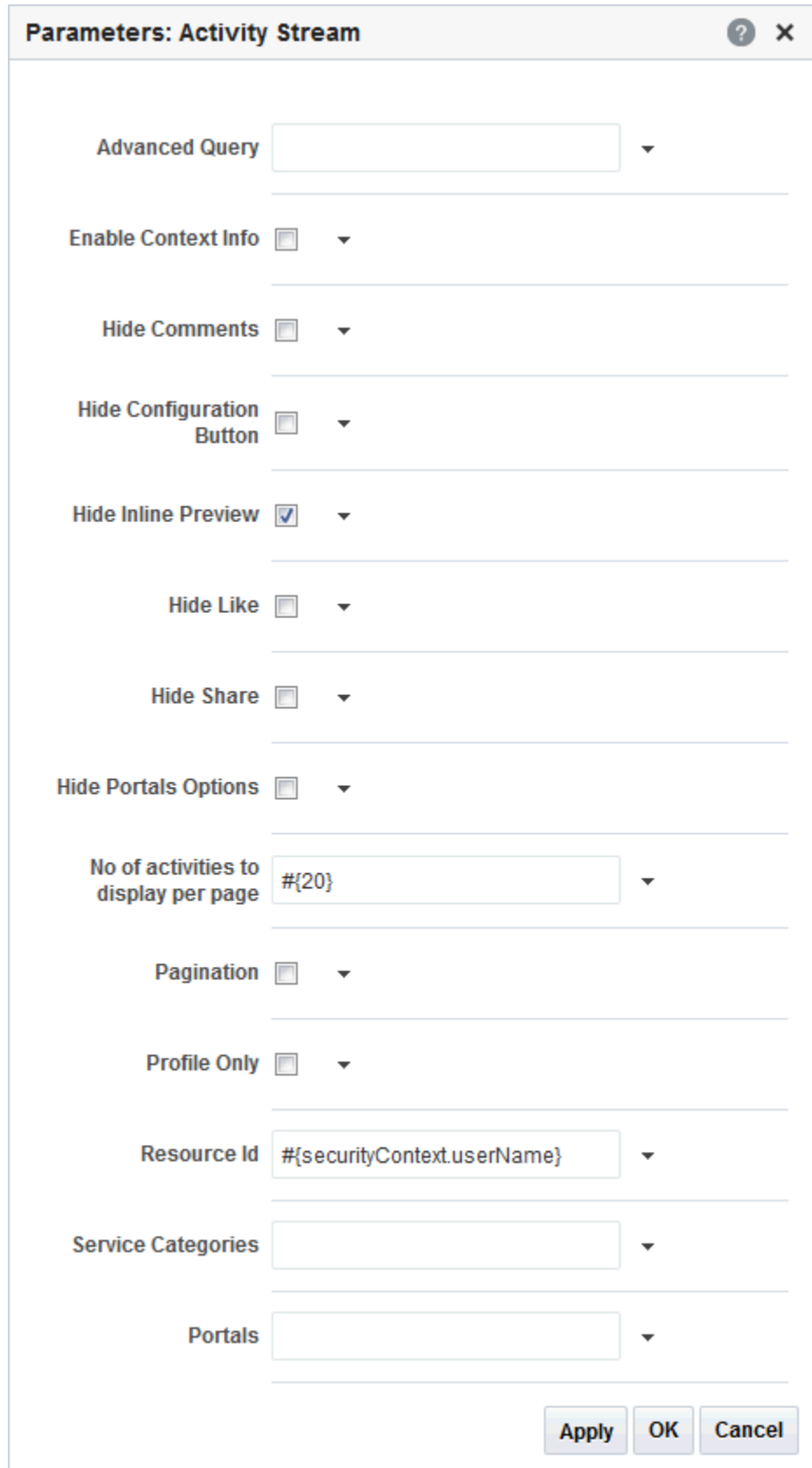
> **Tip:**
>
> The presence or location of the Activity Stream task flow in the resource catalog depends on how the resource catalog is configured. For example, in the default resource catalog, the Activity Stream task flow is included under the **Alerts and Updates** folder.

Working with Activity Stream Task Flow Properties

Activity Stream task flows have associated properties that users with sufficient privileges can access through the task flow's **View Actions** menu. For example, edit the page where the Activity Stream instance appears, click the instance, open the **View Actions** menu, and select **Parameters** to display the Parameters dialog (Figure 41-5).

Figure 41-5   Activity Stream Task Flow Component Properties

> ✎ **See Also:**
>
> Setting Properties on a Component

The following sections provide information about properties associated with Activity Stream task flows and describe the task flow parameters:

- Setting Activity Stream Task Flow Properties
- Activity Stream Task Flow Parameters
- Using an Advanced Query to Filter Activity Stream Items
- Using Properties to Configure an Activity Stream Task Flow Instance

Setting Activity Stream Task Flow Properties

In the page editor, selecting any component exposes a View Actions menu (Figure 41-6), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 41-6   View Actions Menu on an Activity Stream Task Flow
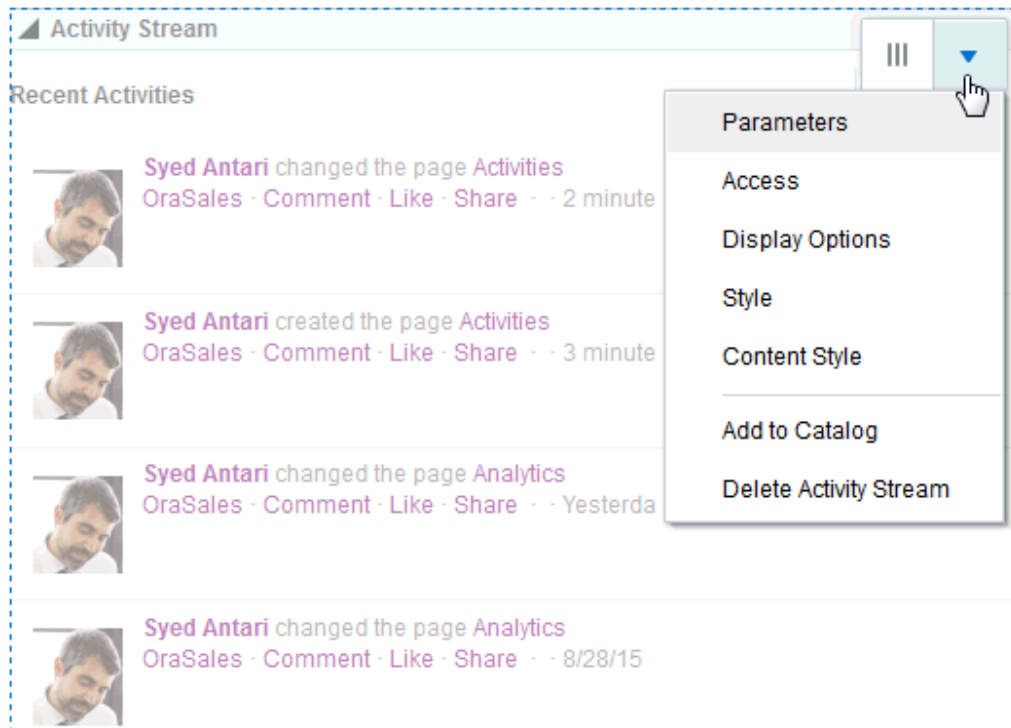
To set Activity Stream task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

- Parameters control the default task flow content. For descriptions of each parameter, see Activity Stream Task Flow Parameters. Parameters can be wired to events, and can be used to facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

- Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

- The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

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.

> **✎ Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Activity Stream Task Flow Parameters

Table 41-2 describes the parameters that are unique to Activity Stream task flows.

Table 41-2   Activity Stream Task Flow Parameters

Parameter	Description
`Advanced Query`	A field for specifying a custom query to filter streamed items.
	For more information, see Using an Advanced Query to Filter Activity Stream Items.
	This parameter is associated with the Activity Stream task flow.

Table 41-2   (Cont.) Activity Stream Task Flow Parameters

Parameter	Description
`Enable Context Info`	A check box for specifying whether contextual information is shown when users click a **Context Info** icon. For example, if the item `John created the purchase order General Supplies` appears in the Activity Stream with a Context Info icon (the reddish dot), users who see the streamed item can click the icon to view the purchase order (PO) in a popup or navigate to the PO, depending on how the event is configured. This parameter is primarily for use where, unless otherwise handled (such as the Profile popup on a user name), resources are rendered within the Resource Viewer system page: • Select the check box to enable context information (`#{true}`). • Deselect the check box to prevent the display of context information (`#{false}`). This parameter is associated with the Activity Stream task flow.
`Hide Comments`	A check box for specifying whether a **comments** link is shown on a task flow instance: • Select the check box to show the **comments** link (`#{true}`). • Deselect the check box to hide the **comments** link (`#{false}`). This parameter is associated with the Activity Stream task flow.
`Hide Configuration Button`	A check box for specifying whether the **Options** link appears on the Activity Stream task flow or the pencil icon appears on Activity Stream - Quick View: • Select the check box to show the configuration control (`#{true}`). • Deselect the check box to hide the configuration control (`#{false}`). This parameter is associated with the following task flows: • Activity Stream - Quick View • Activity Stream

Table 41-2   (Cont.) Activity Stream Task Flow Parameters

Parameter	Description
`Hide Inline Preview`	A check box for specifying whether to hide previews of streamed files: • Select the check box to hide previews of streamed files (`#{true}`). Links to streamed files are provided but previews are omitted. • Deselect the check box to show previews of streamed files (`#{false}`). Both links to and previews of streamed files are shown. For information about the mime types that are supported for file previewing in Activity Stream, see About the Activity Stream. This parameter is associated with the Activity Stream task flow.
`Hide Like`	A check box for specifying whether to hide the **Like** link on streamed items: • Select the check box to hide the **Like** link (`#{true}`). • Deselect the check box to show the **Like** link (`#{false}`). This parameter is associated with the Activity Stream task flow.
`Hide Share`	A check box for specifying whether to hide the **Share** menu on streamed items: • Select the check box to hide the **Share** menu (`#{true}`). • Deselect the check box to show the **Share** menu (`#{false}`). This parameter is associated with the Activity Stream task flow.
`Hide Portal Options`	Specifies whether to show the Portals options in the Activity Stream and Activity Stream - Quick View Configuration dialogs. The Portals options enable users to specify whether to show activities from all portals, the portals of which they are a member, no portals, or just the portal on which the task flow is placed. • Select the check box to show the Portals options. This is the default (`#{true}`). • Deselect the check box to hide the Portals options (`#{false}`). This parameter is associated with the following task flows: • Activity Stream • Activity Stream - Quick View
`No of activities to display per page`	A field for entering the number of streamed items to show per page This parameter is associated with the following task flows: • Activity Stream • Activity Stream - Quick View
`Pagination`	A check box for specifying whether to provide **Previous** and **Next** links to enable users to page through streamed activities: • Select the check box to show **Previous** and **Next** links (`#{true}`). • Deselect the check box to hide them (`#{false}`). This parameter is associated with the Activity Stream task flow.
`Profile Only`	A check box for specifying whether to stream activities only from user profiles: • Select the check box to stream only those activities associated with the current user (`#{true}`). • Deselect the check box to stream the activities of other users along with those associated with the current user (`#{false}`). This parameter is associated with the Activity Stream task flow.

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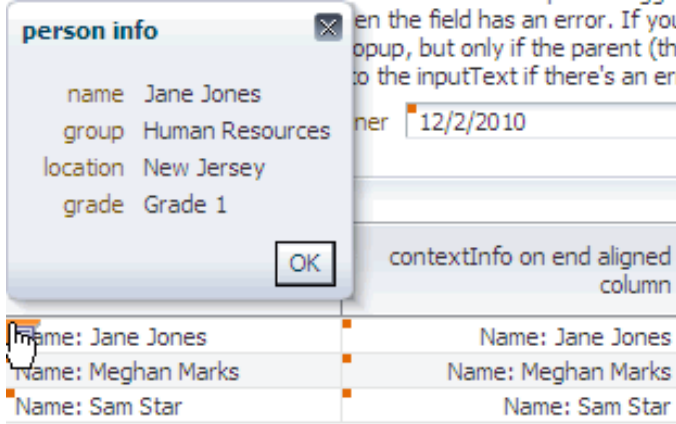**Table 41-2   (Cont.) Activity Stream Task Flow Parameters**

Parameter	Description
`Resource Id`	A field for entering the ID of the current user.
	This value is provided by default, `#{securityContext.userName}`. Users should not change this value when the task flow instance appears in the context of a portal. You can use it in the Home portal to view the activities of a named user.
	This parameter is associated with the Activity Stream task flow.
`Service Categories`	A field for entering the IDs of components from which to stream activities.
	Use this parameter to limit the display of streamed activities to only those associated with the specified component or components. Enter the category ID or the service ID.
	For a list of service IDs, see Service IDs in *Developing for Oracle WebCenter Portal*.
	This parameter is associated with the Activity Stream task flow.
`Portals`	A field for entering the names of portals from which to stream activities.
	Use this parameter to limit the display of streamed activities to only those associated with the specified portal or portals.
	Enter the GUID of the portal or the portal's *internal name*. The portal internal name is the name specified by the **Portal URL** on the **General** page of a portal's administration settings.
	Note that the activities that are streamed in an Activity Stream task flow that is scoped to a particular portal are visible to all members of that portal, regardless of whether they are formally connected to each other.
	This parameter is associated with the Activity Stream task flow.

Using an Advanced Query to Filter Activity Stream Items

The Activity Stream task flow provides an `Advanced Query` parameter for creating custom filters against streamed activities using a SQL `WHERE` clause. For example, using SQL you can set up an Activity Stream instance to show only those activities relating to the page or streaming from the current user or a named user.

This section provides an overview of the Activity Stream Advanced Query option and steps you through the process of entering an advanced query. It includes the following subsections:

- About the Activity Stream Advanced Query Option
- Entering an Advanced Query Against an Activity Stream Task Flow Instance

About the Activity Stream Advanced Query Option

Use `Advanced Query` to create filters against user names, service IDs, and object details, such as a document's display name. You can use SQL syntax for parameter values. Additionally you can place EL expressions within the SQL.

You can construct queries against specific database objects, which are represented by aliases that are prefixed to the inquiry. Table 41-3 lists and describes the types of

database objects against which you can construct a query and provides their alias prefixes.

> **✎ See Also:**
>
> In many cases, you can use EL expressions to obtain the value you require for the supported fields and columns listed in Table 41-3.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Table 41-3   Supported Database Objects for Constructing a SQL WHERE Clause

Database Object	Alias Prefix	Supported Fields/Columns
ACTIVITY	AE	• `SCOPE_ID`—The GUID of the scope (e.g., `#{serviceCtx.scope.GUID}`). • `SERVICE_ID`—The service ID of the component to track. For a list of service IDs, see the Service IDs table in *Developing for Oracle WebCenter Portal*. • `ACTIVITY_TIME`—The time the activity occurs. Use the datetime format that is supported in the SQL or target database. You can also use Oracle database SQL constructs, such as `to_date()`. • `ACTIVITY_TYPE`—The type of activity to track For a list of valid activity type names, see Table 41-4.
ACTIVITY (ACTOR)	AD	`ACTOR_NAME`—The user name of the person performing the activity.
ACTIVITY (OBJECT)	OD	• `SERVICE_ID`—The service ID of the component from which the tracked object issues. For a list of service IDs, see the Service IDs table in *Developing for Oracle WebCenter Portal*. • `OBJECT_ID`—The GUID of the object. • `DISPLAY_NAME`—The object display name. • `OBJECT_TYPE`—The object type. Object type names for use with Advanced Query include: – `event` – `forum` – `topic` – `bookmark` – `list` – `page` – `blog` – `document` – `wiki`

Table 41-4 provides a list of valid activity type names for the ACTIVITY database object described in Table 41-3.

Table 41-4   Activity Type Names for Advanced Query

Tool/Service	Activity Type Name
Events	• `createEvent`
	• `updateEvent`
Tags	• `updateBookmark`
Lists	• `createList`
	• `editList`
Page	• `createPage`
	• `editPage`
Documents **Note:** Document activities in 12*c* (12.2.1) are not streamed, with the exception of documents uploaded through Publisher. Integration with Documents will return in a later release.	• `create-blog` • `update-blog` • `create-document` • `create-wiki` • `update-document` • `update-wiki`
People Connections (Profile)	• `updateStatus` • `updateProfile` • `updatePhoto`
People Connections (Message Board)	• `postScope` • `postself` • `post` • `sharescope` • `shareself` • `share` • `shareobjectscope` • `shareobjectself` • `shareobject` • `updatescope` • `updateself` • `update`
People Connections (Connections)	• `connect` • `inviteForConnection`
People Connections (Feedback)	• `post`

The SQL string that is passed as the advanced query parameter complies with SQL standards. That is, it supports SQL constructs, such as `AND`, `OR`, `IN`, and the like. Note, however, that it does not support `INSERT`, `UPDATE`, `DELETE`, `SELECT`, `JOIN` constructs. The syntax of the advanced query must contain only the `WHERE` clause portion of a SQL query. Because `SELECT` is not supported, the `WHERE` clause cannot have nested queries or subqueries.

The `Advanced Query` parameter also supports EL expressions, which can be embedded in the `WHERE` clause or used to generate the whole `WHERE` clause. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

All the literals in the query must be escaped by prepending a backward slash (\), otherwise such characters generate syntax errors (see Table 41-5 for examples).

Note that the advanced query `WHERE` clause is always `AND`ed to the internal query that is generated by Activity Stream based on the current user, portal membership, connection list, and the like. This is to prevent a user from viewing activities to which he or she does not have access.

Table 41-5 lists examples of advanced queries.

Table 41-5   Examples of Advanced Queries for Use with Activity Stream

Use Case	Query Syntax
Stream only discussion activities.	`AE.SERVICE_ID = \'oracle.webcenter.collab.forum\'`
Stream activities only from an object or current portal.	`OD.OBJECT_ID = \'objectA\' OR AE.SCOPE_ID = \'#{serviceCtx.scope.GUID}\'`
Stream activities only about wikis created by the current user.	`OD.OBJECT_TYPE = \'wiki\' AND AD.ACTOR_NAME = \'#{securityContext.userName}\'`
Stream activities for discussions, but only create activities or all activities for the current user.	`(AE.SERVICE_ID IN (\'oracle.webcenter.collab.forum\') AND AE.ACTIVITY_TYPE IN (\'createTopic\')) OR AD.ACTOR_NAME = \'#{securityContext.userName}\'`

Entering an Advanced Query Against an Activity Stream Task Flow Instance

To enter an advanced query against an instance of the Activity Stream task flow:

1. Edit the page where the Activity Stream appears.

2. Click the Activity Stream you want to change, and select **Parameters** from its **View Actions** menu.

   > **See Also:**
   >
   > Setting Properties on a Component

3. In the Parameters dialog, provide a value for the property `Advanced Query`.

   > **See Also:**
   >
   > See About the Activity Stream Advanced Query Option, for information about the type and format of values you can enter in this field.

4. When you finish revising parameters, click **OK**.

5. Save your changes, and exit the page editor.

Going forward, streamed activities are filtered by your query.

Using Properties to Configure an Activity Stream Task Flow Instance

This section provides examples of how you use property values to affect the behavior of a given task flow instance. It includes the following subsections:

- Preventing Users from Customizing an Activity Stream
- Preventing Users from Commenting on Streamed Items
- Preventing Users from Liking Streamed Items
- Preventing Users from Sharing Streamed Items
- Hiding Portal Options in Activity Stream Task Flows
- Limiting the Stream to Activities from One or More Portals
- Limiting the Stream to One or More Services
- Limiting the Stream to Your Own Activities

Preventing Users from Customizing an Activity Stream

By default, Activity Stream task flows provide user customization controls that enable users to specify whose actions they want to see and from what services and portals in a given Activity Stream. On the Activity Stream task flow, this is the **Options** link. On the Activity Stream - Quick View task flow, this is the pencil icon.

The `Hide Configuration Button` property is available when you want to prevent users from overriding application-level customizations with their own user-level customizations.

To prevent users from customizing an Activity Stream task flow instance:

1. Edit the page, and click the Activity Stream instance.

2. Click the **View Actions** menu, and select **Parameters**.

> ✎ **See Also:**
>
> Setting Properties on a Component

3. In the Parameters dialog, select **Hide Configuration Button**.

> ✎ **Note:**
>
> To show the **Options** link or pencil icon, deselect **Hide Configuration Button**.

4. When you finish revising component parameters, click **OK**.

5. Save your changes, and exit the page editor.

Preventing Users from Commenting on Streamed Items

By default, a **comments** link is shown with all items in an Activity Stream task flow to enable users to comment on a given item (Figure 41-7).

Figure 41-7   Comments Link on a Streamed Item
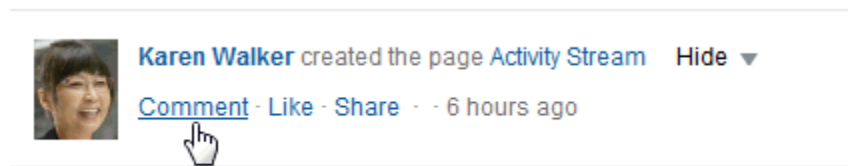
You can use the `Hide Comments` property to suppress the display of the **Comment** link and, consequently, prevent users from commenting on streamed items in a given task flow instance.

To prevent users from commenting on streamed items:

1. In the Activity Stream task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, select **Hide Comments**.

> **Note:**
>
> To show the **Comment** link on streamed items, deselect **Hide Comments**.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Preventing Users from Liking Streamed Items

By default, a **Like** link is shown with all items in an Activity Stream task flow to enable users to express a favorable opinion of a given item (Figure 41-8).

Figure 41-8   Like Link on a Streamed Item
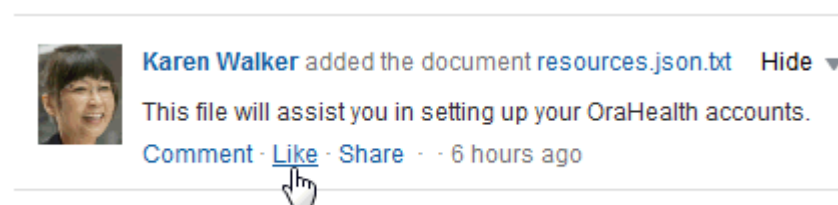
Once clicked, the **Like** link switches to an **Unlike** link to enable users to undo their favorable opinion.

You can use the `Hide Like` property to suppress the display of the **Like** link, and, consequently, prevent users from liking streamed items in a given task flow instance.

To prevent users from liking streamed items:

1. In the Activity Stream task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> ✎ **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, select **Hide Like**.

> ✎ **Note:**
>
> To show the **Like** link on streamed items, deselect **Hide Like**.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Preventing Users from Sharing Streamed Items

By default, a **Share** menu is shown with all items in an Activity Stream task flow to enable users to share a streamed item with their connections (Figure 41-9).

Figure 41-9   Share Menu on a Streamed Item
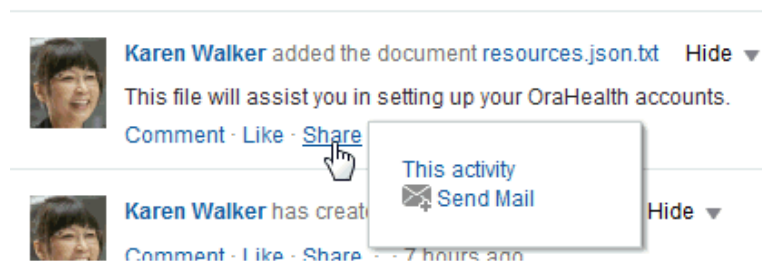
You can use the `Hide Share` property to suppress the display of the **Share** menu, and, consequently prevent users from sharing streamed items from a given task flow instance.

To prevent users from sharing streamed items:

1. In the Activity Stream task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, select **Hide Share**.

> **Note:**
>
> To show the **Share** option on streamed items, deselect **Hide Share**.

3. When you finish revising component parameters, click **OK**.
4. Save your changes, and exit the page editor.

Hiding Portal Options in Activity Stream Task Flows

By default, users see portal options on the **Settings** tab of the Activity Stream and Activity Stream - Quick View Options dialogs (Figure 41-10). Portal options enable users to specify whether to show activities from all portals, the portals they are a member of, no portals, or just the portal where the task flow is placed.

Figure 41-10   Portal Options on Settings Page of Activity Stream Options Dialog
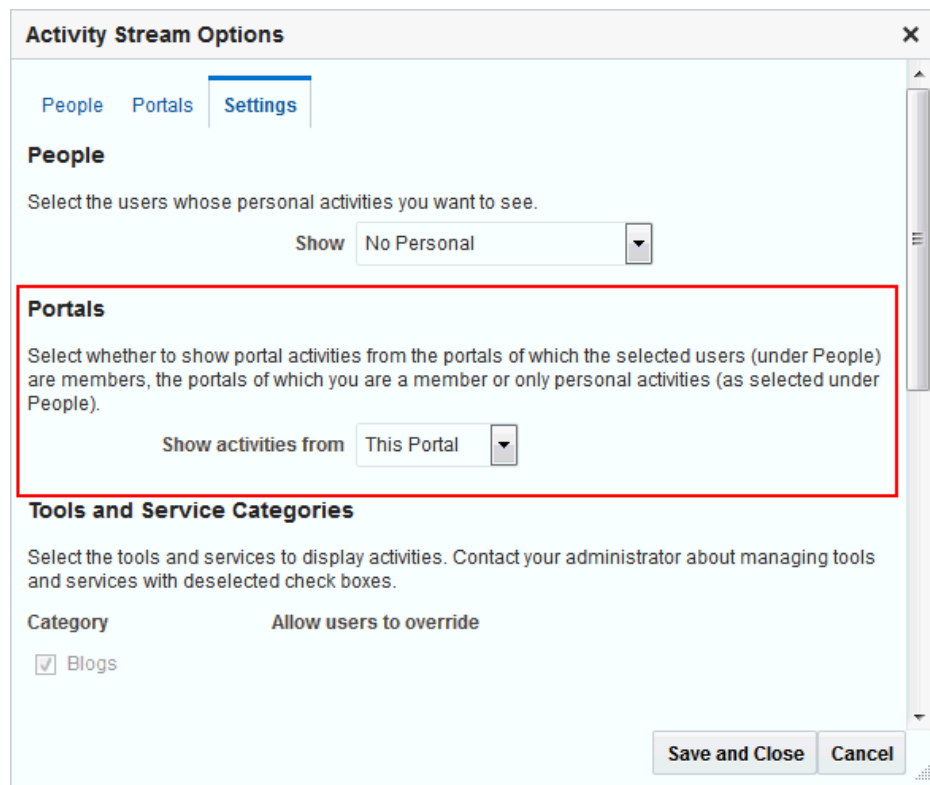
You can use the `Hide portal Options` parameter to suppress the display of the **Portals** section on the Settings page of the Activity Stream task flow Options dialogs.

To hide the Portals options:

1. Click the Activity Stream task flow instance to show the **View Actions** menu.

> ✎ **See Also:**
>
> Setting Properties on a Component

2. From the menu, select **Parameters**.

3. In the Parameters dialog, select **Hide Portals Options**.

> ✎ **Note:**
>
> To show the **Portals** options, deselect **Hide Portals Options**.

4. When you finish revising component parameters, click **OK**.

5. Save your changes, and exit the page editor.

Limiting the Stream to Activities from One or More Portals

Configuration options in both the Activity Stream and Activity Stream - Quick View task flows provide all-or-none options for streaming activities from portals (see Tracking Portal Activities in *Using Portals in Oracle WebCenter Portal*).

The `Portals` property associated with the Activity Stream task flow provides the additional dimension of selecting specific portals from which to stream activities.

To limit the stream to activities from one or more portals:

1. In the Activity Stream task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> ✎ **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, in the `Portals` field, enter a comma-separated list of the portal names or portal GUIDs from which to stream activities in this task flow instance.

> 💡 **Tip:**
>
> Enter the portal *internal name*. The portal internal ID is specified on the **Overview** page of a portal's administration settings.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Limiting the Stream to One or More Services

Configuration options for both the Activity Stream and Activity Stream - Quick View task flows provide a way to select the service categories from which to stream activities (see Tracking Portal Activities in *Using Portals in Oracle WebCenter Portal*).

The `Service Categories` property associated with the Activity Stream task flow extends this capability by enabling you to enforce a particular selection. For example, you can specify the service category `lists`, and only those connections' activities that stream from lists are shown in the task flow instance.

To limit streamed activities to one or more services:

1. Edit the page, and click the Activity Stream instance.

2. Click the **View Actions** menu, and select **Parameters**.

> ✏️ **See Also:**
>
> Setting Properties on a Component

3. In the Parameters dialog, in the `Service Categories` field, enter a comma-separated list of the services from which to stream activities in this instance.

> 💡 **Tip:**
>
> Enter the service category ID or the service ID. For a list of valid service IDs, see the Service IDs table in *Developing for Oracle WebCenter Portal*.

4. When you finish revising component properties, click **OK**.

5. Save your changes, and exit the page editor.

Limiting the Stream to Your Own Activities

You can use the `Profile Only` property associated with the Activity Stream task flow to limit the display of streamed activities to just the user's own activities.

To limit streamed activities to just the user's own activities:

1. Edit the page, and click the Activity Stream instance.

2. Click the **View Actions** menu, and select **Parameters**.

> ✏️ **See Also:**
>
> Setting Properties on a Component

3. In the Parameters dialog, select **Profile Only**.

> **✎ Note:**
>
> To show a user's own activities and those of their connections, deselect **Profile Only**.

4. When you finish revising component parameters, click **OK**.

5. Save your changes, and exit the page editor.

Working with Activity Stream Task Flows

For information about how users work with Activity Stream task flows, see Tracking Portal Activities in *Using Portals in Oracle WebCenter Portal*.

About Publisher

The Publisher task flow is available for publishing messages, files, and URLs to the Activity Streams of all of your connections or to those connections who have access to a specified portal.

> **✎ See Also:**
>
> For information about parameters associated with the Publisher task flow, see Working with Publisher Task Flow Properties.

Things you should know about the Publisher task flow:

- You can use it to send out messages, but not to receive them. It provides no feature for viewing messages.

- It is specifically made to work in conjunction with Activity Stream, where the messages you enter are published.

- It has its own distinct set of properties (see Working with Publisher Task Flow Properties).

- It is not controlled by configuration settings at the application level nor through a user's personal Preferences. Users specify who sees their published messages through a control on the task flow itself. You can also exercise some control over the message destination through task flow properties. For example, the Publisher task flow has an associated property, `Is Update Status`, that shows the last published message as the user's Profile status message.

> **✎ See Also:**
>
> Adding Profiles to a Portal
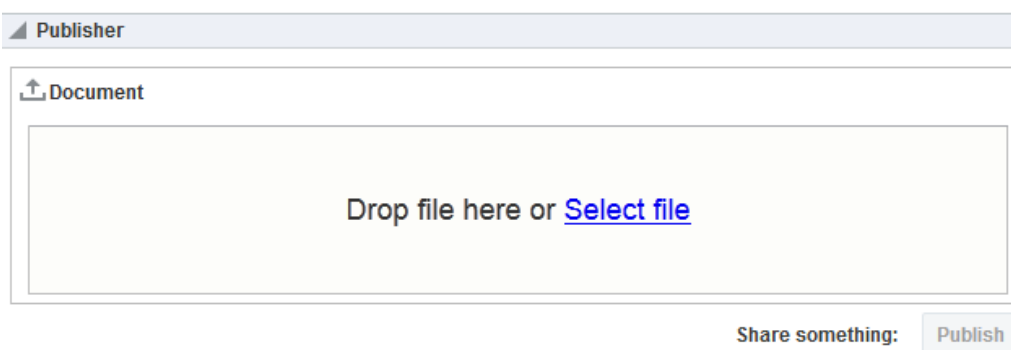
There is one Publisher task flow, but, depending on how you set the properties, it can show options for sharing messages, files, or links (Figure 41-11) or just show options for sharing documents (Figure 41-12).

Figure 41-11   Publisher Task Flow

Figure 41-12   Publisher Task Flow with Upload Document Only Option

In default WebCenter Portal installations, the Publisher task flow is placed on the **Activities** business role page provided in the Home portal for all authenticated users (that is, users who are logged in).

The default **Activities** business role page also contains an Activity Stream task flow where the messages you enter through the Publisher are published.

> ✎ **See Also:**
>
> Managing Business Role Pages in *Administering Oracle WebCenter Portal*

Adding a Publisher Task Flow to a Page

For the steps to add a Publisher task flow to a page, see Adding a Component to a Page.

> 💡 **Tip:**
>
> The presence or location of the Publisher task flow in the resource catalog depends on how the resource catalog is configured. For example, in the default resource catalog, the Publisher task flow is included under the **Social and Communication** folder.

Working with Publisher Task Flow Properties

The Publisher task flow has associated properties that users with sufficient privileges can access through the task flow's **View Actions** menu. For example, edit the page where the task flow instance appears, click the task flow, open the **View Actions** menu, and select **Parameters** to display the Parameters dialog (Figure 41-13).

Figure 41-13   Publisher Parameters Dialog

> ✏️ **See Also:**
>
> Setting Properties on a Component

The following sections provide information about properties associated with the Publisher task flow and describe the task flow parameters:

- Setting Publisher Task Flow Properties
- Publisher Task Flow Parameters
- Blocking File Uploads Through a Publisher Task Flow Instance
- Limiting the Scope of Recipients
- Using the Publisher as a Profile Status Updater
- Using the Publisher as a File Uploader

Setting Publisher Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 41-14), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 41-14   View Actions Menu on a Publisher Task Flow
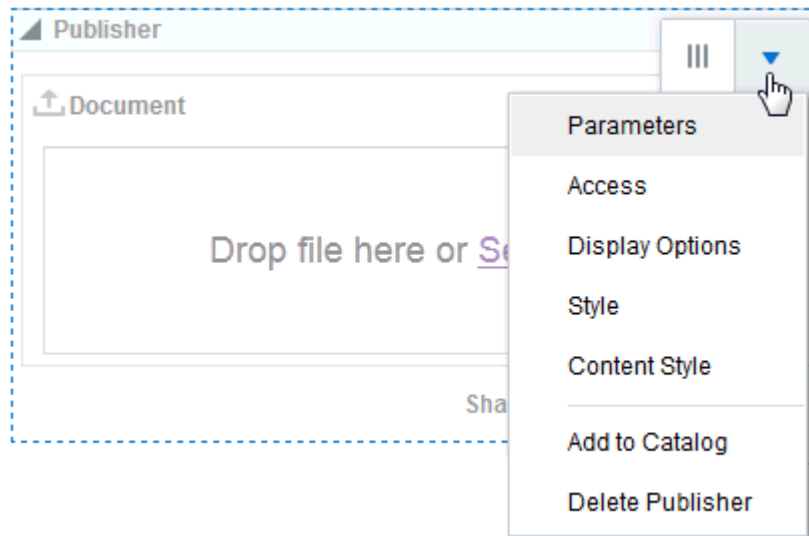
To set Publisher task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

- Parameters control the default task flow content. For descriptions of each parameter, see Publisher Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.
- Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.
- The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

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.

> **✎ Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Publisher Task Flow Parameters

Table 41-6 describes the parameters that are unique to the Publisher task flow.

Table 41-6   Publisher Task Flow Parameters

Parameter	Description
Hide Attach Links	Specifies whether the **Attach: File | Link** option is shown or hidden • Select to hide the **Attach: File | Link** option. • Deselect to show the **Attach: File | Link** option. The **Attach: File | Link** option is shown by default.
Hide Document Uploader	Specifies whether the **File** link is available on the task flow for uploading a document • Select to hide the **File** link. • Deselect to show the **File** link. The **File** link will show only if the **Attach: File | Link** option is shown. The **File** link is shown by default. **Note:** Do not select this option if the Upload Document Only option is selected. If you select both options, Publisher displays no controls.

Table 41-6   (Cont.) Publisher Task Flow Parameters

Parameter	Description
Hide Sharing Picker	Specifies whether the **Share with** menu is shown or hidden • Select to hide the **Share with** menu. • Deselect to show the **Share with** menu. The **Share with** menu is shown by default.
Message key of hints text	Specifies the resource bundle class and message key for hint text Use the format `key[,RBClass]`. `__EMPTY__` as the predefined key for no hint text. This is the default value.
Is Update Status	Indicates whether the message entered in the task flow instance should also be published as the user's Profile status message • Select to publish the message as the user's Profile status message and in the selected recipients' Activity Streams. • Deselect to publish the message only in the selected recipients' Activity Streams. If you attach a file or URL to a published message, then the message is not used as a Profile status message, even if `Is Update Status` is selected. For information about Profiles, see Adding Profiles to a Portal.
Keep open the Publisher after publish	Specifies whether Publisher remains open after a user clicks the **Publish** button • Select to keep the text box open after a message is published. • Deselect to close the Publisher controls after a message is published. Publisher remains open after a message is published by default.
Object Id	The ID of the object to be shared This property assists in generating a link used in navigating to the published object. It is not necessary to provide a value, unless you plan to do so using an EL expression. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*
Object Type	The type of object to be shared This property assists in generating a link used in navigating to the published object. It is not necessary to provide a value, unless you plan to do so using an EL expression. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*
Scope Id	The ID of the scope to which to publish This property assists in generating a link used in navigating to the published object. It is not necessary to provide a value, unless you plan to do so using an EL expression. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*

Table 41-6   (Cont.) Publisher Task Flow Parameters

Parameter	Description
Service Id	The service ID of the service to which the shared object belongs
	This property assists in generating a link used in navigating to the published object. It is not necessary to provide a value, unless you plan to do so by entering a specific service ID or using an EL expression. For a list of valid service IDs, see ELs Related to Tools and Services in *Developing for Oracle WebCenter Portal*. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*
Space Name	The name of the portal in which to publish the messages entered in this task flow instance
	Enter the portal internal name and not the portal display name. The portal internal name is the name specified by the portal URL on the **General** page of a portal's administration settings. The portal display name is specified by **Display Name**, and is the name that appears in the portal banner at the top of the portal.
Upload Document Only	Specifies that Publisher shows only the document upload feature, hiding the text entry area and the **Attach: Link** option (Figure 41-12)
	• Select to show only the document upload feature and hide the text entry area and the **Attach: Link** option.
	• Deselect to show the text entry area and the **Attach: File | Link** option.
	This option is not enabled by default.
	Note: If you select this option, make sure the `Hide Document Uploader` is not selected. If you select both options, Publisher displays no controls.
User Name	The name of the user who owns the current view
	This value is supplied by default. We recommend that you not change the default value, `#{o_w_w_i_v_b_resourceViewerBean.username}`.
Via User	The user name of the person who provided the object the current user is sharing
	For example, if John is shares a document with everyone that Jane originally shared with him, Jane is the "via" user.

Blocking File Uploads Through a Publisher Task Flow Instance

You can use the `Hide Document Uploader` property to hide the **Attach: File** option on a Publisher task flow instance. Users will be unable to share files—though they will still be able to share links.

To block file uploads through a Publisher task flow instance:

1. In the Publisher task flow instance, click the **View Actions** menu, and select **Parameters**.

> ✏ **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, select **Hide Document Uploader**.

> ✏ **Note:**
>
> To show the **Attach: File** option, deselect **Hide Document Uploader**.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Limiting the Scope of Recipients

You can use the `Space Name` property to limit the scope of recipients of published messages to a user's connections in a particular portal. When you do this, the message is streamed only to your and your connections' views of the Activity Stream in the named portal.

To limit the scope of recipients to a particular portal:

1. Edit the page, and click the Publisher instance.

2. Click the **View Actions** menu, and select **Parameters**.

> ✏ **See Also:**
>
> Setting Properties on a Component

3. In the Parameters dialog, enter the internal name of the portal in the `Portal Name` field.

> 💡 **Tip:**
>
> The portal internal name is the name specified by the portal URL on the **General** page of a portal's administration settings. The portal display name is specified by **Display Name**, and is the name that appears in the portal banner at the top of the portal.

4. When you finish revising component parameters, click **OK**.

5. Save your changes, and exit the page editor.

Messages posted through that Publisher task flow instance will be shared with only those connections who have access to the named portal.

Using the Publisher as a Profile Status Updater

You can use the Publisher parameter `Is Update Status` to specify that all messages without attachments are published not only to specified recipients, but also as the user's profile status message (Figure 41-15).

Figure 41-15   Published Message Used as Profile Status
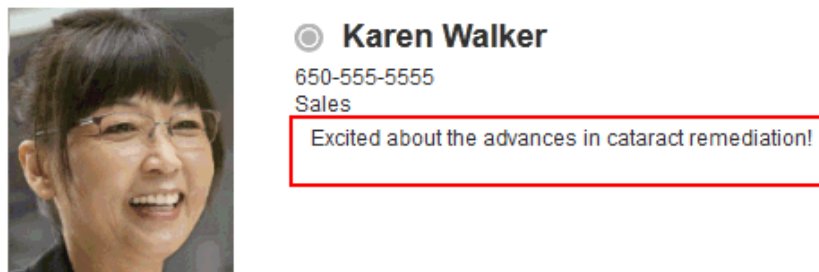
Messages that have an attached file or link are not published as a profile status message.

To specify that messages are also published as profile status messages:

1. Edit the page where the Publisher task flow is placed.

2. Click the Publisher task flow to show the **View Actions** menu, and select **Parameters**.

> ✎ **See Also:**
>
> Setting Properties on a Component

3. In the Parameters dialog, select **Is Update Status** and click **OK**.

4. Save your changes, and exit the page editor.

    Messages that do not include attachments that are posted through that Publisher task flow instance are also shared as the user's personal Profile status message.

Using the Publisher as a File Uploader

You can use the `Upload Document Only` property to limit the functionality of the Publisher task flow to a file uploader (Figure 41-16).

Figure 41-16   Publisher Task Flow as Document Uploader
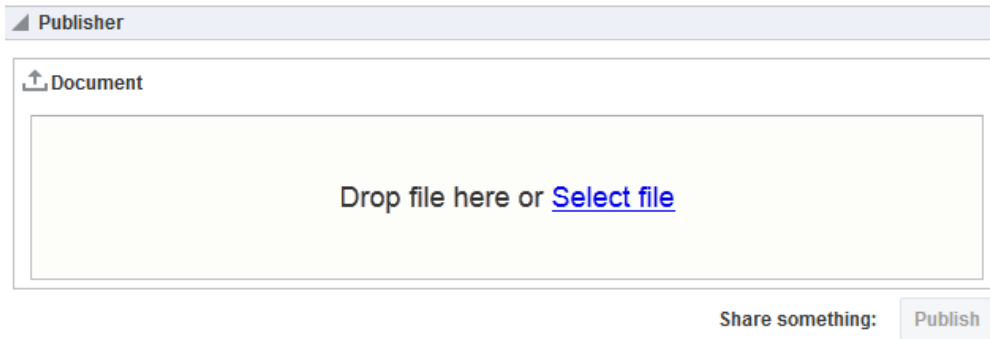
Files uploaded through the Publisher task flow are placed in the Public folder in the document library of the selected scope. That is:

- In the Home portal:

    - Select **Everyone** to publish the file to the **Public** folder in each of your connections' personal Document Library.

    - Select a named portal to publish the file to the **Public** folder in the selected portal's Document Library.

- In a portal, the file is published to the **Public** folder in the portal's Document Library.

To use the Publisher task flow as a file uploader:

1. In the Activity Stream task flow instance, click the **View Actions** menu, and select **Parameters**.

    > ✏️ **See Also:**
    >
    > Setting Properties on a Component

2. In the Parameters dialog, select **Upload Document Only**.

    > ✏️ **Note:**
    >
    > To show the message and link controls, deselect **Upload Document Only**.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

    The Publisher task flow instance renders as a file uploader (see Figure 41-16). The text area and the **Share link** icon are not rendered.

Working with the Publisher Task Flow

For information about how users work with the Publisher task flows, see Liking, Commenting On, and Sharing Items in WebCenter Portal in *Using Portals in Oracle WebCenter Portal*.

42

Adding Analytics to a Portal

Add Analytics to a portal to provide traffic and usage metrics for administrators, portal managers and other business users.

> **✏ Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Manage Security and Configuration` or `Manage Configuration`.
>
> Any user who accesses administration settings for a portal and does not have `Manage` permission (for example, a user with `Customize Pages` permissions, granted permission to edit a page in the portal) will see only the settings available to their role and permissions.
>
> See About Roles and Permissions for a Portal.

Topics:

- About Analytics
- Adding an Analytics Task Flow to a Page
- Working with Analytics Task Flow Properties
- Working with Analytics Task Flows

About Analytics

Analytics allows system administrators and portal managers to track and analyze WebCenter Portal traffic and usage. Analytics provides the following basic functionality:

- Usage Tracking Metrics: Analytics collects and reports metrics of common WebCenter Portal functions, including community and portlet traffic.

- Behavior Tracking: Analytics can be used to analyze WebCenter Portal metrics to determine usage patterns, such as page visit duration and usage over time.

- User Profile Correlation: Analytics can be used to correlate metric information with user profile information. Usage tracking reports can be viewed and filtered by user profile data such as country, company or title.

> **Note:**
>
> Profile information is cached meaning that changes to a user profile are not visible in reports until the cache is updated. The default cache time is 60 minutes, but this value can be changed by your administrator.

This section contains the following topics:

- Understanding the Analytics Administration Page in WebCenter Portal
- Understanding Analytics Task Flows
- Access to Analytics Task Flows in WebCenter Portal

Understanding the Analytics Administration Page in WebCenter Portal

The *Analytics console* displays metrics for the entire WebCenter Portal application. It is available to system administrators with the `Manage Configuration` permission.

Out-of-the-box, this console is only available through a business role page named *Analytics*. It is the system administrator's responsibility to grant people permissions to see the Analytics page. This page is intended for anyone who needs to analyze access and usage statistics; this could include administrators, sales or marketing managers or directors, business analysts, and so on.

Just like other business role pages, the Analytics page is pushed to all the users to whom it is assigned, appearing in the Home portal. Once the Analytics page is available in the Home portal, users can show and hide the page through the Manage Page dialog. For more information, see Specifying the Target Audience for a Business Role Page in *Administering Oracle WebCenter Portal*.

Figure 42-1   Analytics Console for Administrators
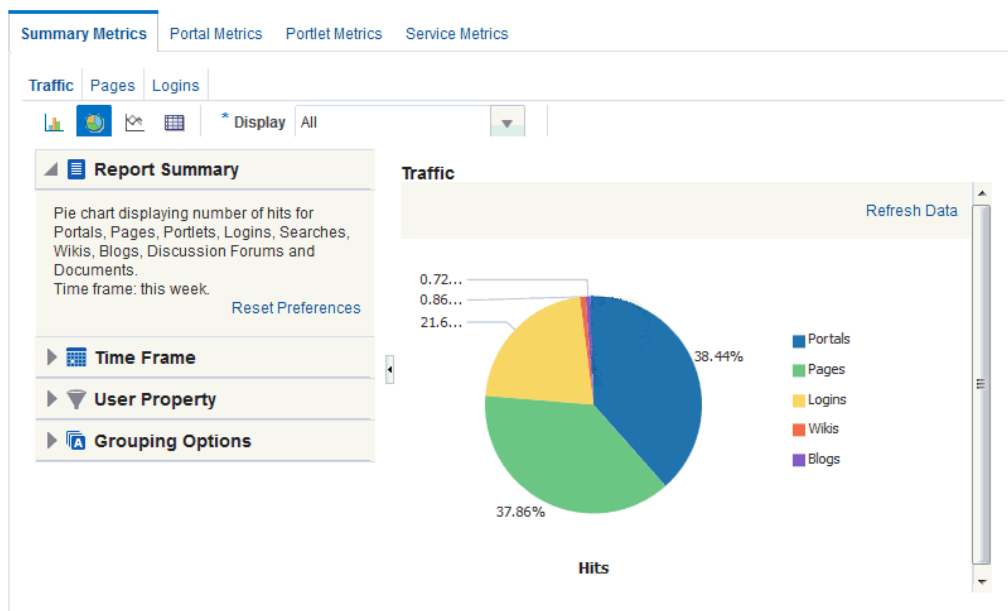
The console consists of four pages, grouping several different reports:

- **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, discussion forum 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.

Understanding Analytics Task Flows

This section lists and describes all the Analytics task flows that are provided with WebCenter Portal. Note that those marked with "Administrator" are only available to users with the `Administrator` role. The following task flows are available out-of-the-box:

Application Analytics:

- WebCenter Traffic
- Page Traffic (Administrator)

Portlet Analytics:

- Portlet Traffic (Administrator)
- Portlet Instance Traffic (Administrator)
- Portlet Response Time (Administrator)
- Portlet Instance Response Time (Administrator)

Service Analytics:

- Search Metrics

> **Note:**
>
> The images shown in the following sections represent one view of each report. However each report can be customized to display the data in different ways (for example, a bar chart, a pie chart, a line chart, or a table). For information on customizing reports, see Customizing Analytics Reportsand Personalizing Your Analytics Report View.

WebCenter Traffic

The WebCenter Traffic task flow (Figure 42-2) displays a summarized view for common events within the portal.

Use this task flow to track application-wide events—portal views, page views, portlet views, logins, number of searches, wiki views, blog views, and document views.

Figure 42-2 Analytics Task Flow - WebCenter Traffic
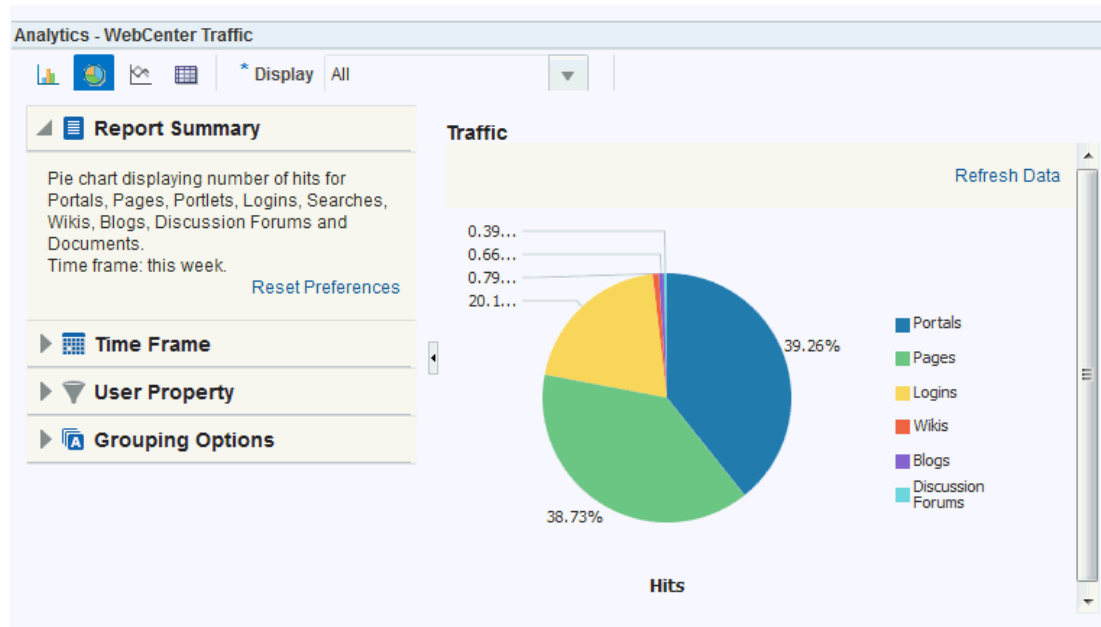
Page Traffic (Administrator)

The Page Traffic task flow (Figure 42-3) displays the number of page hits and the number of unique users who have visited any portal page.

Use this task flow to quickly see the most visited pages (top pages) and/or the least visited pages (bottom pages). You can view page data by hits (total number of page views) and/or users (unique number of users who viewed pages). You can filter the report to show data only for specific pages (in the **Display** options list, select **Specify**, then click **Select**, select pages, then click **OK**) or pages from specific portals (in the WebCenter Portal query options).

Figure 42-3 Analytics Task Flow - Page Traffic
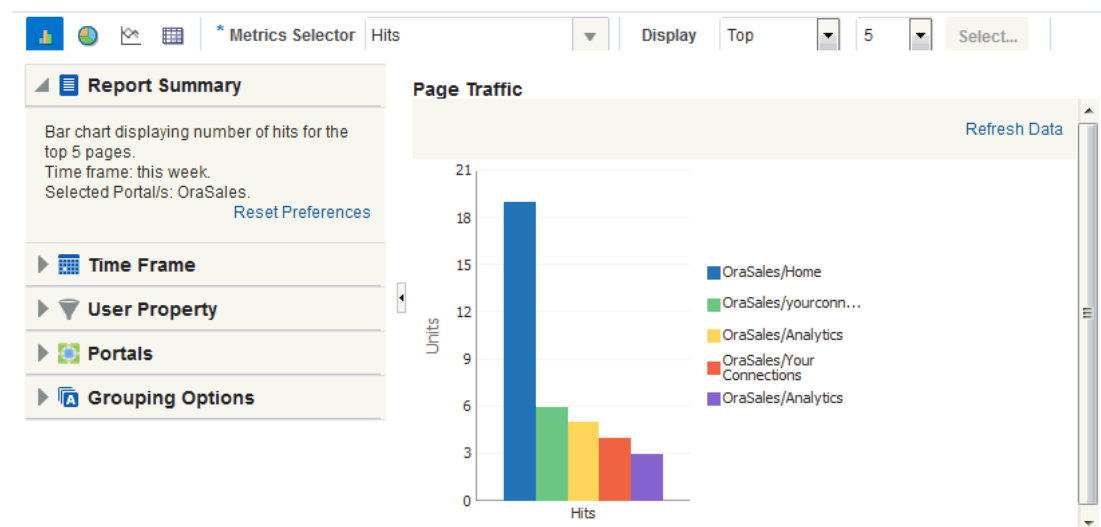
> **Note:**
>
> Pages belonging to the *Home portal* are excluded by default but there is an
> option to include this information if you want to do so.

Portlet Traffic (Administrator)

The Portlet Traffic task flow (Figure 42-4) displays portlet usage information—the
number of portlet hits (the number of times a portlet is displayed) and number of
unique users that access a portlet.

Use this task flow to quickly see the most popular portlets (top), and the least popular
portlets (bottom). You can filter the data to only show specific portlets or show all
portlets. Similarly, you can filter the portlet data by portal.

Figure 42-4   Analytics Task Flow - Portlet Traffic
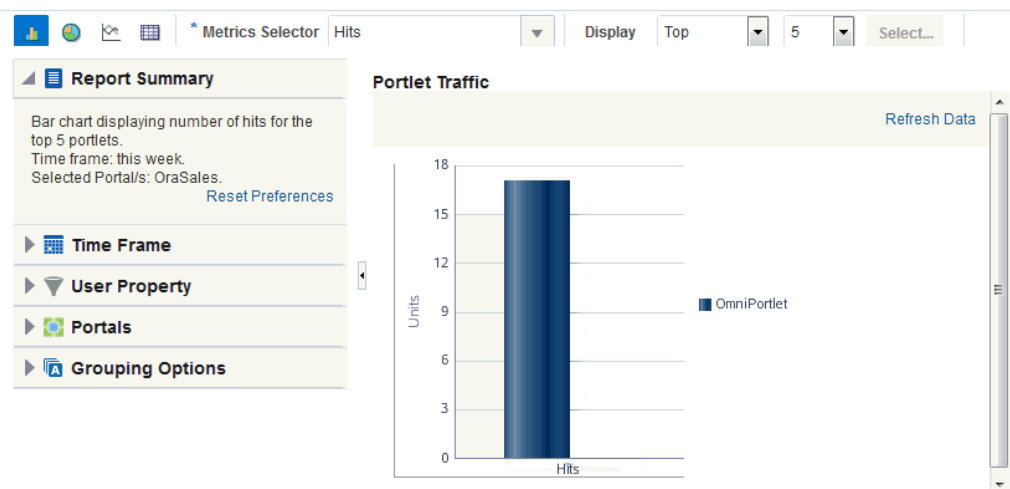
> **Note:**
>
> The Home portal is not included in the data.

Portlet Instance Traffic (Administrator)

The Portlet Instance Traffic task flow (Figure 42-5) displays usage information—the
number of portlet hits (the number of times a portlet is displayed) and number of
unique users that access a portlet—for individual portlet instances. If the same portlet
displays on several different pages, each placement is considered as a portlet
instance.

Use this task flow to quickly see the most popular portlet instances (top), and the least
popular portlet instances (bottom). You can filter the data to only show specific portlet

instances or show all portlet instances. Similarly, you can filter the portlet data by portal.

Figure 42-5   Analytics Task Flow - Portlet Instance Traffic

> **Note:**
>
> The Home portal is not included in the data.

Portlet Response Time (Administrator)

The Portlet Response Time task flow (Figure 42-6) displays performance information— average, minimum, and maximum response time—for individual portlets.

Use this task flow to quickly see the slowest portlets (bottom), the fastest portlets (top), and compare performance data. Portlet response times are important because there is often a direct link between page performance and the slowest portlets. When troubleshooting poor performance within a portal, it is important to identify the worst performing portlets. You can filter the data to only show specific portlets or show all portlets. Similarly, you can filter the portlet data by portal.

Figure 42-6   Analytics Task Flow - Portlet Response Time
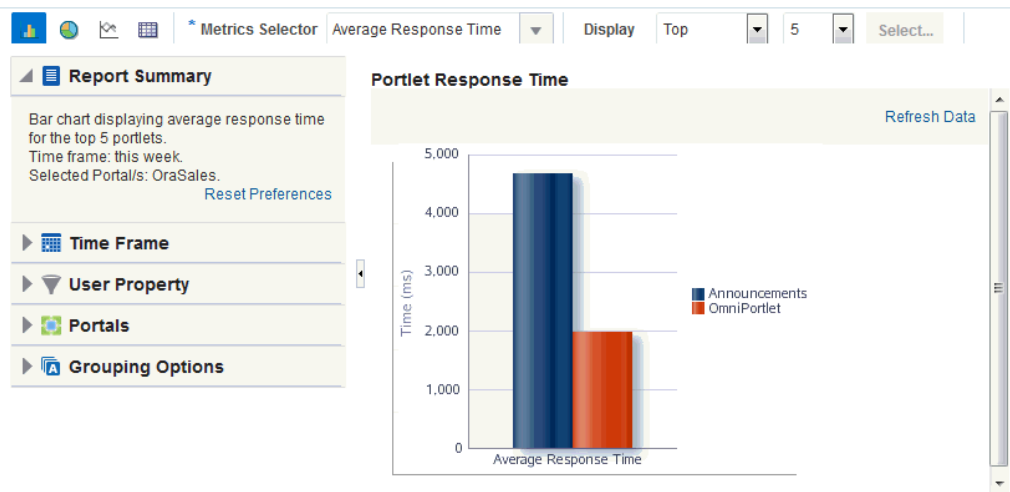
Portlet Instance Response Time (Administrator)

The Portlet Instance Response Time task flow (Figure 42-7) displays performance information—average, minimum, and maximum response time—for individual portlet instances. If the same portlet displays on several different pages, each placement is considered as a portlet instance.

Use this task flow to quickly see the slowest portlet instances (bottom), the fastest portlet instances (top), and compare performance data. You can filter the data to only show specific portlet instances or show all portlet instances. Similarly, you can filter the portlet data by portal.

Figure 42-7   Analytics Task Flow - Portlet Instances Response Time

Search Metrics

The Search Metrics task flow (Figure 42-8) tracks searches performed within the portal.

Use this task flow to quickly see the most popular (top) and least popular (bottom) search phrases.

Figure 42-8   Analytics Task Flow - Search Metrics
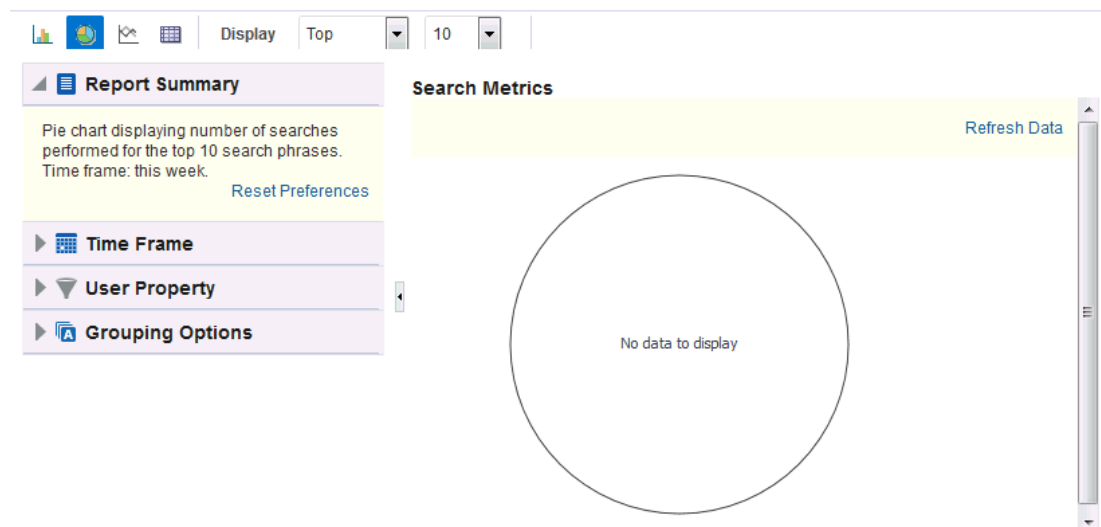
Access to Analytics Task Flows in WebCenter Portal

In WebCenter Portal, resource catalogs only display analytics task flows to users with appropriate permissions:

- Administrators - Users with the `Administrator` role have access to all the Analytics task flows

- Managers - Within a portal, members with the `Portal Manager` role can only access task flows specific to that portal

After a task flow is added to a page, anyone with access to the page can see the task flow.

Adding an Analytics Task Flow to a Page

For the steps to add an Analytics task flow to a page, see Adding a Component to a Page.

> **Tip:**
>
> The presence or location of the Analytics task flow in the resource catalog depends on how the resource catalog is configured. For example, in the default resource catalog, the Analytics task flow is included under the **Analytics** folder.

> ✏️ **Note:**
>
> When you add an Analytics task flow to a portal, it displays information for that portal, not for all portals.

Working with Analytics Task Flow Properties

Analytics task flows have associated properties, which users with sufficient privileges can access through the task flows' **View Actions** menu. For example, select **Parameters** to show the Parameters dialog (Figure 42-9).

Figure 42-9   Analytics Task Flow: Parameters Dialog
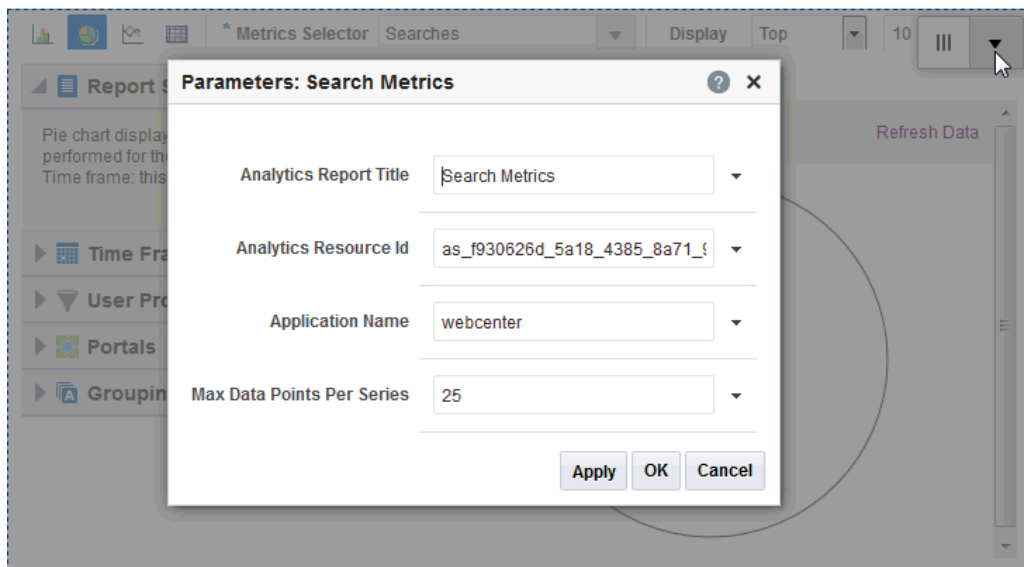
> ✏️ **See Also:**
>
> Setting Properties on a Component

The following sections provide information about properties of the Analytics task flows and describe the task flow parameters:

- Setting Analytics Task Flow Properties
- Analytics Task Flow Parameters

Setting Analytics Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 42-10), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 42-10   View Actions Menu on an Analytics Task Flow
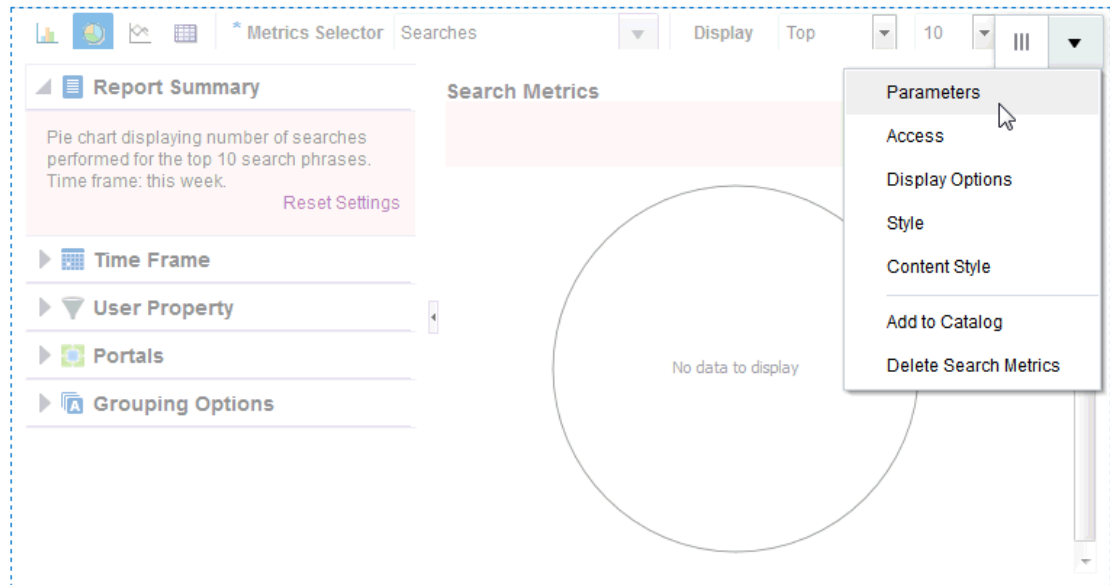
To set Analytics task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

   • Parameters control the default task flow content. For descriptions of each parameter, see Analytics Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

   • Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

   • The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

   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.

> **Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Analytics Task Flow Parameters

Table 42-1 describes the parameters that are unique to the Analytics task flows.

Table 42-1   Analytics Task Flow Parameters

Parameter	Description
Analytics Report Title	Specifies the display title that appears above the analytics data. **Note:** • Use the Analytics Report Title rather than the Text property in the Display Options dialog. Changing the Text value has no effect on Analytics task flows. • You cannot change the report titles in the Analytics console.
Analytics Resource Id	Specifies the MDS document used to store user customizations/application customizations for the task flow instance in MDS. **Warning:** Do not edit this value.
Application Name*	Specifies the portal for which you want to display analytics data. For WebCenter Portal, this is always `webcenter`. The analytics database can be used to store event data from multiple applications so this parameter is required to identify which application data to display. If omitted, the task flow displays analytics data for all supported portals.
Max Data Points Per Series	Indicates the maximum number of data points to be displayed in a bar or line chart. The default value is 25. Valid values are between 1 and 1000. **Note:** Increasing the number of data points might increase the time it takes to render the report.

Working with Analytics Task Flows

This section contains the following topics:

- Customizing Analytics Reports
- Personalizing Your Analytics Report View

Customizing Analytics Reports

If you want to set defaults for Analytics reports, you can do so by editing the report settings in the page editor. Any changes you make while in the page editor will become the default report settings for all users in page View mode. For example, you can edit the Analytics page, changing the following settings on the **Summary Metrics** page in the Traffic report: set the report type to pie chart, set the time frame to this week. When users visit the Analytics page, those settings will be applied by default. Users can then edit the report as necessary for their needs. This can be useful if there are particular settings you know are commonly used by your users, or to customize a particular instance of an Analytics task flow on a group-specific page.

You can also configure the report settings to determine the controls available to users in View mode. In the page editor, click the **Configure report preferences** icon to display the Report Settings popup. In this popup, you can specify whether to show or hide the following report settings:

- **Chart**
  - **Chart Style** list allows you to select a color scheme for reports
  - **Chart Type Options** allows you to show or hide the chart types (bar, pie, line, table) at the top of the report
- **Data Selection**
  - **Report Summary** allows you to show or hide the Report Summary section to the left of the report
  - **Metrics Selector** allows you to show or hide the list of metrics (such as Hits, and Unique Users)
  - **Display Options** (not available with Logins) allows you to show or hide the list of display options (such as Portals, Pages, and Portlets)
  - **Selection Button** (not available with Traffic, Logins, Portal Traffic, Portal Response Time, Search Metrics, Document Metrics, Wiki Metrics, Blog Metrics) allows you to show or hide the **Specify** option in the **Display** list and the **Select** button at the top of the report
  - **Additional Options** (not available with Traffic, Logins, Portal Traffic, Portal Response Time, Portlet Traffic, Portlet Instances Traffic, Portlet Response Time, Portlet Instances Response Time, Search Metrics, Document Metrics, Wiki Metrics, Blog Metrics) allows you to show or hide the Additional Options section to the left of the report
- **Filtering**
  - **Time Frame Filters** allows you to show or hide the Time Frame section to the left of the report
  - **User Property Filters** allows you to show or hide the User Property section to the left of the report
  - **Portal Filter** (not available with Traffic, Logins, Search Metrics) allows you to show or hide the Portals section to the left of the report
- **Grouping**
  - **Group By Options** allows you to show or hide the Grouping Options section to the left of the report

Personalizing Your Analytics Report View

Analytics task flows include display options at the top of the report and query options to the left of the report. These options enable you to personalize the report for your needs by changing the metrics included in the report and the way the report is presented. Most options are the same for all Analytics task flows.

This section includes the following subsections:

- Report Display Options
- Query Options

Report Display Options

The report display options at the top of the report enable you to select the type of report, select the type of metrics to include, and, for some task flows, control the top/bottom range to display.

Report Types

You can display your report as a bar chart, pie chart, line chart, or table depending on the display and query options you select. To select your report type, click the associated icon.

Table 42-2 lists the report types available for different display and query options. It includes the following columns:

- Selected Metrics specifies what has been selected in the list of metrics, a single metric or multiple metrics.

> ✎ **Note:**
>
> Search Metrics and Document Metrics task flows show only those single metrics; there is no list to select metrics.

- Group By Options specifies what has been selected in the Grouping Options section to the left of the report, **No Selection** or one of the available selections.

- Bar, Pie, Line, and Table specify whether you can view that type of report with the specified selections.

Table 42-2   Display Options for the Analytics Task Flows

Selected Metrics	Group By Option	Bar	Pie	Line	Table
Single metric Login Traffic task flow	No selection	N	N	N	Y
Single metric All other task flows	No selection	Y	Y	N	Y
Single metric	Time interval, user property, or Both*	Y	N	Y	Y

Table 42-2   (Cont.) Display Options for the Analytics Task Flows

Selected Metrics	Group By Option	Bar	Pie	Line	Table
Multiple metrics WebCenter Traffic and Login Traffic task flows	No selection	Y	Y	N	Y
Multiple metrics All other task flows	No selection	Y	N	Y	Y
Multiple metrics WebCenter Traffic and Login Traffic task flows	Time interval or user property	Y	N	Y	Y
Multiple metrics All other task flows	Time interval or user property	N	N	N	Y
Multiple metrics Login Traffic task flow	Both*	N	N	N	Y

* The grouping option **Both** is available only for the Login Traffic task flow.

Metrics

You can select which type of metrics to include in your report. Your metrics options differ depending on the task flow you are using:

- WebCenter Traffic: Portals, Pages, Portlets, Logins, Searches, Wikis, Blogs, Documents
- Page Traffic: Hits, Unique Users
- Login Metrics: Logins, Unique Users
- Portal Traffic: Hits, Unique Users, Visits
- Portal Response Time: Average Response Time, Minimum Response Time, Maximum Response Time
- Portlet Traffic: Hits, Unique Users
- Portlet Instance Traffic: Hits, Unique Users
- Portlet Response Time: Average Response Time, Minimum Response Time, Maximum Response Time
- Portlet Instance Response Time: Average Response Time, Minimum Response Time, Maximum Response Time
- Search Metrics: This task flow shows only search metrics, so it does not include an option to select metrics.
- Document Metrics: This task flow shows only document metrics, so it does not include an option to select metrics.
- Wiki Metrics: Views, Unique Users
- Blog Metrics: Views, Unique Users

To select which metrics to include in your report, select the metrics from the list above the report.

Figure 42-11   Analytics Task Flow - Metrics Selection
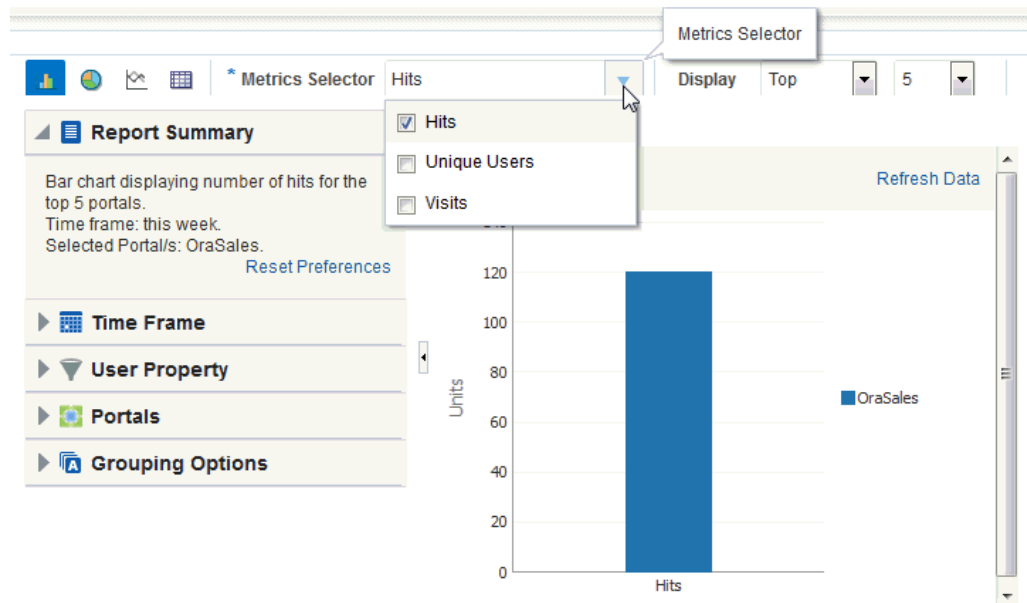
Top, Bottom, or Custom Ranges

With some task flows you can specify whether you want to see the top, bottom, all, or a custom ranges of metrics in your report. Use these options to see the most and least popular items in your portal.

To display the top or bottom ranges of metrics in your report, in the lists above the report, select **Top** or **Bottom**, and then select a number to define the range.

To display a custom range, in the list above the report, select **Specify**, then click **Select**.

The top and bottom options are available for Pages, Portlet Traffic, Portlet Instances Traffic, Response Time, Portlet Response Time, Portlet Instances Response Time.

The custom range option is available for Pages, Traffic, Response Time, Portlet Traffic, Portlet Instances Traffic, Response Time, Portlet Response Time, Portlet Instances Response Time, Search Metrics, Document Metrics, Wiki Metrics, Blog Metrics.

Query Options

Analytics task flows include the following query options to the left of the report:

- **Report Summary**

  Displays a summary of the selected display and query options shown in the report.

- **Time Frame**

  Enables you to specify the date range for the metrics displayed in the report. You can select from the following options: Yesterday, Today, This Week, Last Week, This Month, Last Month, Last Three Months, Last Six Months, This Year, Last Year, or you can specify your own date range.

- **User Property**

Enables you to filter your report by user property. After selecting a property from the list, you can specify a value that the property must contain or must not contain, and only metrics that apply to the filtered property display in the report.

– **Property**: Select a property on which to filter the report. You can select City, Company, Country, Department, Display Name, Employee ID, IM User, Manager, Phone, State or Province, Street, Title, or ZIP code

– **Operator**: Select how you want to filter the property. You can select **Contains** or **Does Not Contain**.

– **Value**: Type a value on which to filter the property.

> **Note:**
>
> To search using a wildcard (for example, `%` or `?`), you must prefix the wildcard with a back slash (\). For example, to search for give or giving, type `giv\%` in the **Value** box.

• **Additional Options**

Enables you to include Home portal pages in report data. These options are available with the Pages task flow (in the Page Traffic report).

• **Portals**

When Analytics task flows display in the Home portal or on a business role page, you can choose which portals to include in your report. When Analytics task flows are used within a particular portal, only metrics only for that portal display; the Portals option is unavailable (grayed out).

To specify the portals to include in your report, click the **Portal Filter** icon to display the Specify Portals popup. Select the portals you want to include in your report, using Ctrl+click and Shift+click to select multiple portals.

This option is not available with the Traffic, Logins, or Search Metrics task flows.

• **Grouping Options**

Enables you to select an option by which to group the metrics in your report. You can group by a time interval (Hour, Day, Week, Month, or Year), a user property, or, with the Logins task flow, both.

> **Note:**
>
> This setting affects the available display options for the report.
>
> See Table 42-2.

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Adding Announcements to a Portal

Add Announcements to a portal to provide portal members with a quick, convenient way to create and broadcast messages instantly or at a specified future time.

> **Note:**
>
> Oracle WebCenter Portal has deprecated the support for Jive features (announcements and discussions). If you have upgraded from a prior release to Release 12c (12.2.1.4.0), Jive features remain available in your upgraded instance but Oracle support is not provided for these features. In the next release, Jive features will not be available even in the upgraded instances

> **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Manage Security and Configuration` or `Manage Configuration`.
>
> At a minimum, you must have the following permissions:
>
> - `Edit Pages` (to add the Announcements task flow to a page)
>
> - `Edit Task Flows` (to modify the task flow, if necessary)
>
> - One or more of the following advanced permissions: `Create, Edit, and Delete Announcements` or `Create and Edit Announcements`
>
> See About Roles and Permissions for a Portal.

Topics:

- Prerequisites for Announcements
- About Announcements
- Modifying Announcement Forum Settings for a Portal
- Adding an Announcements Page to a Portal
- Adding an Announcements Task Flow to a Page
- Working with Announcements Task Flow Properties
- Working with the Announcements Task Flow

Prerequisites for Announcements

For announcements to work, the system administrator needs to perform the following task for WebCenter Portal:

- Install and configure the Discussion Server and make sure that the connection between the two applications is active. Discussions and announcements require a single connection to WebCenter Portal's Discussion Server. For more information, see Managing Announcements and Discussions in *Administering Oracle WebCenter Portal*.

> ✎ **See Also:**
>
> Troubleshooting Issues with Announcements and Discussions in *Administering Oracle WebCenter Portal*

To make announcements available in a portal, the portal manager or anyone with `Manage Security and Configuration` or `Manage Configuration` permission must perform the following tasks:

- If not already enabled, enable the Announcements tool, as described in Enabling and Disabling Tools and Services Available to a Portal.
- Optionally, modify announcement forum settings, as described in Modifying Announcement Forum Settings for a Portal.
- Provide access for users to announcements in either of the following ways:
  - Provide users with the pretty URL to the **Announcements** page (see Pretty URLs for Pages in a Specified Portal).
  - Add a page link to the **Announcements** page in the portal navigation (see Adding an Announcements Page to a Portal).
  - Add the Announcements task flow to a page in the portal (see Adding an Announcements Task Flow to a Page).

> ✎ **Note:**
>
> For information about the announcements feature and how to use announcements, see Working with the Announcements Task Flow.

About Announcements

WebCenter Portal provides the ability to post announcements about important activities and events to all authenticated users. For example, a portal manager can announce the availability of a new feature or the plan to take a portal offline temporarily for maintenance or the system administrator can announce the plan to shut down portal for maintenance (Figure 43-1).

Figure 43-1   Sample Announcement in the Announcements - Quick View Task Flow

Announcements - Quick View

Window washing on Monday, September 28
Release celebreation scheduled for November
Sales conference is scheduled
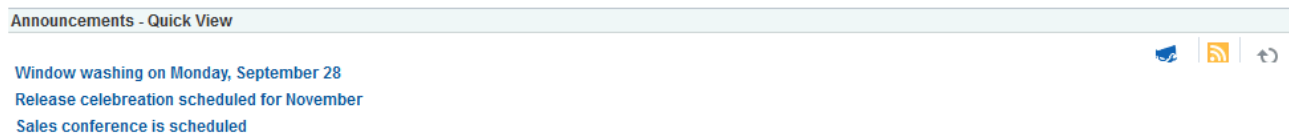
Announcements are integrated with many other features, such as Activity Stream, RSS, and presence, and you can link announcements to other tools, such as events and discussions. For example, if your company is announcing a new product, you can link from the announcement directly to a discussion forum, where potential customers can ask other customers about the product, or link to an instant messenger where customers can chat with a customer service representative about the product. Announcement titles and text are searchable with Elasticsearch.

Announcements are limited to the portal where you create them. In the Home Portal, announcements are for WebCenter Portal (or application-wide), and are available to all logged-in (authenticated) users.

The **Announcements** tool is enabled in portals created with certain templates. If the Announcements tool is not included in the portal template, then you need to enable it in the portal. For information about enabling announcements in a portal, see Enabling and Disabling Tools and Services Available to a Portal. The Announcements task flow must also be in your resource catalog. For information see Adding a Resource to a Resource Catalog.

As the portal manager, you will need to provide users access to the Announcements task flows in one or more of the following ways:

- By providing users with a pretty URL to access the Announcements page or console. For more information, see Pretty URLs for Pages in a Specified Portal.

- By creating an Announcements page in the portal, as described in Adding an Announcements Page to a Portal.

- By adding the task flows to a portal page, as described in Adding an Announcements Task Flow to a Page.

Modifying Announcement Forum Settings for a Portal

Both announcements and discussions use the discussions server to store data. By default, WebCenter Portal creates a single announcement forum for a new portal after announcements is enabled. For more information, see Enabling and Disabling Tools and Services Available to a Portal. After enabling announcements, you can optionally modify the default settings to allocate a different forum for the portal (described in this section).

For more information about configuring and managing announcements, see Managing Announcements and Discussions in *Administering Oracle WebCenter Portal*.

To modify the announcement forum settings for a portal:

1. On the **Tools and Services** page (see Accessing Tools and Services Administration for a Portal), select **Announcements** (Figure 43-2).

   Note the default forum ID specified for the portal.

Figure 43-2   Portal Announcement Forum Settings
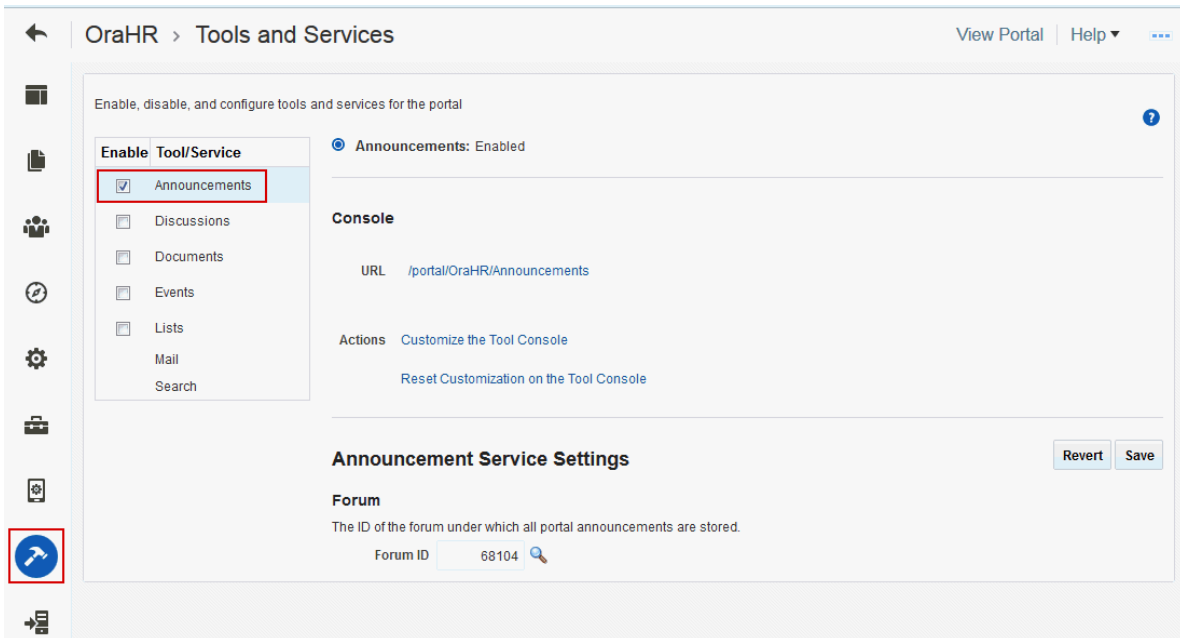
2. Click **Choose a forum for portal** icon next to the Forum ID field if you want to change the default Forum ID.

   See Publishing Portal Mail in a Discussion Forum for more information.

3. Select another forum and click **Select**, or click **Create Forum** to create a new forum.

   If you create a new forum, enter the **Forum Name** and click **Create**.

   The Forum ID field is updated to show the updated forum ID.

   - All announcement views in the portal will show data from the new forum.

   - All new announcements for this portal will now be stored under the new forum ID.

   - All existing announcements and edits to those announcements for this portal will still be stored under the old forum ID.

   - Existing permissions are not copied to the new forum ID, so you must provide members with the required permissions to work with announcements.

4. Click **Save**.

Adding an Announcements Page to a Portal

To provide navigation to the **Announcement**s page in a portal, you can add a page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation.

> **Note:**
>
> The **Announcements** page (or console) is not automatically exposed when the tool is enabled or when the portal is created. However, if the portal template exposes the **Announcements** page, the portal will also automatically expose this page.

Adding an Announcements Task Flow to a Page

For the steps to add an Announcements or Announcements - Quick View task flow to a page, see Adding a Component to a Page.

> **Note:**
>
> The presence or location of the Announcements task flow in the resource catalog depends on how the resource catalog is configured. For example, in the Default Portal Catalog, the Announcements task flow is included under the **Alerts and Updates** folder.
>
> The Announcements - Quick View task flow is not available in the Default Portal Catalog provided with WebCenter Portal, so you will only see an entry for it if it has been added to a custom resource catalog that has been made available to the page.
>
> For more information, see Adding a Resource from the Resource Registry (in the Add Resource Catalog Item dialog, select **Task Flows**, then **Design Time**, then **Announcements - Quick View**). To use the custom resource catalog for editing portal pages, make sure it is **Available**, and set for use by pages in the portal, as described in Changing the Resource Catalogs in a Portal.

Figure 43-3 shows the Announcements task flow on a page.

Figure 43-3   Announcements - Quick View Task Flow on a Page
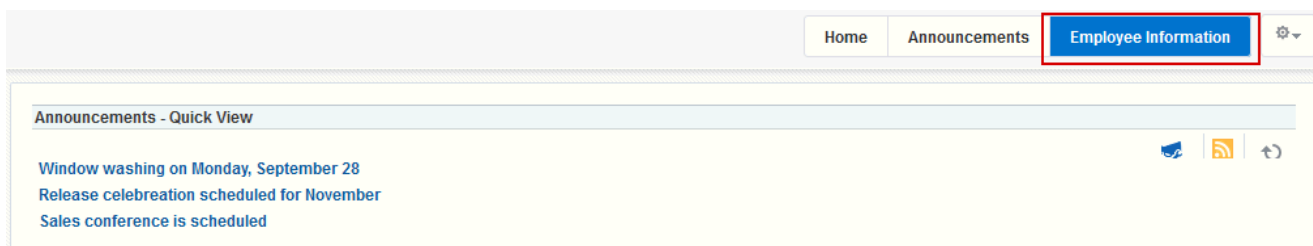
Users with Edit privileges can set the task flow's region parameter to the ID of the forum under which announcements must be created and stored.
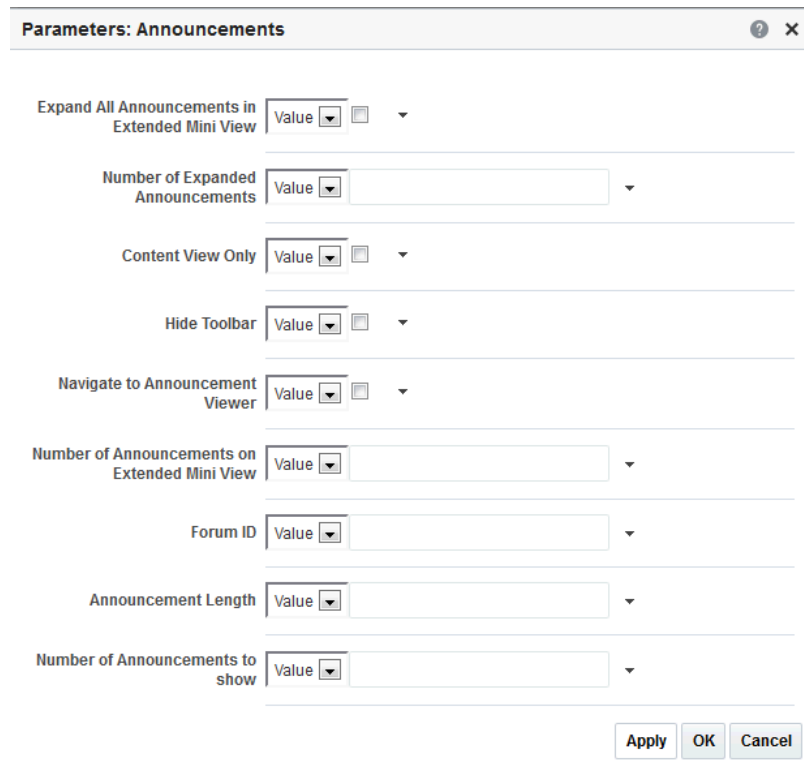
> **Note:**
>
> The Announcements - Quick View task flow opens in a portal, regardless of the forum ID specified.

For more information about setting task flow properties, see Working with Announcements Task Flow Properties.

Working with Announcements Task Flow Properties

Announcements task flows have associated properties, which users with sufficient privileges can access through the task flows' **View Actions** menu. For example, select **Parameters** to display the Parameters dialog (Figure 43-4).

Figure 43-4   Announcements Task Flow Component Properties

> **See Also:**
>
> Setting Properties on a Component

The following sections provide information about properties of Announcements task flows and describe the task flow parameters.

- [Setting Announcements Task Flow Properties](#)
- [Announcements Task Flow Parameters](#)

Setting Announcements Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 43-5), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 43-5   View Actions Menu on an Announcements Task Flow
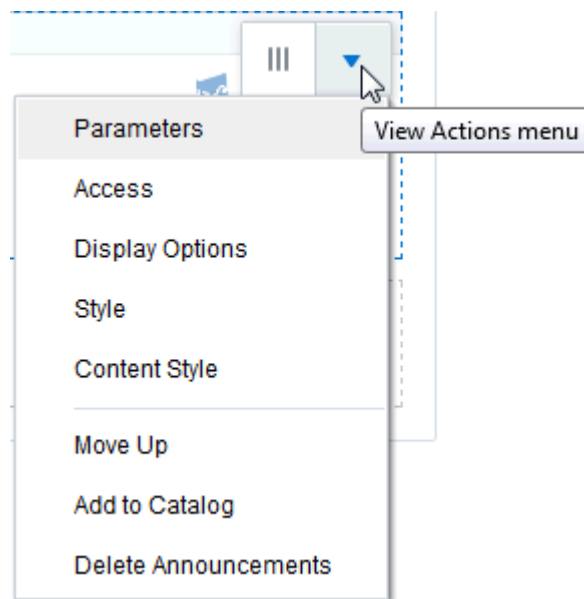
To set Announcements task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

   - Parameters control the default task flow content. For descriptions of each parameter, see Announcements Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

   - Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

   - The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

   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.

> **Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Announcements Task Flow Parameters

Table 43-1 describes the parameters that are unique to the Announcements task flows.

Table 43-1   Announcements Task Flow Parameters

Parameter	Description	Task Flow
Expand All Announcements in Extended Mini View	Select to display details for all announcements in the extended quick view. The default value is deselected, in which case announcements display the announcement title only.	Announcements - Quick View
Number of Expanded Announcements	The number of announcements to display announcement details. Announcements exceeding this value display the announcement title only. Use only when `Content View Only` is deselected. Express values using the following formats: • **Constant**—Express a constant value, such as 2 or 5. • **Page parameter**—Enter a page parameter to grab the value from the page on which the task flow is placed. For more information, see Wiring Pages and Components. • **EL expression**—The default. Enter an Expression Language (EL) expression.	Announcements - Quick View
Content View Only	Select to remove the announcement title and display just the announcement content. Leave unchecked to render the title. When selected, the values for `Announcement Length` and `Number of Expanded Announcements` are ignored.	Announcements - Quick View
Hide Toolbar	Hides the Announcements toolbar.	Announcements - Quick View
Navigate to Announcement Viewer	Select to navigate to the announcement resource. Default behavior (deselected) is to launch in a popup window.	Announcements - Quick View
Number of Announcements on Extended Mini View	The number of announcements to show in a page on extended mini view.	Announcements - Quick View

Table 43-1   (Cont.) Announcements Task Flow Parameters

Parameter	Description	Task Flow
`Forum ID`	The ID of the forum under which announcements are created in the back-end discussions server.	Announcements - Quick View
	In WebCenter Portal, this property is blank by default. However, internally it maps to the forum ID associated with the current portal. For Home portals, global (system) announcements are returned. You can edit this property to specify a different forum ID.	Announcements
`Announcement Length`	The number of characters to show in announcement details. Use only when `Content View Only` is deselected.	Announcements - Quick View
	If no value is specified, then WebCenter Portal displays 200 characters.	
	This parameter takes effect with `Number of Expanded Announcements`.	
	Express values using the following formats:	
	• **Constant**—Express a constant value, such as `200` or `500`.	
	• **Page parameter**—Enter a page parameter to grab the value from the page on which the task flow is placed. For more information, see Wiring Pages and Components.	
	• **EL expression**—The default. Enter an Expression Language (EL) expression.	
	The value you enter for `Announcement Length` is ignored if `Content View Only` is selected.	
`Number of Announcements to Show`	The number of announcements to show on the quick view.	Announcements - Quick View

Working with the Announcements Task Flow

Both the Announcements and the Announcements - Quick View task flows display current announcements. The Announcements task flow additionally offers tools for managing announcements within the task flow. With the Announcements - Quick View task flow, you must click the **Open Announcement Manager** icon to manage announcements.

The Announcements - Quick View task flow includes numerous parameters to customize your view. For example, administrator can remove the link to the Announcement Manager. This lets you present announcements to end users where manage controls are not needed. The task flow lists 10 announcements by default, but you can change this number and change how much of the announcement is displayed. The **More Announcements ...** link opens a popup window containing the complete list of all announcements with pagination behavior. This is called the Extended Quick View (or Extended Mini View).

As the portal manager, you can perform all the tasks with announcements:

- View announcements in the Announcements task flow—All members with `View Announcements` permissions in Home Portals and portal managers. For more information, see Viewing Announcements in the Announcements Task Flow and Viewing Announcements in the Quick View Task Flow.

- Create announcements—All members with `Create and Edit Announcements` permissions. For more information, see Creating an Announcement in *Using Portals in Oracle WebCenter Portal*.

- Edit announcements—Creator of the announcement, discussions server administrators in Home Portals and portal managers. For more information, see Editing Announcements in *Using Portals in Oracle WebCenter Portal*.

  > **✎ Note:**
  >
  > If members have `Create, Edit, and Delete Announcements` permissions, they can edit any announcement in the portals in which they have access. If they have `Create and Edit Announcements` permissions, they can edit only those announcements that they created.

- Delete announcements—Discussions server system administrators in Home Portals and portal managers. For more information, see Deleting an Announcement in *Using Portals in Oracle WebCenter Portal*.

  > **✎ Note:**
  >
  > If members have `Create, Edit, and Delete Announcements` permissions, they can delete any announcement in the portals in which they have access. If they have `Create and Edit Announcements` permissions, they can delete only those announcements that they created.

- Send mail—All members. For more information, see Sending Mail from an Announcement in *Using Portals in Oracle WebCenter Portal*.

- Find or create links—All members. For more information, see Linking Announcements in *Using Portals in Oracle WebCenter Portal*.

This section includes the following topics:

- Viewing Announcements in the Announcements Task Flow
- Working with the Announcements - Quick View Task Flow

Viewing Announcements in the Announcements Task Flow

The Announcements task flow not only provides the tools to create, edit, and delete announcements, it also provides controls for determining when an announcement is published and when it expires and is consequently removed from the task flow. It provides **Show** lists for personalizing your view of announcements. After you create an announcement, you are offered the option to mail or link the announcement.

Depending on the privileges you have on the page and whether the required services are configured in WebCenter Portal, you may see only a subset of these options in the Announcement Manager. For example, the **Delete** icon is displayed only to users with `manage` privilege.

Discussions server administrators in Home portals and portal managers can access the Announcements task flow.

To view announcements in the Announcements task flow, either select the Announcements task flow on a page, or select the **Announcements** page.

Figure 43-6 shows some announcements in the Announcements task flow.

Figure 43-6   Announcements in the Announcements Task Flow

> ⚲ **Tip:**
>
> The way you access this page depends on the page template in use. For example, in a side navigation template, you may access it through a **Manage** menu.
>
> You can also navigate to this page using the direct URL provided in WebCenter Portal Pretty URLs.

Working with the Announcements - Quick View Task Flow

The Announcements - Quick View task flow is essentially a viewer for convenient access to current announcements. More robust features, for such actions as creating and editing announcements, are offered in the Announcements task flow.

By default, announcements in the Announcements - Quick View task flow show announcement titles as links. But you can configure the task flow to display only announcement titles, titles with some amount of content, or only content.

> ✎ **See Also:**
>
> Working with Announcements Task Flow Properties

This section contains the following subsections:

- Viewing Announcements in the Quick View Task Flow
- Managing Announcements in the Quick View Task Flow

Viewing Announcements in the Quick View Task Flow

The Announcements - Quick View task flow provides a read-only view of the announcement title.

To view announcements in an Announcements - Quick View task flow:

1. In the **Announcements - Quick View** task flow, click the announcement you want to view (Figure 43-7).

Figure 43-7   Announcements - Quick View Task Flow
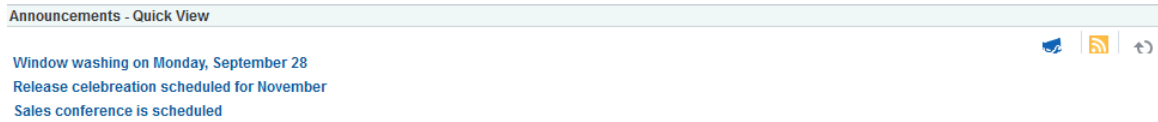
The announcement details display in the Announcement dialog (Figure 43-8). Similar to the announcement content displayed in the Announcements task flow, this dialog displays content with all the formatting that was applied to it.

Figure 43-8   Announcement Accessed from Quick View Task Flow
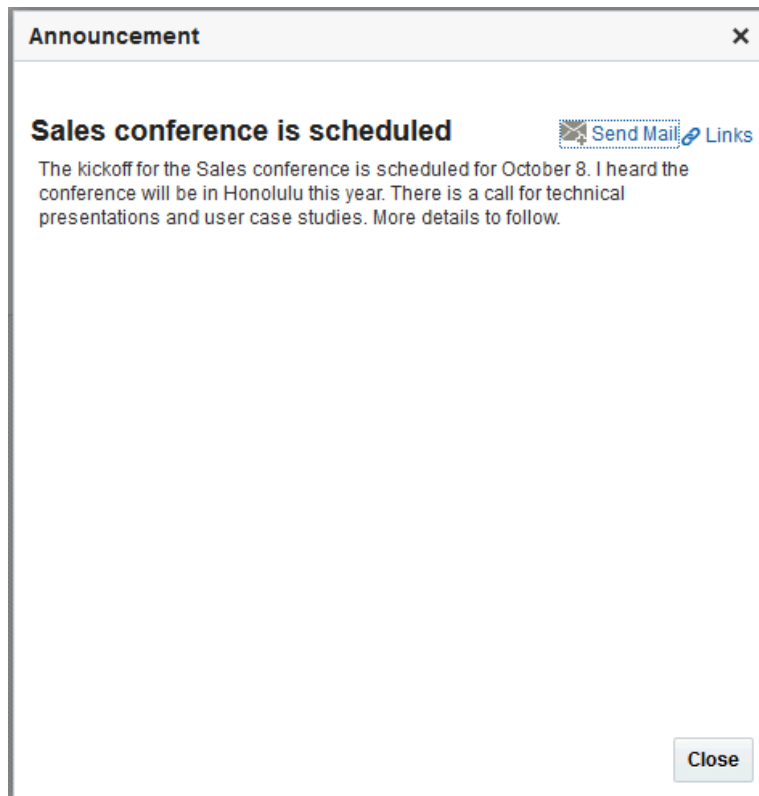
2. Click **Close** to exit the dialog.

Managing Announcements in the Quick View Task Flow

You can manage announcements in the Announcements - Quick View task flow with the Announcement Manager. The Announcement Manager provides the functionality to create an announcement or from existing announcements the ability to edit, delete

(if users have the permission to do so), send mail, and create links in the Announcements task flow.

Administrators can remove the link to the Announcement Manager. If your administrator allows this functionality, then you see the **Open Announcement Manager** icon (Figure 43-9).

The Announcement Manager allows users to create new announcements, edit existing announcements, delete (if users have the permission to do so) announcements, send mail to portal members (showing the content and a link to the announcement), and link announcements with other assets.

Figure 43-9   Open Announcement Manager Icon

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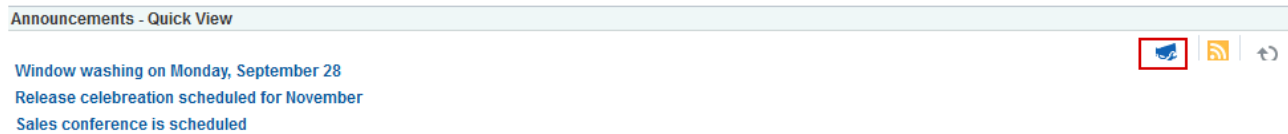
Adding Connections to a Portal

Add Connections to a portal to allow portal members to establish a collaboration network of work friends and associates.

> ✏ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Basic Services: Edit Page Access and Structure` (standard permissions) or `Pages: Edit Pages` (advanced permissions).
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- About Connections
- Adding a Connections Task Flow to a Page
- Working with Connections Task Flow Properties
- Working with Connections Task Flows

About Connections

Connections provides a means of collecting your business friends and contacts into a social network. It furnishes tools for managing your own connections and viewing the connections of others. Using People Connections Preferences, you can grant differing levels of access to those who are and are not your connections. For example, you can limit view privileges on your Profile to just your connections or enable your connections to view certain sections of your Profile, while hiding those sections from users who are not your connections. For more information, see Setting Connections Preferences in *Using Portals in Oracle WebCenter Portal*.

When you connect with other users, you give them access to your People Connections views, and gain access to theirs.

> **Note:**
>
> People Connections encompasses Connections, Activity Stream, Message Board, Feedback, and Profile. For more information, see:
>
> - Adding an Activity Stream to a Portal
> - Adding Messages and Feedback to a Portal
> - Adding Profiles to a Portal

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

WebCenter Portal provides the following Connections task flows:

- **Connections** for viewing and managing your connections, creating connections lists, and sending and responding to invitations to connect (Figure 44-1)

Figure 44-1   Connections Task Flow
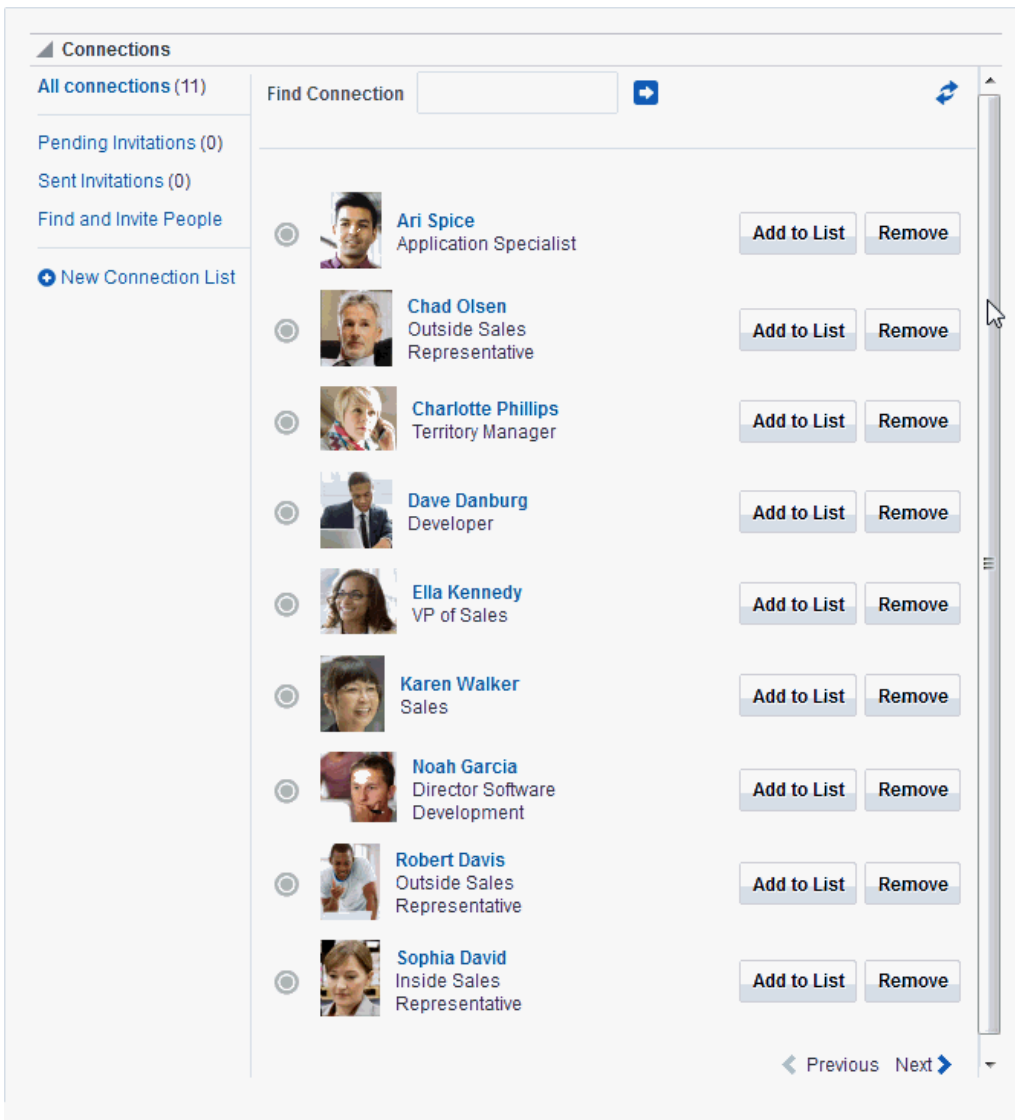
- **Connections - Card** for photos, status messages, and instant contact options to your connections (Figure 44-2)

Figure 44-2   Connections - Card Task Flow
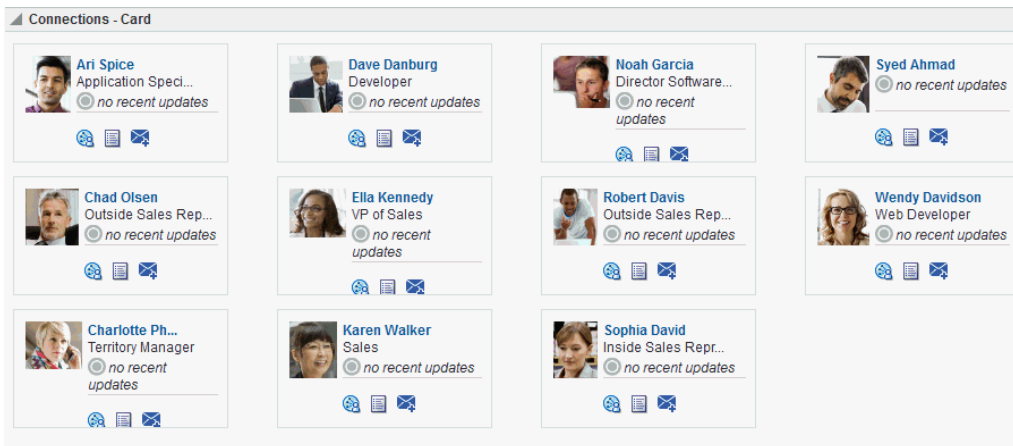
- **Connections - Detailed View** for photos and quick access to your connections and to features for inviting new connections, managing existing connections, and organizing your connections into lists (Figure 44-3)

Figure 44-3   Connections - Detailed View Task Flow
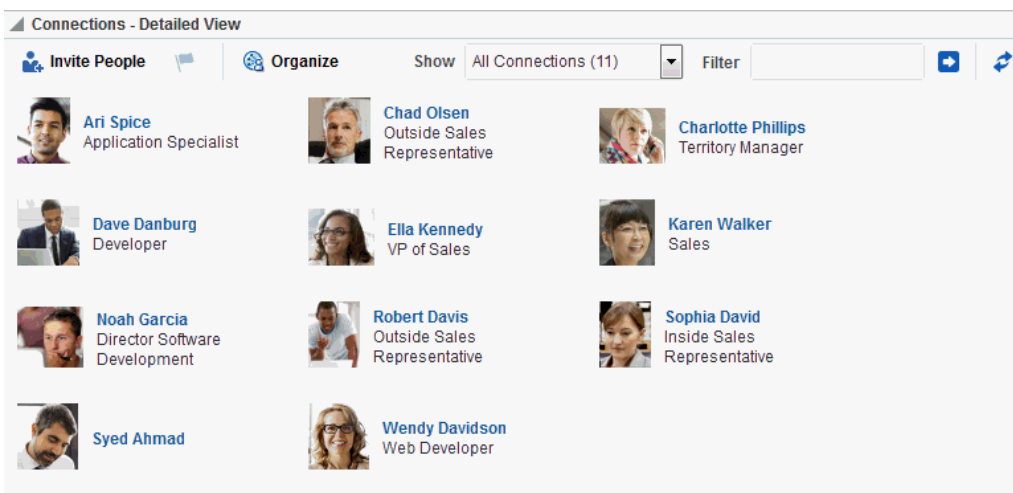
- **Connections - Quick View** for photos and quick access to your connections (Figure 44-4)

Figure 44-4   Connections - Quick View Task Flow
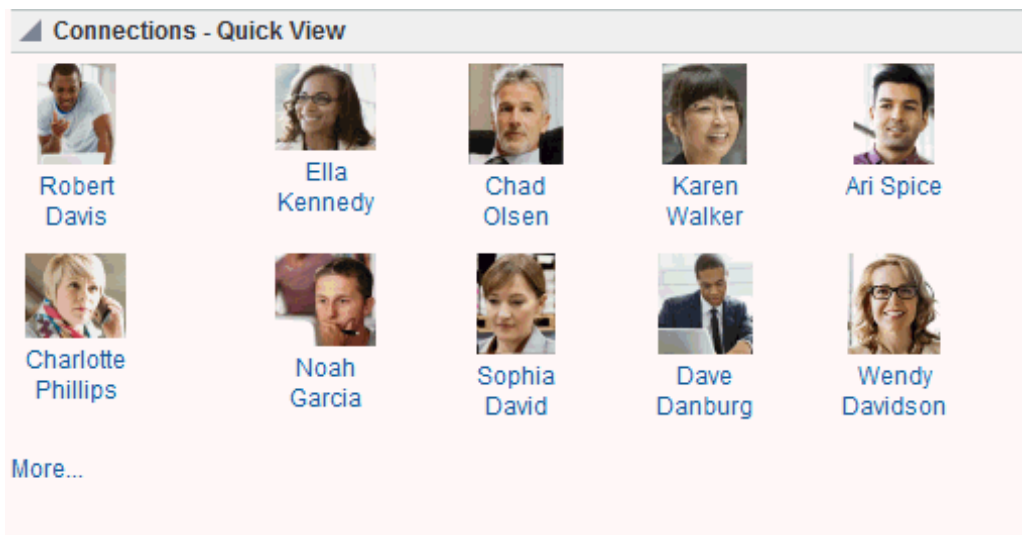
Connections task flows have associated properties that you can use to control the appearance and behavior of a task flow instance. For example, you can use Connections properties to specify the number of connections to show or the number of rows to show in Connections - Card and Connections - Quick View task flows.

> ✎ **See Also:**
>
> Working with Connections Task Flow Properties

For information about using Connections features, see Managing Your Contacts in *Using Portals in Oracle WebCenter Portal*.

Adding a Connections Task Flow to a Page

For the steps to add a Connections task flow to a page, see Adding a Component to a Page.

> 💡 **Tip:**
>
> The presence or location of Connections task flows in the resource catalog depends on how the resource catalog is configured. For example, in the default resource catalog, the Connections task flows are included under the **Social and Communication** folder.
>
> For information about the Connections task flows, see About Connections.

Working with Connections Task Flow Properties

Connections task flows have associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu. For example, in page edit mode, click the

component to show the **View Actions** menu. Select **Parameters** to open the Parameters dialog (Figure 44-5).

Figure 44-5   Connections Task Flow Component Properties
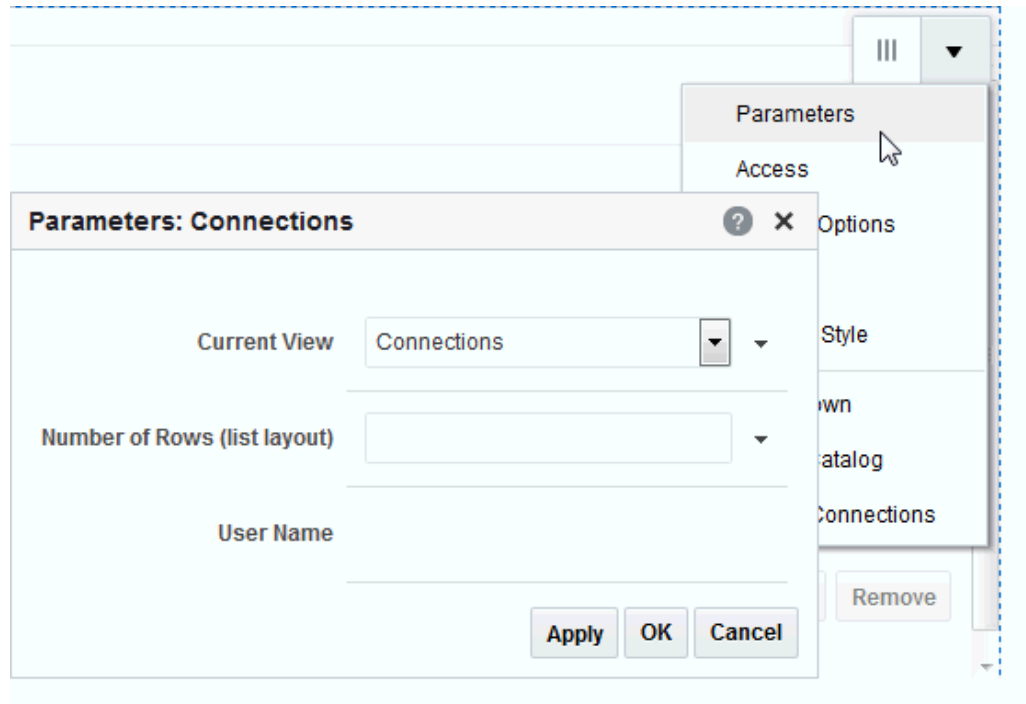
> ✎ **See Also:**
>
> Setting Properties on a Component

The following sections provide information about properties associated with Connections task flows and describe task flow parameters:

- Setting Connections Task Flow Properties
- Connections Task Flow Parameters
- Using Properties to Configure a Connections Task Flow Instance

Setting Connections Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (About Connections), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 44-6   View Actions Menu on a Connections Task Flow
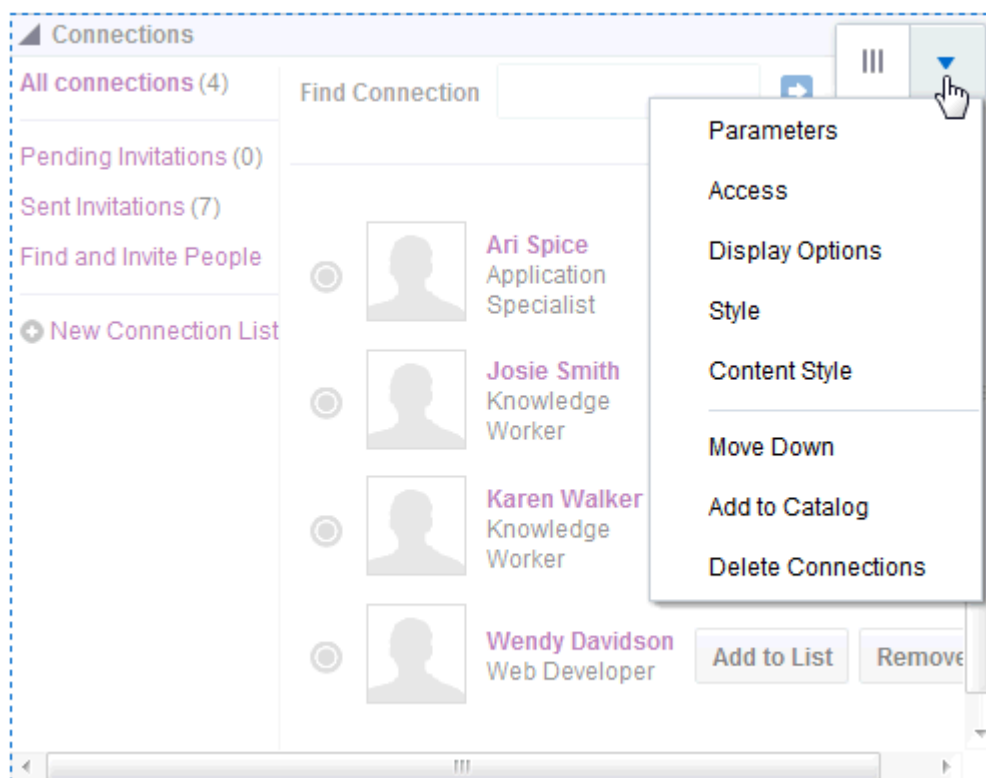
To set Connections task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

    *   Parameters control the default task flow content. For descriptions of each parameter, see Connections Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

    *   Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

    *   The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

    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.

> **Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Connections Task Flow Parameters

Table 44-1 describes the parameters that are unique to Connections task flows.

Table 44-1   Connections Task Flow Parameters

Parameter	Description
Allow Remove	A Boolean value representing whether a control is available on the task flow for removing a connection
	Enter either `true` or `false`.
	This value is honored only when the task flow instance is rendered in list format. For more information, see Profile Format.
	This parameter is associated with the Connections - Card task flow.
Connection List Name	The name of a grouped list of connections
	Use this parameter to limit the display of connections to those on the specified Connections list.
	Enter the name of a Connections list.
	This parameter is associated with the Connections - Card task flow.
Current View	The view to display by default
	Valid values include:
	• `connections`—(the default value) a list of connections
	• `receivedInvitations`—a list of connections invitations you received
	• `sentInvitations`—a list of connections invitations you sent
	• `people`—a search field for finding people with whom to connect
	When users access the task flow instance, the view specified here is the first one they see. All selections, except `people`, provide controls for navigating to the application default view (`connections`). Selecting `people` provides search and select controls for inviting other users to connect.
	This parameter is associated with the Connections task flow.

Table 44-1 (Cont.) Connections Task Flow Parameters

Parameter	Description
Filter Pattern	A value to act as a filter against task flow content
	For example, to show only those connections with a user name that includes the term *pat* (including *patrick* or *sripathy*), enter `pat` in the **Filter Pattern** field.
	This parameter is associated with the Connections - Card task flow.
Hide Footer	A Boolean value representing whether to hide the task flow footer
	Use this parameter to show or hide a link at the bottom of the task flow that enables users (when shown) to navigate to a detailed view of Connections when the number of available connections exceeds the number of connections that are shown.
	• Select the check box (`#{true}`) to hide the task flow footer.
	• Deselect the check box (`#{false}`) to show the task flow footer.
	This parameter is associated with the following task flows:
	• Connections – Card
	• Connections – Quick View
Hide Header	A Boolean value representing whether to hide the task flow header
	Use this parameter to show or hide a link at the bottom of the task flow that enables users (when shown) to navigate to a detailed view of Connections when the number of available connections exceeds the number of connections that are shown.
	• Select the check box (`#{true}`) to hide the task flow header.
	• Deselect the check box (`#{false}`) to show the task flow header. (default)
	This parameter is associated with the Connections - Quick View task flow.
Hide Name	Determines whether the connection's name appears under the connection's picture when the Profile Format is set to **iconic**.
	• Select the check box (`#{true}`) to hide connections' names. The connection's photo is a link to his or her profile.
	• Deselect the check box (`#{false}`) to show the connection's name under the photo. The connection's name is a link to his or her profile. (default)
	This parameter is associated with the Connections - Card task flow.
Launch Style	Has 2 options for now snapshot and profile. By default the value will be snapshot. This task flow parameter will be honored only if the Profile Launched on Selection is checked.
	Select one of the following formats:
	• `Snapshot`—Launches a profile popup when a user clicks a connection.
	• `Profile`—Launches the profile page when a user clicks a connection.
	This parameter is considered only if Profile Launched on Selection is selected.
	This parameter is associated with the Connections - Card task flow.

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Table 44-1 (Cont.) Connections Task Flow Parameters

Parameter	Description
`Number of Columns`	The number of columns to show in the task flow
	For example, with six connections to show, a value of `2` means those connections are shown in two columns with three rows.
	When a user's number of connections exceeds the number of connections allowed after column and row restrictions are applied, **Previous** and **Next** links are shown, enabling the user to page through his connections. (See also Number of Rows.)
	This parameter is associated with the following task flows:
	• Connections - Card
	• Connections - Quick View
`Number of Connections per page`	The number of connections to show in the given task flow instance
	Enter a numeric value, such as `10`, `2`, `15`, and so on.
	The number you enter here limits the number of connections that are shown in the task flow instance. If a user's number of connections exceeds the specified value, a **More** link is shown, enabling the user to navigate to a full view of the **Profile** page's **Connections** subpage.
	This parameter is ignored if both the number of rows and the number of columns have been specified together as parameters.
	This parameter is associated with the following task flows:
	• Connections - Card
	• Connections - Detailed View
	• Connections - Quick View
`Number of Rows`	The number of rows to show in the task flow
	For example, with six connections to show and a value of `2` for `Number of Columns`, a value of `2` for `Number of Rows` means connections are shown in two columns with two rows. That is, four connections are shown.
	When a user's number of connections exceeds the number of connections allowed after column and row restrictions are applied, **Previous** and **Next** links are shown, enabling the user to page through his connections. (See also Number of Columns.)
	This parameter is associated with the following task flows:
	• Connections - Card
	• Connections - Quick View
`Number of Rows (list layout)`	The number of rows to show in a list layout of the Connections task flow
	This value is honored only when the view of the Connections task flow is set to `connections`. (For more information, see Current View.)
	When a user's number of connections exceeds the number of connections allowed after row restrictions are applied, **Previous** and **Next** links are shown, enabling the user to page through his connections.
	This parameter is associated with the Connections task flow.

Table 44-1   (Cont.) Connections Task Flow Parameters

Parameter	Description
`Profile Format`	The layout style for the task flow Select one of the following formats: • `vcard`—Renders each connection in a virtual business card and includes the connection's user name and status message and quick-access buttons for interacting with your connections. • `iconic`—Renders the connection's personal profile photo and shows the user name below the photo. • `list`—Renders connections in a list, showing the personal profile photo, user name, information about recent profile updates, and quick-access buttons for interacting with your connections. • `tiled`—Renders the connection's personal Profile photo and shows the user name and job title beside the photo. This parameter is associated with the Connections - Card task flow.
`Profile Launched on Selection`	A Boolean value representing whether a Profile popup should open when a user clicks a connection listed in the task flow • Select the check box (`#{true}`) to enable the user's profile to launch when a user clicks a connection. The profile view launched is determined by the Launch Style selection (Snapshot or Profile). • Deselect the check box (`#{false}`) to suppress this option. This parameter is associated with the Connections - Card task flow.
`Show "See all your connections" in footer always`	Determines whether the footer with a **See all your connections** link should always be displayed. • Select the check box (`#{true}`) to show always show the footer with a **See all your connections** link. The footer appears even if there are fewer connections than the value set for the Number of Connections per page. • Deselect the check box (`#{false}`) to display the footer with a **More** link if there are more connections than the value set for the Number of Connections per page. This parameter is associated with the Connections - Card task flow.
`Sort Criteria`	The connections sort order Enter `LAST_ACTIVITY_TIME` to sort connections in descending date/time order. Leave blank to sort alphabetically by name. This parameter is associated with the following task flows: • Connections - Card • Connections - Detailed View
`User Id`	The ID of the user to show in the task flow This value is set automatically (`#{securityContext.userName}`). Do not edit this value. This parameter is associated with the following task flows: • Connections - Quick View • Connections - Detailed View

Table 44-1   (Cont.) Connections Task Flow Parameters

Parameter	Description
User Name	The ID of the user to show in the task flow
	This value is set automatically (`#{securityContext.userName}`). Do not edit this value.
	This parameter is associated with the following task flows:
	• Connections - Card
	• Connections

Using Properties to Configure a Connections Task Flow Instance

This section provides examples of how you use property values to affect the behavior of a given task flow instance. Because you make these changes in the page editor, they affect all users' views of the affected task flow instance.

This section includes the following subsections:

- Adding a Remove Button to Connections - Card

- Restricting Connections Displayed to Those on a Named List

- Specifying an Initial View for a Connections Task Flow Instance

- Limiting the Number of Displayed Connections

- Specifying Numbers of Rows and Columns

- Applying a Filter to a Connections - Card Task Flow Instance

- Selecting a Display Format for a Connections - Card Task Flow Instance

- Invoking a Profile Popup from a Connections - Card Task Flow Instance

Adding a Remove Button to Connections - Card

By default, the Connections - Card task flow does not provide a control for permanently removing a connection. You can use the `Allow Remove` property on a Connections - Card task flow instance to render a **Remove** button next to each listed connection. `Allow Remove` is honored when the task flow's `Profile Format` property is set to `List` or `Virtual Business Card`.

To enable the removal of a connection in a Connections - Card task flow:

1. In the Connections - Card task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

   > ✎ **See Also:**
   >
   > Modifying Component Properties

2. In the Parameters dialog, set `Profile Format` to `list`.

3. Provide a value for `Allow Remove`:

- Select the check box (`#{true}`) to enable the display of a **Remove** button next to a listed connection (Figure 44-7).

Figure 44-7   Remove Icon on a Connections - Card Task Flow
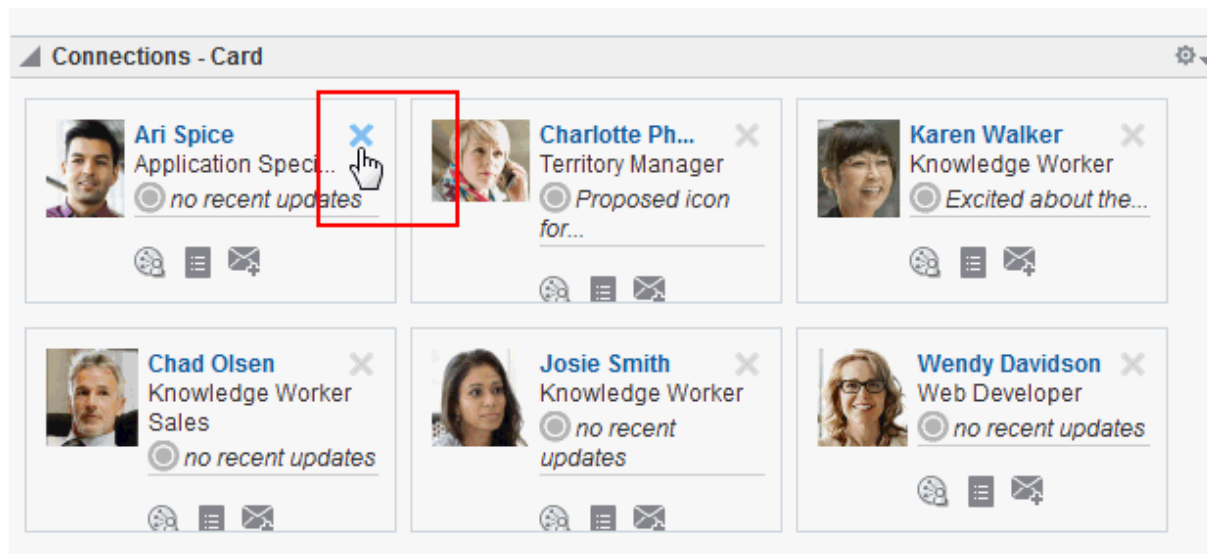
- Deselect the check box (`#{false}`) to disable this feature.

4. Click **OK**.

Restricting Connections Displayed to Those on a Named List

In an instance of the Connections - Card task flow, you can use the `Connection List Name` property to restrict the display of connections to only those users included on a named Connections list.

> **See Also:**
>
> For information about Connections lists, see Creating and Managing Groups of Contacts in*Using Portals in Oracle WebCenter Portal*.

To restrict a Connections - Card task flow to a particular Connections list:

1. In the Connections - Card task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> **See Also:**
>
> Modifying Component Properties

2. In the Parameters dialog, in the **Connection List Name** field, enter the name of the Connections list to use to limit the display of connections.

3. Click **OK**.

Specifying an Initial View for a Connections Task Flow Instance

Use the `Current View` property to specify the initial view of a Connections task flow instance. For most views, users can change the default you specify here. The exception is the `people` view, in which there are no controls for switching to a different view.

To specify an initial view for a Connections task flow instance:

1. In the Connections task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> ✏️ **See Also:**
>
> Modifying Component Properties

2. In the Parameters dialog, for `Current View`, select one of the following:

    - `connections`—(the default value) a list of connections
    - `receivedInvitations`—a list of connections invitations you received
    - `sentInvitations`—a list of connections invitations you sent
    - `people`—a search field for finding people with whom to connect

3. Click **OK**.

Limiting the Number of Displayed Connections

The Connections - Card, Connections - Detailed View, and Connections - Quick View task flows provide the property `Number of Connections per page` for limiting the number of connections to show at a time. If a user's number of connections exceeds the specified value, a link is shown at the bottom of the task flow to enable the user to navigate to a full view of the **Profile** page's **Connections** subpage.

To limit the number of displayed connections in a Connections - Card, Connections - Detailed View, or Connections - Quick View task flow instance:

1. In the Connections - Card, Connections - Detailed View, or Connections - Quick View task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> ✏️ **See Also:**
>
> Modifying Component Properties

2. In the Parameters dialog, provide a value for **Number of Connections per page**.

3. Click **OK**.

Specifying Numbers of Rows and Columns

The Connections, Connections - Card, and Connections - Quick View task flows provide properties for controlling the number of columns and rows to show at a time. When column and row values are both specified, and a user's number of connections exceeds the specified values, **Previous** and **Next** links are shown, enabling the user to page through his connections.

To specify the number of rows and columns of connections to show:

1. In the Connections, Connections - Card, or Connections - Quick View task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> ✏ **See Also:**
>
> Modifying Component Properties

2. In the Parameters dialog, enter a numeric value to control the number of rows to show:

   • For Connections, enter a number for **Number of Rows (list layout)**.

   • For Connections - Card and Connections - Quick View, enter a number for **Number of Rows**.

3. For Connections - Card and Connections - Quick View, enter a numeric value in the **Number of Columns** field to control the number of columns to show.

4. Click **OK**.

Applying a Filter to a Connections - Card Task Flow Instance

The `Filter Pattern` property enables you to apply a filtering term that limits the display of connections in a Connections - Card task flow instance to only those who meet the filtering criteria. For example, to show only those connections with a user name that includes the term *pat* (including *patrick* or *sripathy*), enter `pat` for the `Filter Pattern` property.

The filter is applied to all of the information in a given card, so you can filter against things like the user's job title or name. For example, entering the term *manager*, ensures that only those connections whose job title includes *manager* are displayed in the task flow instance.

To apply a filter to a Connections - Card task flow instance:

1. In the Connections - Card task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> ✏ **See Also:**
>
> Modifying Component Properties

2. In the Parameters dialog, enter a filtering term for **Filter Pattern**.

> **Tip:**
>
> For example, enter a job title, a user name, or partial values, such as
> `man`.

3. Click **OK**.

Selecting a Display Format for a Connections - Card Task Flow Instance

The `Profile Format` property provides options for controlling the arrangement of connections within a Connections - Card task flow instance. Both the placement of information and the amount of information shown are affected by your selection.

To select a display format for a Connections - Card task flow instance:

1. In the Connections - Card task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> **See Also:**
>
> Modifying Component Properties

2. In the Parameters dialog, select a format from the **Profile Format** drop-down list:

   - `Virtual Business Card`—Renders each connection in a virtual business card and includes the connection's user name and status message and quick-access buttons for interacting with your connections (Figure 44-8).

Figure 44-8   Connections - Card in Virtual Business Card Format
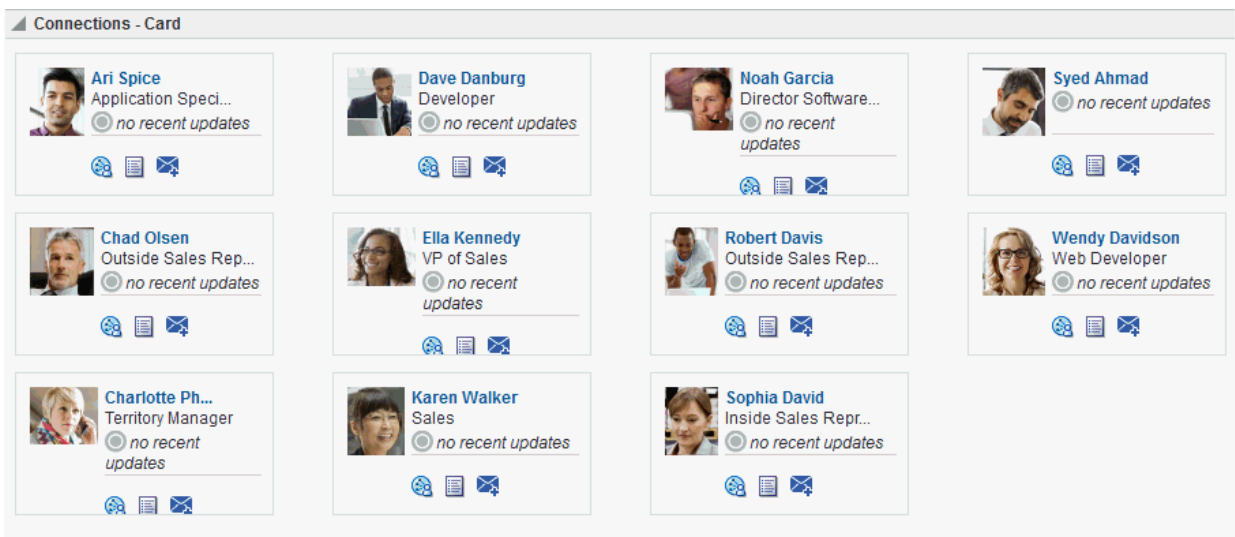
   - `Iconic`—Renders the connection's personal profile photo and shows the user name below the photo (Figure 44-9).

Figure 44-9   Connections - Card in Iconic Format
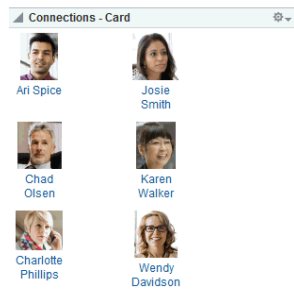
- `List`—Renders connections in a list, showing the personal profile photo, user name, information about recent profile updates, and quick-access buttons for interacting with your connections (Figure 44-10).

Figure 44-10   Connections - Card in List Format
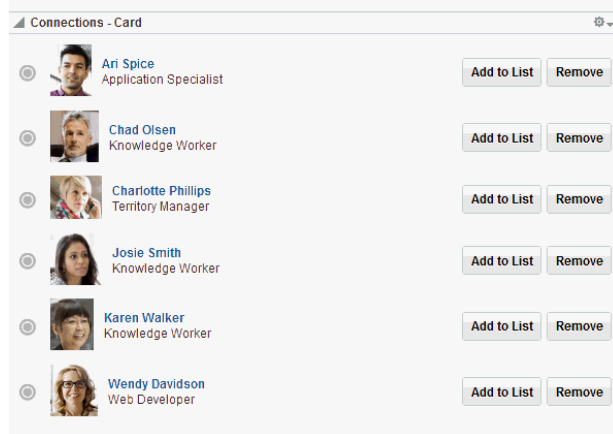
- `Tiled`—Renders the connection's personal Profile photo and shows the user name and job title beside the photo (Figure 44-11).

Figure 44-11   Connections - Card in Tiled Format
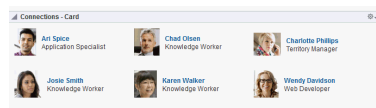
3. Click **OK**.

Invoking a Profile Popup from a Connections - Card Task Flow Instance

The `Profile Launched on Selection` property provides a means of launching a Profile popup when users click a connection name in a Connections - Card task flow instance (Figure 44-12).

Figure 44-12   Invoking a Profile Popup from the Connections - Card Task Flow
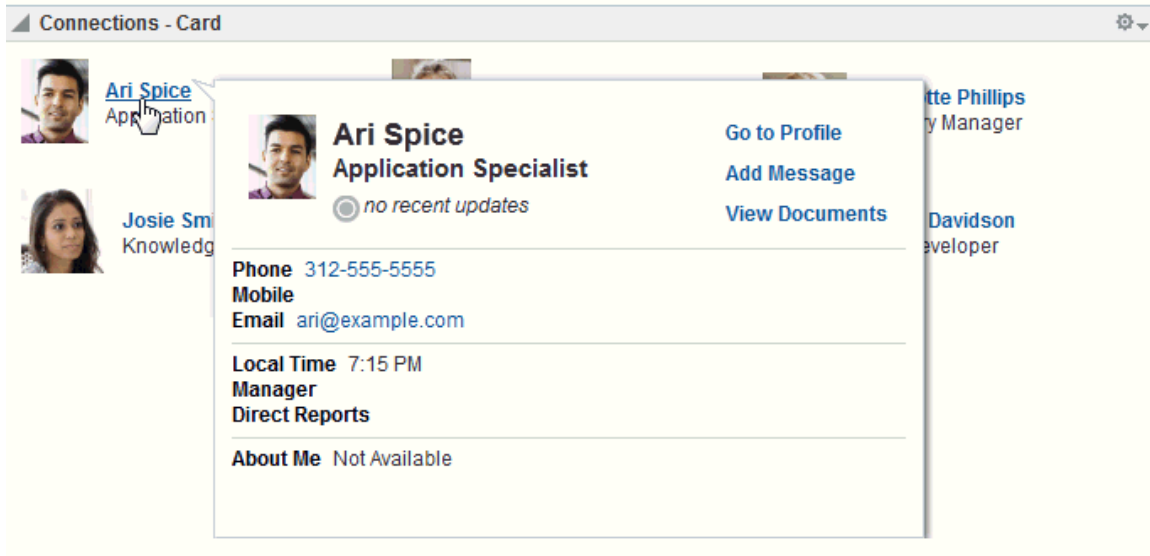
When this option is not selected, clicking a connection name in the task flow simply selects the connection.

To enable the launch of a Profile popup from a Connections - Card task flow instance:

1. In the Connections - Card task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

   > ✎ **See Also:**
    >
    > Modifying Component Properties

2. In the Parameters dialog, select an option for Profile Launched on Selection:

    *   Select the check box (`#{true}`) to enable a Profile popup to launch when a user clicks a connection.

    *   Deselect the check box (`#{false}`) to suppress this option.

3. Click **OK**.

Working with Connections Task Flows

For information about how users work with Connections task flows, see Managing Your Contacts in *Using Portals in Oracle WebCenter Portal*.

45

Adding Discussion Forums to a Portal

Add Discussion Forums to a portal to allow portal members to create and participate in text-based discussions with other members, post questions, and search for answers.

> **Note:**
>
> Oracle WebCenter Portal has deprecated the support for Jive features (announcements and discussions). If you have upgraded from a prior release to Release 12c (12.2.1.4.0), Jive features remain available in your upgraded instance but Oracle support is not provided for these features. In the next release, Jive features will not be available even in the upgraded instances

> **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Manage Security and Configuration` or `Manage Configuration`.
>
> At a minimum, you must have the following permissions:
>
> - `Edit Pages` (to add the Discussions task flows to a page)
> - `Edit Task Flows` (to modify the task flow, if necessary)
> - One or more of the following advanced permissions: `Create, Edit, and Delete Discussions` or `Create and Edit Discussions`
>
> See About Roles and Permissions for a Portal.

Topics:

- Prerequisites for Discussions
- About Discussions
- Modifying Discussion Forum Settings for a Portal
- Publishing Portal Mail in a Discussion Forum
- Adding a Discussions Page to a Portal
- Adding a Discussions Task Flow to a Page
- Working with Discussions Task Flow Properties
- Working with Discussions Task Flows

Prerequisites for Discussions

For discussions to work, the system administrator needs to perform the following tasks for WebCenter Portal:

- Install and configure the Discussion Server and make sure that the connection between the two applications is active. Discussions and announcements require a single connection to Oracle WebCenter Portal Discussions Server. For more information, see Managing Announcements and Discussions in *Administering Oracle WebCenter Portal*.

- Configure Discussions forum options for WebCenter Portal, as described in Configuring Discussion Forum Options for WebCenter Portal in *Administering Oracle WebCenter Portal*.

> **✎ See Also:**
>
> Troubleshooting Issues with Announcements and Discussions in *Administering Oracle WebCenter Portal*

To make discussions available in a portal, the portal manager or anyone with `Manage Security and Configuration` or `Manage Configuration` permission must perform the following tasks:

- If not already enabled, enable the Discussions tool, as described in Enabling and Disabling Tools and Services Available to a Portal.

- Optionally, modify Discussion Forum settings, as described in Modifying Discussion Forum Settings for a Portal.

- Optionally, configure the portal mail settings to publish mail in portal Discussion Forums, as described in Publishing Portal Mail in a Discussion Forum.

- Provide access for users to discussions in any of the following ways:

  - Provide users with the pretty URL to the **Discussions** page (see Pretty URLs for Pages in a Specified Portal).

  - Add a page link to the **Discussions** page in the portal navigation (see Adding a Discussions Page to a Portal).

  - Add a discussions task flow to a page in the portal (see Adding a Discussions Task Flow to a Page).

> **✎ Note:**
>
> For information about the discussions feature and how to use discussions, see Working with Discussions Task Flows.

About Discussions

You can use discussions to post, respond to, and preserve topical information in discussion forums limited to the current portal or to multiple portals. Users post topics to a discussion forum, and other users post information relevant to those topics. All of this information is preserved within the forum.

The back-end server that provides discussions (Oracle WebCenter Portal's Discussions Server) manages content in a hierarchy. At the top of the hierarchy are *categories*, below that are *forums*, and then *topics*. Where categories are exposed in your portal, authorized users can create multiple forums within a given scope and multiple topics under those forums. Where categories are not exposed, authorized users can create multiple topics under one forum within a given scope.

A new portal is assigned a single discussion forum by default.Portal managers can allocate multiple forums to a portal if required, as described in Modifying Discussion Forum Settings for a Portal.

Discussions are scoped to portals. That is, you can create forums and topics only within the context of a portal. You can view and participate in discussions in both portals and the Home portal, depending on your application permissions.

Access to discussions is influenced by application security. Users can access discussions according to the permissions they are granted by their specific user roles within a given portal.

Scoping additionally limits the users who can view and participate in discussions. For example, only members of the *Finance* portal can view discussions that transpire in *Finance* portal forums.

To expose a discussion forum to a specific set of users, you must add just those users as members of the portal where you hold the forum (for more information, see Granting Users Access to a Portal).

To open a discussion to all users, you must create a publicly-accessible portal (for more information, see Granting Public Access to a Portal).

Most Discussions task flows provide configuration settings for specifying which forum content to show. This is of particular use in the Home portal, which exists outside a specific portal (for more information, see Working with Discussions Task Flow Properties).

> **✎ Note:**
>
> All instances of the Discussions task flow in a portal runs against the same back-end server and it serves no purpose to add multiple Discussions task flow instances. This is true for all task flows that require connections to back-end servers, for example, task flows for presence, announcements, and mail.

There are a wide variety of task flows for viewing and participating in discussions:

- **Discussion Forums** provides controls for creating discussion forums; creating, replying to, and managing discussion forum topics; and selecting watched forums and watched topics (Figure 45-1).

Only portal managers can create, edit, and delete discussion forums, as described in Creating a Discussion Forum.

For more information about creating and managing forum topics and replies, watching forums and topics, showing and hiding forum information, sending mail from discussion topics, see Working with Discussions in *Using Portals in Oracle WebCenter Portal*.

Figure 45-1   Discussion Forums Task Flow

The Discussion Forums task flow is exposed by default on the **Discussions** page of a portal (see Adding a Discussions Page to a Portal) . You cannot add this task flow to a Home portal.

- **Forums** provides a means of accessing all possible views of a particular portal's discussions: Recent Topics, Popular Topics, Watched Topics, and Watched Forums (Figure 45-2).

Figure 45-2   Forums

The Forums task flow also provides controls for selecting the data to show in addition to the forum or topic title. The **Personalize** icon (pencil) in the task flow toolbar opens the Display Settings dialog (Figure 45-3).

For example, when Recent Topics is selected on the menu, the Display Settings dialog offers the options **Author**, **Date**, and **Replies** (Figure 45-3). When the task flow displays Watched Forums, the Display Settings dialog offers the options **Date** and **Topics**.

For more information, see Showing or Hiding Information in Forums View in *Using Portals in Oracle WebCenter Portal*.

Figure 45-3   Display Settings Dialog
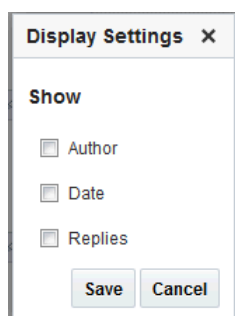
The available display settings vary according to the option currently selected on the Forums task flow **Display Options** menu (Figure 45-4).

Figure 45-4   Display Options Menu (Forums)

The Forums task flow can be placed on any page, regardless of whether the page is scoped to the Home portal or portal. It is available under the **Social and Communication** folder in the default resource catalog.

- **Popular Topics** (Figure 45-5) provides a look at the most frequently viewed discussion topics in all the discussion forums in a given portal.

Figure 45-5   Popular Topics Task Flow

The Popular Topics task flow also provides controls for determining the data to show in addition to the topic title. Click the **Personalize** (pencil) icon in the task flow header to open a panel with controls for selecting the type of additional data to show (Figure 45-6).

Figure 45-6   Show Panel in a Popular Topics Task Flow

The Popular Topics task flow can be placed on any page, regardless of whether the page is scoped to the Home portal or a portal. It is available under the **Alerts and Updates** folder in the default resource catalog.

For more information, see Showing or Hiding Information in Popular Topics in *Using Portals in Oracle WebCenter Portal*.

- **Recent Topics** (Figure 45-7) provides a look at the discussion topics accessed in the last two days in all the discussion forums in a given portal.

Figure 45-7   Recent Topics Task Flow

Access to portal discussion topics is restricted to only those portals of which you are a member.

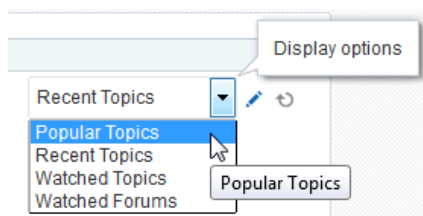The Recent Topics task flow also provides controls for determining the data to show in addition to the topic title. Click the **Personalize** icon (pencil) in the task flow header to open a panel with controls for selecting the type of additional data to show (Figure 45-8).

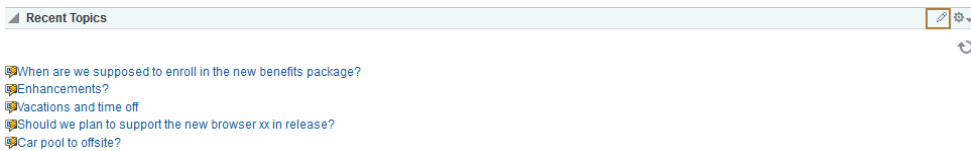**Figure 45-8   Show Panel in a Recent Topics Task Flow**

The Recent Topics task flow can be placed on any page, regardless of whether the page is scoped to the Home portal or portal. It is available under the **Alerts and Updates** folder in the default resource catalog.

For more information, see Showing or Hiding Information in Recent Topics in *Using Portals in Oracle WebCenter Portal*.

- **Watched Forums** (Figure 45-9) provides a means of viewing all discussion forums you have selected to watch from a particular portal or from all portals.

Figure 45-9   Watched Forums Task Flow

The Watched Forums task flow also provides controls for determining the data to show with the topic title. Click the **Personalize** icon (pencil) in the task flow header to open a panel with controls for specifying the type of additional data to show (Figure 45-10).

Figure 45-10   Show Panel in a Watched Forums Task Flow

The Watched Forums task flow can be placed on any page, regardless of whether the page is scoped to the Home portal or portal. It is available under the **Social and Communication** folder in the default resource catalog.

For more information, see Showing or Hiding Information in Watched Forums in *Using Portals in Oracle WebCenter Portal*.

- **Watched Topics** (Figure 45-11) provides a cohesive view of all the topics you have selected to watch from a particular portal or from all portals.

Figure 45-11   Watched Topics Task Flow

The Watched Topics task flow also provides controls for determining the data to show with the topic title. Click the **Personalize** (pencil) icon in the task flow header to open a panel with controls for specifying the type of additional data to show (Figure 45-12).

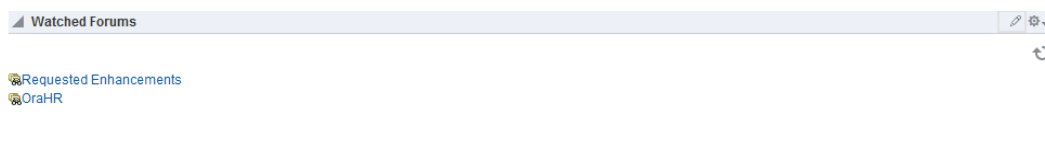**Figure 45-12   Show Panel in a Watched Topics Task Flow**

The Watched Topics task flow can be placed on any page, regardless of whether the page is scoped to the Home portal or portal. It is available under the **Social and Communication** folder in the default resource catalog.

For more information, see Showing or Hiding Information in Watched Topics in *Using Portals in Oracle WebCenter Portal*.

Discussions is tightly integrated with other features, such as links and mail. For example, mail sent to a portal distribution list can additionally be posted to that portal's default discussion forum. The portal manager must select **Monitor Incoming Mail** in the portal settings for discussions (see Publishing Portal Mail in a Discussion Forum). Every discussion topic provides the opportunity to link from the topic to another portal asset, such as a document or an announcement.

Modifying Discussion Forum Settings for a Portal

The system administrator is responsible for setting discussion forum options for the entire application through WebCenter Portal Administration pages (see Configuring Discussion Forum Options for WebCenter Portal in *Administering Oracle WebCenter Portal*). By default, WebCenter Portal creates a single discussion forum for a new portal after discussions is enabled. For more information, see Enabling and Disabling Tools and Services Available to a Portal. After enabling Discussions, you can optionally modify the default setting to allocate multiple discussion forums to the portal (described in this section).

WebCenter Portal stores all discussion forums and categories under the application root category on the discussions server. The system administrator can change the root category, as described in Specifying Where Discussions and Announcements are Stored on the Discussions Server in *Administering Oracle WebCenter Portal*. If required, you can change the default storage location for the discussion forums for a particular portal.

For more information about configuring and managing discussions, see Managing Announcements and Discussions in *Administering Oracle WebCenter Portal*.

To modify the discussion forum settings for a portal:

1. On the **Tools and Services** page (see Accessing Tools and Services Administration for a Portal), select **Discussions** (Figure 45-13).

Figure 45-13   Portal Discussion Forum Settings
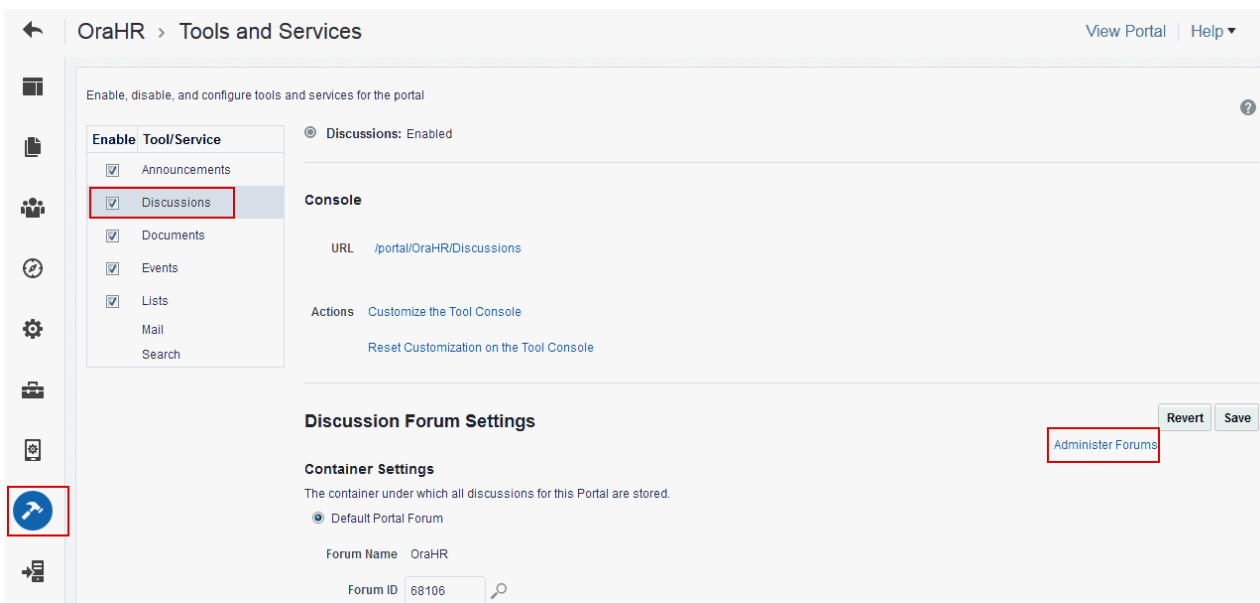
2. (Optional) To launch the Jive Forums Administration Console, the Web-based tool for configuring and managing discussion forums, click **Administer Forums** (Figure 45-13).

3. To allocate multiple discussion forums to the portal, select **Support Multiple Forums for the Portal**.

> **Note:**
>
> The Watched Topics and Recent Topics task flows on the Home page of a Discussions portal template are set to display data from a single forum, which is the default configuration. If you are specifying that your portal use multiple forums, the Watched Topics and Recent Topics task flows must be edited to remove the task flow parameters from the Forum ID field. See "Forum ID" in Discussions Task Flow Parameters.

4. Click **Save**.
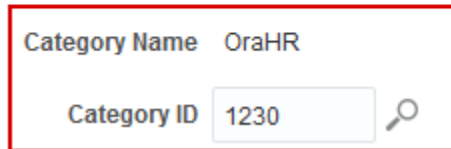
The page refreshes to show a category, under which the multiple forums are stored (Figure 45-14).

Figure 45-14   Portal Discussion Forum Settings: Multiple Forums

5. To store portal discussions in a different category and discussion forum than those specified by **Category Name** and **Forum Name**, click the **Choose a category for portal** icon (Figure 45-14) to change the storage location.

6. Click **Save**.

Publishing Portal Mail in a Discussion Forum

Communication through the portal mail distribution list can be published as discussion forum posts. When a mail message is new, a new topic is created for it. When a mail message is a reply to an existing mail message, a topic reply is created for it.

> **Note:**
>
> WebCenter Portal supports Microsoft Exchange server or any mail server that supports IMAP4 and SMTP. To enable WebCenter Portal users to access mail within WebCenter Portal and perform basic operations such as read, reply, and forward, you must first register the appropriate mail server with the WebCenter Portal application. The Mail service is not configured out-of-the-box. Refer to Managing Mail in *Administering Oracle WebCenter Portal*.

To publish portal mail in a discussion forum:

1. On the **Tools and Services** page (see Accessing Tools and Services Administration for a Portal), select **Discussions**.

2. To publish portal mail on a discussion forum of your choice, select **Monitor Incoming Email** (Figure 45-15).

    To disable this feature so that mail is not published for any portal, deselect this check box.

Figure 45-15   Portal Discussion Forum Settings: Mail

3. If required, update the portal **Mail Account**.

   This is the default distribution list used to mail all portal members. For details, see Configuring the Mail Distribution List for a Portal.

   > **Note:**
   >
   > If you specify a mail distribution list that has been defined as the distribution list for a different portal, then the mail sent to that distribution list is by default archived in the discussion forum specified in the **Mail Settings** for that portal. Mail sent to a portal distribution list can only be archived one time in one forum, on a first come first served basis.

4. In the **IMAP Host** field, enter the name of the computer where the IMAP (Internet Message Access Protocol) service is running; in the **IMAP Port** field, enter the port on which the IMAP service listens.

5. Select **Use SSL** if a secured connection (SSL) is required for incoming mail over IMAP.

6. Enter the **User Name** and **Password** of a portal member with sufficient privileges to modify these settings (`Manage` privilege).

7. To publish portal mail on a different discussion forum than the forum specified by **Forum Name**, edit the value in **Forum Name** or **Forum ID**.

   Click **Choose a forum for portal mail** next to the **Forum ID** field to display list of available forums in the portal (Figure 45-16).

Figure 45-16   Selecting a Forum for Portal Mail
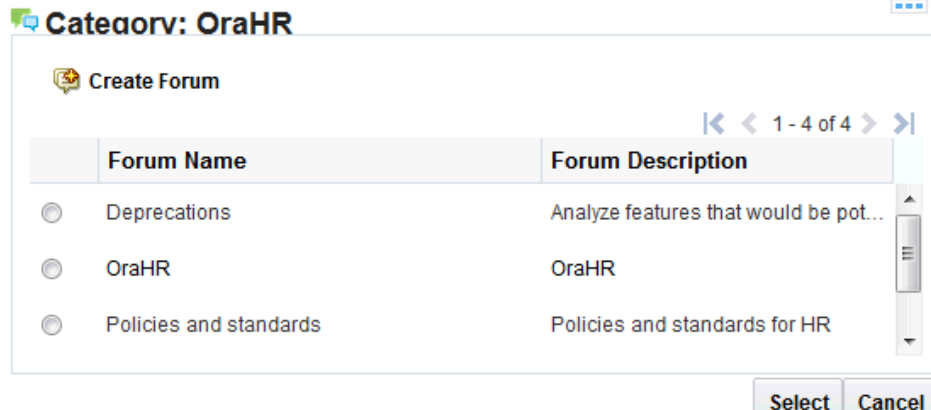
8. Select a forum in the list and click **Select**.

   Alternatively, create a forum from scratch. Click **Create Forum**, then enter a suitable name and description. If you have not selected to set up multiple forums, then you will not see this option.

   > **Note:**
   >
   > If no forum is specified for mail archiving, or the specified forum is deleted, mail sent to the distribution list is not archived anywhere.

9. Click **Save**.

Adding a Discussions Page to a Portal

To provide navigation to the **Discussions** page in a portal, you can add a page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation.

> **Note:**
>
> The **Discussions** page (or console) is not automatically exposed when the tool is enabled or when the portal is created. However, if the portal template exposes the **Discussions** page, the portal created from that template will also automatically expose this page.

Adding a Discussions Task Flow to a Page

Task flows expose all of the functionality available for discussions. Discussion Forums is the most feature-rich task flow, providing controls for creating and managing discussion forums and posting and managing discussion topics and replies. The other task flows are useful windows into discussion forum content. They provide different views of the discussion forums and topics available to a particular portal or all portals.

For the steps to add a discussions task flow to a page, see Adding a Component to a Page.

> **Tip:**
>
> The discussions task flows are included in the default resource catalog (except the Discussion Forums console, which is included by default on the Discussions page) under the **Social and Communication** folder (Forums, Watched Forums, and Watched Topics) and the **Alerts and Updates** folder (Popular Topics and Watched Topics).
>
> For more information about the discussions task flows, see About Discussions.

Figure 45-17 shows the Popular Topics task flow.

Figure 45-17   Popular Topics Task Flow

Users with Edit privileges can access the task flow's properties in the page editor. For information about configuring a discussions task flow to display the discussions from a particular portal or from all portals, see Working with Discussions Task Flow Properties.

Working with Discussions Task Flow Properties

Discussions task flows have associated properties, which users with sufficient privileges can access through the task flows' **View Actions** menu. For example, select **Parameters** to display the Parameters dialog (Figure 45-18).

Figure 45-18   Discussion Recent Topics Task Flow Component Properties

> **See Also:**
>
> Setting Properties on a Component

The following sections provide information about properties of Discussions task flows and describe the task flow parameters:

- Setting Discussions Task Flow Properties
- Discussions Task Flow Parameters

Setting Discussions Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 45-19), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 45-19   View Actions Menu on Recent Topics Task Flow
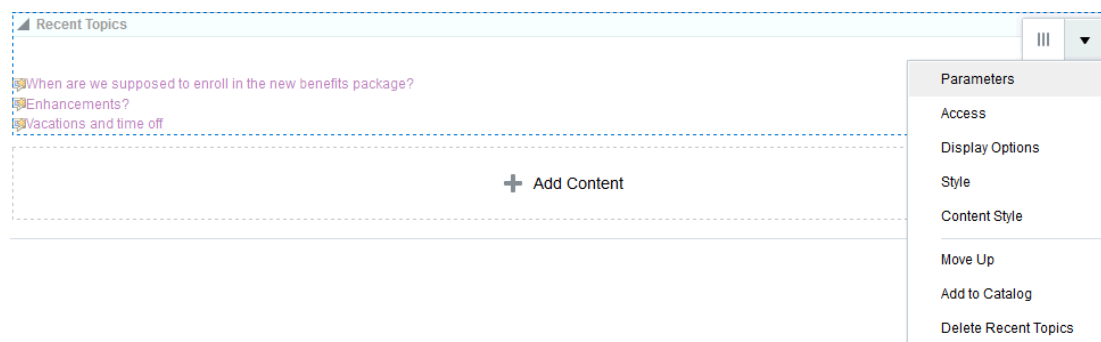
To set Discussions task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

   • Parameters control the default task flow content. For descriptions of each parameter, see Discussions Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

   • Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

   • The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

   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.

   > **Note:**
   >
   > When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
   >
   > EL validation is not performed on non-generic display options.

   If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Discussions Task Flow Parameters

Table 45-1 describes the properties that are unique to the discussions task flows.

Table 45-1   Discussions Task Flow Parameters

Parameter	Description	Task Flow
Category ID	On the discussions server, the category ID under which a given set of forums is managed For the Forums task flow, use this parameter to specify the set of forums to present. For all other discussions task flows, use this parameter to specify the parent ID of the topics to show by default. If omitted, the value defaults to the Category ID associated with the current portal. In the Home portal, it takes the root Category ID. Use the following EL expression to return the Category ID of a named portal: `#{sessionContext['oracle.webcenter.collab.forum'].groupInfo['PortalName'].categoryId}` Enter the internal name (not the portal display name) for the variable `PortalName`. The portal internal name is the name specified by the portal URL on the portal's administration settings. The portal display name is specified by **Display Name**, and is the name that appears in the portal banner at the top of the portal. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.	• Discussion Forums • Forums - Quick View • Popular Topics • Recent Topics • Watched Forums • Watched Topics
Forum ID	On the discussions server, the identifier under which topics are managed Use this parameter to identify the default forum to show in the task flow. Use the following EL expression to return the forum ID of a named portal: `#{sessionContext['oracle.webcenter.collab.forum'].groupInfo['PortalName'].forumId}` Enter the portal internal name (not the portal display name) for the variable `PortalName`. The portal internal name is the name specified by the portal URL on the portal's administration settings. The portal display name is specified by **Display Name**, and is the name that appears in the portal banner at the top of the portal. If you are selecting to use multiple forums in your portal, remove the parameter specified in the Forum ID field of the default Watched Topics and Recent Topics task flows on the Home page of a Discussions portal template. This is because these two default task flows on the Home page of a Discussions portal template are set to display data from a single forum, which is the default configuration. In this instance, the Forum ID will be set to `${sessionContext['oracle.webcenter.collab.forum'].groupInfo[portalContext.currentPortalName].forumId}`. Delete this value and save the page.	• Discussion Forums • Popular Topics • Recent Topics • Watched Topics

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Table 45-1   (Cont.) Discussions Task Flow Parameters

Parameter	Description	Task Flow
Hide Toolbar	A means of showing or hiding the task flow personalization feature (see Showing and Hiding Additional Discussion Forum Information in *Using Portals in Oracle WebCenter Portal*. • If selected, then the task flow personalization feature is hidden. • If not selected, then the task flow personalization feature is shown. This is the default value.	• Popular Topics • Recent Topics • Watched Forums • Watched Topics
Show Recursive Forums	Determines if you show forums either in a category only or in subcategories. • If selected, then all forums under a given category/subcategory are shown. This can impact performance. • If not selected, then only the category's direct child forums are shown. This is the default value.	Forums
Show Categories	A means of showing the forums grouped under the Category ID or the topics specified under the Forum ID. • If selected, then the task flow displays the forums classified under Category ID. • If not selected, then the task flow displays the topics associated with the specified Forum ID. This is the default value. This parameter value works in combination with other parameters.	Forums
Do Not Allow Selecting Number of Topics Fetched	If selected, then users are not allowed to change the number of visible topics.	Discussion Forums
Number of Topics Fetched	Sets the number of visible topics.	• Discussion Forums • Forums - Quick View
Number of Recent Topics Fetched	Sets the number of visible recent topics.	Recent Topics
Number of Watched Forums Fetched	Sets the number of visible watched forums.	Watched Forums
Number of Watched Topics Fetched	Sets the number of visible watched topics.	Watched Topics
Do Not Show More Link	If selected, then the **More** link (to see more topics or forums) is not visible.	• Forums - Quick View • Recent Topics • Watched Forums • Watched Topics

Working with Discussions Task Flows

The Discussion Forums task flow is rich, providing controls for creating and managing discussion forums (available to the portal manager only) and posting and managing discussion topics and replies. The other task flows, such as Watched Topics or Watched

Forums are useful views into discussion forum content. They provide different views of the discussion forums and topics available to a particular portal or all portals.

> **Note:**
>
> Most of the tasks can be accomplished by portal members with the permissions to `Create and Edit Discussions`, `Reply To Discussions` and `View Discussions`. Tasks such as creating and managing forum topics and replies, watching forums and topics, showing and hiding forum information, sending mail from discussion topics, are described in Viewing and Participating in Discussions in *Using Portals in Oracle WebCenter Portal*.
>
> Only portal managers can or members with the permission to `Create, Edit, and Delete Discussions` can create, edit, and delete discussion forums, described in this section.

This section contains the following subsections:

- Creating a Discussion Forum
- Editing the Forum Name and Description
- Deleting a Discussion Forum

Creating a Discussion Forum

Create discussion forums on the **Discussions** page (or console) or with the Discussion Forums task flow.

> **Note:**
>
> A new portal is assigned a single discussion forum by default.Portal managers can allocate multiple forums to a portal if required, as described in Modifying Discussion Forum Settings for a Portal.

To create a discussion forum:

> **Note:**
>
> To create forums, you must be the portal manager, or have permission to `Create, Edit, and Delete Discussions`.

1. Go to the **Discussions** page (console) or the Discussions Forums task flow.

   If multiple forums have been enabled, then you see a Forums link pointing to the list of forums (Figure 45-20)

Figure 45-20   Discussions Page with Multiple Forums Enabled
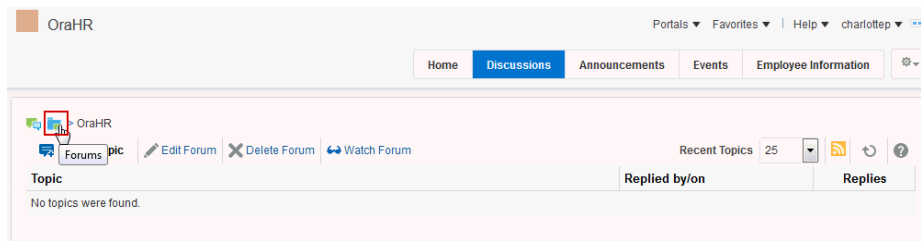
2. Click the **Forums** link, and then click **Create Forum** (Figure 45-21).

Figure 45-21   Create Forum
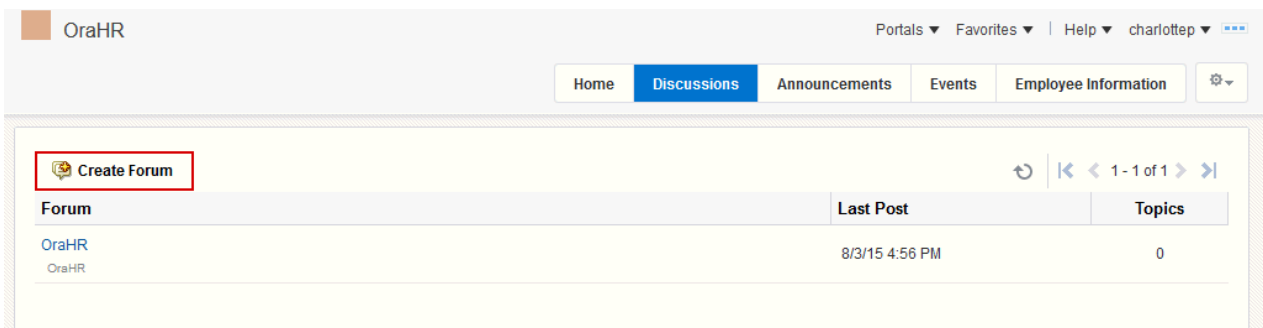
The Create Forum dialog opens (Figure 45-22).

Figure 45-22   Create Forum Dialog
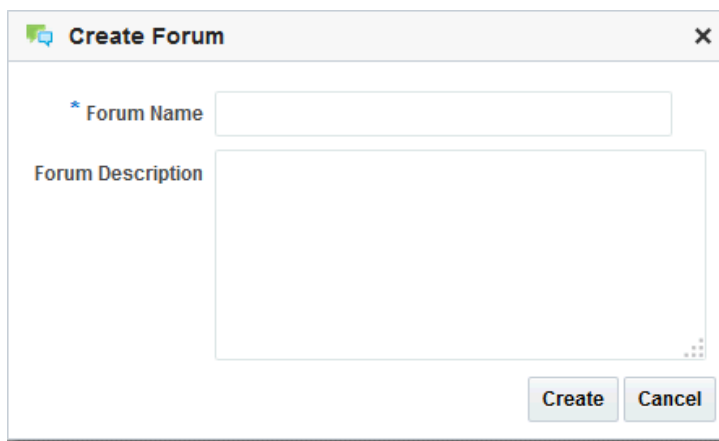
3. In the **Forum Name** field, enter a name for the discussion forum.

    You can enter up to 200 characters.

4. Optionally, in the **Forum Description** text box, enter a description of the discussion forum.

    You can enter up to 4000 characters.

5. Click **Create**.

The new forum appears in the list of forums (Figure 45-23). Click a forum name to view forum content.

Figure 45-23   New Discussion Forum (Requested Enhancements)

Editing the Forum Name and Description

To rename a discussion forum or revise its description:

> **✎ Note:**
>
> To edit the forum name and description, you must be the portal manager, or have permission to `Create, Edit, and Delete Discussions`.

1. Go to the **Discussions** page (or console) or the Discussions Forums task flow, and click the forum name link you want to edit.

   The forum page appears (Figure 45-24).

Figure 45-24   Forum Page with Edit Forum Link
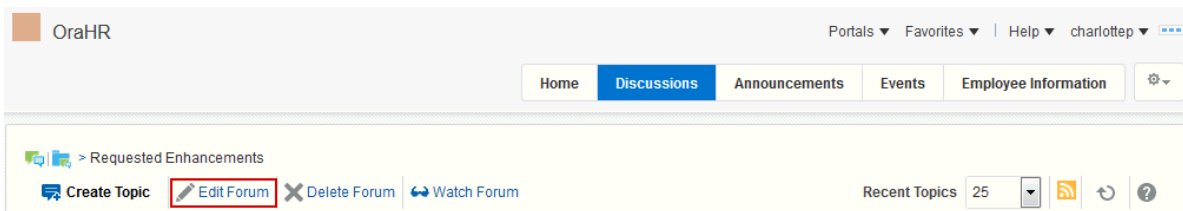
2. Click **Edit Forum**.

   The Edit Forum dialog opens (Figure 45-25).

Figure 45-25   Edit Forum Dialog

3. Optionally, in the **Forum Name** field enter a new name for the discussion forum.

    You can enter up to 200 characters.

4. Optionally, in the **Forum Description** text box, revise the default description of the discussion forum.

    You can enter up to 4000 characters.

5. Click **Save**.

Deleting a Discussion Forum

To delete a discussion forum:

> **Note:**
>
> To delete a discussion forum, you must be the portal manager, or have permission to `Create, Edit, and Delete Discussions`.
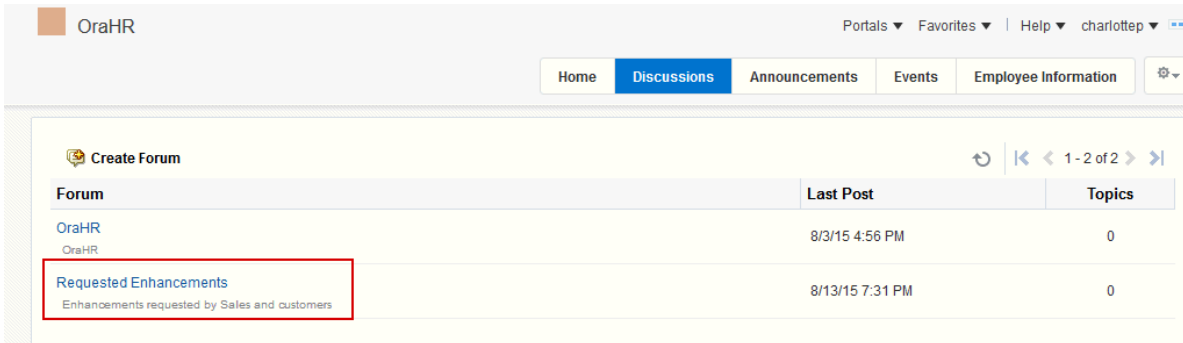
1. Go to the **Discussions** page (console) or the Discussions Forums task flow, and click the name link of the forum you want to delete.

    The forum page appears (Figure 45-26).

Figure 45-26   Forum Page with Delete Forum Link
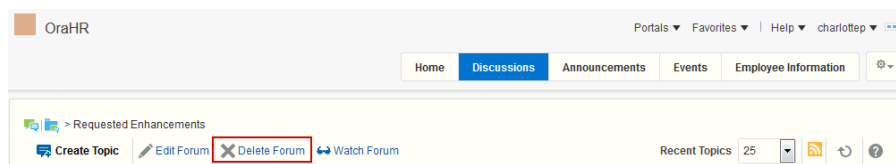
2. Click **Delete Forum**.

3. In the Delete Forum dialog that appears, click **Delete** to confirm the operation.

    The forum and all the topics associated with the forum are deleted.

46
Adding Events to a Portal

Add Events to a portal to allow portal members to view and manage calendar events, including their personal Microsoft Exchange calendar and portal calendars.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Manage Security and Configuration` or `Manage Configuration`.
>
> At a minimum, you must have the following permissions:
>
> - `Edit Pages` (to add the Events task flows to a page)
> - `Edit Task Flows` (to enable calendar overlays)
>
> See About Roles and Permissions for a Portal.

Topics:

- Prerequisites for Events
- About Calendars and Events
- Creating and Managing Portal Event Categories
- Showing Events on a Page in the Home Portal
- Showing Events on the Events Page in a Portal
- Displaying Multiple Calendars in an Events Task Flow
- Adding an Events Page to a Portal
- Adding an Events Task Flow to a Page
- Working with Events Task Flow Properties

Prerequisites for Events

For events to work, the system administrator needs to perform the following task for WebCenter Portal:

- For using personal calendars, install the Microsoft Exchange server components and configure the application for WebCenter Portal. The connection between the two applications must be active. For more information, see Managing Calendar Events in *Administering Oracle WebCenter Portal*.

> ✏️ **See Also:**
>
> Troubleshooting Issues with Events in *Administering Oracle WebCenter Portal*

To make events available in a portal, the portal manager or anyone with `Manage Security and Configuration` or `Manage Configuration` permission must perform the following tasks:

- For portal events, if not already enabled during portal creation, enable the Events tool, as described in Enabling and Disabling Tools and Services Available to a Portal.

- Optionally, configure the event categories, as described in Creating and Managing Portal Event Categories.

- Provide access for users to events in any of the following ways:

  – Provide users with the pretty URL to the **Events** page (see Pretty URLs for Pages in a Specified Portal).

  – Add a page link to the **Events** page in the portal navigation (see Adding an Events Page to a Portal).

  – Add the Events task flow to a page in the portal (see Adding an Events Task Flow to a Page).

> ✏️ **Note:**
>
> For information about the events feature and how to use calendaring and events, including subscribing to events, see Working with Calendars and Events in *Using Portals in Oracle WebCenter Portal*.

About Calendars and Events

Events include appointments, meetings, presentations, and so on. WebCenter Portal provides two kinds of events:

> ✏️ **Note:**
>
> For events to display, events must be enabled and the Events task flow must be added to a page or the Events page (or console) must be accessible. See the following sections:
>
> - Enabling and Disabling Tools and Services Available to a Portal
> - Adding an Events Page to a Portal
> - Adding an Events Task Flow to a Page

- **Personal events** are not related to a specific portal. They could include personal appointments with a doctor or dentist, or lunch with a friend.

  Personal events come from your Microsoft Exchange calendar and display only to you in Events task flows that are located on pages in the Home Portal. See Showing Events on a Page in the Home Portal.

- **Portal events** are related to a specific portal. They could include weekly meetings, presentations, or a customer visit.

  Portal events display to all members of the portal on the portal's dedicated **Events** page (which can be exposed by the portal manager) or in any Events task flow that is located on a page in the portal.

> ✏ **See Also:**
>
> Where to View Events in *Using Portals in Oracle WebCenter Portal*

There are two task flows for displaying both personal and portal events:

- The **Events** task flow provides a fully featured calendar where, as well as viewing events in a variety of layouts, you can also create and manage events and display events from multiple calendars.

- The **Events - Mini View** task flow provides a more compact view of events as a list. You can view upcoming events and edit existing events. You cannot create new events in this task flow. This is useful if you want to provide information about events but do not have enough space on the page for a full calendar.

Creating and Managing Portal Event Categories

> ✏ **Note:**
>
> Enable Events, as described in Enabling and Disabling Tools and Services Available to a Portal.

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. In the portal administration (see Accessing Tools and Services Administration for a Portal), click **Tools and Services** in the left navigation pane.

   You can also enter the following URL in your browser to navigate directly to the **Tools and Services** page:

   ```
   http://host:port/webcenter/portal/portalName/admin/services
   ```

> ✏️ **See Also:**
>
> WebCenter Portal Pretty URLs

> 💡 **Tip:**
>
> The way you access this page depends on the page template in use. For example, in a side navigation template, you can access it through a **Manage** menu.

2. On the **Tools and Services** page, select **Events**.

Figure 46-1 Working with Portal Event Categories
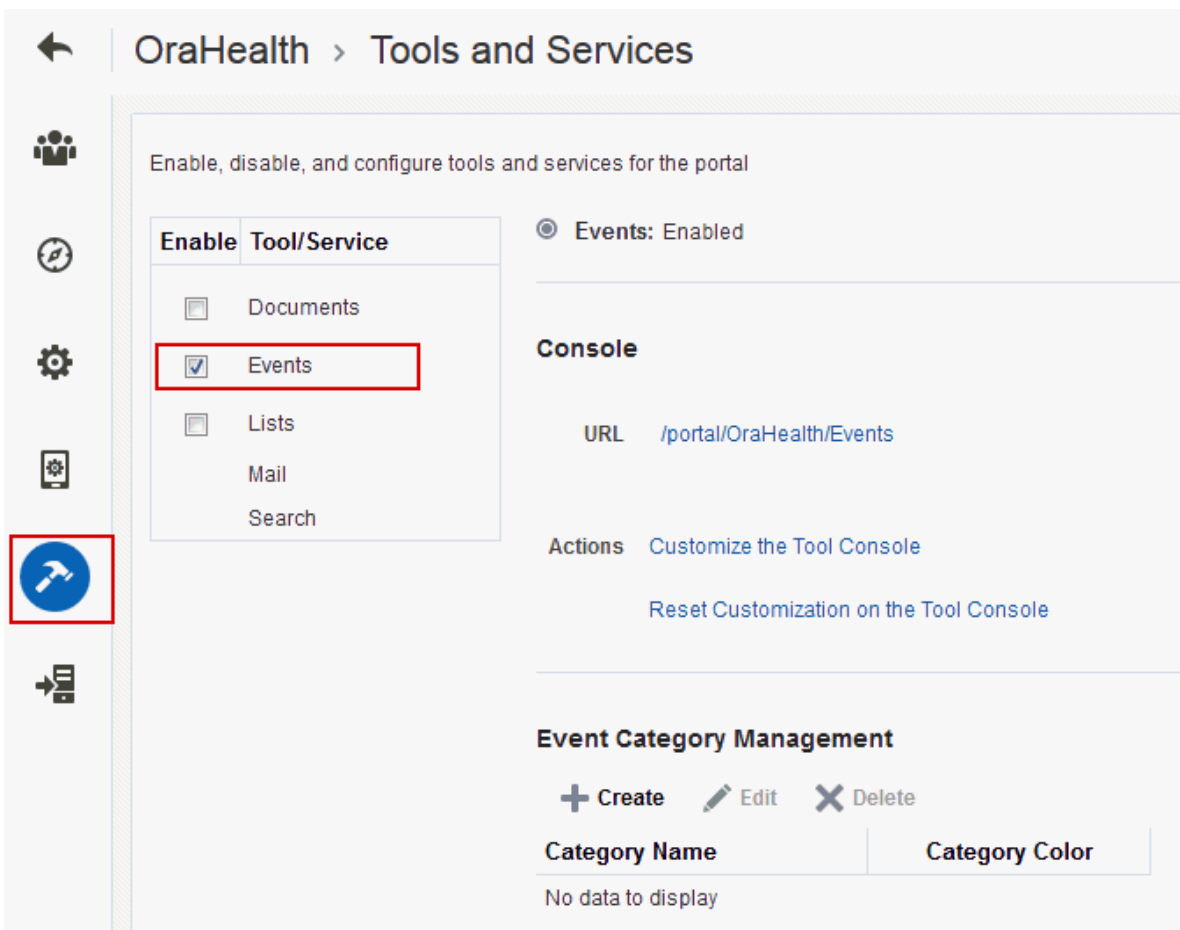
3. Click **OK** to dismiss the message about giving portal users permissions.

4. To create a new portal event category, click **Create** .

Figure 46-2   Creating an Event Category
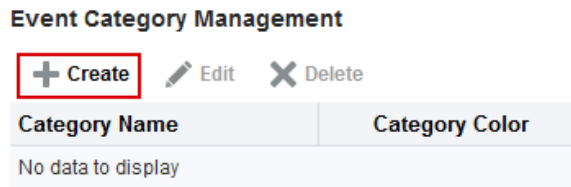
5. In the Create Category dialog, enter a **Category Name**, and select a color for the event category, then click **Yes**.

Figure 46-3   Create Category Dialog
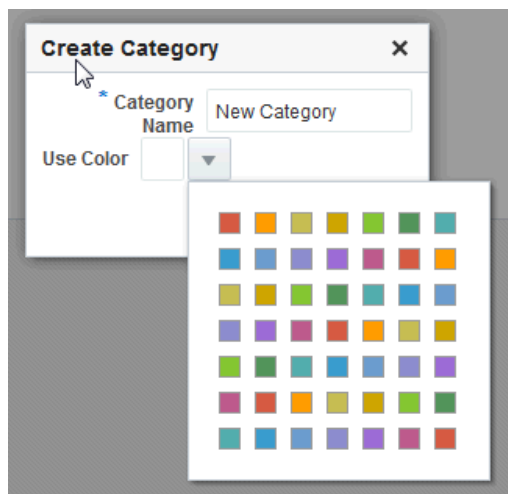
For information about assigning a category to an event, see Working with Calendars and Events (specifically Scheduling Events) in *Using Portals in Oracle WebCenter Portal*.

The category to which an event belongs also displays when a user hovers the mouse pointer over the event on the Events page or in an Events task flow. Users can also filter the Events page or an Events task flow to display events belonging to one or more specific categories.

For more information, see Filtering Events by Category in *Using Portals in Oracle WebCenter Portal*.

6. To edit or delete a portal event category, select the category, then click either **Edit** or **Delete**.

Figure 46-4   Editing or Deleting a Portal Event Category
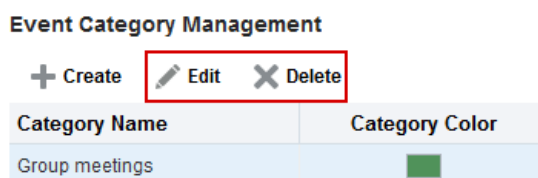
For more information see Revising Scheduled Events and Cancelling Scheduled Events in *Using Portals in Oracle WebCenter Portal*

Showing Events on a Page in the Home Portal

You can maintain a calendar of personal events external to WebCenter Portal that does not relate to specific portals. If you use Microsoft Exchange 2007 (or later) for this calendar, you can include your **personal events on a page in the Home portal**. This keeps all your calendar information in a single place, here you can view, edit or delete personal events or create new personal events that are pushed to your Exchange calendar.

> **Note:**
>
> You can use calendar overlaying to display portal events alongside personal events on a page in the Home portal, but you cannot push portal events into your Exchange calendar.
>
> For more information about calendar overlaying, see Displaying Multiple Calendars in an Events Task Flow.

To show events on a page in the Home portal:

> **Note:**
>
> Before you can access your personal events in WebCenter Portal, your system administrator must install and create an active connection to the Microsoft Exchange Server. See Managing Calendar Events in *Administering Oracle WebCenter Portal.*

1. Add a personal page to the Home portal.

   See Creating and Managing Personal Pages in *Using Portals in Oracle WebCenter Portal*.

2. Edit the page and add the Events task flow.

   See Editing a Personal Page in *Using Portals in Oracle WebCenter Portal* and Adding an Events Task Flow to a Page.

3. Click **Login to Personal Calendar** (Figure 46-5).

   In the Home portal, the Events task flow does not initially display the calendar of events from your personal calendar. Instead it displays a link prompting you to **Login to Personal Calendar**.

> **Note:**
>
> If you see the link **Try Again** instead of **Login to Personal Calendar**, there is a problem with the connection to the Microsoft Exchange Server. Contact your system administrator.

Figure 46-5   Events Task Flow in Home Portal Before Logging In (Without Calendar Overlaying)
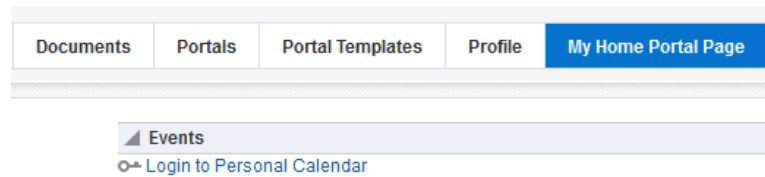
If you do not have a Microsoft Exchange calendar, or do not want to display personal events, but still want to view portal events in the Home portal, you can enable calendar overlaying (see Displaying Multiple Calendars in an Events Task Flow), click **Personal Events** (Figure 46-6) and then click **Continue** (Figure 46-7).

Figure 46-6   Personal Events Link on a Page in the Home Portal
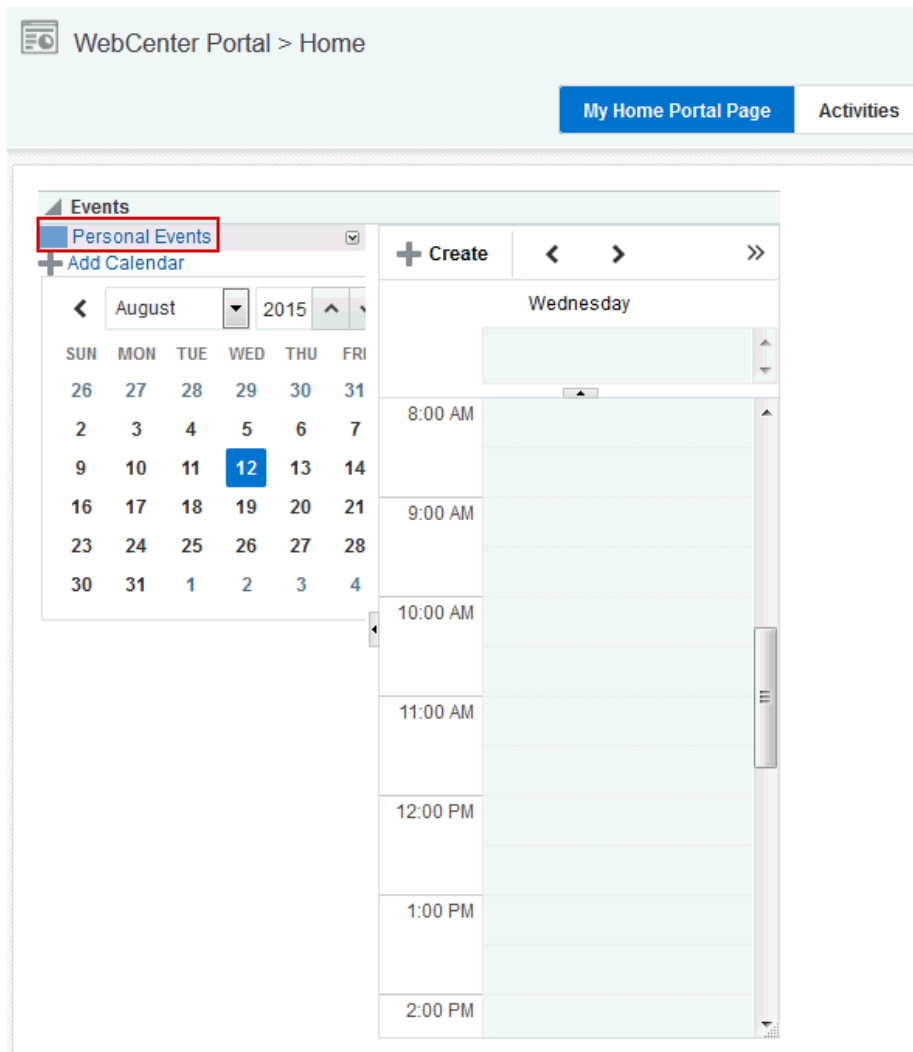
Figure 46-7   Events Task Flow in Home Portal (With Calendar Overlay Enabled)
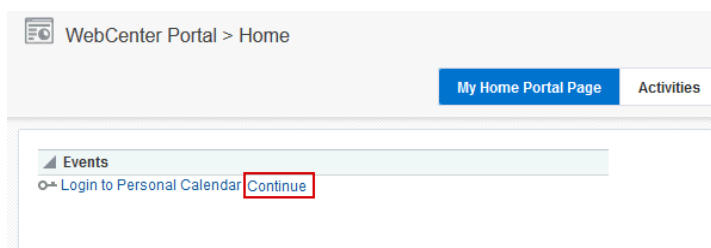
4. In the **External Application Login** dialog that appears, enter your Microsoft Exchange login credentials and click **OK.**

> **Note:**
>
> The **External Application Login** dialog may include additional fields and information, depending on the requirements of the mail service that provides it. For more information about external applications and storing your login credentials in WebCenter Portal, see Providing Login Information for External Applications in *Using Portals in Oracle WebCenter Portal*.

Your personal calendar is displayed (Figure 46-8).

Figure 46-8   Personal Calendar
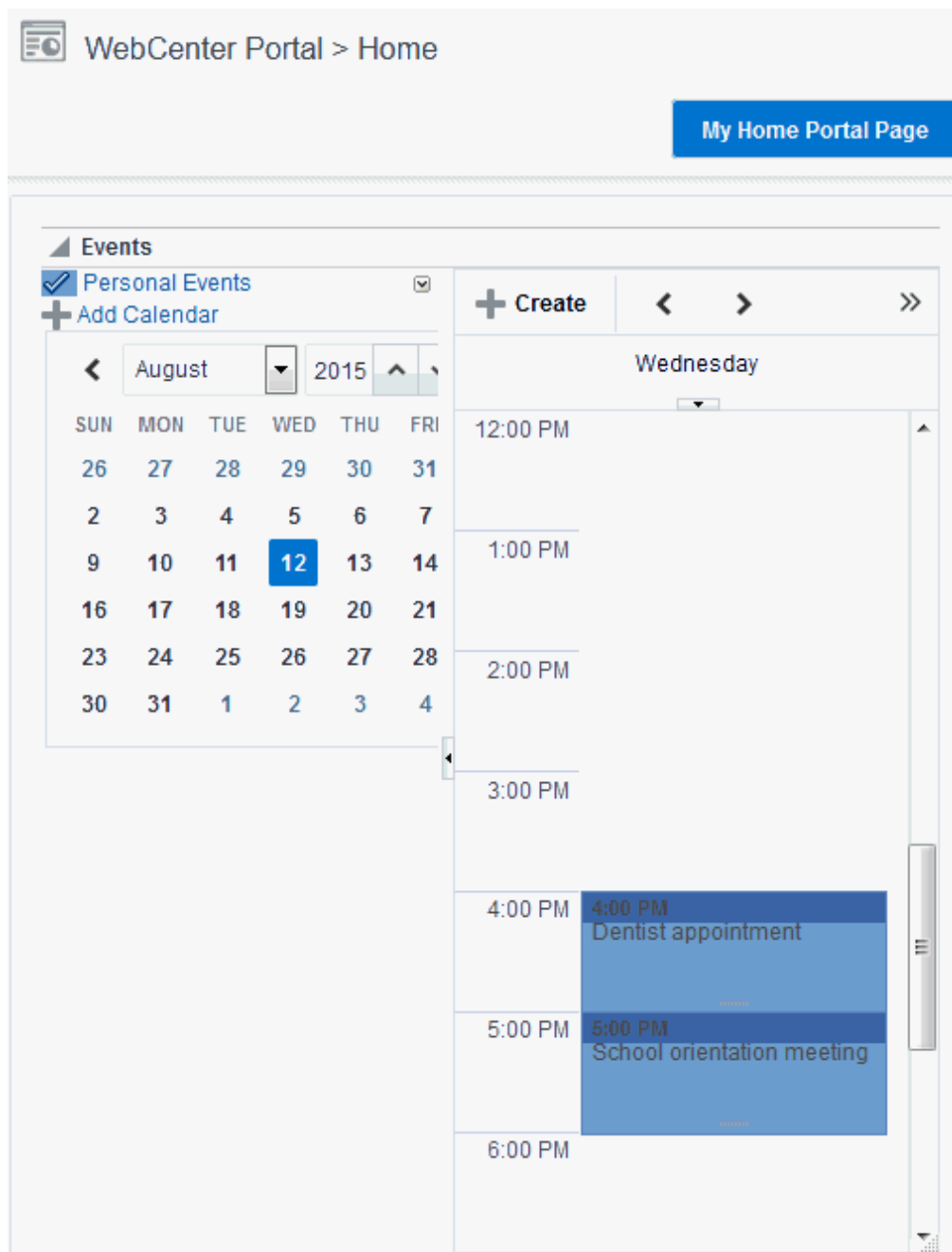
If you decide not to show the Events page later, see Showing or Hiding a Page in the Portal Navigation.

If you want members to be able to access their personal calendars, you must give them access to the page. See Setting Page Security.

Showing Events on the Events Page in a Portal

Showing Events on a Page in the Home Portal describes how you can add the Events task flow to a page in the Home portal to display your personal Exchange calendar. This section describes viewing events on the **Events** page or console. In every portal where events is enabled, portal events display on the **Events** page. However, the **Events** page (or console) will not display by default. You will need to provide navigation by giving users access to the page through a pretty URL or by adding an **Events** page to the portal. See Adding an Events Page to a Portal.

> **Note:**
>
> The Home portal does not show the **Events** page by default, but users can expose it in their view using the **Show Page** option on the **Personalize Pages** page. See Showing or Hiding Pages in Your View of the Home Portal in *Using Portals in Oracle WebCenter Portal*.

Figure 46-9 shows the Events task flow on the Events page (or console).

Figure 46-9   Events Task Flow on the Events Page
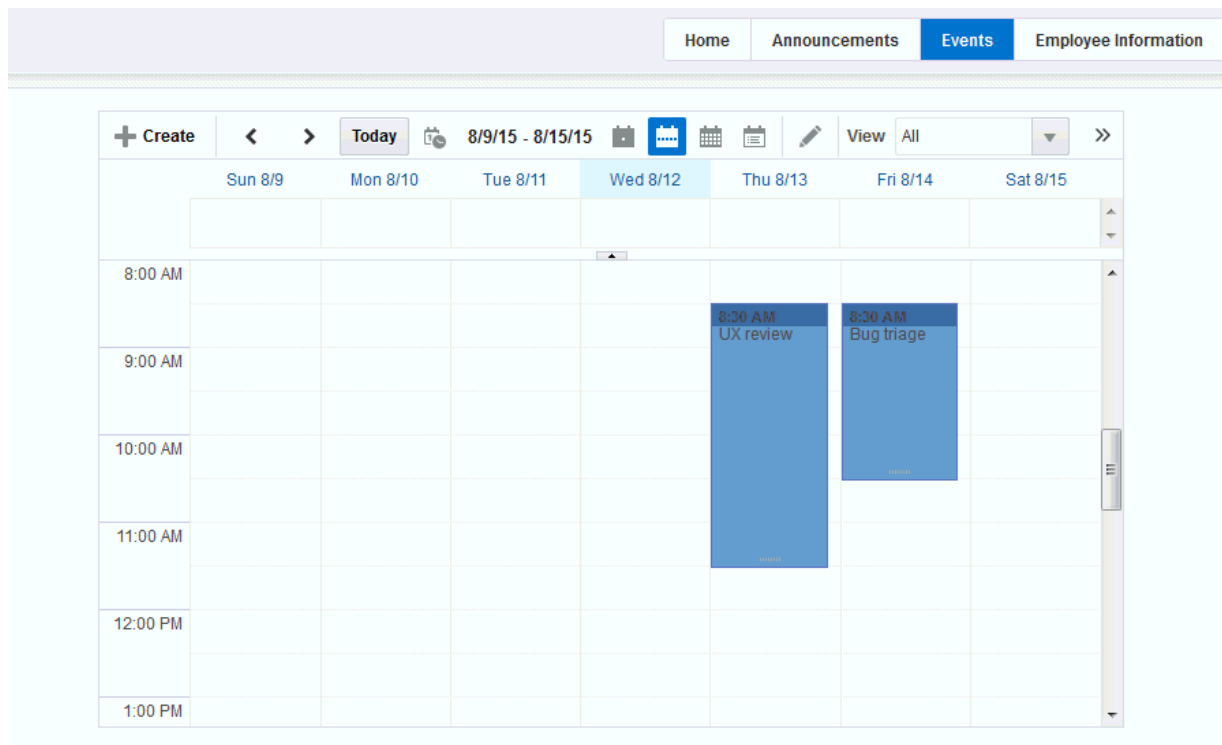
You can also add the Events task flow to another page in your portal, as described in Adding an Events Task Flow to a Page.

Displaying Multiple Calendars in an Events Task Flow

In addition to displaying your personal events in the Home portal, you can also display events from multiple portals in an Events task flow. This is referred to as *calendar overlaying*. In this way, you can have all your important events available in one location, the Home portal, rather than having to go to multiple portals to manage your daily schedule.

The events from each calendar are displayed in a different color to help identify the source of the event, if you created categories at the time you enabled events (see Creating and Managing Portal Event Categories). If you are overlaying calendars on a page in the Home portal or on a portal page, category colors are used only for events from the current portal. All events from overlaid calendars are displayed in the color defined for that portal if the events do *not* have categories. But if the overlaid calendars have event categories, then the events *with* category will be shown for the calendars from other portals, provided the portal in which overlay is enabled has that same category.

> **Note:**
>
> Calendar overlaying is available only in Events task flows. A portal's **Events** page or console displays events from the current portal only. For the Events task flow to display, the Events task flow must be added to a page in the Home portal. See Adding an Events Task Flow to a Page.

This section includes the following subsections:

- Enabling Calendar Overlaying
- Displaying Additional Calendars

Enabling Calendar Overlaying

To enable calendar overlaying on a page:

1. Open the page containing the Events task flow in the page editor (see Opening a Page in the Page Editor).
2. In the task flow toolbar, click the **View Actions** menu and select **Parameters**.
3. In the Parameters dialog, from the **Calendar Overlay Style** drop-down, select:
   - **None** if you do *not* want to use calendar overlays.
   - **Mini** to use a compact view of the calendar overlay. This takes up less space on the page, but it might not be immediately obvious how to work with the overlays. Use this option if space is very limited on the page, or when your users have become familiar with calendar overlays and how to use them. Mini style is available only with Day and List view, not Week or Month.
   - **Full** to use a detailed calendar overlay. Use this option if space is not an issue on the page and to provide a richer user interface.

Figure 46-10   Calendar Overlay Style Events Property

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

5. Click **Save** at the top left of the page editor toolbar to save your changes.

   The Events task flow now includes an area to the left of the calendar where you can choose other calendars to display in the task flow.

   If you selected the **Full** option for the **Calendar Overlay Style**, the calendar overlay area includes text as well as icons and also includes a date picker to help you easily move around your calendar.

   Figure 46-11 shows the Events task flow on a page in the Home portal, with full calendar overlay.

Figure 46-11   Events Task Flow with Full Calendar Overlay Area
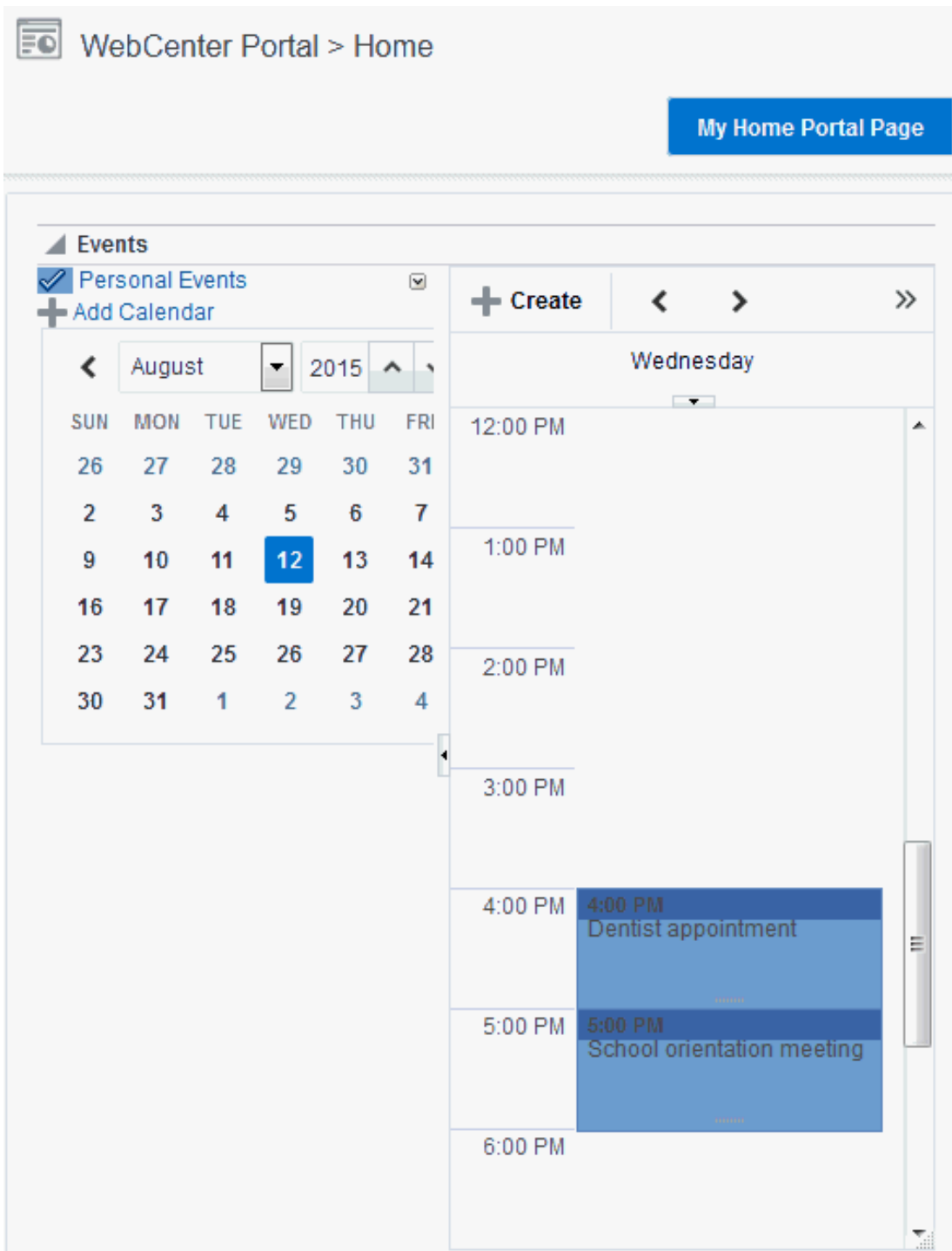
If you selected the **Mini** option for the **Calendar Overlay Style**, the calendar overlay area is much smaller, displaying the day view only (Figure 46-12).

Figure 46-12   Events Task Flow with Mini Calendar Overlay Area
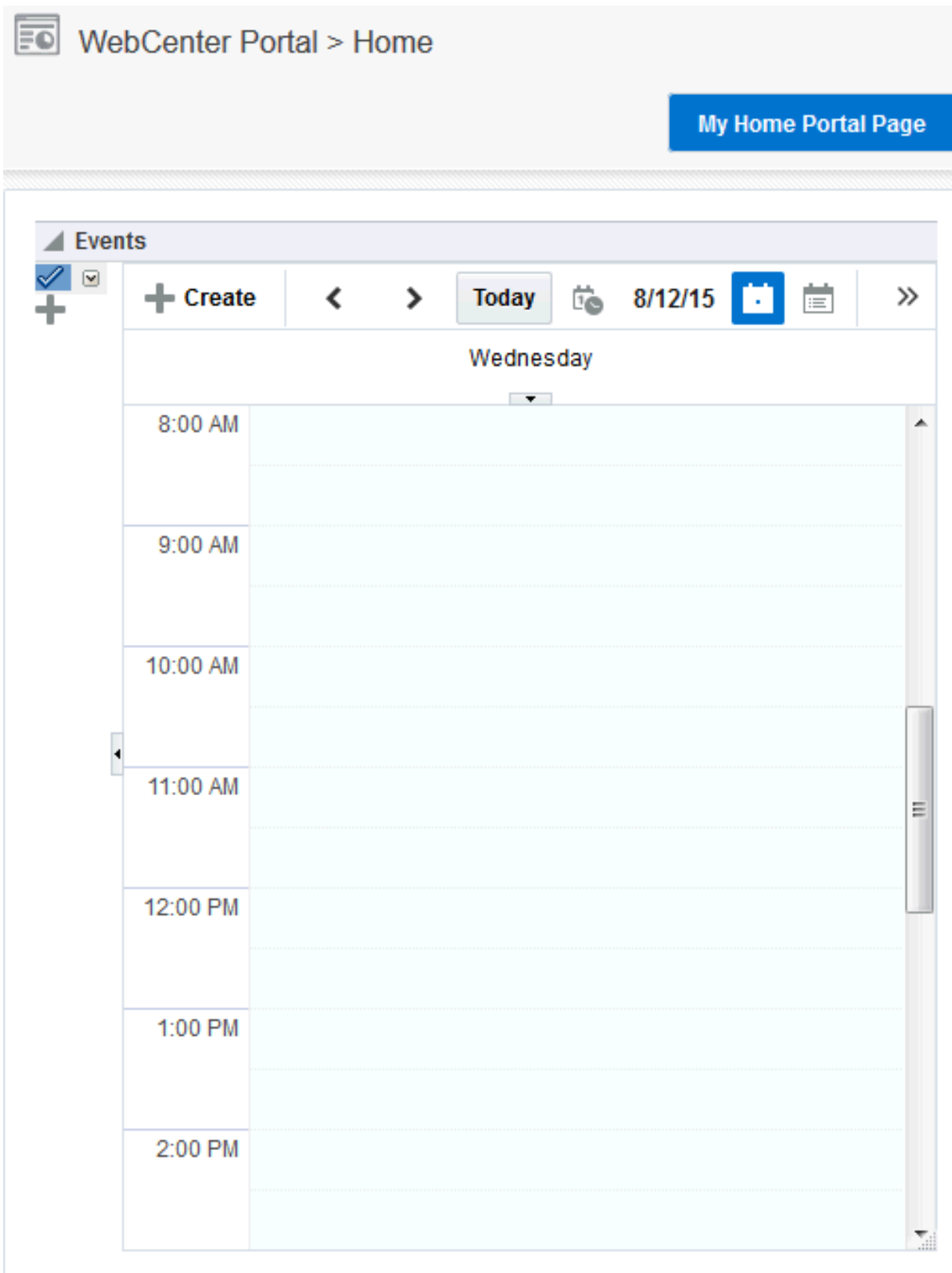
> **✎ Note:**
>
> If you have not yet set up and logged in to your personal calendar, click **Personal Events** and then click the **Continue** link to display the portal calendar in the task flow (Figure 46-7).

Displaying Additional Calendars

When the calendar overlaying feature is enabled (see Enabling Calendar Overlaying), users can display as many calendars as they want in the Events task flow. Each calendar's events are displayed in a different color to make it easier to distinguish which calendar it belongs to.

To display additional calendars:

1. Go to the Home portal or the appropriate portal and locate the page that contains the Events task flow.

   > **✎ Note:**
   >
   > Additional calendars are not available on the Events page.

2. In the calendar overlay area of the Events task flow, click the **Add Calendar** icon (Figure 46-13).

   Figure 46-13   Add Calendar Icon

3. In the Add Calendar dialog (Figure 46-14), select the portal that has the calendar that you want to display in the task flow.

   You can select multiple portals.

Figure 46-14   Add Calendar Dialog
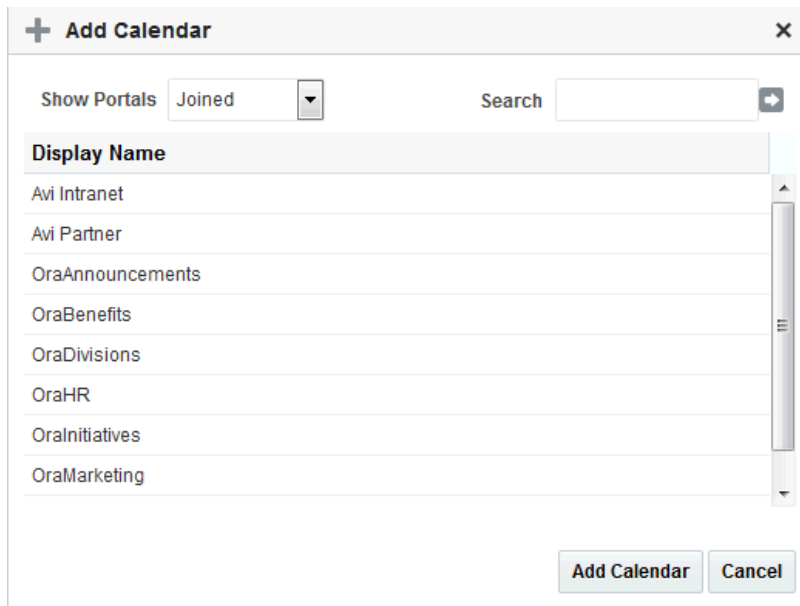
4. Click **Add Calendar.**

    The calendar overlay area now includes the selected portals on the left.

5. Select the check box next to each portal whose calendar you want to view.

    The events from each portal are displayed in a different color (Figure 46-15).

Figure 46-15   Events From Multiple Calendars
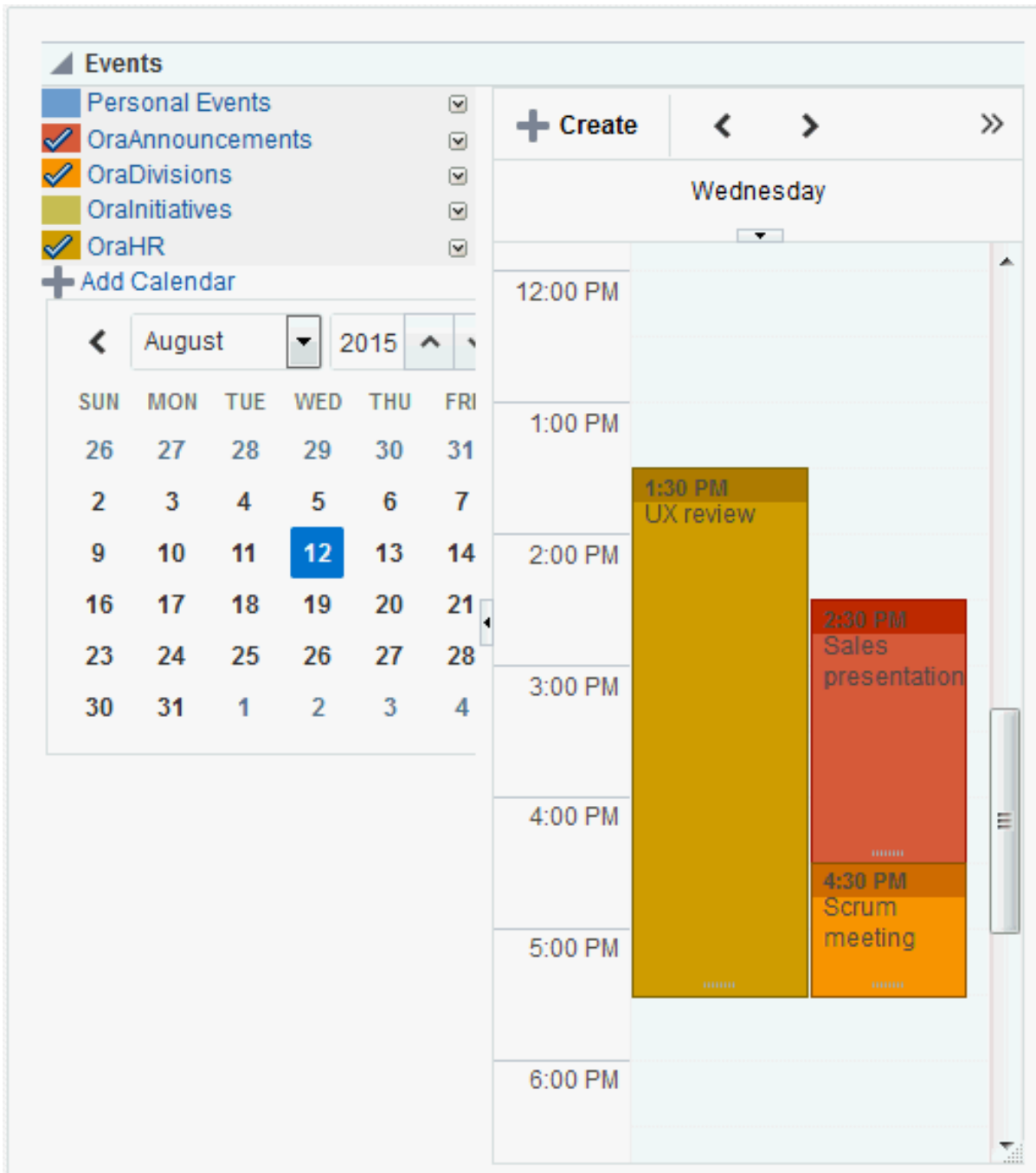
Adding an Events Page to a Portal

To provide navigation to the **Events** page in a portal, you can add a page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation.

> **Note:**
>
> The **Events** page (or console) is not automatically exposed when the tool is enabled or when the portal is created. However, if the portal template exposes the **Events** page, the portal that is created from the template will also automatically expose this page.

Adding an Events Task Flow to a Page

For the steps to add an events task flow to a page, see Adding a Component to a Page.

> **Tip:**
>
> The presence or location of the Events task flows in the resource catalog depends on how the resource catalog is configured. For example, in the default resource catalog, the Tags task flows are included under the **Social and Communication** folder.
>
> For more information about the Events task flows, see About Calendars and Events.

Figure 46-16 shows the Events task flow on a page in the Home portal.

Figure 46-16   Events Task Flow with Full Calendar Overlay Area
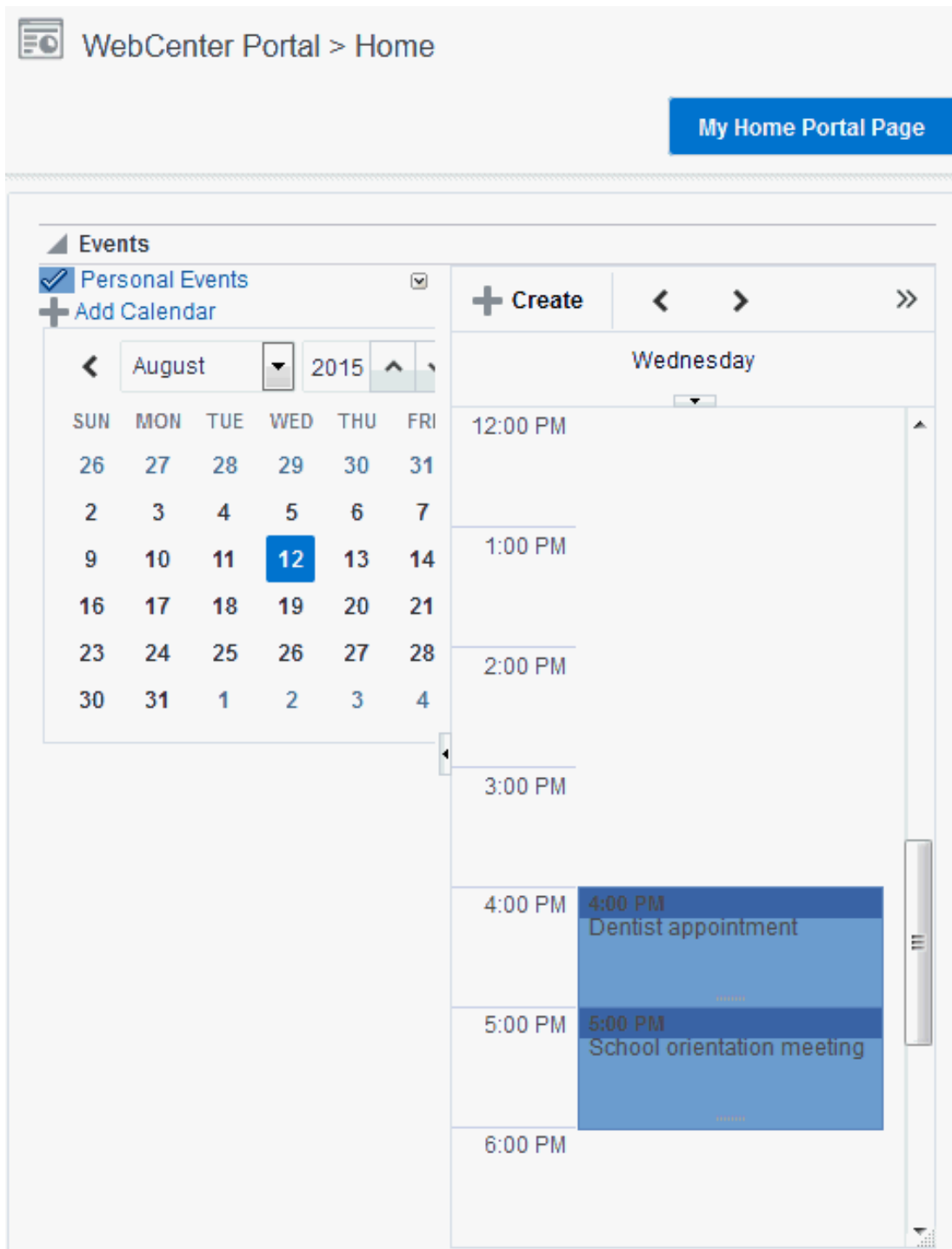
Users with Edit privileges can access the task flow's Component Properties dialog in the page editor (see Working with Events Task Flow Properties).

Working with Events Task Flow Properties

The Events task flows have associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu. For example, select **Parameters** to display the Parameters dialog (Figure 46-17).

Figure 46-17   Events Task Flow Component Properties

> ✎ **See Also:**
>
> Setting Properties on a Component

The following sections provide information about properties of the Events task flows and describe the task flow parameter:

- Setting Events Task Flow Properties
- Events Task Flow Parameters
- Events - Mini View Task Flow Parameters

Setting Events Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 46-18), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 46-18   View Actions Menu on an Events Task Flow
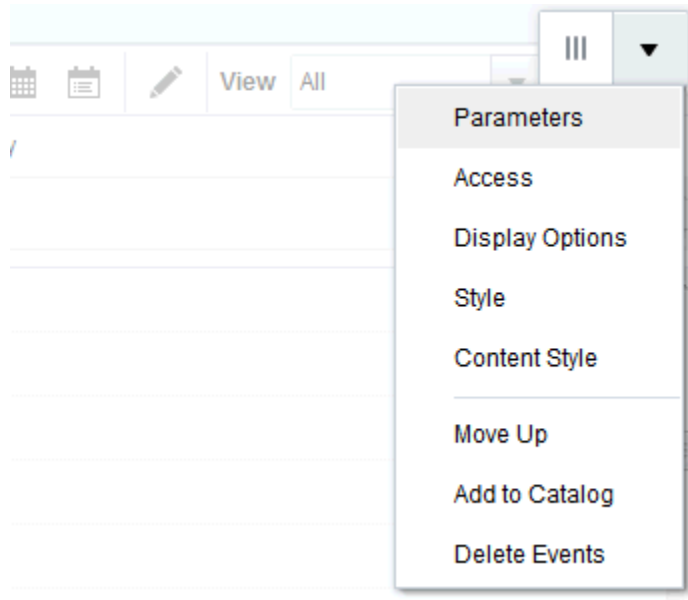
To set Events task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

    *   Parameters control the default task flow content. For descriptions of each parameter, seeEvents Task Flow Parameters and Events - Mini View Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

    *   Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

    *   The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

3. Save your changes.

Events Task Flow Parameters

Table 46-1 describes the parameters that are unique to the Events task flow.

Table 46-1   Events Task Flow Parameters

Parameter	Description
Calendar Overlay Style	Whether calendar overlay is enabled. Valid values are: • Empty (default): No calendar overlay • **None:** No calendar overlay • **Mini:** Calendar overlay is enabled in Mini mode, which takes up less screen space • **Full:** Calendar overlay is enabled in Full mode
Calendar Style Class	The name of the custom style class you want to apply to the calendar component.
Customization ID	A unique identifier for event view customization. Customization ID assists with maintaining the association of this task flow instance with its customization and personalization settings. This value is set automatically. Do not edit this value.
Default Current Date	The default current date on the calendar. Valid values are: • Empty (default): The current date (that is, today's date) • Any date using the format mm/dd/yyyy
Disable Personalize and Customize	A check box to determine whether users can personalize or customize the task flow. If not selected, users can personalize and customize the task flow.
Group Space	The name of the portal that is the source of listed events. Valid values are: • Empty: Task flow displays events for the current portal (that is, the portal in which it is placed) • Any portal display name: Task flow displays events for the named portal The portal display name is available on the **General** page in the portal administration settings.
Maximum Calendars	The maximum number of calendars that a user can add to the task flow. When the maximum is reached, the Add Calendar icon no longer appears in the task flow. Default value: 20
Maximum Enabled Calendars	The maximum number of calendars that a user can display simultaneously. This value must not be greater than the value specified for **Maximum Calendars**. Default value: The same value as that specified for **Maximum Calendars**

Events - Mini View Task Flow Parameters

Table 46-2 describes the parameters that are unique to the Events - Mini View task flow.

Table 46-2   Events - Mini View Task Flow Parameters

Property	Description
Calendar Toolbox Layout	Custom calendar toolbox layout. The value is passed to the ADF calendar component as a `toolboxLayout` attribute.
Customization ID	A unique identifier for event view customization.
	Customization ID assists with maintaining the association of this task flow instance with its customization and personalization settings. This value is set automatically. Do not edit this value.
Event Text Length	The maximum number of characters of the event title to display in Mini view.
	Leave blank or enter `0` if you do not want the event title to be truncated.
	Default value: `18`
List Events in Number of Upcoming Days	The number of days for which to list upcoming events.
	Default value: `30`
Number of Events Per Page	The number of events to display at one time.
	Default value: `5`
Using ADF Calendar Component	A check box to select determine whether to use the ADF Calendar UI Component or a simple list with page flow.

47

Adding Lists to a Portal

Add Lists to a portal to allow portal members to create, publish, and manage lists to track project milestones, issues, and much more.
Create lists from Excel spreadsheets or from prebuilt templates, or create your own custom lists from scratch. When you create a list, it becomes available in the resource catalog to add to any page in the portal .

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Manage Security and Configuration` or `Manage Configuration`.
>
> At a minimum, you must have the following permissions:
>
> • `Edit Pages` (to add the Lists task flow to a page)
>
> • `Edit Task Flows` (to modify the task flow, if necessary).
>
> • One or more of the following advanced permissions: `Create, Edit, and Delete Lists` or `Create Lists`, `Edit Lists`, `Delete Lists`, `Edit List Data`, and `View Lists`.
>
> • To create and manage lists, the portal-level permission `Customize Pages`.
>
> See About Roles and Permissions for a Portal.

Topics:

- Prerequisites for Working with Lists
- About Lists
- Adding a Lists Page to a Portal
- Adding a Lists Task Flow to a Page
- Working with List Viewer Task Flow Properties
- Working with the Lists Task Flow

Prerequisites for Working with Lists

For lists to be available in a portal, the portal manager or anyone with `Manage Security and Configuration` or `Manage Configuration` permission must perform the following tasks:

- If not already enabled, enable the Lists tool, as described in Enabling and Disabling Tools and Services Available to a Portal.

- Provide access for users to lists in any of the following ways:

– Provide users with the pretty URL to the **Lists** page (see Pretty URLs for Pages in a Specified Portal).

– Add a page link to the **Lists** page in the portal navigation (see Adding a Lists Page to a Portal).

– Add the Lists task flow to a page in the portal (see Adding a Lists Task Flow to a Page).

When a list is created from the **Lists** page (or console), that list appears in the Resource Catalog. You can then add that task flow to a page in your portal (see Adding a Lists Task Flow to a Page.).

> ✎ **Note:**
>
> For information about working with lists, Working with the Lists Task Flow.

About Lists

Lists provide a means of creating, publishing, and managing lists of information. Lists are useful for 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.

The lists created in a portal are unique to that portal. A portal cannot consume the lists created in another portal.

Create and populate lists using the controls on the **Lists** page (or console) using the Lists viewer. Place populated lists on a page using the List Viewer task flow. Users must have appropriate permissions to perform actions on lists.

Use the controls on the **Lists** page to create and revise lists and list data and to view all of a portal's current lists (Figure 47-1).
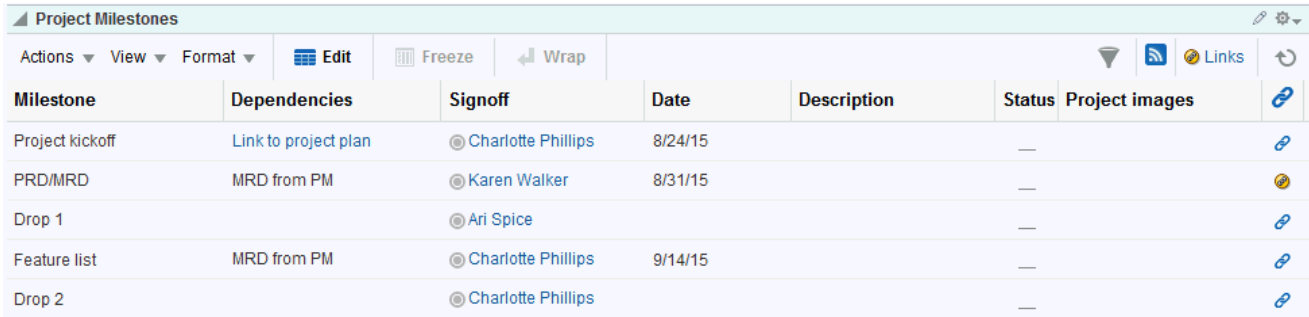
Figure 47-1   Lists on the Lists Page

On the **Lists** page, you can make use of templates for rapid creation of lists and other features 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 List Viewer task flow (Figure 47-2) provides a means of placing a particular list on a page.

Figure 47-2   A List in the List Viewer Task Flow

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 (if RSS is enabled in the portal), and linking to other WebCenter Portal assets from the list and from a list row (see Linking Information in WebCenter Portal in *Using Portals in Oracle WebCenter Portal*).

Additionally, the List Viewer provides access to customization features that enable you to control the look of a particular list instance and its data. For example, use customization to control color banding of rows or columns or to apply filters to list data. For more information, see About Customizing Lists.

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 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 the portal (for more information, see Exporting a List and Importing a List from an Excel Spreadsheet).

The list is rendered within a List Viewer task flow. See Working with the Lists Task Flow for more information.

The **Lists** page is available in any portal where lists is enabled. If the **Lists** page (or console) is not shown by default when you navigate to a portal, refer to Adding a Lists Page to a Portal to expose the Lists page in the portal.

As a portal manager, you can also access the **Lists** page from **Pages and Portals Actions** menu: select **Manage**, then **Lists** (see Figure 47-3)

Figure 47-3   Lists Menu in Pages and Portals Actions Menu
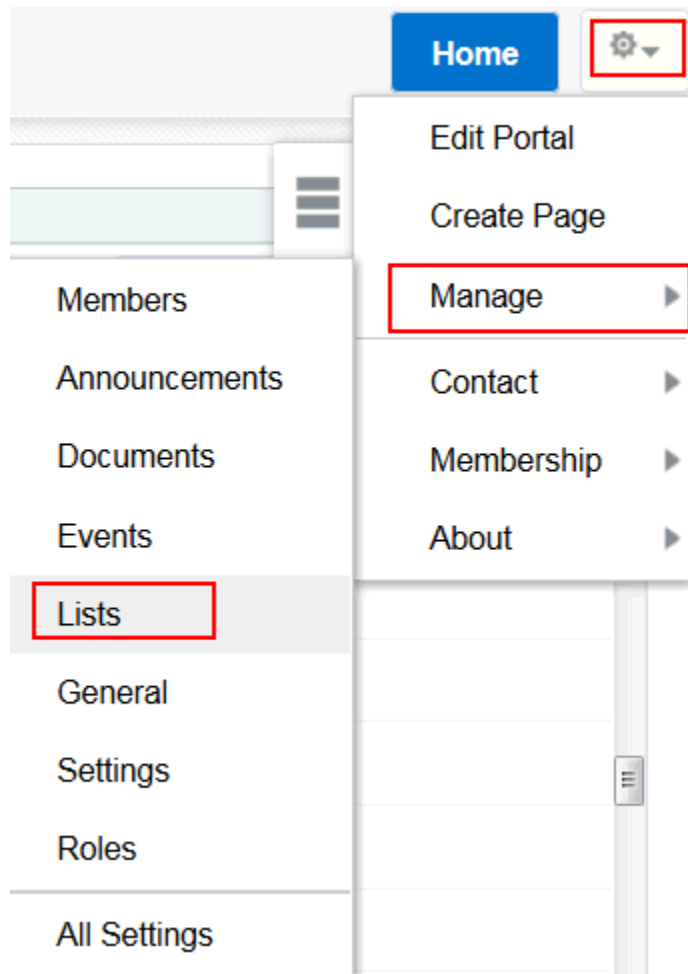
> **Note:**
>
> Lists are not available in the Home portal.

Through tight integration with links, lists provides the opportunity to associate other WebCenter Portal items with an entire list or an individual list row. Linking enables you to associate documents, notes, and URLs with a list or a list row (see Linking Information in WebCenter Portal in *Using Portals in Oracle WebCenter Portal*).

Lists additionally provide RSS feeds for all lists, if RSS is enabled in the portal (see Enabling or Disabling RSS News Feeds for a Portal). See Obtaining List News Feeds in *Using Portals in Oracle WebCenter Portal* for using RSS in lists.

Adding a Lists Page to a Portal

To provide navigation to the **Lists** page in a portal, you can add a page link to the portal navigation, as described in Adding an Existing Page to the Portal Navigation.

> **Note:**
>
> The **Lists** page (or console) is not automatically exposed when the tool is enabled or when the portal is created. However, if the portal template exposes the **Lists** page, the portal will also automatically expose this page.

Adding a Lists Task Flow to a Page

For the steps to add a lists task flow to a page, see Adding a Component to a Page.

> **Tip:**
>
> The presence or location of a lists task flow in the resource catalog depends on how the resource catalog is configured. For example, in the default resource catalog, the Lists folder is included under the **Social and Communication** folder. The Lists folder contains the lists that have been created using the Lists task flow on the Lists page. If no lists have been created, the default resource catalog shows an empty folder
>
> For more information about creating lists, editing the list structure, copying a list, and deleting a list, see Creating and Managing Lists in *Using Portals in Oracle WebCenter Portal*.

All of the lists created in a portal are available on the **Lists** page (or console) and through the portal's resource catalog (Figure 47-4).

Figure 47-4   Lists in the Resource Catalog
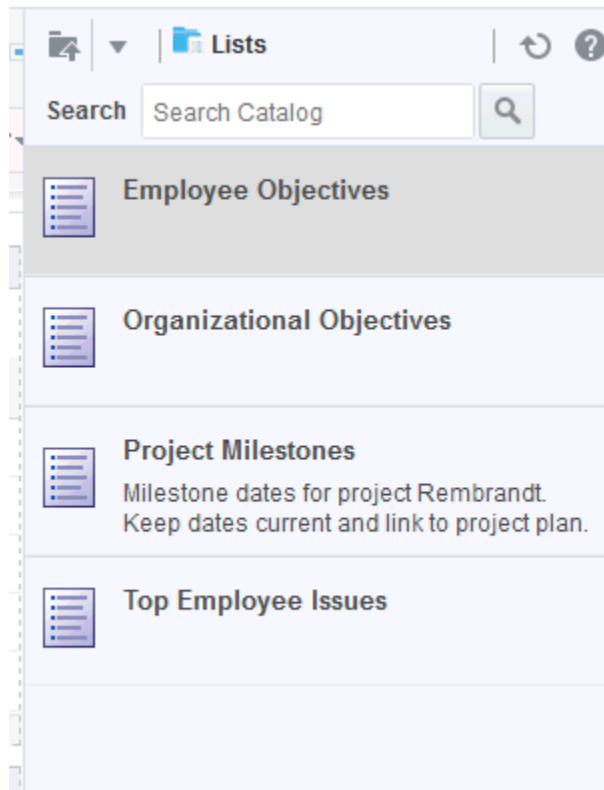
If the portal has only one list that has been created on the **Lists** page (or console), you will see only that one list in the portal's resource catalog (Figure 47-5).

Figure 47-5   List in the Resource Catalog
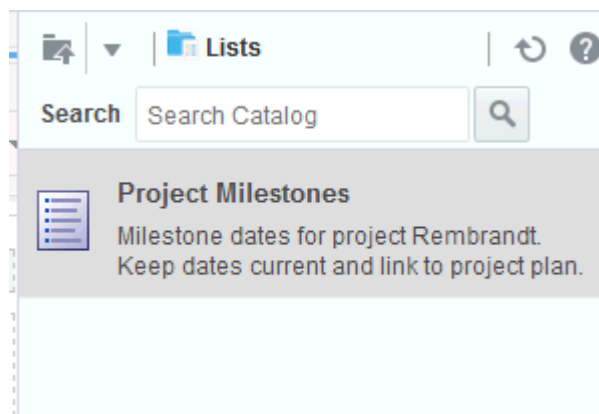
Working with List Viewer Task Flow Properties

The List Viewer task flow has associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu. For example, select **Parameters** to display the Parameters dialog (Figure 47-6).

Figure 47-6   List Viewer Task Flow Parameters in the Component Properties Dialog

> **See Also:**
>
> Modifying Component Properties

The following sections provide information about properties associated with the List Viewer task flow and describe the parameters that are unique to it:

• Setting List Viewer Task Flow Properties
• List Viewer Task Flow Parameters

Setting List Viewer Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 47-7), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 47-7   View Actions Menu on a List Viewer Task Flow
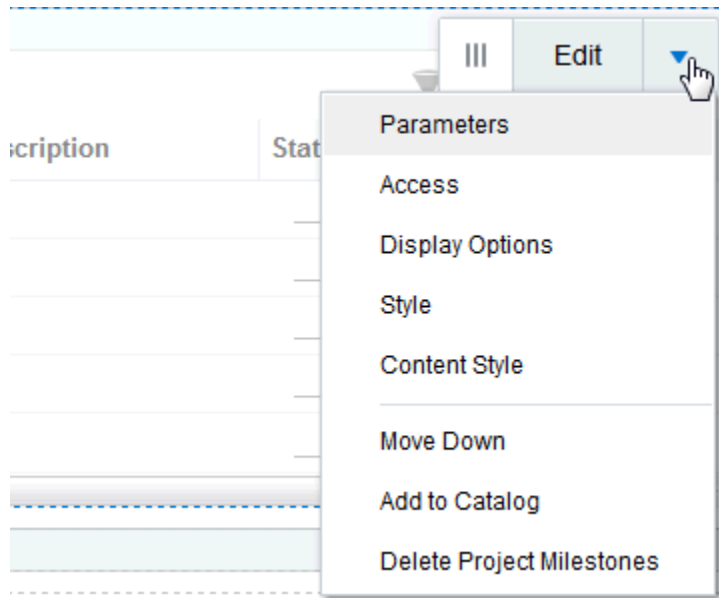
To set the List Viewer task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

    •   Parameters control the default task flow content. For descriptions of each parameter, see List Viewer Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

    •   Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

    •   The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

3. Save your changes.

List Viewer Task Flow Parameters

Table 47-1 describes the parameters that are unique to the List Viewer task flow. Note that List Viewer task flow parameter values are set automatically and should not be changed.

Table 47-1   List Viewer Task Flow Parameters

Parameter	Description
List ID	A unique identifier for the list to show
	Either `List ID` or `Local List ID` must have a value. This value is set automatically. Do not edit this value.
List Scope ID	A unique identifier for the scope containing the list
	If no value is present, the current scope is used. This value is set automatically. Do not edit this value.
Local List Customization ID	A unique identifier within the scope for the list customization
	This value is set automatically. Do not edit this value.
Local List ID	A unique identifier within the scope for the list to show
	Either `List ID` or `Local List ID` must have a value. This value is set automatically. Do not edit this value.
Show List Name and Description	A check box for specifying whether to display the list name and description
	If no value is present, the list name and description are not shown. Values include `true` and `false`. This value is set automatically. Do not edit this value.

Working with the Lists Task Flow

This section describes how to use the Lists task flow in the portal manager role. It includes the following subsections:

- About Customizing Lists

- Exporting a List and Importing a List from an Excel Spreadsheet

See Working with Lists in *Using Portals in Oracle WebCenter Portal* for the following tasks:

- Viewing Lists

- Creating and Managing Lists describes how to create lists, edit the list structure (rename a list, add columns to a list, rearrange columns, and delete columns), copy a list, and delete a list.

- Adding and Managing List Data describes how to add a specific data type to a list, edit list data, delete list rows, and refresh list data.

- Sending a Link to a List to Other Users describes how to send a link of a specific list to other users.

About Customizing Lists

You can perform user customizations on your own view of a list instance, or you as the portal manager or application specialist can perform application customizations on a list instance, affecting everyone's view. User personalizations involve changes made in page *view* mode; while application customizations involve changes made in the page editor. Everyone can perform user personalizations of 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 task flow. They do not apply to lists rendered on the **Lists** page.

A second instance of a list is not affected by the customizations you make to the first instance. For example, imagine that you have placed the *Issues* list on both the *Sales* page and the *What's New* page. If you sort the list by the *Number* column on the *Sales* page, the *Issues* list is not automatically sorted by *Number* on the *What's New* page.

While application customizations affect everyone's view of a list instance, user customizations are layered over them. For example, you may perform an application customization on a list containing columns A, B, and C, so that column C is first in list column order (C, A, B). A user can then perform a user customization on the list so that column A is first in list column order in their personal view of the same list instance (A, C, B).

> **Note:**
>
> In the page editor, you can perform application customizations. In page view mode, you see user customizations layered over application customizations. If the same property is set at both the application and user levels, the user value takes precedence in your own view. For user-level customizations, see Customizing Lists in *Using Portals in Oracle WebCenter Portal*.

This section includes the following topic:

- Performing Application-Level Customizations on a List

Performing Application-Level Customizations on a List

You can perform user-level or application level customizations on a list. WebCenter Portal users or portal participants can perform these customizations to manage their personal view of lists. An application specialist or portal manager can perform the same customizations from the page editor to affect the view of all users.

> **Note:**
>
> Some user and application customizations apply to a list rendered in a List Viewer task flow. They do not apply to lists rendered on the **Lists** page.

To perform application-level customizations on a list:

1. Go to the List page or List instance.
2. Open the page in the page editor.

   See Opening a Page in the Page Editor.
3. Customize the list for all users.

See *Using Portals in Oracle WebCenter Portal* for the following customization tasks that can be performed on a list:

- Sorting List Data on a Column

- Resizing List Columns

- Changing Column Order on a List Instance

- Hiding and Showing List Columns

- Freezing a Column Position

- Wrapping Column Data

- Applying Color Banding to List Rows

- Filtering List Data

Exporting a List and Importing a List from an Excel Spreadsheet

Lists provides a means of exporting and importing lists. If you can view the list, you can export it to Microsoft Excel 1997 - 2003 and 2007 formats and revise list data in Excel. If you have sufficient privileges to edit the list, you can import the revised list back into WebCenter Portal.

> **Tip:**
>
> You can also create a list by importing an Excel spreadsheet. For more information, see Creating Lists in *Using Portals in Oracle WebCenter Portal*.

This section describes how to export and import lists and provides information about additional software that may be of use in this process. It includes the following subsections:

- About Exporting and Importing Lists
- Exporting a List to a Spreadsheet
- Importing an Exported List

About Exporting and Importing Lists

Use list export and import options to add and revise list rows in a Microsoft Excel spreadsheet. List structure and links for the list and list rows are unaffected by export and import. When exporting a list, only the list data is exported, not the list structure nor the links. When a list is imported, new links and modified links will not be affected by the import.

After you export a list, if other changes are made to list data in WebCenter Portal, they are overwritten when you import the list. Before content is overwritten, a confirmation dialog provides you with an opportunity to stop the import and preserve WebCenter Portal changes.

Importing a spreadsheet cannot be used to modify list structure. However, you can import any spreadsheet to a list that has the same columns. A warning is raised if the spreadsheet was not created from an export of the list, but you can dismiss this warning and proceed if desired. You can also export a list without rows to a spreadsheet, add rows in Excel, and then import it.

You must take care when you export a list not to revise the list structure in Excel nor in WebCenter Portal. You cannot import an exported list if the list structure is changed in WebCenter Portal after export. You can add and remove list rows in the spreadsheet; such changes are reflected in the list on import.

Adding and removing list columns in the spreadsheet does not affect the list structure. Consequently, when you import a spreadsheet with columns that were removed through Excel, the import succeeds. The columns continue to appear in the imported list; though the deleted column data does not.

When you export a list from WebCenter Portal, you are prompted for the Excel format (1997 - 2003 and 2007 formats are offered). To import a spreadsheet, the same formats are accepted.

Exporting a List to a Spreadsheet

When you can view a list, you can export the list to a Microsoft Excel file. Exporting enables you to use your Excel skills to easily add to and revise list data. Controls for exporting lists are available in both the List Viewer task flow and on the **Lists** page.

To export a 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`.

Figure 47-8   Export to Excel Dialog
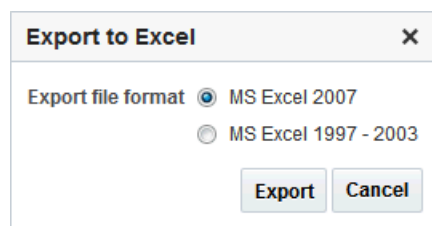
Importing an Exported List

After you have created or revised list data and saved it in an Excel format, you can import it using controls available in both the List Viewer task flow and on the **Lists** page. To import list data, you must have, minimally, `Edit` permission on the page that contains the list.

To import an exported list:

1. 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`).

Figure 47-9   Import from Excel Dialog
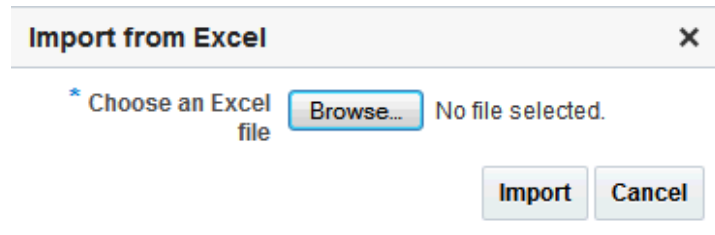
3. Click **Import**.

   If the spreadsheet was not created from an export of the list, a warning is given. Click **Import** to proceed 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.

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Adding Mail to a Portal

Add Mail to a portal to allow portal members to access business mail, or simply send mail, from within a portal.

You can configure the Mail and Send Mail feature. The Send Mail feature does not require the mail service. That is, even if the mail service has not been configured in your portal, you can use the Send Mail feature with WebCenter Portal's Mail Service option, if that option is selected for WebCenter Portal and for the portal in which you are using mail.

> ✏️ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Manage Security and Configuration` or `Manage Configuration`.
>
> At a minimum, you must have the following permissions:
>
> • `Edit Pages` (to add the Mail task flows to a page)
>
> • `Edit Task Flows` (to modify the task flow, if necessary)
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- Prerequisites for the Mail Service
- Configuring the Mail Distribution List for a Portal
- Configuring the Send Mail Feature
- About the Mail Task Flow
- Logging in to a Mail Task Flow
- Adding the Mail Task Flow to a Page
- Working with Mail Service Task Flow Properties

Prerequisites for the Mail Service

For the Mail service to work, the system administrator needs to perform the following tasks for WebCenter Portal:

- Install and configure the Mail service components for WebCenter Portal and make sure that the connection between the two applications is active. For more information, see Managing Mail in *Administering Oracle WebCenter Portal*.

- Enable the Send Mail feature for WebCenter Portal, as described in Configuring Send Mail Notifications for WebCenter Portal in *Administering Oracle WebCenter Portal*.

> **✎ See Also:**
>
> Troubleshooting Issues with Mail in *Administering Oracle WebCenter Portal*

To make the Mail service available in a portal, the portal manager or anyone with `Manage Security and Configuration` or `Manage Configuration` permission must perform the following tasks:

- Optionally, update the mail distribution list, as described in Configuring the Mail Distribution List for a Portal. Note that the default distribution list is created when the portal is created.

- Add the mail task flow to a page in the portal, as described in Adding the Mail Task Flow to a Page.

> **✎ Note:**
>
> For information about the Send Mail feature and how to use mail, see Sending and Viewing Mail in *Using Portals in Oracle WebCenter Portal*.

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.

For more information, see Managing Mail in *Administering Oracle WebCenter Portal*.

> **✎ Note:**
>
> - With some browsers, Send Mail notifications are garbled for many non-English languages. When multibyte characters are encoded (required for the "mailto:" protocol), the URL length exceeds the browser limit. As a workaround, configure the Send Mail feature to use WebCenter Portal's Mail service instead of the local mail client. For more information, see Configuring Send Mail Notifications in *Administering Oracle WebCenter Portal*.
>
> - The system administrator maintains the connection between the WebCenter Portal and the mail server. If you are experiencing issues with this connection, report the problem to the system administrator. See the Registering Mail Servers in *Administering Oracle WebCenter Portal*.

Note that mail is enabled upon portal creation and the default distribution list is created. If the portal name is not unique, the default distribution list creation fails, and in such cases, you need to select a default distribution list.

For each portal, a distribution list is created in the configured mail server (that is, the Exchange Server) which will contain mail addresses of the members of that portal. So when you send a mail to the distribution list, all the members of that portal will receive the mail. Portal members can be users and also groups. In such cases, the mail will be sent to the members of that group as well. These groups might not have mail ids associated with them. In the Send Mail options, you can specify who should be included when mail is sent to the members.

The default distribution list is named *portal_name@mail_domain*. For example, the default distribution list for a portal named `Finance Project` is `FinanceProject@`*mail_domain*, where *mail_domain* is derived from the LDAP Domain setting in the Edit Mail Server Connection screen (accessed through Oracle Enterprise Manager). As members leave or join the portal, WebCenter Portal automatically updates the default distribution list to synchronize with the portal membership. Note that this functionality is provided only the Mail Server is Microsoft Exchange and Microsoft Active Directory Server (ADS) is installed.

If the Mail service is disconnected, WebCenter Portal deletes the default distribution list that was automatically created for the portal and attempts to send mail to all members of the portal (see Sending Mail to Portal Members or Managers in *Using Portals in Oracle WebCenter Portal*). The Mail Compose window opens with the **To** field blank instead of prepopulated with the mail distribution list.

Instead of using the default distribution list, you can modify the distribution list for portal mail, as follows:

1. On the **Tools and Services** page, select **Mail**.
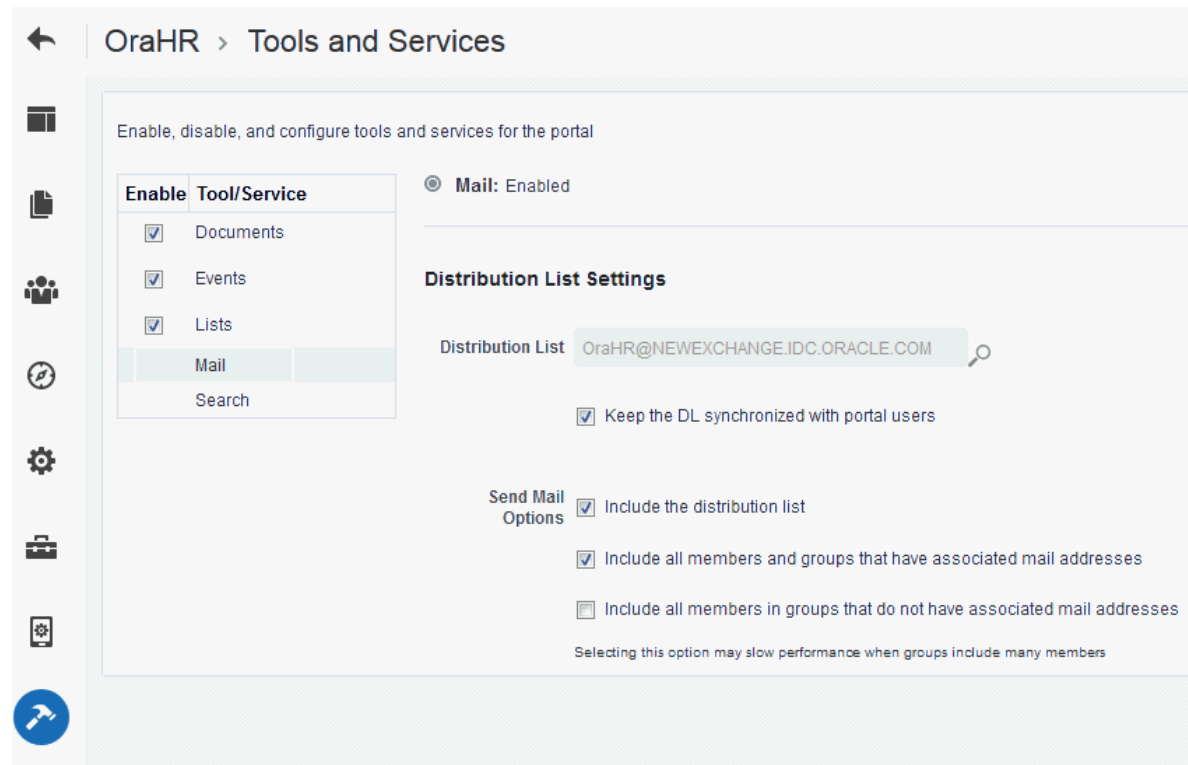
   You can also enter the following URL in your browser to navigate directly to the **Tools and Services** page:

   `http://`*host:port*`/webcenter/portal/`*portalName*`/admin/services`

   > **See Also:**
   >
   > WebCenter Portal Pretty URLs

Figure 48-1   Configuring the Mail Distribution List for a Portal

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).

> **Note:**
>
> This selection can potentially generate an extremely large distribution list, and create performance issues or mail server errors. Your system administrator can use the WLST `setMailServiceProperty` command `mail.recipient.limit` property to restrict the number of recipients to a message, as described in `setMailServiceProperty` in *WebCenter WLST Command Reference Reference*.

5. Click **Save**.

Configuring a Shared Mail Connection for a Portal

When a portal is configured to use a *shared mail connection*, users do not have to specify credentials when sending mail using the WebCenter Portal Mail Service.

To configure a shared mail connection for a portal:

1. Confirm that WebCenter Portal is using the WebCenter Portal Mail service to send mail.

   See Enabling Shared Mail Connections for Send Mail Notifications in *Administering Oracle WebCenter Portal*.

2. Ask your Fusion Middleware administrator to set up a mail connection that uses an external application configured with the shared credentials you require, and then record the name of that mail connection.

   For details, see Setting Up a Shared Mail Connection in *Administering Oracle WebCenter Portal*.

3. In the portal administration (see Accessing Portal Administration), click **Settings**.

4. On the Settings page, scroll down to the Attributes section, then click **Add Attribute**.

5. In the Add Attribute dialog, enter the custom attributes listed in Table 48-1 (and as shown in Figure 48-2), then click **Add**:

Table 48-1   Custom Attributes for Shared Mail Connections

Name	Value
`collab.mail.compose.sharedConnectionName`	Name of the shared mail connection. For example: `MySharedMailConnection`
`notifications.use.mail.composer`	Must be set to `true`.

The attributes are added to the portal's settings.

Figure 48-2   Setting Shared Mail Connection Attributes for a Portal
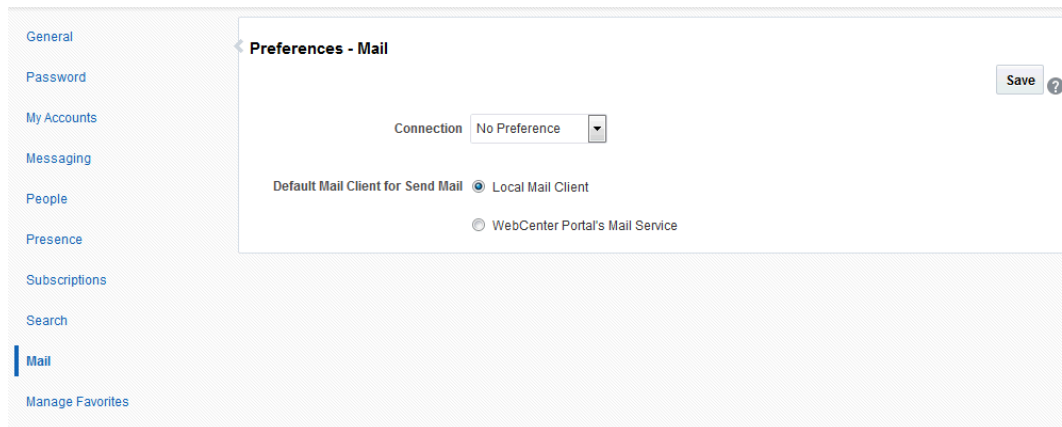
6. (Optional) By default, Send Mail notifications are disabled for public/anonymous users. To enable them in a portal, add the following portal custom attribute:

```
notifications.anonymous.enabled = true
```

Configuring the Send Mail Feature

The Send Mail feature does not require WebCenter Portal's Mail component. That is, even if Mail has not been configured in WebCenter Portal, the Send Mail feature is available using the WebCenter Portal's Mail Service option.

Your system administrator determines the mail client that the Send Mail feature uses: either WebCenter Portal's Mail Service component or a local mail client. The default value is a local mail client. If your system administrator enabled users to override this mail client setting, then you can choose to use a different mail client on the Mail Preferences page (Figure 48-3).

Figure 48-3   Mail Preferences for Send Mail

Selecting Your Preferred Mail Connection

When WebCenter Portal provides access to multiple mail connections, it also provides a way for you to choose which connection to use. See Selecting Your Preferred Mail Connection in *Using Portals in Oracle WebCenter Portal*.

About the Mail Task Flow

The Mail task flow conveniently exposes familiar mail functionality in your portal. It works with the same mail server that provides your regular business mail, and the mail messages exposed in your portal are the same messages you would see in your mail inbox. Many of the same actions are also supported. For example, you can send messages with attachments, forward messages, and so on. This does not replace your company mail, but rather enhances it by making it accessible within WebCenter Portal.

The Mail task flow enables users to perform simple mail functions, such as view, read, create and create with attachments, reply, forward, and delete. All mail is stored in your inbox and can be accessed from there through a link.

> **Note:**
>
> For information about how to use the mail feature, see Sending and Viewing Mail in *Using Portals in Oracle WebCenter Portal*.

The Mail task flow fetches mail messages from the inbox folder only. It does not support fetching mail from other folders or moving messages.

All mail servers based on IMAP4 and SMTP protocols are supported. WebCenter Portal provides access to multiple mail connections. You can use a different mail connection by selecting it in the portal's Preferences settings. For more information, see Selecting Your Preferred Mail Connection in *Using Portals in Oracle WebCenter Portal*.

The Mail task flow exposes features from your mail server (Figure 48-4). Note that the Mail task flow does not render embedded images. If an email contains inline images, they are shown as attachments, and not within the message body.

Figure 48-4   Mail Task Flow
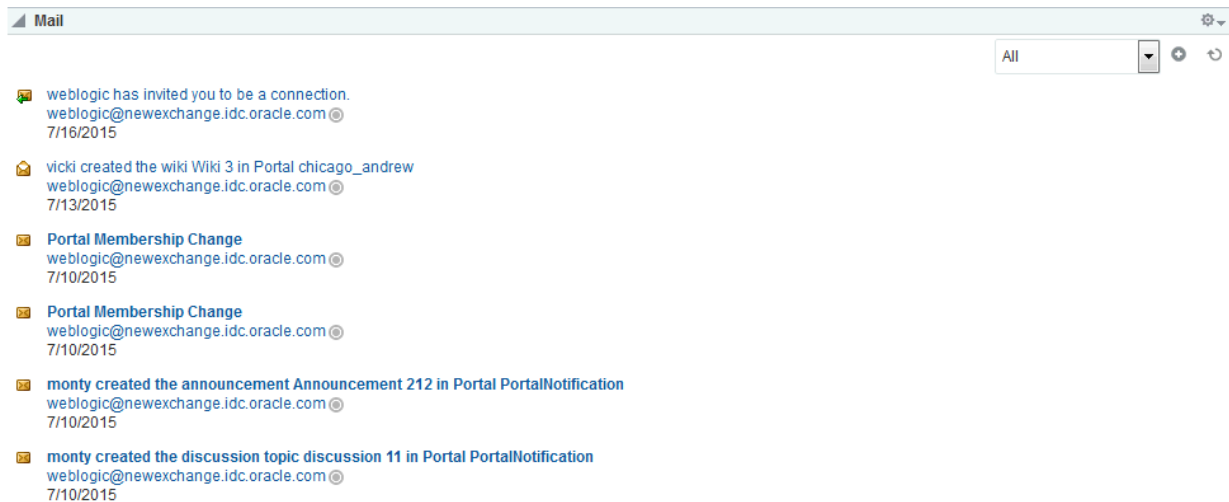
The Mail task flow presents the following features:

- A menu for specifying which messages to display

- A **Compose** icon for starting the process of creating a new message

- A **Refresh** icon for updating the task flow with new messages

The default mail distribution list that contains the mailing list of all portal members is created automatically when the portal is created. A portal manager can configure a different distribution list. After configuring, as members are added to or deleted from the portal, the mailing list is updated automatically. For more information, see Configuring the Mail Distribution List for a Portal.

Users can mail other portal users or any user recognized by the back-end server that supports the Mail component.

Mail is integrated with instant messaging and presence (IMP) to provide additional options for contacting others. Each mail message includes the sender's user name and status icon (Figure 48-5), which you can click to open a context menu with options for starting a chat session or sending a new mail.

> **✎ Note:**
>
> If IMP is not configured in WebCenter Portal, the status icons are grayed out. For more information about instant messaging and presence, see Using Instant Messaging and Presence Viewer in *Using Portals in Oracle WebCenter Portal*.

Figure 48-5   User Name and Status Icon
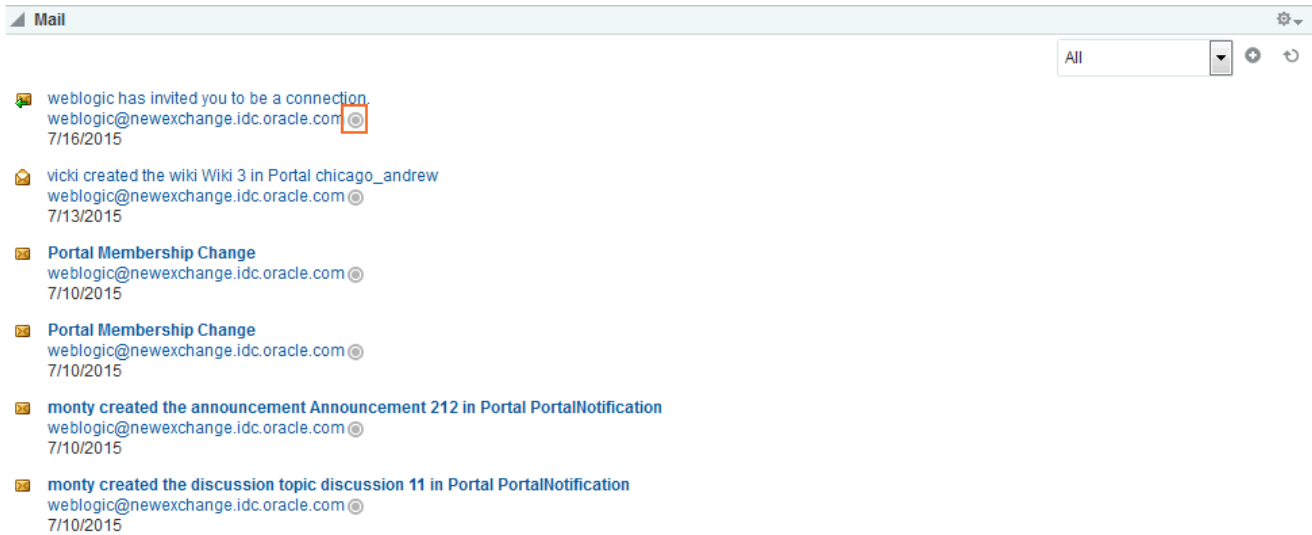
Users with page edit privileges can access the task flow's region parameter through the page editor. For more information about setting the Mail task flow properties, see Working with Mail Service Task Flow Properties.

Logging in to a Mail Task Flow

To log in to a Mail task flow:

1. Go to a Mail task flow, and click the **Login to Mail** link (Figure 48-6).

Figure 48-6   Login Message in a Mail Task Flow
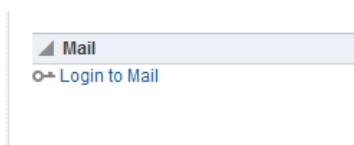
The **External Application Login** dialog (Figure 48-7) opens.

Figure 48-7   External Application Login Dialog

> **Note:**
>
> The **External Application Login** dialog may include additional fields and information, depending on the requirements of the service that provides it. For more information about external applications and storing your login credentials in a WebCenter Portal application, see Providing Login Information for External Applications in *Using Portals in Oracle WebCenter Portal*.

2. Enter your user name and password and any other login credentials that your mail application requires.

   Required fields are marked with an asterisk (*).

3. Optionally, select **Remember my login information** to store your credentials.

   The next time you log in to WebCenter Portal, your mail credentials are retrieved from storage and you are logged in.

4. Click **OK**, and the Mail task flow displays mail from your inbox.

> **Note:**
>
> By default, the 50 most recent mail messages from your mail server inbox folder are displayed. However, if required, your system administrator can configure this to a higher value, if your server supports the increase in memory cache that fetching additional mail requires. Care should be taken to have a value suitable to your environment. This value impacts all users. That is, if the Mail service is configured to read 200 recent mail messages, then it reads 200 recent mail messages for all users.

Adding the Mail Task Flow to a Page

The Mail task flow exposes your company's mail server features within the context of your portal. Use the Mail task flow to view, respond to, and manage your personal mail.

For the steps to add a Mail task flow to a page, see Adding a Component to a Page.

> **Tip:**
>
> The presence or location of the Mail task flow in the resource catalog depends on how the resource catalog is configured. For example, in the Default Home Portal Catalog, the Mail task flow is included under the **Social and Communication** folder.
>
> For information about the Mail task flow, see About the Mail Task Flow.

Working with Mail Service Task Flow Properties

The Mail task flow has associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu. For example, select **Parameters** to display the Parameters dialog (Figure 48-8).

Figure 48-8   Mail Task Flow Component Properties
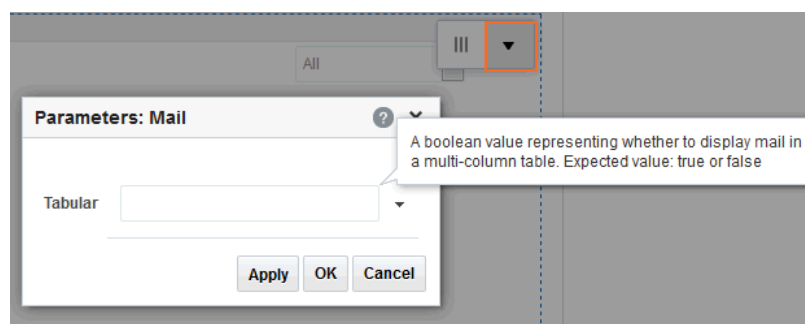
> **See Also:**
>
> Setting Properties on a Component

The following sections provide information about properties of the Mail task flow and describe the task flow parameter.

- Setting Mail Task Flow Properties
- Mail Task Flow Parameters

Setting Mail Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 48-9), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 48-9   View Actions Menu on a Mail Task Flow
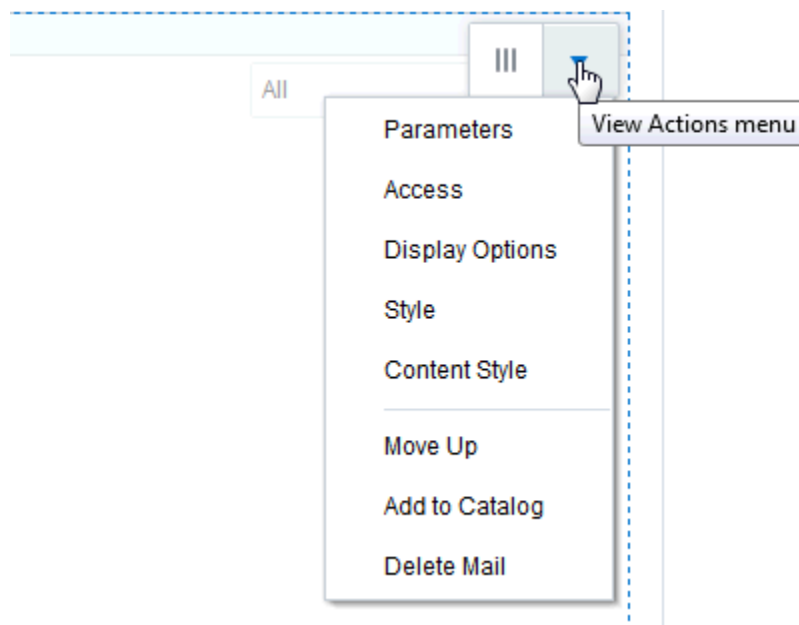
To set Mail Service task flow properties:
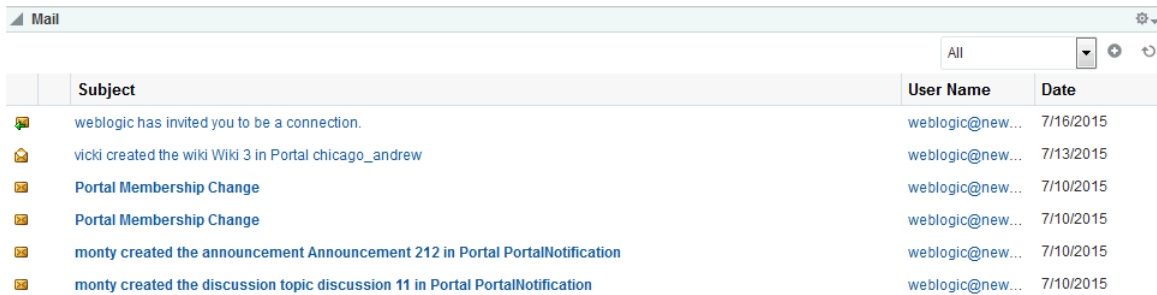
1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

   - Parameters control the default task flow content. For descriptions of each parameter, see Mail Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

- Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

- The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

3. Save your changes.

Mail Task Flow Parameters

The Mail task flow has one associated region parameter: `Tabular`. Using the EL value type, enter a value of `true` to display the information associated with a mail message, such as its subject, sender, and, date sent, in a tabular format. Figure 48-10 illustrates a tabular format Mail task flow.

Figure 48-10   A Mail Task Flow where the Parameter Tabular Is Set to True

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Adding Messages and Feedback to a Portal

Add Messages and Feedback to a portal to allow portal members to post, view, and manage messages and feedback to and from their connections. .

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Basic Services: Edit Page Access and Structure` (standard permissions) or `Pages: Edit Pages` (advanced permissions).
>
> See About Roles and Permissions for a Portal.

Topics:

- About Message Board
- About Feedback
- Adding a Message Board or Feedback Task Flow to a Page
- Working with Message Board and Feedback Task Flow Properties
- Working with Message Board and Feedback Task Flows

About Message Board

On personal pages in the Home portal, Message Board provides a means of viewing and posting messages to and from you and other users. To view your messages, you must add a Message viewer to one of your personal pages (a page you created) in the Home portal. To receive messages from other users, you must provide other users access to that personal page and set your message preferences to allow those users to view and/or post messages for you. To view or post messages for another user, you must be granted access to that user's personal page and access to view and/or post messages for the user through that user's preferences.

In portals other than the Home portal, Message Board provides a means of viewing and posting messages within the scope of the portal. In a portal, every instance of a Message Board task flow shows the same content: messages left by authorized users who are members of the portal. The portal Message Board leverages Page permissions as its permission model.

Table 49-1 lists the page permissions required for performing actions in a portal Message Board.

Table 49-1   Page Permissions for a Portal Message Board

Page Permission	Post	View	Update	Delete
View Page	No	Yes	No	No
Personalize Page	Yes	Yes	Yes for messages posted by this user	Yes for messages posted by this user
Perform All Page Actions	Yes	Yes	Yes for all messages	Yes for all messages

> **See Also:**
>
> Managing Roles and Permissions for a Portal

> **Note:**
>
> • Before you access Message Board, your system administrator can set global application defaults that affect what all users may see and do with their own and other users' messages. For more information, see Configuring Message Board in *Administering Oracle WebCenter Portal*.
>
> • In addition to being available in Message Board viewers, messages are streamed to the Activity Stream (unless your system administrator has configured the Activity Stream not to show Message Board activity).

WebCenter Portal provides the following Message Board task flows:

• **Message Board** for adding, viewing, updating, hiding, deleting, and managing your view of messages, and for marking messages as private and sharing private messages (Figure 49-1)

Figure 49-1   Message Board Task Flow
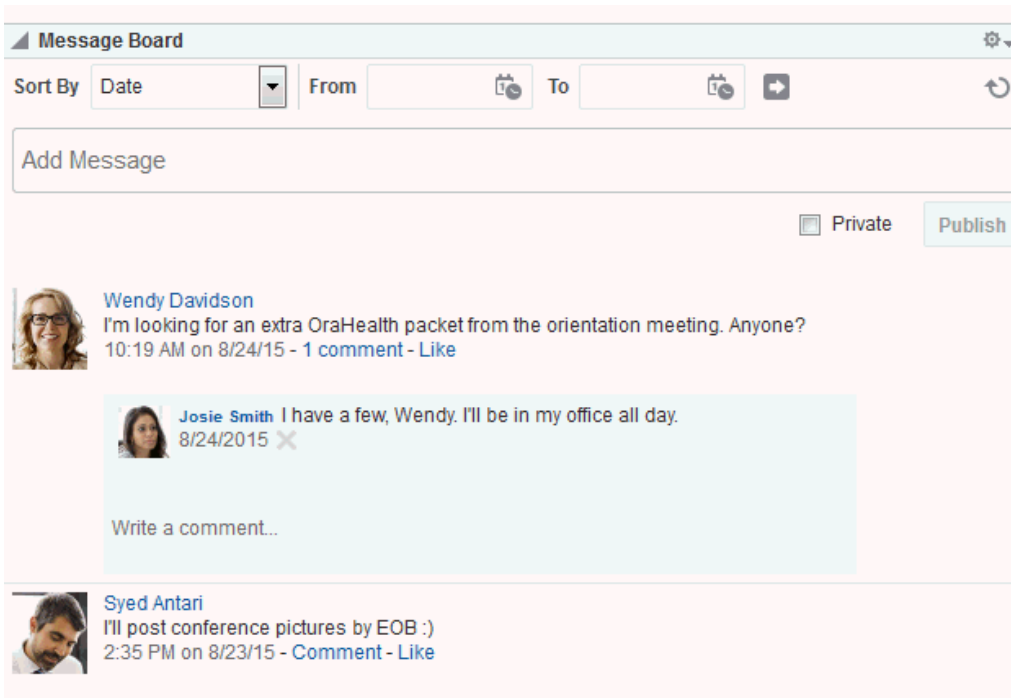
- **Message Board - Quick View** for adding, viewing, updating, hiding, and deleting messages, and for marking messages as private and sharing private messages (Figure 49-2)

Figure 49-2   Message Board - Quick View Task Flow
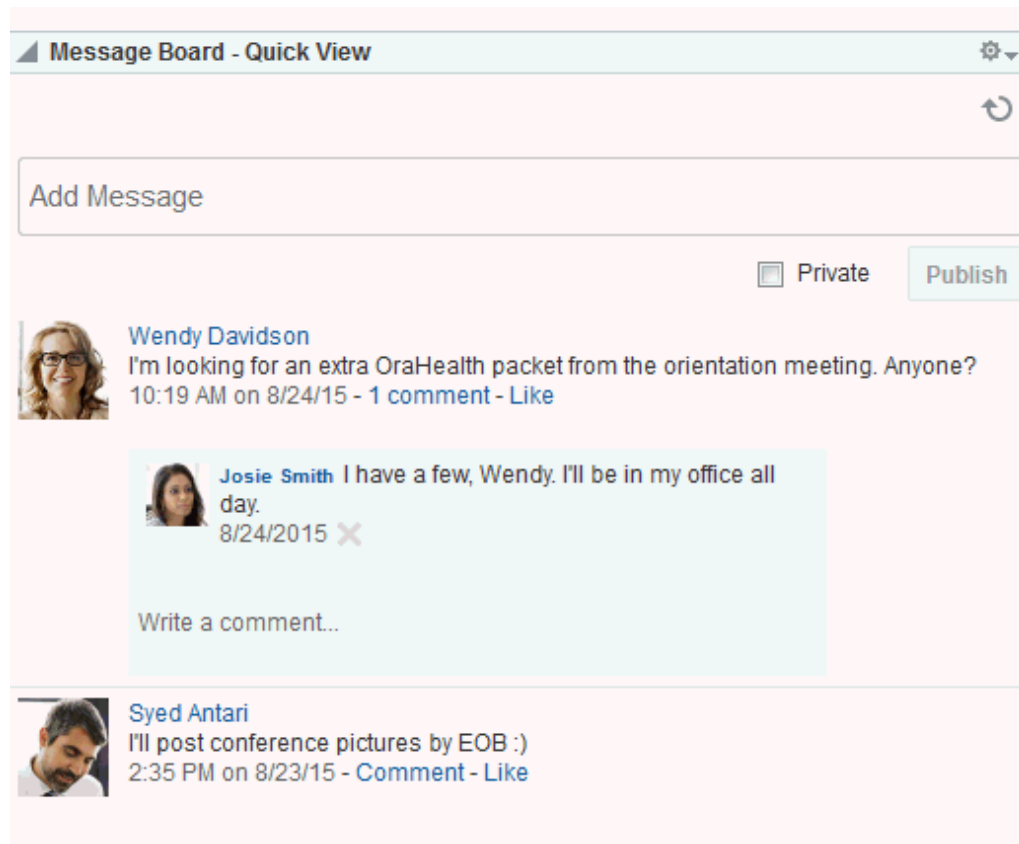
For more information about Message Board features, see Working with Feedback and the Message Board in *Using Portals in Oracle WebCenter Portal*.

About Feedback

Feedback provides a means of viewing, posting, and managing feedback remarks. Feedback task flows must be associated with an individual user, so they are meant to be added to a user's personal page in the Home portal. The user can then provide other users access to that personal page so that those users can provide feedback.

WebCenter Portal provides the following Feedback task flows:

- **Feedback** for viewing, posting, and managing Feedback (Figure 49-3)

Figure 49-3   Feedback Task Flow
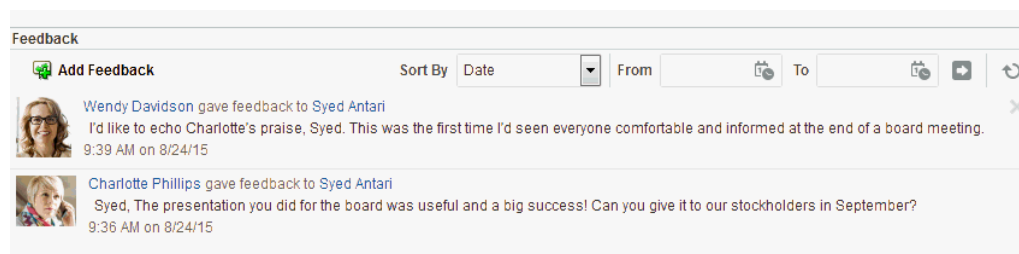
- **Feedback - Quick View** for viewing and posting Feedback (Figure 49-4)

Figure 49-4   Feedback - Quick View Task Flow
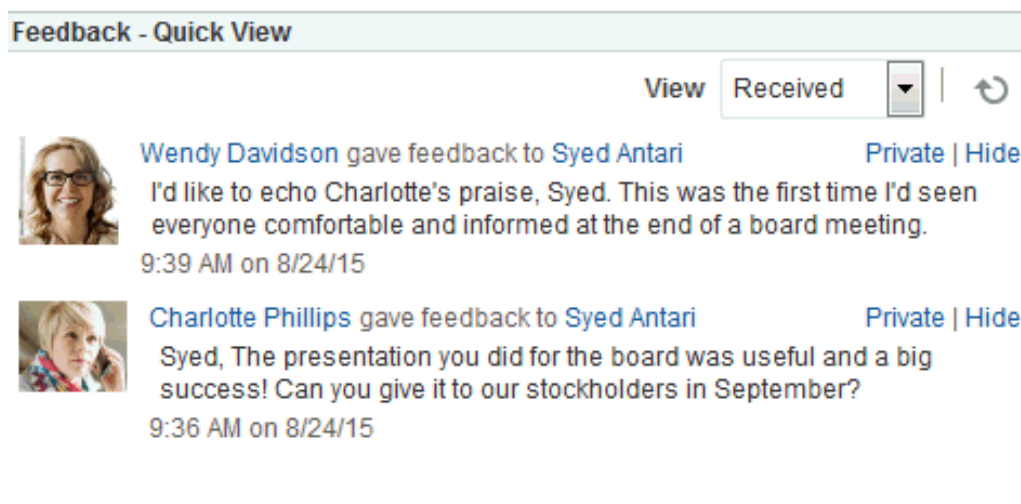
For more information about Feedback features, see Working with Feedback and the Message Board in *Using Portals in Oracle WebCenter Portal*.

Adding a Message Board or Feedback Task Flow to a Page

For the steps to add a Message Board or Feedback task flow to a page, see Adding a Component to a Page.

> **Note:**
>
> The presence or location of the Message Board or Feedback task flows in the resource catalog depends on how the resource catalog is configured. For example, in the Default Portal Catalog, the Announcements task flow is Message Board task flows are included under the **Social and Communications** folder.
>
> The Feedback task flows are not available in the Default Portal Catalog provided with WebCenter Portal, so you will only see an entry for them if they have been added to a custom resource catalog that has been made available to the page.
>
> For more information, see Adding a Resource from the Resource Registry (in the Add Resource Catalog Item dialog, select **Task Flows**, then **Design Time**, then scroll to the Feedback task flows). To use the custom resource catalog for editing portal pages, make sure it is **Available**, and set for use by pages in the portal, as described in Changing the Resource Catalogs in a Portal.
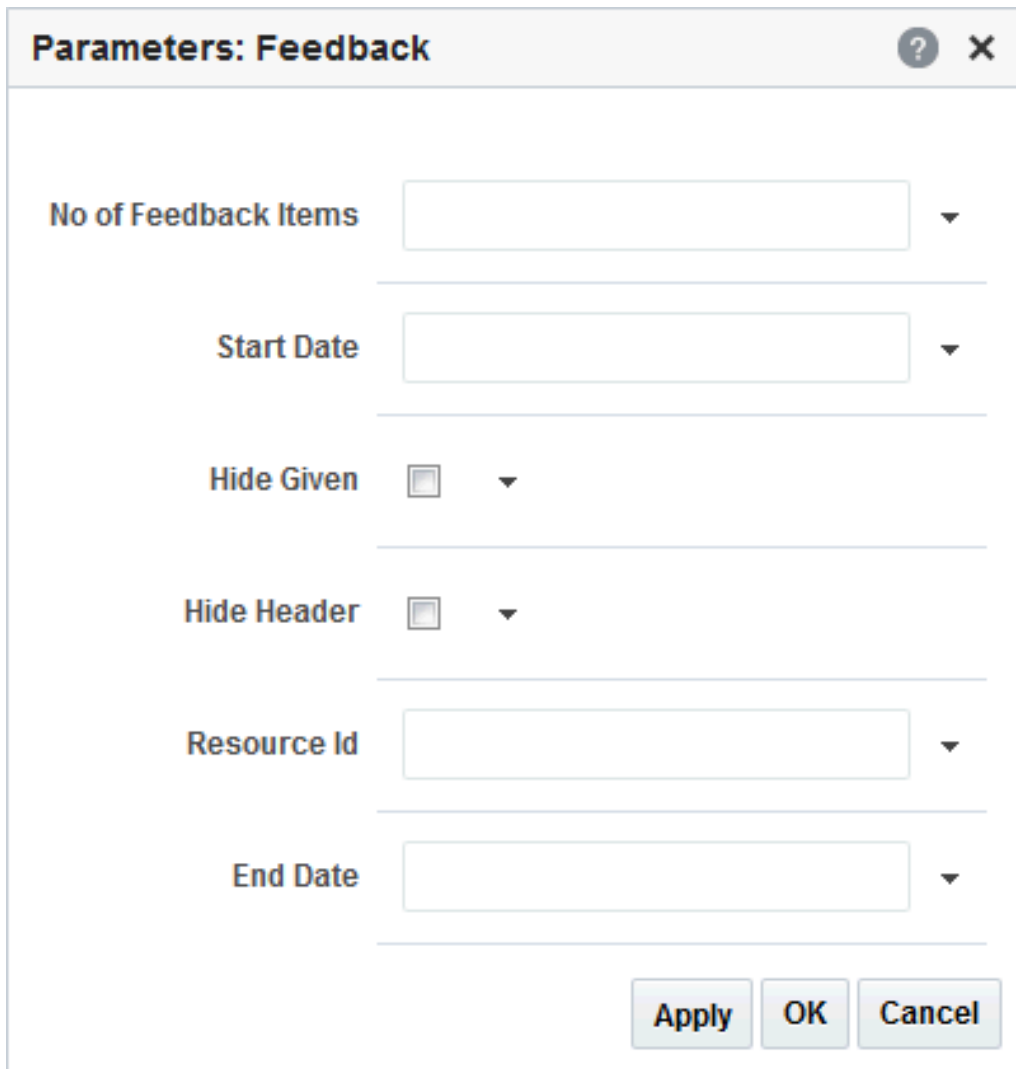
Working with Message Board and Feedback Task Flow Properties

> **✎ Note:**
>
> The Feedback task flows are meant for a user's personal page because they must be associated with an individual user. However, working with task flow properties is an advanced task and is therefore covered in this guide rather than in *Using Portals in Oracle WebCenter Portal*.

Message Board and Feedback task flows have associated properties that users with sufficient privileges can access through the task flow's **View Actions** menu. For example, in edit page mode, click the task flow to show the **View Actions** menu, and select **Parameters** to open the Parameters dialog (Figure 49-5).

Figure 49-5   Parameters Dialog for a Feedback Task Flow

The following sections provide information about Message Board and Feedback task flow properties and describe task flow parameters:

- Setting Message Board and Feedback Task Flow Properties
- Message Board and Feedback Task Flow Parameters
- Using Parameters to Configure Message Board and Feedback Task Flow Instances

> ✎ **Note:**
>
> For more information, see Setting Properties on a Component .

Setting Message Board and Feedback Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 49-6), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 49-6   View Actions Menu on a Message Board Task Flow
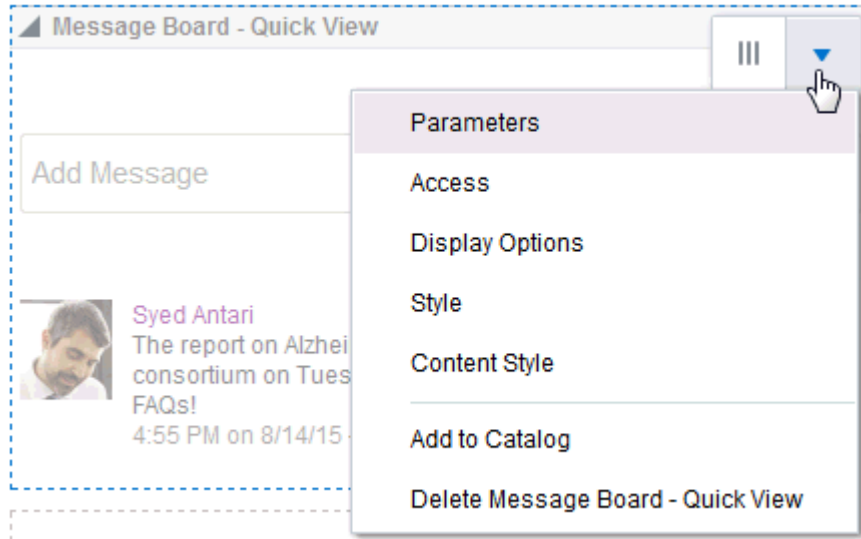
To set Message Board or Feedback task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

   - Parameters control the default task flow content. For descriptions of each parameter, see Message Board and Feedback Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

   - Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

   - The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

   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.

> ✎ **Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Message Board and Feedback Task Flow Parameters

Table 49-2 describes the parameters that are unique to Message Board and Feedback task flows.

Table 49-2   Message Board and Feedback Task Flow Parameters

Parameter	Description
Display Message Size	The number of characters to show for each Feedback message Messages exceeding the specified value are truncated. This parameter is associated with the Feedback – Quick View task flow.
End Date	The ending date for a date range within which to show messages and posts Use the format YYYY/MM/DD. Use this parameter with Start Date. This parameter is associated with the following task flows: • Feedback • Feedback - Quick View • Message Board
Group Space	Specifies the portal for which to show messages Enter the portal *internal name*. The portal internal name is the name specified by the **portal URL** on the **General** page of a portal's administration settings. The portal *display name* is specified by **Display Name**, and is the name that appears in the banner at the top of a portal. This parameter is associated with the following task flows: • Message Board • Message Board - Quick View
Hide Actions	Specifies whether to show or hide the actions normally associated with a Feedback or Message Board entry, such as Private, Edit, Hide, and Delete • Select the check box to hide actions associated with a Feedback or Message Board entry (#{true}). • Deselect the check box to show such actions (#{false}). When no value is entered, this is the default. This parameter is associated with the following task flows: • Feedback – Quick View • Message Board – Quick View

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Table 49-2 (Cont.) Message Board and Feedback Task Flow Parameters

Parameter	Description
Hide Footer	Specifies whether to hide the task flow footer • Select the check box to hide the task flow footer (#{true}). • Deselect the check box to show the task flow footer (#{false}). This parameter turns the **More** link on (#{false}) or off (#{true}). Note that it does not affect the **Previous** and **Next** links that may also display toward the bottom of the task flow. This parameter is associated with the following task flows: • Feedback - Quick View • Message Board - Quick View
Hide Given	Specifies whether to enable or disable the display of Feedback left for others • Select the check box to disable the display of Feedback left for others in a given task flow instance (#{true}). • Deselect the check box to allow the display of Feedback left for others in a given task flow instance (#{false}). Selecting Hide Given hides the **View** menu so that only Feedback received is shown. This parameter is associated with the following task flows: • Feedback • Feedback - Quick View
Hide Header	Specifies whether to show or hide the task flow header • Select the check box to hide the task flow header (#{true}). • Deselect the check box to show the task flow header (#{false}). This parameter is associated with the following task flows: • Feedback • Feedback - Quick View • Message Board • Message Board - Quick View
Hide Publisher	Specifies whether to show or hide the message entry field and the upload file and URL controls (the Publisher) • Select the check box to disable the display of the message entry field in a given task flow instance (#{true}). • Deselect the check box to allow the display of the message entry field in a given task flow instance (#{false}). This parameter is associated with the following task flows: • Message Board • Message Board - Quick View
Message Type	Specifies the types of messages to display: • All - (default) Displays both public and private messages. • Public - Displays only public messages. • Private - Displays only private messages. This parameter applies only when user is viewing their own message board. This parameter is associated with the following task flows: • Message Board • Message Board - Quick View

Table 49-2   (Cont.) Message Board and Feedback Task Flow Parameters

Parameter	Description
No of Feedback items	The number of Feedback items to show in the task flow
	For example, enter 5 to specify that a maximum of five items can appear in the task flow. In quick view, a **More** link appears at the bottom of the task flow when there are more items than the specified number of items. Users click **More** to open the main view of the task flow where all items are accessible. In main view, **Previous** and **Next** links are shown. Users click these to page through entries.
	This parameter is associated with the following task flows:
	• Feedback
	• Feedback - Quick View
No of Messages	The number of messages to show in the task flow
	For example, enter 5 to specify that a maximum of five items can appear in the task flow. In quick view, a **More** link appears at the bottom of the task flow when there are more items than the specified number of items. Users click **More** to open the main view of the task flow where all items are accessible. In main view, **Previous** and **Next** links are shown. Users click these to page through entries.
	This parameter is associated with the following task flows:
	• Message Board
	• Message Board - Quick View
Resource Id	The ID of the user to show in the task flow
	This value is set automatically, #{securityContext.userName}, which returns the name of the current user.
	Note: If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.
	This parameter is associated with the Feedback task flow.
Start Date	The starting date for a date range within which to show messages and posts
	Use the format YYYY/MM/DD. Use this parameter with End Date.
	This parameter is associated with the following task flows:
	• Feedback
	• Feedback - Quick View
	• Message Board
User Id	The ID of the user to show in the task flow
	This value is set automatically, #{securityContext.userName}, which returns the name of the current user.
	Note: If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.
	This parameter is associated with the Feedback - Quick View task flow.

Table 49-2 (Cont.) Message Board and Feedback Task Flow Parameters

Parameter	Description
User Name	The ID of the user to show in the task flow
	This value is set automatically, `#{securityContext.userName}`, which returns the name of the current user.
	Note: If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.
	This parameter is associated with the following task flows:
	• Message Board
	• Message Board - Quick View

Using Parameters to Configure Message Board and Feedback Task Flow Instances

The properties associated with Message Board and Feedback task flows make it possible to control such things as the number of messages to show, the maximum length of Feedback posts, the presence or absence of a message input field, and so on.

Setting task flow properties affects every users' view of the task flow instance.

This section provides examples of how to use task flow parameters to achieve these results. It includes the following subsections:

- Hiding Action Links and Icons on a Task Flow Instance
- Limiting the Number of Messages and Feedback Posts Shown
- Limiting the Length of Posts in a Feedback - Quick View Task Flow
- Preventing Users from Adding Messages to Message Board
- Hiding the Feedback You Have Left for Others
- Scoping the Display of Messages to a Named Portal
- Specifying the Date Range of Shown Messages and Feedback

Hiding Action Links and Icons on a Task Flow Instance

Users with page edit privileges can set the `Hide Actions` parameter on a Message Board - Quick View or Feedback - Quick View task flow to hide the actions normally associated with each posted message. Such actions include the **Edit**, **Hide**, and **Private** links and the **Delete** icon (Figure 49-7).

Figure 49-7 Actions on a Message Board Message

To hide actions on a Message Board - Quick View or Feedback - Quick View task flow instance:

1. In the Message Board - Quick View or Feedback - Quick View task flow instance toolbar, click the **View Actions** menu and **select Parameters**.

> ✎ **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, select **Hide Actions**.

> ✎ **Note:**
>
> To show hidden actions, deselect **Hide Actions**.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Limiting the Number of Messages and Feedback Posts Shown

Parameters on all Message Board and Feedback task flow types enable you to specify how many messages or Feedback posts to show in a given task flow instance. When the number of messages or posts exceeds the value that you provide:

- **Previous** and **Next** icons appear on the full task flow views, enabling users to page through all messages and posts.

- A **More** link appears on task flow quick views. Users click this to launch a dynamically-generated page that shows all messages or posts.

For Message Board and Message Board - Quick View task flows, use the `No of Messages` parameter. For Feedback and Feedback - Quick View task flows, use the `No of Feedback Items` parameter.

To limit the number of messages and feedback posts shown in a given task flow instance:

1. In the Message Board or Feedback task flow instance toolbar, click the **View Actions** menu and **select Parameters**.

> ✎ **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, enter the number of messages or Feedback posts you want to allow in the task flow instance:

   - For Message Board and Message Board - Quick View task flows, in the **No of Messages** box, enter a number.

   - For Feedback and Feedback - Quick View task flows, in the **No of Feedback Items** enter a number.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Limiting the Length of Posts in a Feedback - Quick View Task Flow

Use the `Display Message Size` parameter on a Feedback - Quick View task flow instance to limit the number of characters that can be entered for a given post. Posts that exceed the limit are truncated.

To limit the number of characters allowed for a post to a Feedback - Quick View task flow:

1. In the Feedback - Quick View task flow instance toolbar, click the **View Actions** menu and **select Parameters**.

> ✎ **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, in the **Display Message Size** box, enter the number of characters to allow for a given post.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Preventing Users from Adding Messages to Message Board

You can use the `Hide Publisher` parameter to hide the message input field and its associated icons in a Message Board or Message Board - Quick View task flow instance. This is useful when you want a Message Board to be a window onto current messages without also being a point of input.

To prevent users from adding messages to a Message Board task flow instance:

1. In the Message Board task flow instance toolbar, click the **View Actions** menu and **select Parameters**.

> ✎ **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, select **Hide Publisher**.

> ✎ **Note:**
>
> To show Publisher controls, deselect **Hide Publisher**.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Hiding the Feedback You Have Left for Others

You can use the `Hide Given` parameter to prevent the display of the Feedback you have left for others in both types of Feedback task flows. Selecting `Hide Given` hides the **View** menu, so that only Feedback received is shown.

To hide the Feedback you have left for others:

1. In the Feedback task flow instance toolbar, click the **View Actions** menu and **select Parameters**.

> **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, select **Hide Given**.

> **Note:**
>
> To show the **View** menu, deselect **Hide Given**.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Scoping the Display of Messages to a Named Portal

Both types of Message Board task flows provide the `Group Portal` parameter for specifying the portal for which to display messages. For example, imagine that, from the Home portal, you want to see the messages people are entering in the *Standards* portal. You can place either type of Message Board task flow on a page in the Home portal, and configure it to show the messages entered in the *Standards* portal.

To scope the display of messages to a named portal:

1. In the Message Board task flow instance toolbar, click the **View Actions** menu and **select Parameters**.

> **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, in the **Group Portal** field, enter the internal name of the portal of interest.

> **✏ Note:**
>
> To show Publisher controls, deselect **Hide Publisher**.

> **💡 Tip:**
>
> The portal *internal* name is the name specified by the **portal URL** on the **General** page of a portal's administration settings. The portal *display name* is specified by **Display Name**, and is the name that appears in the banner at the top of a portal.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Specifying the Date Range of Shown Messages and Feedback

You can use the `Start Date` and `End Date` parameters on the Message Board, Feedback, and Feedback - Quick View task flows to limit the display of messages and Feedback posts to those entered between the two specified dates.

For both parameters, use the date format `YYYY-MM-DD`, for example `2010-01-02`.

To limit the display of messages and feedback posts to those entered within a specified date range:

1. In the Message Board or Feedback task flow instance toolbar, click the **View Actions** menu and **select Parameters**.

> **✏ See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, enter a date range:

- In the `Start Date` field, enter the date after which to show messages and posts.

- In the `End Date` field, enter the date before which to show messages and posts.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Working with Message Board and Feedback Task Flows

For information about how users work with Message Board and Feedback task flows, see Working with Feedback and the Message Board in *Using Portals in Oracle WebCenter Portal*.

50

Adding Notifications to a Portal

Add Notifications to a portal to allow portal members to receive timely notice of changes to portal objects and content to which they are subscribed. Users can track changes that occur to their connections, their portal memberships, specific portals, and to the application objects that are important to them.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Basic Services: Edit Page Access and Structure` (standard permissions) or `Pages: Edit Pages` (advanced permissions).
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- About Subscriptions and Notifications
- Adding a Notifications Task Flow to a Page
- Working with Notifications Task Flow Properties
- Working with Notifications Task Flows

About Subscriptions and Notifications

Notifications provide a way to receive messages about changes at the application, portal, and object levels. Messages are triggered when the portals and application objects a user has subscribed to change.

Messages are sent across selected messaging channels that can include text or mail, depending on how your administrator has configured Notifications. For example, a user can receive a mail message when an event is added or a text message when someone responds to a note . Mail and text contain links that take the user to the scene of the change.

Users can choose the objects that trigger a notice by subscribing to them. In WebCenter Portal, there are three levels of subscription:

- *Application*, for notices about changes to portal memberships, Message Board, Connections, and Feedback

  Such notifications occur only for application-level activities that involve the user directly.

- *Portal*, for notices about tools, such as Events, that occur within the scope of a selected portal

- *Object*, for changes to the application objects a user has subscribed to, such as a event.

Table 50-1 describes the types of activities that can trigger a notification and indicates the level and location of the associated subscription.

> **✎ Note:**
>
> Owning an object, such as a document, wiki, or blog, does not automatically subscribe a user to that object. The user must explicitly subscribe to an object to receive subscription-related notifications about it, unless the administrator has set and enforced company-wide subscription defaults. For more information about object-level subscriptions, see Subscribing to the Application, to Portals, and to Objects in *Using Portals in Oracle WebCenter Portal*.

Table 50-1   Activities that Can Trigger Notifications

Service	Activity	Level	Where to Subscribe
Connections	A user sends you an invitation to connect **Note:** Out of the box, the option to send notifications for invitations to connect is enabled and is not end-user configurable.	Application	Preferences (for more information, see Setting Application-Level Subscriptions in *Using Portals in Oracle WebCenter Portal*)
Portal Management	Your portal role changes, for example from `Portal Manager` to another custom role	Application	Preferences
Portal Management	You are added as a member of a portal	Application	Preferences
Portal Management	Your portal membership is removed	Application	Preferences
Portal Management	A user posts a message to your Message Board	Application	Preferences
Message Board	A user likes your Message Board post (messages explicitly set on a Message Board and not those added from Publisher to the Activity Stream)	Application	Preferences
Message Board	A user comments on your Message Board post (messages explicitly set on a Message Board and not those added from Publisher to the Activity Stream)	Application	Preferences
Feedback	A user posts feedback for you	Application	Preferences
Event	A new event is created	Portal	On the portal
Event	An event is updated	Portal	On the portal
Event	An event is deleted	Portal	On the portal

Notifications provide the following task flows:

- **Subscription Preferences** enables users to select the types of activities to be notified about. The task flow shows different options depending on whether it

appears in the Home portal (Figure 50-1) or a portal (Figure 50-2). The Home portal view of the Subscription Preferences task flow shows the same user interface and information that appear on the **General Subscriptions** tab of the Subscriptions preferences page.

Figure 50-1   Subscription Preferences Task Flow - Home Portal
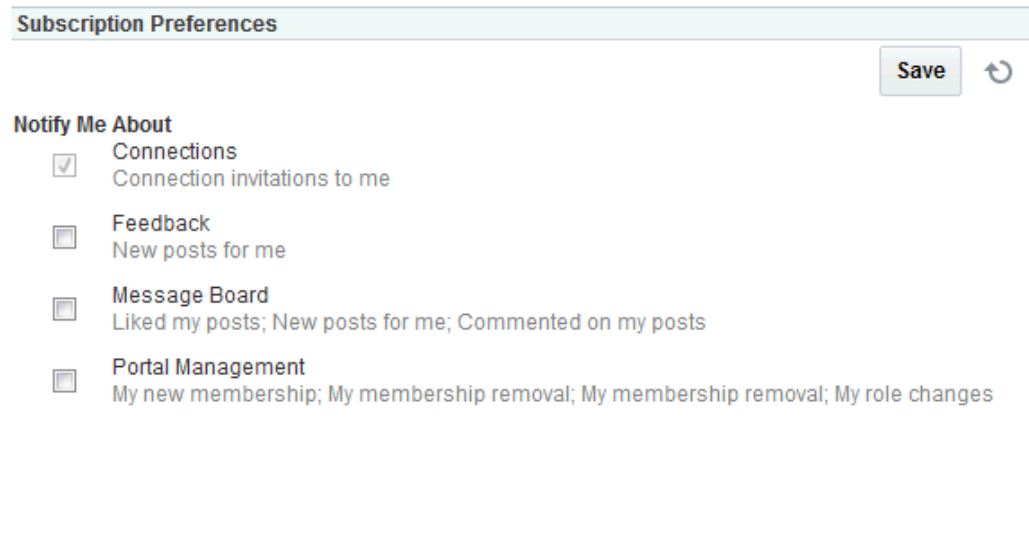

Figure 50-2   Subscription Preferences Task Flow - Portal
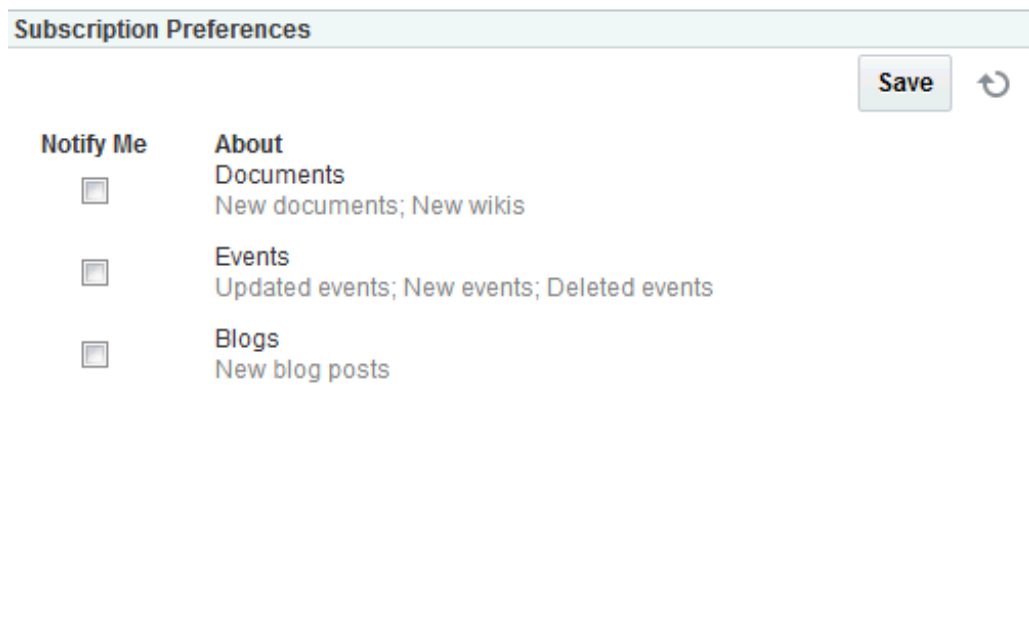
- **Subscription Viewer** shows a users subscriptions and enables the user to unsubscribe from particular notifications (Figure 50-3). The Subscription Viewer task flow shows the same user interface and information that appear on the Current Subscriptions tab of the Subscriptions preferences page.

Figure 50-3   Subscription Viewer Task Flow

Adding a Notifications Task Flow to a Page

For the steps to add a Notifications task flow to a page, see Adding a Component to a Page.

> 💡 **Tip:**
>
> The presence or location of Notification task flows in the resource catalog depends on how the resource catalog is configured. For example, in the default resource catalog, the Subscription Viewer task flow is included under the **Alerts and Updates** folder. The Subscription Preferences task flow is not included in the default resource catalog, so you must add it to a custom resource catalog before you can add it to a page. For information, see Adding a Resource to a Resource Catalog.
>
> For information about Notifications task flows, see About Subscriptions and Notifications.

Working with Notifications Task Flow Properties

The Subscription Preferences task flow has associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu. For example, edit the page, click the task flow to show the **View Actions** menu, and select **Parameters** to open the Parameters dialog (Figure 50-4).

> ✏️ **Note:**
>
> The Subscription Viewer task flow does not have associated properties.

Figure 50-4   Subscription Preferences Task Flow Parameters

> ✏️ **See Also:**
>
> Setting Properties on a Component

The following sections provide information about Notifications properties and parameters:

- Setting Notifications Task Flow Properties
- Notifications Task Flow Parameters
- Hiding Save and Refresh Actions on Subscription Preferences
- Showing Subscription Controls for One Portal in Another

Setting Notifications Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 56-4), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 50-5   View Actions Menu on a Subscription Preferences Task Flow
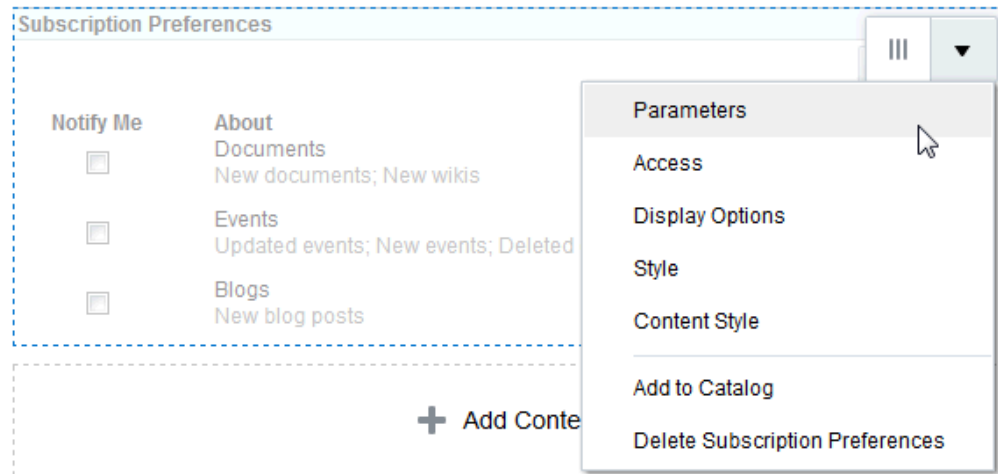
To set Subscription Preferences task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the property you want to set:

   • Parameters control the default task flow content. For descriptions of each parameter, see Notifications Task Flow Parameters. Parameters can be wired to events, and can be used to facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

   • Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

   • The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

   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.

   > ✎ **Note:**
   >
   > When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
   >
   > EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Notifications Task Flow Parameters

Table 50-2 describes the parameters that are unique to the Subscription Preferences task flow. The Subscription Viewer task flow does not have associated parameters.

Table 50-2   Subscription Preferences Task Flow Parameters

Parameter	Description
Hide Actions	A control for showing or hiding the **Save** button and **Refresh** icon • Enter #{true} to hide the controls. • Enter #{false} to show the controls. This parameter is set to #{false} by default.
Scope Name	The name of the portal for which to display portal-level subscription options Use the portal internal name, available on the **General** page in portal administration. The portal internal name is at the end of the value in the **portal URL** field. For example, in the following URL, the portal internal name is standards: http://myHost[...]/webcenter/spaces/standards

Hiding Save and Refresh Actions on Subscription Preferences

The Subscription Preferences task flow has an associated parameter, named Hide Actions, that you can use to hide the **Save** button and **Refresh** icon on a selected task flow instance.

To hide the **Save** and **Refresh** actions on a task flow instance:

1. In page edit mode, click the task flow to show the component toolbar.

> **✏ See Also:**
>
> Setting Properties on a Component

2. Open the **View Actions** menu, and select **Parameters**.

3. In the Parameters dialog, in the **Hide Actions** box, enter #{true}.

> **✏ Note:**
>
> To show the **Save** and **Refresh** actions, in the **Hide Actions** box, enter #{false}.

4. Click **OK** to exit the editor.

5. When you finish revising component parameters, click **OK**.

6. Save your changes, and exit the page editor.

Showing Subscription Controls for One Portal in Another

The Subscriptions Preferences task flow has an associated parameter, named `Scope Name`, that enables you to display the subscription options for one portal in another portal.

`Scope Name` can be handy in a few cases. For example, normally, a Subscription Preferences task flow shows application-level subscription options when it is situated in the Home portal. Instead, you could use `Scope Name` to control your subscription options for a particular portal from the Home portal. You could also set up a control center from which to control settings for various portals from one location.

To display subscription controls for one portal in another:

1. In page edit mode, click the task flow to show the component toolbar.

> **See Also:**
>
> Setting Properties on a Component

2. Open the **View Actions** menu, and select **Parameters** to open the Parameters dialog.

3. In the **Scope Name** field, enter the name of the portal to show in the task flow.

> **Note:**
>
> • Use the portal internal name, available on the **General** portal in portal administration. The portal internal name is at the end of the value in the **Portal URL** field. For example, in the following URL, the portal internal name is `standards`:
>
>   `http://myHost[...]/webcenter/spaces/standards`
>
> • To show subscription controls for the current scope, remove the value in the **Scope Name** field.

4. When you finish revising component parameters, click **OK**.

5. Save your changes, and exit the page editor.

Working with Notifications Task Flows

For information about how users work with Notifications task flows, see Getting Notified When Things Change in *Using Portals in Oracle WebCenter Portal*.

51

Adding Personal Notes to a Portal

Add Notes to a portal to allow portal members to set reminders of important events and other general information.

> **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Manage Security and Configuration` or `Manage Configuration`.
>
> At a minimum, you must have the following permissions:
>
> - `Edit Pages` (to add the Notes task flows to a page)
> - `Edit Task Flows` (to modify the task flow, if necessary)
> - One or more of the following advanced permissions: `Create, Edit, and Delete Notes` or `Create Notes, Edit Notes, Delete Notes`, and `View Notes..`
>
> See About Roles and Permissions for a Portal.

Topics:

- Prerequisites for Working with Notes
- About Notes
- Adding the Notes Task Flow to a Page
- Setting Notes Task Flow Properties
- Working with the Notes Task Flow

Prerequisites for Working with Notes

For notes to work in a portal, the portal manager or anyone with `Manage Security and Configuration` or `Manage Configuration` permission has to perform the following tasks:

- Add the Notes task flow to the default resource catalog, because the Notes task flow is not included in the out-of-the-box default resource catalog.
- Add the Notes task flow to a page in the portal, as described in Adding the Notes Task Flow to a Page.

> **Note:**
>
> For information on using the functions and features of notes, such as creating notes, editing notes, and so on, see Working with the Notes Task Flow.

About Notes

Notes provides useful features for writing yourself reminders in the form of personal notes. You can add notes by using the Notes task flow, which displays the personal notes of the currently logged in user (Figure 51-1). Only the notes that you create are displayed in the Notes task flow. No other user sees your notes, and you do not see any other user's notes.

Figure 51-1   A Notes Task Flow

Notes

Make hotel reservations in Orlando
Make doctor's appointment for regular checkup
Pick up drycleaning
Update school registration information
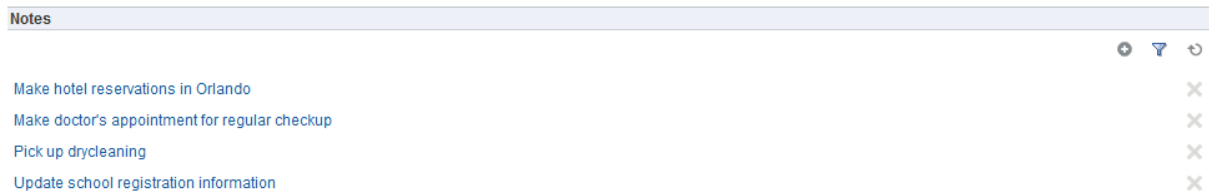
You can filter your Notes list by note titles. Filtering enables you to narrow the focus of your Notes to just the notes that match your filtering criteria. Consider devising a naming scheme for your notes to make the most of filtering.

You can link a note to an asset like a document or a list. While you can link to a new note (Figure 51-2), you cannot link to existing notes. All users who have access to the object can view the linked note too. See Adding and Linking to a Note in *Using Portals in Oracle WebCenter Portal*.

Figure 51-2   Linking an Announcement to a New Note
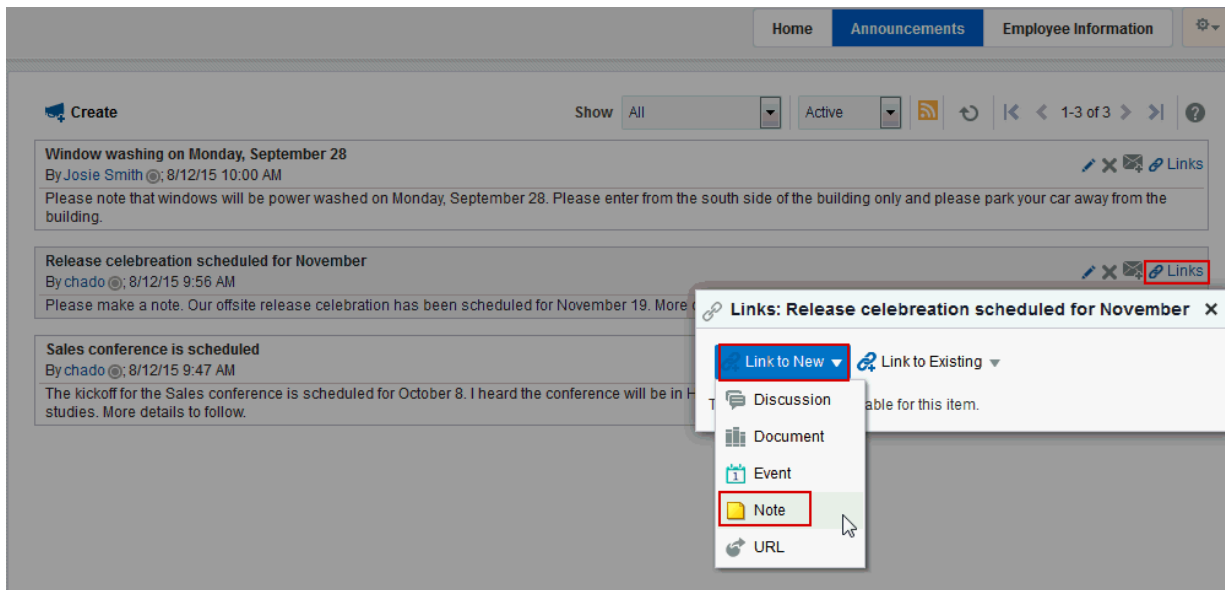
Adding the Notes Task Flow to a Page

For the steps to add the Notes task flow to a page, see Adding a Component to a Page.

> **Note:**
>
> The presence or location of the Notes task flow in the resource catalog depends on how the resource catalog is configured. For example, the Notes task flow is not available in the Default Portal Catalog, so you will only see an entry for it if it has been added to a custom resource catalog that has been made available to the page.
>
> For more information, see Adding a Resource from the Resource Registry (in the Add Resource Catalog Item dialog, select **Task Flows**, then **Design Time**, then **Notes**). To use the custom resource catalog for editing portal pages, make sure it is **Available**, and set for use by pages in the portal, as described in Changing the Resource Catalogs in a Portal.

Setting Notes Task Flow Properties

The Notes task flow has associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu. For example, select **Display Options** to display the Display Options dialog (Figure 51-3).

Chapter 51
Setting Notes Task Flow Properties

**Figure 51-3 Display Options on a Notes Task Flow**

> **See Also:**
>
> Setting Properties on a Component

To set Notes task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu (Figure 51-4) and select the properties you want to set:

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51-4

Figure 51-4   View Actions Menu on a Notes Task Flow
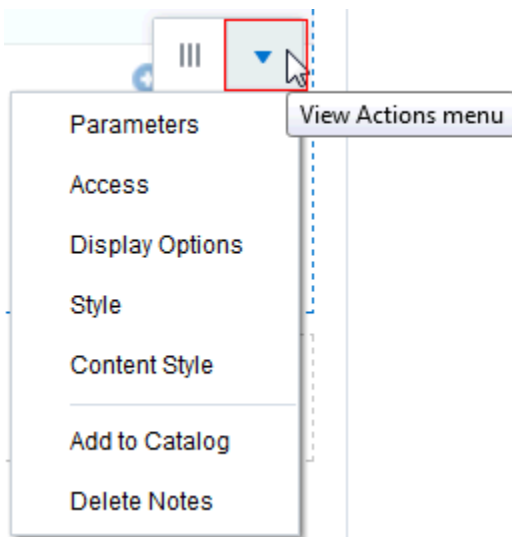
- The Notes task flow does not have any unique properties, and therefore no parameters are shown in the Parameters dialog.

  The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Setting Component Display Options Properties. and Setting Style and Content Style Properties.

  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.

  > ✎ **Note:**
  >
  > When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
  >
  > EL validation is not performed on non-generic display options.

  If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Working with the Notes Task Flow

WebCenter Portal offers a way for you to keep track of useful, sometimes vital, bits of information through notes.

For information about using the functions and features of notes, such as creating notes, editing notes, and so on, see Managing Your Notes in *Using Portals in Oracle WebCenter Portal*.

52

Adding Polls to a Portal

Add Polls to a portal to allow portal members to create, manage, and analyze online polls.

> ✏ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Manage Security and Configuration` or `Manage Configuration`.
>
> At a minimum, you must have the following permissions:
>
> • `Edit Pages` (to add the Polls task flows to a page)
>
> • `Edit Task Flows` (to modify the task flow, if necessary)
>
> See About Roles and Permissions for a Portal.

Topics:

• About Polls
• Adding a Polls Task Flow to a Page
• Working with Polls Task flow Properties
• Working with the Polls Task Flows

About Polls

WebCenter Portal users can create, edit, take, and analyze online polls. With polls, you can survey your audience (such as their opinions and their experience level), check whether they can recall important information, and gather feedback and metrics.

WebCenter Portal provides the following Polls task flows:

• **Quick Poll** task flow creates a quick one-question poll. For more information about creating a quick poll, see Creating a Quick Poll Task Flow

• **Take Polls** task flow publishes the most recently published poll or the one you want to display. The Take Polls task flow displays the poll for users to take. For more information about the Take Polls task flow, see Working with the Take Polls Task Flow

• **Polls Manager** task flow creates detailed polls, and lets you view the status of all current polls, perform operations on current polls, as well as publish, analyze, close, and delete all polls. For more information about creating polls using the Polls Manager task flow, see Working with the Polls Manager Task Flow

• **View Poll Results** task flow lets you view poll results. For more information about viewing the results of a specific poll, see Working with the View Poll Results Task Flow

You can do the following with polls:

- Create a poll. You can create quick polls with only a name, description, and question, or you can create detailed polls.

  Use the Quick Poll task flow to create a quick one-question poll (Creating a Quick Poll Task Flow), or use the Polls Manager to create more detailed polls (Creating a Poll in *Using Portals in Oracle WebCenter Portal*).

- Create a template for polls. Templates contain the same questions, sections, and welcome and closing content.

- Edit an existing poll. For example, you can add questions to the poll, change existing questions, or publish (open) and close the poll (Editing a Poll in *Using Portals in Oracle WebCenter Portal*).

- Take a specific or the most recently-published poll (see Taking Polls in *Using Portals in Oracle WebCenter Portal*).

- View poll results. See Working with the View Poll Results Task Flow.

- See the status of all polls and available actions for each poll, such as edit, delete, publish, analyze, and clear results.

More detailed poll functionality is available through the Polls Manager.

> **Note:**
>
> Polls created through the Polls Manager must be published and open to be taken. Users cannot take unpublished or closed polls.

Adding a Polls Task Flow to a Page

For the steps to add a Polls task flow to a page, see Adding Components to a Page.

> **Note:**
>
> The presence or location of the Polls task flows in the resource catalog depends on how the resource catalog is configured. For example, in the default portal catalog, the Polls task flows are included under the Polls folder.

Working with Polls Task flow Properties

The Polls task flow has associated properties, which users with sufficient privileges can access through the task flow's View Actions menu. For example, select Parameters to display the Parameters dialog.

The following sections provide information about properties associated with Polls task flows and describe task flow parameters:

- Setting Polls Task Flow Properties
- Polls Task Flow Parameters

Setting Polls Task Flow Properties

In the page editor, selecting any component exposes a View Actions menu, which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

> **See Also:**
>
> Setting Properties on a Component

To set Polls task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

    *   Parameters control the default task flow content. For descriptions of each parameter, see Polls Task Flow Parameters. Parameters can be wired to polls, and can be used to facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

    *   Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

    *   The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

    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.

    > **Note:**
    >
    > When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
    >
    > EL validation is not performed on non-generic display options.

    If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Polls Task Flow Parameters

The following table describes the parameters that are unique to the Polls task flow.

Table 52-1   Polls Task Flow Parameters

Parameter	Description	Task Flow
scope	The portal name from which polls are to be fetched. If this is supplied, then polls of that particular portal are shown. In the Home portal, when this parameter is not supplied, polls from all portals are fetched.	This parameter appears in the properties for the Polls Manager task flow.
Show User Data Only	Specifies whether to display all polls or only those created by the current user: • Select **No** (default) to display all polls. • Select **Yes** to display only those polls created by the user If the scope parameter is specified, then this parameter works the same but within only that scope.	This parameter appears in the properties for the Polls Manager task flow.
Poll Id	The name of the poll to display, available from the drop-down list.	This parameter appears in the properties for the Take Polls and View Poll Results task flows.
Show In Edit Mode	Specifies whether users can edit a quick poll: • Select **No** to display the Design Poll button for editing the quick poll appears in the page editor only; it is not visible to users viewing the page. • Select Yes to display the Design Poll button appears in both view and edit modes, so users can edit the quick poll.	This parameter appears in the properties for the Quick Poll task flow

Working with the Polls Task Flows

The polls task flows let you create and manage polls.

Topics

- Creating a Quick Poll Task Flow
- Working with the Polls Manager Task Flow
- Working with the Take Polls Task Flow
- Working with the View Poll Results Task Flow

Creating a Quick Poll Task Flow

Quick Poll allows one-question poll to be published immediately. Each quick poll needs its own Quick Poll task flow on the page.

Ensure that the Quick Poll task flow is added to a portal page. See Adding a Polls Task Flow to a Page.

To create a quick poll:

1. From the Quick Poll task flow, click **Design Poll**.
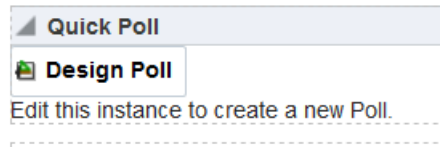
> **✎ Note:**
>
> The Design Poll will not be visible in page view if you select No for the **Show in Edit Mode** parameter for this task flow. This prevents participants from editing the poll. Polls Task Flow Parameters.

2. On the **General** tab, enter the following information:

   • **Name**: The name of the poll.

     The name you enter appears in the Component Properties as a parameter in the Take Polls and View Poll Results task flows.

   • **Description**: Optionally, enter a description of the poll. This description does not appear in the poll.

   • **Close After:** Optionally, select or enter the number of days for the poll to stay open.

3. Click the **Question** tab, then design your one-question poll.

   a. Select a Question Type drop-down list. Your selection determines the answer choices the user sees, for example, Multiple Choice (Only One Answer) or Multiple Choice (Multiple Answers).

   b. Enter your question in the Question field.

   c. Enter the answer selections in the answer field. For a multiple choice question, enter each answer choice in a separate line.

   d. Optionally, select the Add Comment Field to add a custom field, such as Tell us more! or Other or Please Explain.

   e. Select the Require Answer to Question check box if you want to make the question mandatory, requiring users to answer the question.

   f. Click **OK**

Note:

The same types of questions are available in Quick Poll and in the Polls Manager.

The following figure shows what poll users see. Note that the same Quick Poll you designed appears in the Quick Poll and Take Polls task flows.

Quick Poll also appears in the Polls Manager and can be managed in the following ways:

*   From the Polls Manager task flow. See Working with the Polls Manager Task Flow.

*   From the Quick Poll task flow, click **Design Poll** to edit the quick poll.

> **Note:**
>
> To prevent participants from editing a Quick Poll, in the Parameters dialog of the Quick Poll task flow. select **No** for the **Show in Edit Mode** parameter. For more information, see Polls Task Flow Parameters.
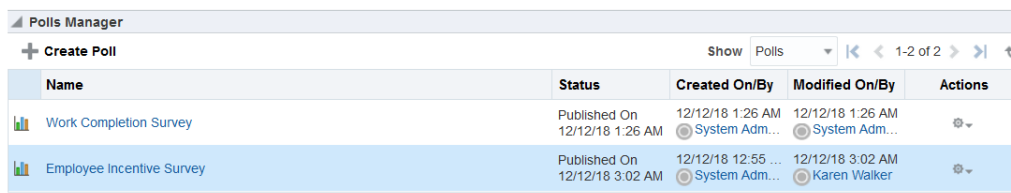
Working with the Polls Manager Task Flow

The Polls Manager task flow lets you create polls, view the status of all current polls, and perform operations on existing polls, including edit, save (as a poll or as a poll template), publish, clear results, close, analyze, and delete.

When you add the Polls Manager task flow to a page, you can do the following tasks to prevent other participants from editing the poll:

- Set the page security access on the page where you add the Polls Manager task flow. See Setting Component Access.

- If participants have permissions to edit the page, they can add the Polls Manager task flow to their Home portal. To prevent this, customize the resource catalog and edit the resource catalog to remove the Polls Manager task flow. Make sure to assign the new resource catalog to the Resource Catalog for Pages.

The following figure shows an example of a Polls Manager task flow on a page:

From the Poll Manager, you can do the following:

- Add a new poll. Click **Create Poll** to add a new poll.

- View the latest poll date. Click the **Refresh** icon to update your view.

- Click the **Actions** icon next to a poll to edit the poll, analyze the poll results, close the poll, delete the poll, or clear the existing results.

For information about how to create poll, edit the poll, analyze the poll results, close the poll, delete the poll, see

Working with the Take Polls Task Flow

The Take Polls task flow displays the most recently-published available poll, unless it is set to display a specific poll with the Poll Id parameter. After a user submits a response for that poll, this task flow displays the next most recently-published poll.

To configure the Take Polls task flow:

1. After you add the Take Polls task flow to the page, click **View Actions** and then select **Parameters**.

2. On the **Paramters-View Poll Results**, select the poll you want users to take from the **Poll Id** drop-down list.
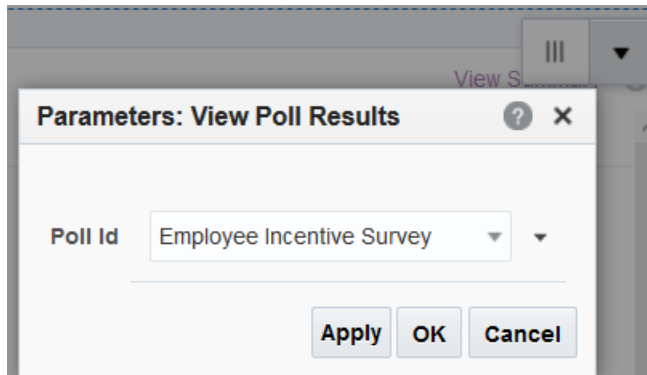
3. Click **OK**.

The poll you selected appears in the Take Polls task flow.

For information about taking polls, see Taking Polls in *Using Portals in Oracle WebCenter Portal*.

Working with the View Poll Results Task Flow

The View Poll Result task flow provides a graphical view of poll results. The View Poll Results task flow must be set to display a specific poll with the Poll Id parameter.

To view poll results:

1. After you add the View Poll Results task flow to the page, click the **Actions** menu and select **Parameters**.

2. In the **Parameters-View Poll Results**, select the poll you want to view from the **Poll Id** drop-down list.
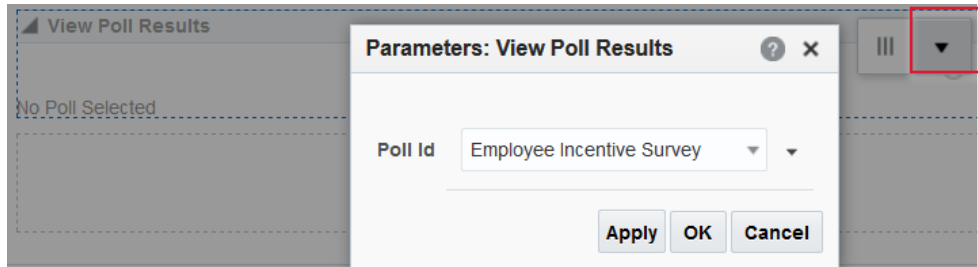
3. Click **OK**.

   Notice that the poll you selected appears in the task flow, showing the results of the poll.

53
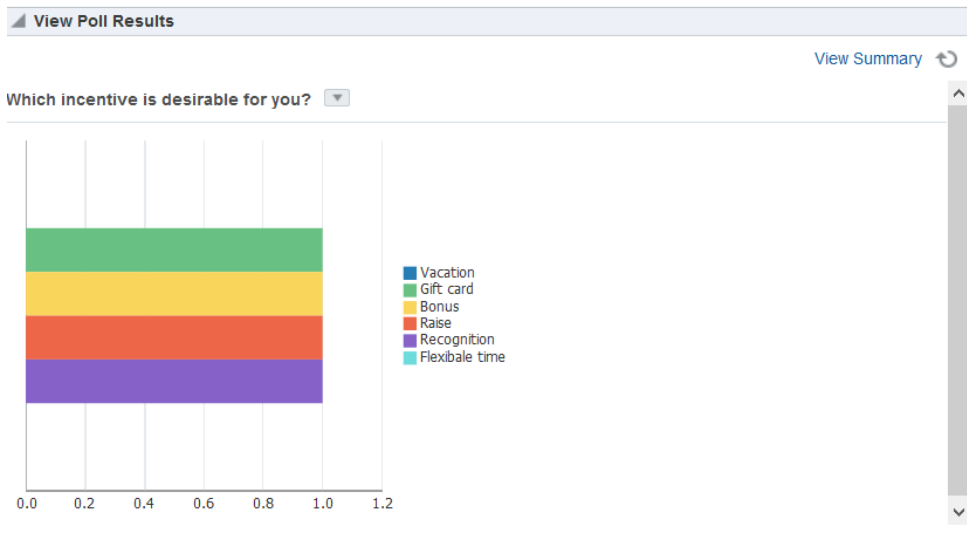
Adding Profiles to a Portal

Add Profiles to a portal to allow portal members to view personal profile information such as mail address, phone number, office location, department, manager, direct reports for themselves and other members.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Basic Services: Edit Page Access and Structure` (standard permissions) or `Pages: Edit Pages` (advanced permissions).
>
> See About Roles and Permissions for a Portal.

Topics:

- About Profiles
- Adding a Profile Task Flow to a Page
- Working with Profile Task Flow Properties
- Working with Profile Task Flows

About Profiles

Profile provides a variety of views into users' personal profile information. Such information can include mail address, phone number, office location, department, manager, direct reports, and so on. In a typical WebCenter Portal installation, Profile takes the bulk of its information from the back-end identity store that provides WebCenter Portal with its users (for more information, see Synchronizing Profiles with the Identity Store in *Administering Oracle WebCenter Portal*). Additionally, Profile may offer opportunities for altering some of this information and for providing additional data not included in the identity store.

Before users access their Profiles or Profile preferences, your administrator can set global application defaults that affect what all users may see and do with their own and other users' Profiles. For more information, see Configuring Profile in *Administering Oracle WebCenter Portal*.

> **Note:**
>
> - The Profile user interface was updated in 12*c* Release 2 (12.2.2.0.0). Depending on how your system administrator configured your installation of WebCenter Portal, you may see the legacy Profile user interface. For information on the legacy Profile user interface, see Managing Your Profile in the *User's Guide for Oracle WebCenter Portal: Spaces* for 11*g* Release 1 (11.1.1.7.0).
>
> - Empty fields (fields without any content) do not appear in some profile views.

Users access Profile information by clicking a user name wherever they see it in WebCenter Portal. Depending on where the user clicks in the portal, the either see a brief, popup view of the user profile or they see a full profile view on the WebCenter Portal **Profile** page. For information about how users interact with profiles and use Profile task flow features, see Managing Your Profile in *Using Portals in Oracle WebCenter Portal*.

In addition to the **Profile** page, Profile provides several task flows that each offer a unique view of a user's Profile information. Provided you have edit permission on a page, you can place a Profile task flow wherever you find it of use.

Profile provides the following task flows:

- **Organization View** for a graphical depiction of the current user's position within the company—that is, a detail of the overall organization chart. In Organization View, you can cycle through three views of the current user's Profile information, including contact information; the user's address and the current time in the user's locale; and a summary About Me statement. It also provides a link to a full-blown profile of the current user (Figure 53-1).

Figure 53-1   Organization View Task Flow
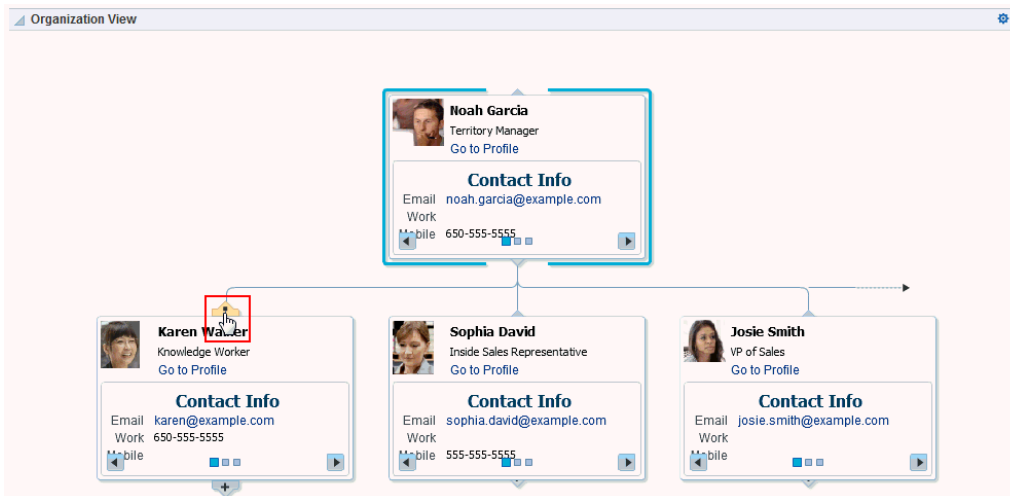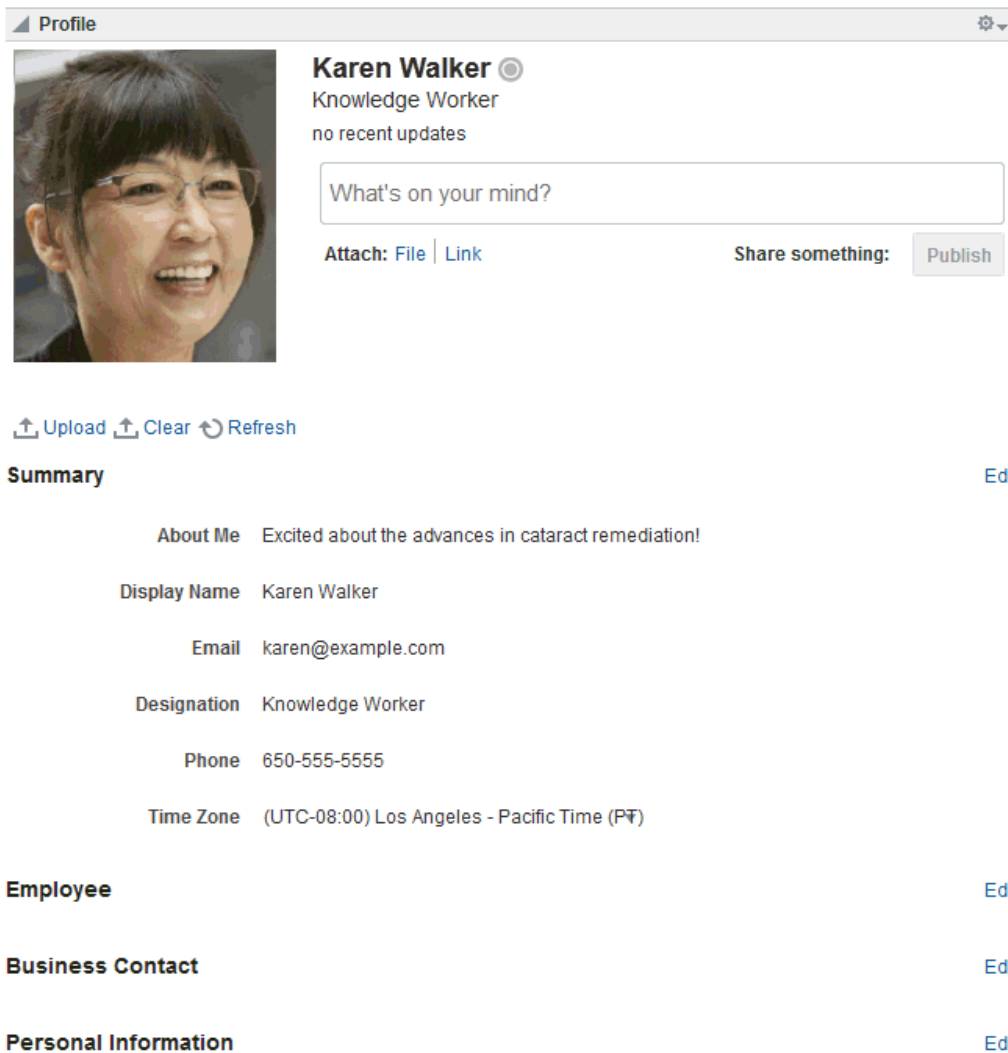
> ✏️ **See Also:**
>
> For information about enabling a hierarchical view of your organization, as depicted in Figure 53-1, see Specifying a Management Chain for Organization View in *Administering Oracle WebCenter Portal*.

- **Profile** for displaying a user's profile details, uploading a photo, and (if enabled) editing Profile details (Figure 53-2)

Figure 53-2   Profile Task Flow

- **Profile - Gallery** for accessing all of your social networking information from one view (Figure 53-3)

Figure 53-3   Profile Gallery Task Flow
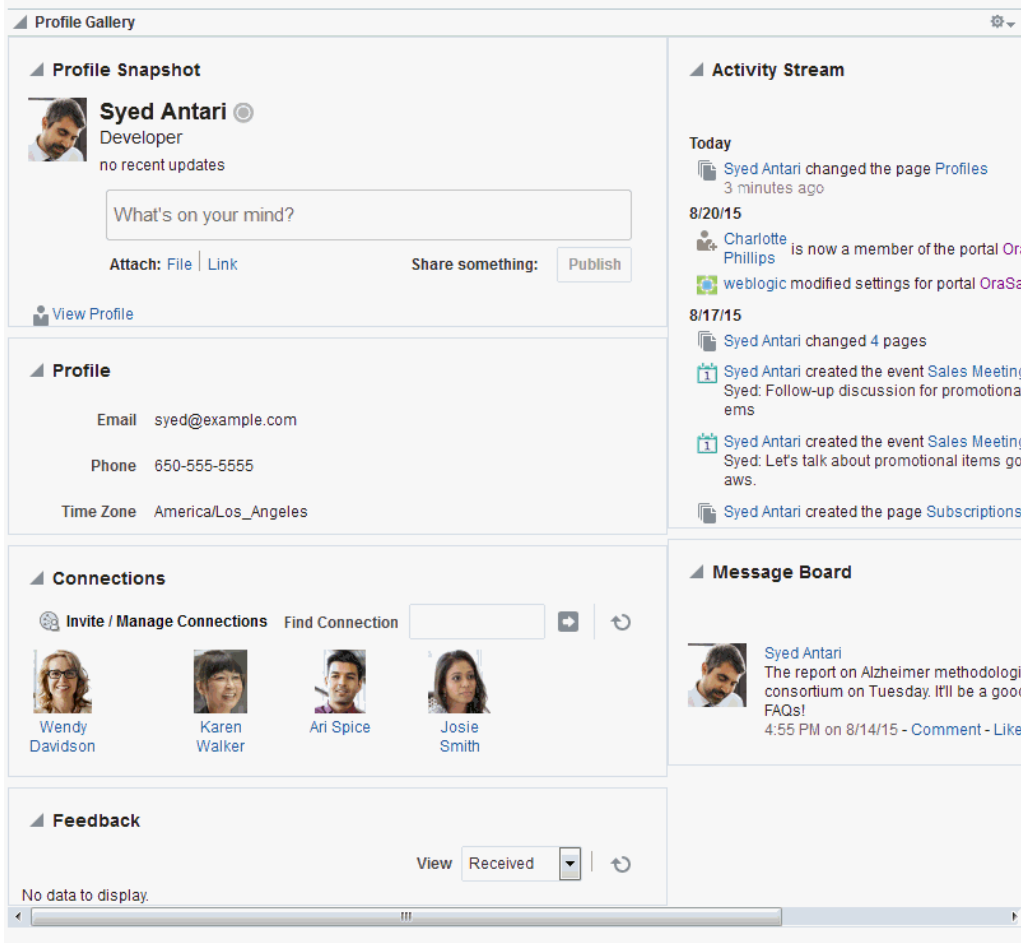
- **Profile - Snapshot** for viewing a user photo and status message (Figure 53-4)

Figure 53-4   Profile - Snapshot Task Flow
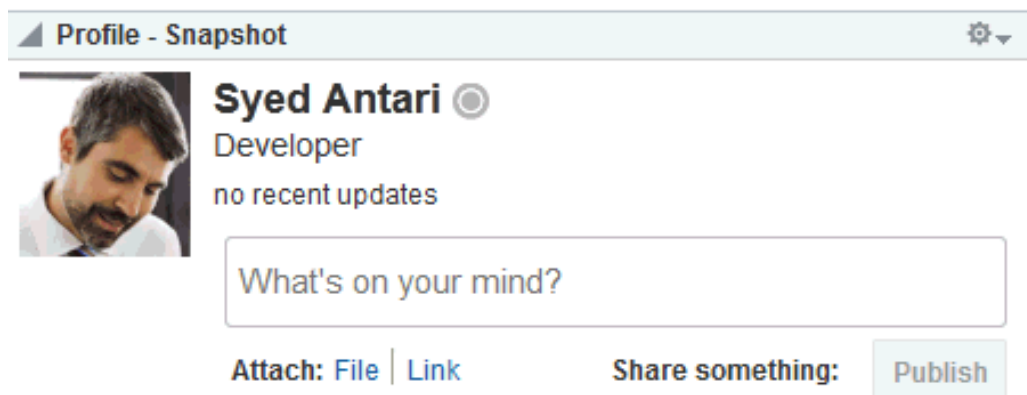
Profile task flows have associated properties that you can use to control the appearance and behavior of a task flow instance. For example, you can use Profile properties to specify that the statements you enter into a Publisher task flow (see

About Message Board) are included in those Profile views that provide a status message. You can control whether a Profile allows the display of a photo and whether the photo can be updated in page view mode.

> ✎ **Note:**
>
> Empty fields (fields without any content) do not appear in some profile views.

> ✎ **See Also:**
>
> Working with Profile Task Flow Properties

Adding a Profile Task Flow to a Page

For the steps to add a Profile task flow to a page, see Adding Components to a Page.

> 💡 **Tip:**
>
> The presence or location of the Profile task flows in the resource catalog depends on how the resource catalog is configured. For example, in the default resource catalog, the Profile task flows are included under the **Social and Communication** folder.
>
> For more information about the Profile task flows, see About Profiles.

Working with Profile Task Flow Properties

Profile task flows have associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu. For example, edit the page, click the task flow instance to show the toolbar, open the **View Actions** menu, and select **Parameters** to display the Parameters dialog (Figure 53-5).

Figure 53-5   Profile Task Flow Component Properties Dialog

> ✎ **See Also:**
>
> Setting Properties on a Component

The following sections provide information about Profile task flow properties and parameters:

- Setting Profile Task Flow Properties
- Organization View Task Flow Parameters
- Profile Task Flow Parameters
- Profile Gallery Task Flow Parameters
- Profile - Snapshot Task Flow Parameters
- Using Properties to Configure a Profile Task Flow Instance

Setting Profile Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 53-6), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 53-6   View Actions Menu on a Profile Task Flow
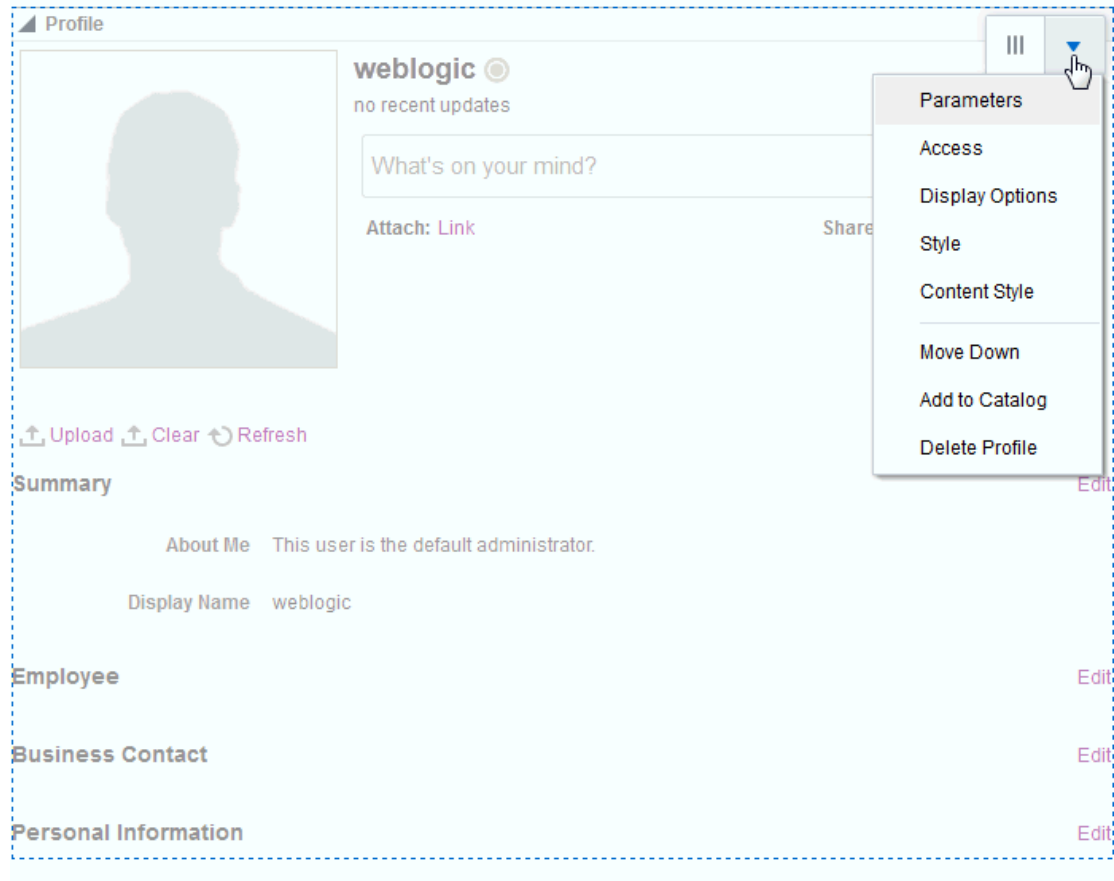
To set Profile task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu, and select the property you want to set:

    •   Parameters control the default task flow content. For descriptions of each parameter, see: Organization View Task Flow Parameters, Profile Task Flow Parameters, Profile Gallery Task Flow Parameters, and Profile - Snapshot Task Flow Parameters.

        Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

    •   Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

    •   The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

    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 in lieu of a constant

value. Click the ▼ icon next to a property, then select **Expression Builder** to open the editor.

> **✎ Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Organization View Task Flow Parameters

Table 53-1 describes the parameters that are unique to the Organization View task flow.

Table 53-1   Organization View Task Flow Parameters

Parameter	Description
`Control Panel Shown`	Determines whether the task flow displays a control panel for manipulating the style, alignment, and size of the content
	Select to show the control panel, deselect to hide the control panel. The control panel is hidden by default.
`User Id`	The ID of the user to display in the task flow
	The value for this parameter, `#{securityContext.userName}`, is set automatically. The value is an Expression Language expression that returns the name of the current user.
	If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Profile Task Flow Parameters

Table 53-2 describes the parameters that are unique to the Profile task flow.

Table 53-2   Profile Task Flow Parameters

Parameter	Description
Edit Mode	Determines whether to display Profile details as editable without requiring specific navigation to an editable view • Enter #{true} to always show Profile details in edit mode. • Enter #{false} to show Profile details as read-only. When the value is set to #{false}, users click an **Edit** button to take Profile details into edit mode. Note that this parameter is recognized only if the parameter Section-Wise Edit Enabled is set to #{false}. This parameter is set to #{false} by default.
Profile ID	The ID of the user to display in the task flow The value for this parameter, #{securityContext.userName}, is set automatically. The value is an Expression Language expression that returns the name of the current user. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.
Section-Wise Edit Enabled	Determines whether to display section-by-section edit capability in the task flow • Enter #{true} to enable section-by-section editing. An **Edit** link is shown on each editable Profile section. • Enter #{false} to disable section-by-section editing. One **Edit** button is shown for the whole task flow. This parameter is set to #{true} by default.

Profile Gallery Task Flow Parameters

Table 53-3 describes the parameters that are unique to the Profile Gallery task flow.

Table 53-3   Profile Gallery Task Flow Parameters

Parameter	Description
Resource Id	The ID of the user to show in the task flow The value for this parameter, #{securityContext.userName}, is set automatically. The value is an Expression Language expression that returns the name of the current user. If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Profile - Snapshot Task Flow Parameters

Table 53-4 describes the parameters that are unique to the Profile - Snapshot task flow.

Table 53-4   Profile - Snapshot Task Flow Parameters

Parameter	Description
Allow photo upload	Determines whether the task flow displays controls that enable users to upload, clear and refresh a profile photo
	Select to show profile photo controls, deselect to hide profile photo controls. The profile photo controls are hidden by default.
Allow status update	Determines whether the task flow displays controls that enable users to enter a personal status message and attach a file or link to the message
	Select to allow users to enter a status message through the task flow, deselect to hide status update controls. The status message controls are shown by default.
	If status updates are enabled, users can enter updates through an embedded Publisher task flow. For information about the Publisher task flow, see Liking, Commenting On, and Sharing Items in WebCenter Portal in *Using Portals in Oracle WebCenter Portal*.
Image Size	Determines the size of the Profile photo displayed in the task flow
	Values can be one of: ORIGINAL, LARGE, MEDIUM, SMALL. The default size is MEDIUM.
Org Bread Crumbs Shown	Determines whether a breadcrumb delineating the user's upward path in the organization hierarchy is shown
	Select to show the breadcrumb, deselect to hide the breadcrumb. The breadcrumb is hidden by default.
Profile Edit Link Shown	Determines whether the task flow displays a link to edit the user Profile
	Select to show the **Edit Profile** link, deselect to hide the link. The link is hidden by default.
	This link does not perform any operation, but instead leads to a region navigation event (to the same view), which the consumer can listen to and perform navigation appropriately.
	Out of the box, the Profile business role page, which contains the Profile - Snapshot task flow, is wired to the Profile task flow on the About subpage. Upon receiving a region navigation event from the Profile - Snapshot task flow, clicking the Edit link switches the Edit Mode parameter of the Profile task flow on the About subpage, effectively toggling the mode. Because of this out-of-the-box wiring, the Edit link works on the My Profile business role page. If you plan to expose the Profile Edit link, you must retain the code to listen to the region navigation event and provide the same type of wiring to the target task flow.
User Name	The ID of the user to display in the task flow
	The value for this parameter, #{securityContext.userName}, is set automatically. The value is an Expression Language expression that returns the name of the current user.
	If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Using Properties to Configure a Profile Task Flow Instance

This section provides examples of how you use property values to affect the behavior of a given task flow instance. It includes the following subsections:

- • Change Profile Photo in Profile - Snapshot Task Flow
- • Post a Status Update
- • Expose Additional Controls in Organization View
- • Enable Continuous Edits to Profile Details
- • Setting Size of Profile Images in Profile - Snapshot Task Flow
- • Exposing Navigational Breadcrumbs in Profile - Snapshot
- • Enabling Section-By-Section Profile Editing

Change Profile Photo in Profile - Snapshot Task Flow

Use the property `Allow photo upload` to enable users to upload their own Profile photos in an instance of the Profile - Snapshot task flow. When you enable photo upload, **Upload**, **Clear**, and **Refresh** controls appear below the photo display area (Figure 53-7).

Figure 53-7   Photo Controls on Profile - Snapshot Task Flow
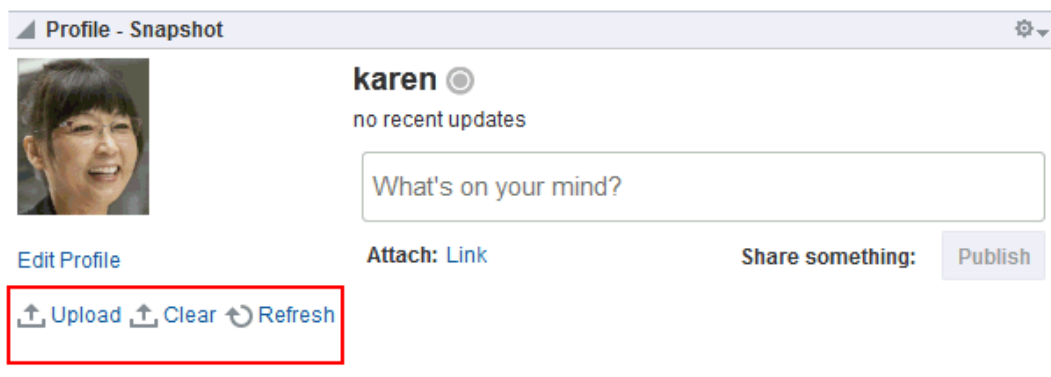
> **Note:**
>
> Photos uploaded to Profile - Snapshot are persisted to all other Profile task flows that expose a photo.

To enable users to change their Profile photo in the Profile - Snapshot task flow:

1. In the Profile - Snapshot task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, select **Allow photo upload**.

> ✏️ **Note:**
>
> To prevent users from changing their profile photos, deselect **Allow photo upload**.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Post a Status Update

Use the property `Allow status update` to show or hide a means of entering a personal status message in the Profile - Snapshot task flow. If status updates are enabled, users can enter their status messages through an embedded Publisher task flow (Figure 53-8).

Figure 53-8   Publisher Features in Profile - Snapshot Task Flow
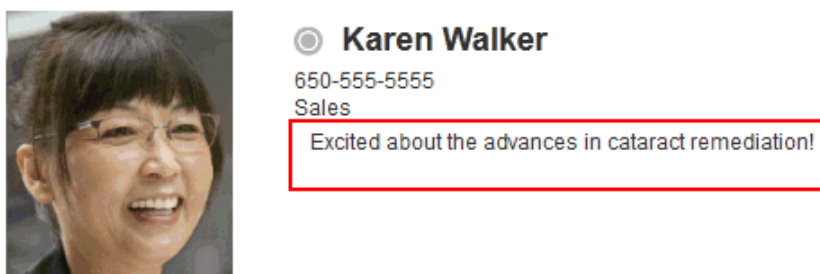
> ✏️ **See Also:**
>
> For information about the Publisher task flow, see About Publisher.

When this property is enabled, whenever the current user posts a status message using the Publisher task flow, it is also posted as a Profile status message to Profile - Snapshot, Profile Gallery, and Profile task flows.

To enable users to post a status update to their Profile:

1. In page edit mode, click the Profile - Snapshot task flow to show the toolbar, open the **View Actions** menu, and select **Parameters**.

> ✏️ **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, select **Allow status update**.

> **✎ Note:**
>
> To prevent users from updating their profile status through this task flow, deselect **Allow status update**.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Expose Additional Controls in Organization View

The Organization View task flow provides additional controls for manipulating your view of task flow content (Figure 53-9).

Figure 53-9   Control Panel Shown in Organization View
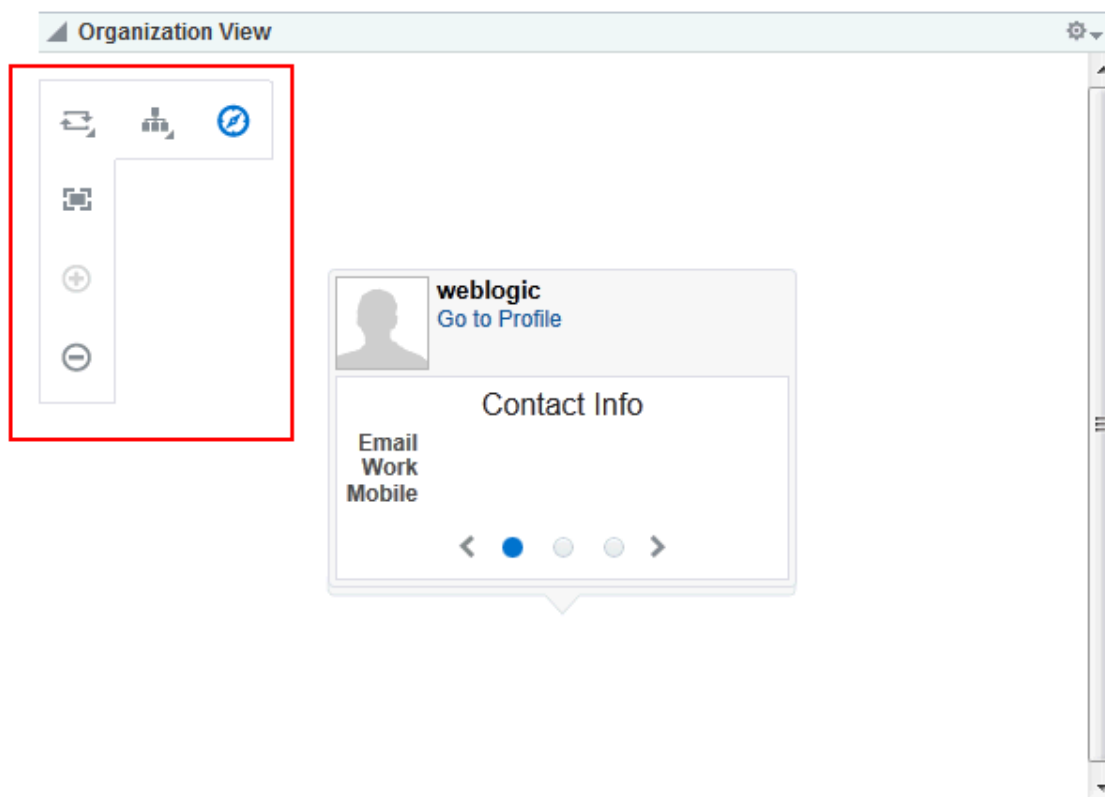
Use additional controls to zoom in and out and select a display format.

Use the property `Control Panel Shown` to expose these controls in an instance of the Organization View task flow.

To expose additional controls in an Organization View task flow:

1. In the Organization View task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, select **Control Panel Shown**.

> **Note:**
>
> To hide the Organization View control panel, deselect **Control Panel Shown**.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Enable Continuous Edits to Profile Details

Use the property `Edit Mode` to enable users to edit Profile details without having to specifically enter an edit mode. Users navigate to the task flow instance and make changes to editable fields without having to first click an **Edit** button or link.

> **Note:**
>
> This parameter is recognized only if the parameter `sectionWiseEditEnabled` is set to `#{false}`. For more information, see Enabling Section-By-Section Profile Editing.

To enable continuous edits of Profile details:

1. In the Profile task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

> **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, in the **Edit Mode** box, enter `#{true}`.

> **Note:**
>
> To require that users click an **Edit** button to take Profile details into edit mode, in the **Edit Mode** box, enter `#{false}`.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Setting Size of Profile Images in Profile - Snapshot Task Flow

Use the property `Image Size` to set the display size of images that are uploaded through a Profile - Snapshot task flow. The value you enter affects the size of the photo in only the given task flow instance. No other types of Profile task flows and no other task flow instances are affected.

To set the size of a Profile image in the Profile - Snapshot task flow:

1. In page edit mode, click the task flow to show the **View Actions** menu, open the menu, and select **Parameters**.

> ✎ **See Also:**
>
> Setting Properties on a Component

2. In the Parameters dialog, enter a value in the **Image Size** box: `ORIGINAL`, `SMALL MEDIUM`, or `LARGE`

   Here are examples of these size selections:

   - `ORIGINAL` (Figure 53-10)

   Figure 53-10   Image Size Set to ORIGINAL
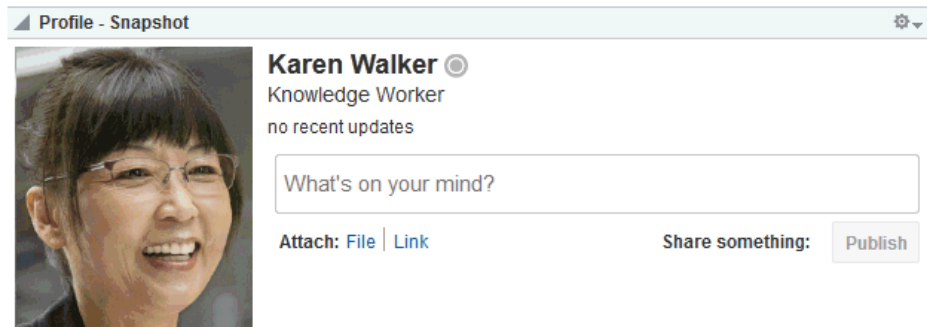
   - `SMALL` (Figure 53-11)

   Figure 53-11   Image Size Set to SMALL
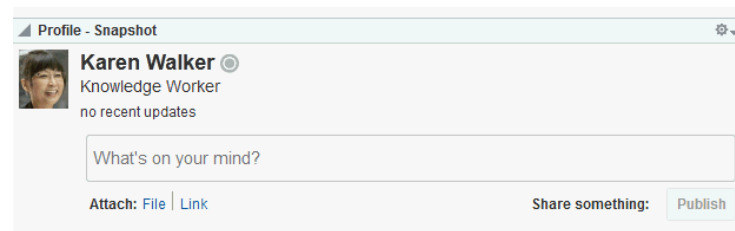
- `MEDIUM` (Figure 53-12)

Figure 53-12   Image Size Set to MEDIUM
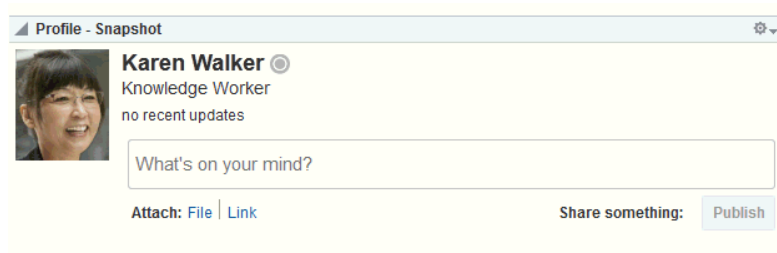
- `LARGE` (Figure 53-13)

Figure 53-13   Image Size Set to LARGE
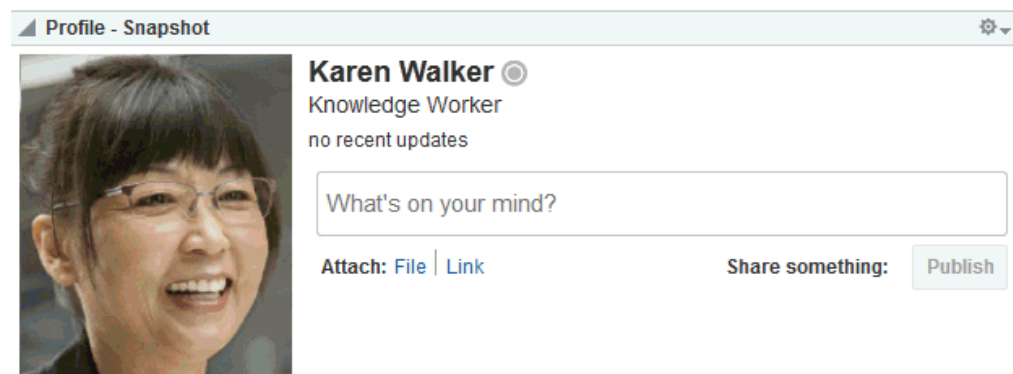
3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Exposing Navigational Breadcrumbs in Profile - Snapshot

Use the property `Org Bread Crumbs Shown` to enable the display of breadcrumbs that visualize the current users position in the organization hierarchy (Figure 53-14).

Figure 53-14   Breadcrumbs in Profile - Snapshot Task Flow
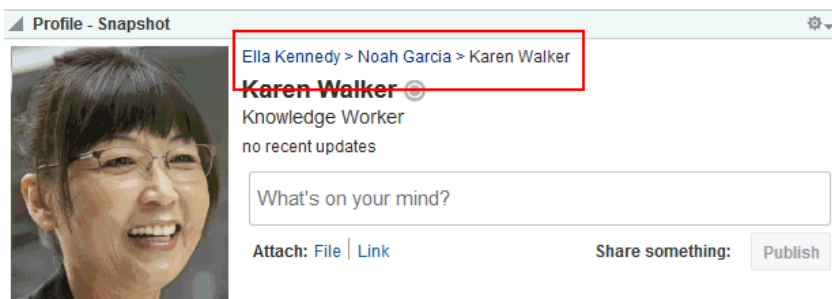
Users can click a name in the hierarchy to navigate to a view of that user's Profile.

To expose navigational breadcrumbs in a Profile - Snapshot task flow:

1. In page edit mode, click the Profile - Snapshot task flow to show its **View Actions** menu, open the menu, and select **Parameters**.

    > ✎ **See Also:**
    >
    > Setting Properties on a Component

2. In the Parameters dialog, select **Org Bread Crumbs Shown**.

    > ✎ **Note:**
    >
    > To hide hierarchical breadcrumbs, deselect **Org Bread Crumbs Shown**.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Enabling Section-By-Section Profile Editing

Use the `Section-Wise Edit Enabled` property to specify whether section-by-section editing is enabled, exposing **Edit** buttons on each editable section of a Profile task flow instance (Figure 53-15), or disabled, exposing only a single **Edit** button for the entire Profile (Figure 53-16).

Figure 53-15   Section-By-Section Profile Editing

Figure 53-16   Profile with Single Edit Button
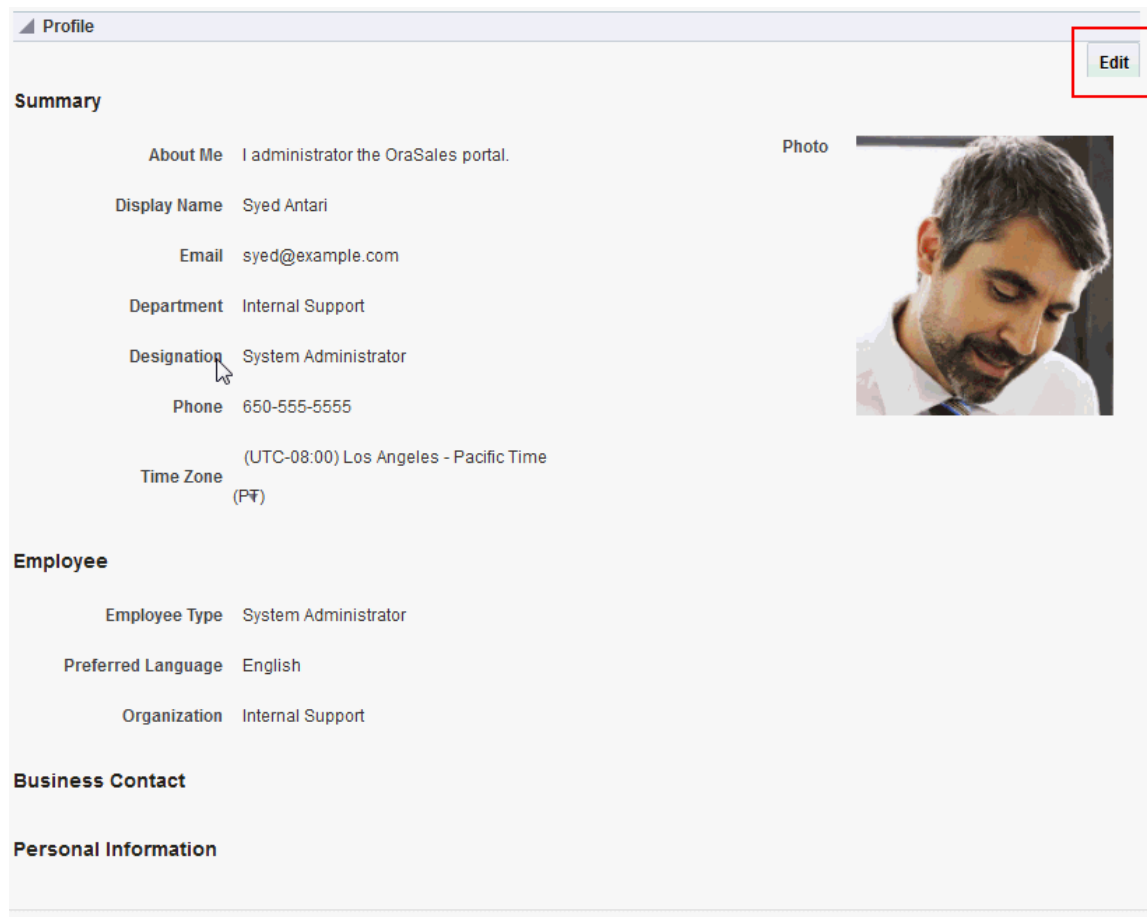
> **Note:**
>
> Whether Profile details are editable in all Profile task flow instances is determined by your administrator. For more information, see Configuring Profile in *Administering Oracle WebCenter Portal*.

To enable section-by-section editing in a Profile task flow instance:

1. In the Profile task flow instance toolbar, click the **View Actions** menu, and select **Parameters**.

   > **See Also:**
   >
   > Setting Properties on a Component

2. In the Parameters dialog, in the **Section-Wise Edit Enabled** box, enter `#{true}`.

> **✎ Note:**
>
> To show one **Edit** button for all the Profile details, in the **Section-Wise Edit Enabled** box, enter `#{false}`.

3. When you finish revising component parameters, click **OK**.

4. Save your changes, and exit the page editor.

Working with Profile Task Flows

For information about how users work with Profile task flows, see Managing Your Profile in *Using Portals in Oracle WebCenter Portal*.

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Adding RSS Feeds to a Portal

Add RSS (Really Simple Syndication) feeds to a portal to allow portal members to view news feeds in RSS 2.0 and Atom 1.0 formats, or in an RSS Viewer.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permissions `Manage Security and Configuration` or `Manage Configuration`.
>
> At a minimum, you must have the following permissions:
>
> • `Edit Pages` (to add the RSS task flow to a page)
>
> • `Edit Task Flows` (to edit the feed location).
>
> For more information about portal-level permissions, see About Roles and Permissions for a Portal.

Topics:

- Prerequisites for RSS News Feeds
- About RSS News Feeds
- Adding an RSS Task Flow to a Page
- Working with RSS Task Flow Properties
- Working with RSS Task Flows

Prerequisites for RSS News Feeds

For RSS to work, the system administrator must perform the following task for WebCenter Portal:

- For external RSS feeds, set up a proxy server. For more information, see Managing RSS in *Administering Oracle WebCenter Portal*.

For RSS to work in a portal, the portal manager or anyone with `Manage Security and Configuration` or `Manage Configuration` permission must perform the following tasks at the portal level:

- Enable the **Publish RSS** option for a portal, as described in Enabling or Disabling RSS News Feeds for a Portal.

- Add the RSS task flow to a page in the portal, as described in Adding an RSS Task Flow to a Page.

- Edit the feed location, as described in Editing the Feed Location of an RSS Task Flow.

> **Note:**
>
> For information about the RSS feature and how to view and obtain RSS news feeds, see Working with RSS Task Flows.

About RSS News Feeds

RSS exposes its features in the following ways:

- The RSS icon on a task flow—enables you to publish content from WebCenter Portal tools as a news feed. See About RSS and Obtaining Tool News Feeds in *Using Portals in Oracle WebCenter Portal*.

- A dedicated RSS Manager page (WebCenter Portal only)—displays a list of published feeds from all accessible portals for viewing in either RSS 2.0 or Atom 1.0 news readers. See RSS Manager in *Using Portals in Oracle WebCenter Portal*.

- The RSS task flow—adds an RSS viewer to the page for displaying feeds from external sources and WebCenter Portal tools. See RSS Task Flow and Obtaining Tool News Feeds in *Using Portals in Oracle WebCenter Portal*.

> **Note:**
>
> RSS does not support non-ASCII user names and passwords if the character encoding of the browser-based basic authentication is different from the character encoding of the system on which WebCenter Portal is deployed. On a Linux system, the character encoding is generally different, and therefore RSS does not support non-ASCII credentials.
>
> If the character encoding is same, users can use corresponding non-ASCII credentials. For example, for the WebCenter Portal instance installed on French Windows Server 2003, users can use a French user name on the French Windows to pass the basic authentication using Internet Explorer.

RSS Task Flow

Use the RSS task flow to add a news feed from an external site to your portal (Figure 54-1).

Figure 54-1   RSS Task Flow of Oracle Press Release Feed
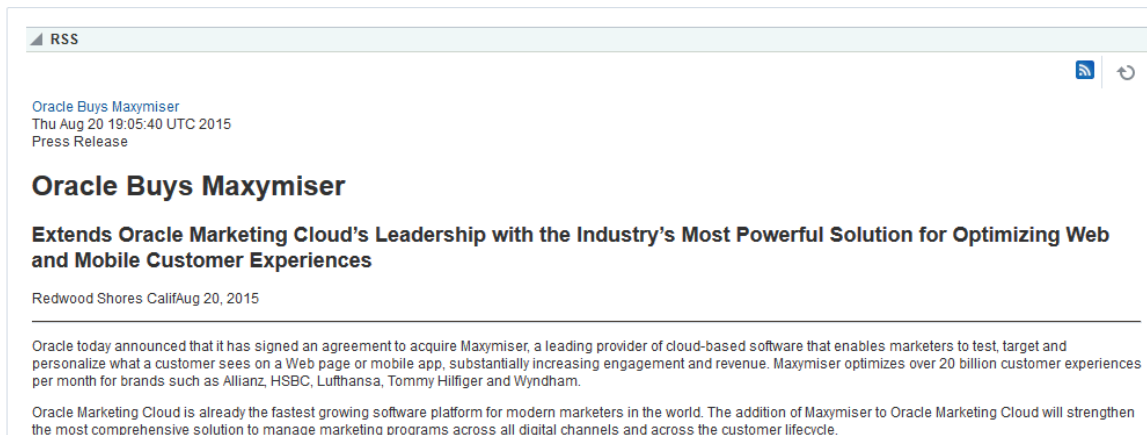
You can add the RSS task flow to a page (see Adding an RSS Task Flow to a Page) and configure it to display content from any external RSS feed. Additionally, the RSS task flow supports login credential passing, by using an external application.

> **See Also:**
>
> For information about specifying a feed for the RSS task flow, see Editing the Feed Location of an RSS Task Flow.

The RSS task flow can render news feeds outside of a corporate firewall. However, to consume external news feeds outside of the firewall, your system administrator must configure proxies for RSS. For more information, see Managing RSS in *Administering Oracle WebCenter Portal*. Contact your system administrator if you cannot consume external feeds, but want to do so. To contact the administrator, click the **Administrator** link at the bottom of WebCenter Portal.

Accessing External Applications

Every time you access a secure news feed item, you must log on to that secure application to view content. You can either supply login credentials each time you access an application, or let an external application store and manage your login credentials. After your credentials for a particular application are stored, you are logged in to that application automatically when you log in to WebCenter Portal. You can provide this capability for all frequently used external applications.

If the secured application you want to access is not registered as an external application, perform the steps in Providing Login Information for External Applications in *Using Portals in Oracle WebCenter Portal*.

Adding an RSS Task Flow to a Page

You can incorporate news feeds from external sources into your application pages by using the RSS task flow. You can add the RSS task flow from the resource catalog in the page

editor. The RSS task flow includes an RSS viewer, which you can use to view content from external news feeds within your portal page.

Each instance of the RSS viewer displays news feeds from one source. If you plan to display multiple external news feeds on a particular page, you can place multiple RSS task flows on that page.

To display content from an external RSS feed, proxies must be configured in your application. Contact your system administrator if you have problems accessing external RSS feeds in your task flow.

WebCenter Portal provide the ability to store and manage your login credentials by using external applications. After your credentials for a particular application are stored, you are logged in to that application automatically when you log on to your application. So, if an external RSS news feed or WebCenter Portal tools feed requires your login credentials, when you get to the step where you specify the feed URL, you may have to also specify the name of the external application that is configured to store your login credentials for reading a secure RSS feed.

For the steps to add an RSS task flow to a page, see Adding a Component to a Page.

> 💡 **Tip:**
>
> The presence or location of the RSS task flow in the resource catalog depends on how the resource catalog is configured. For example, in the default resource catalog, the RSS task flow is included under the **Alerts and Updates** folder.
>
> After adding the RSS task flow, you need to edit the task flow to specify the RSS feed location. For information, see Editing the Feed Location of an RSS Task Flow.

Working with RSS Task Flow Properties

The RSS task flow has associated properties, which users with sufficient privileges can access through the task flow's **View Actions** menu. For example, select **Parameters** to display the Parameters dialog (Figure 54-2).

Figure 54-2   RSS Task Flow Component Properties

The following sections provide information about properties of the RSS task flow and describe the task flow parameter:

- Setting RSS Task Flow Properties
- RSS Task Flow Parameters

Setting RSS Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 54-3), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 54-3   View Actions Menu on a RSS Task Flow
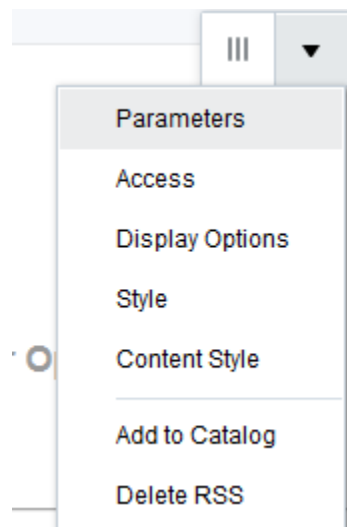
To set RSS task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

   - Parameters control the default task flow content. For descriptions of each parameter, see RSS Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

   - Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

- The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

3. Save your changes.

RSS Task Flow Parameters

Table 54-1 describes the parameters that are unique to the RSS task flow.

Table 54-1   RSS Task Flow Parameters

Parameter	Description
External Application ID	The name of the external application that is configured to store a user's login credentials for reading a secure RSS feed.
	If you are not sure whether there is an external application configured to store your credentials, contact your system administrator. To contact the administrator, click the **Administrator** link at the bottom of WebCenter Portal.
RSS Feed URL	The URL to access the RSS feed. For example, to use the Oracle Press Releases RSS feed, enter:
	`https://www.oracle.com/corporate/press/rss/rss-pr.xml`

Working with RSS Task Flows

As the portal manager, you can add or edit the feed location of an RSS task flow and also provide users an option to remove the task flow from a page.

This section includes the following topics:

- Editing the Feed Location of an RSS Task Flow
- Deleting the RSS Task Flow

> **Note:**
>
> For information about the RSS feature and how to view and obtain RSS news feeds, see Monitoring RSS Feeds in *Using Portals in Oracle WebCenter Portal*.

Editing the Feed Location of an RSS Task Flow
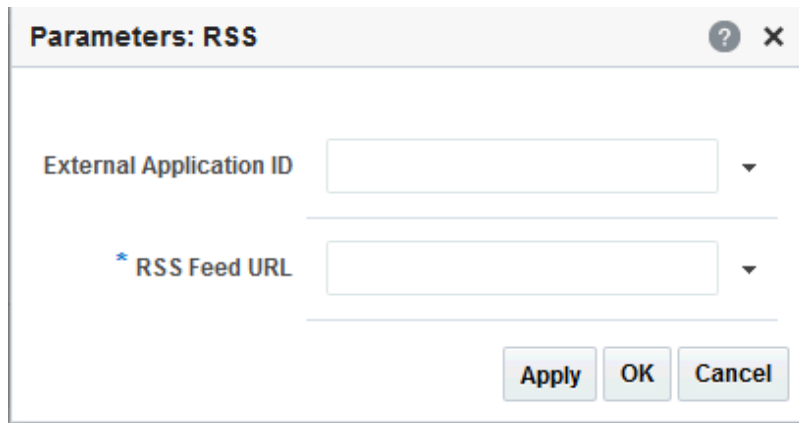
You can change the feed URL or the external application ID specified for an RSS task flow at any point of time.

To change the feed location of an RSS task flow:

1. Go to the web site that provides the RSS feed you want to view through the RSS viewer, and copy its RSS URL.

2. Open the page containing the RSS task flow in the page editor (see Opening a Page in the Page Editor).

3. In the RSS task flow toolbar, click the **View Actions** menu and select **Parameters** (Figure 54-3).

4. In the Parameters dialog, paste the URL that you copied in step 1 into the **RSS Feed URL** field (Figure 54-4).

Figure 54-4   Specifying the Feed Location in the RSS Task Flow

For information about the RSS task flow parameters, see Working with RSS Task Flow Properties.

5. If the feed you want to publish requires authentication, in the **External Application ID** field, specify the name of the external application configured to store your login credentials for accessing that feed.

See Accessing External Applications for information about external applications.

6. Click **Apply** to save your changes and continue editing, or click **OK** to save your changes and close the dialog.

Content from the external feed you specified is displayed within the RSS task flow.

7. Click **Save** at the top-right corner of the page editor to save your changes and remain in the page editor.

8. Optionally, click **View Portal** to exit the page editor.

Deleting the RSS Task Flow

From the Edit page mode, you can delete the RSS component from a page by using the **Remove** icon (Figure 54-5).

Figure 54-5   Remove Icon on an RSS Task Flow
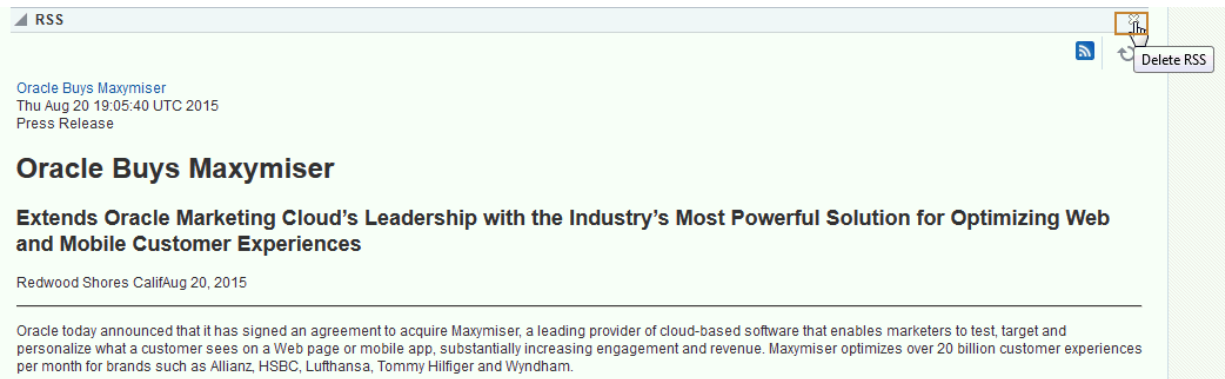
You can also allows users to remove the RSS component from a page by selecting the **Allow Remove** option from the Display Options dialog (Figure 54-6).

Figure 54-6   Exposing the Remove Option for an RSS View

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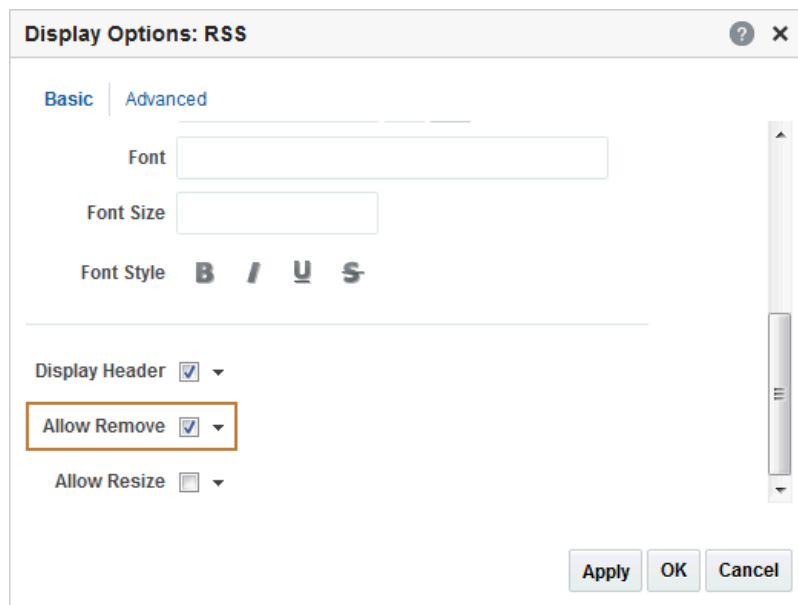
Configuring Elasticsearch in a Portal

WebCenter Portal uses Elasticsearch for searching in a portal. As a portal manager, you can tailor the search settings for a portal such as customizing the scope of the search, customizing the custom attributes or facets, and enabling saved search task flows on a portal page.

> ✏️ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permission `Basic Services: Edit Page Access and Structure` (simple permissions) or `Pages: Edit Pages` (advanced permissions).
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- About Searching in WebCenter Portal
- Understanding Search with Elasticsearch
- Customizing Search Using Elasticsearch
- Saving the Search Results

About Searching in WebCenter Portal

WebCenter Portal uses Elasticsearch for searching a portal. See Understanding Search with Elasticsearch.

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

Another type of search is used for finding users in the identity store (for example, by clicking the **Find User** icon in a Mail compose window.

Figure 55-1   Find User Icon in a Mail Compose Window

Understanding Search with Elasticsearch

Elasticsearch is a highly scalable search engine. It allows you to store, search, and analyze big volumes of data quickly and provides a distributed, multitenant-capable full-text search engine with an HTTP web interface and schema-free JSON documents.

Advantages of Elasticsearch

- Elasticsearch provides full-text search capabilities as it is built on Lucene.

- Elasticsearch is document-oriented. It stores data as structured JSON documents and indexes all fields by default, with a higher performance result.

- Elasticsearch is API driven; actions can be performed using a simple Restful API.

- Elasticsearch retrieves search results fast because it searches an index instead of searching the text directly.

You can configure Elasticsearch to search the following resources in WebCenter Portal:

- Documents, including wikis and blogs

- Portals, page metadata, page content (contents of HTML, Text and Styled Text components), lists, and people resources

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

Customizing Search Using Elasticsearch

Search settings for WebCenter Portal are configured by the system administrator in WebCenter Portal Administration. Portal managers have the option to configure the scope of the search to include search results for the Home portal only or all portals.

This section contains the following topics:

- Accessing Search Settings in Portal Administration
- Configuring the Result Types with Elasticsearch
- Configuring the Search Scope with Elasticsearch
- Configuring Facets with Elasticsearch
- Enriching Search Results Using Custom Attributes with Elasticsearch

Accessing Search Settings in Portal Administration

1. In the portal administration, click **Tools and Services** in the left navigation pane.

2. Click **Search**

   The **Search Settings** page opens.
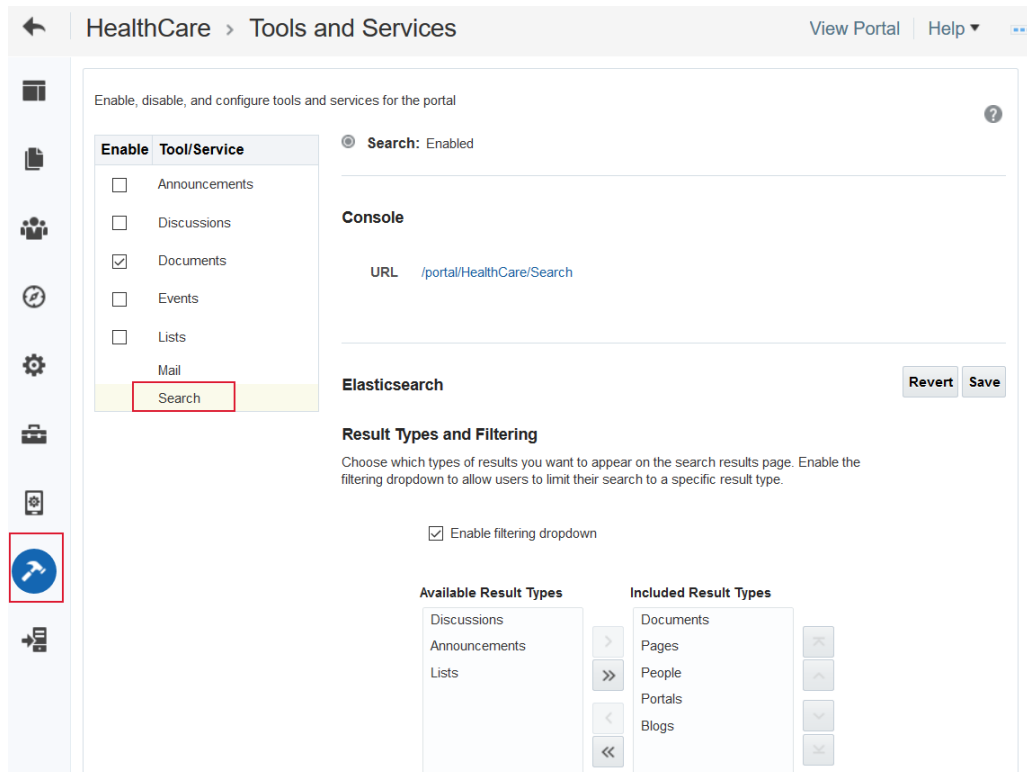
From the Search Settings page, you can configure the following:

- Configure the result type and enable filtering. See Configuring the Result Types with Elasticsearch

- Set the search scope. See Configuring the Search Scope with Elasticsearch

- Configure the facets for your search results. See Configuring Facets with Elasticsearch

- Configure the custom attributes for your search results. See Enriching Search Results Using Custom Attributes with Elasticsearch

Configuring the Result Types with Elasticsearch

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 set the result type and enable the filtering option:

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. In the **Result Types and Filtering** section, select **Enable filtering drop down** to enable filtering the search results based on selected services.

3. Select the desired WebCenter Portal services and move them between the **Available Result Types** and **Included Result Types** lists.

4. Click **Save**.

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**.

Configuring Facets with Elasticsearch

Faceted search allows you to find information by applying multiple filters, for example, search by author, portal, or last modified date. 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 custom facet 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. In the **Facet** section, select the desired facets and move them between the **Available Facets** and **Included Facets** lists.

   You can also change the order in which the facets display.

Facets

Facets in the "Included" section will appear in the search results. Use up and down arrows to specify desired order of the facets in the search results.

Available Facets

Author

Tags

Included Facets

Portal

Mimetype

Last Modified Date
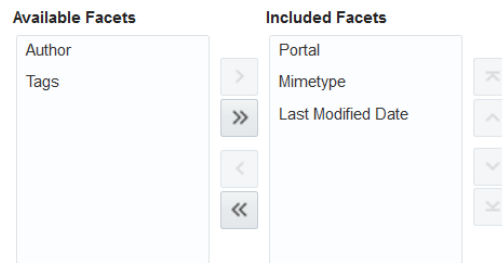
3. Click **Save**.

Enriching Search Results Using Custom Attributes with Elasticsearch

In the Custom Attributes section of the Search Settings page, you can select which custom search attributes should appear in search results and the order in which they appear.

To configure the custom attributes:

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. In the **Custom Attributes** section, select the desired custom attribute and move them between the **Available Attributes** and **Included Attributes** lists.

   You can also change the order in which the attributes display.

Custom Attributes

Custom Attributes in the "Included" section will appear in the search results. Use up and down arrows to specify desired order of the attributes in the search results.

Available Attributes

Account

Document Function

Document ID

Document Title

File Size

Document Profile

Modifier

Library GUID

Mimetype

Document Out Date

Parent GUID

Region Definition

Document Revision

Role Access List

Included Attributes

Author

Last Modified

Document Type

Original Name
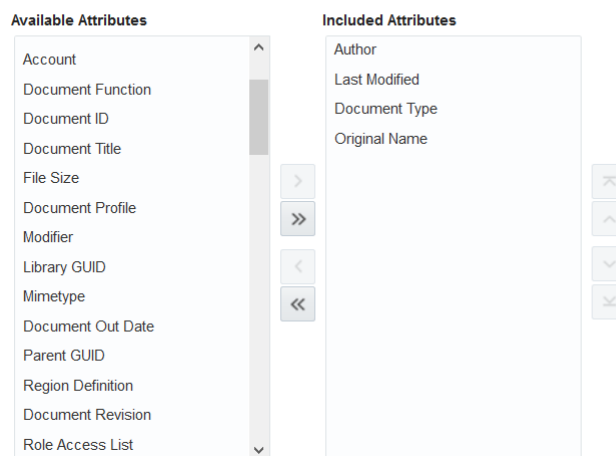
3. Click **Save**.

Saving the Search Results

Enable users to add and manage the saved searches on portal pages. Portal users can save the search results and manage the saved searches on a portal page.

WebCenter Portal supports the following saved search task flows:

- All Saved Searches: Use to view the available saved searches in a portal. In this task flow, portal users can view, and run the saved searches.
- Saved Searches: Every saved search that is available in the portal is stored in this folder as a task flow. You can enable the portal users to view the search results directly on a portal page.

Topics:

- Adding a Saved Search Task Flow to a Page
- **Working with Saved Search Task Flow Properties**
- Working with Saved Search Task Flows

Adding a Saved Search Task Flow to a Page

When you add a Saved Search task flow to a page, WebCenter Portal users can view, customize, and run the saved search on a portal page.

For the steps to add one or more Saved Search task flows to a page, see Adding a Component to a Page.
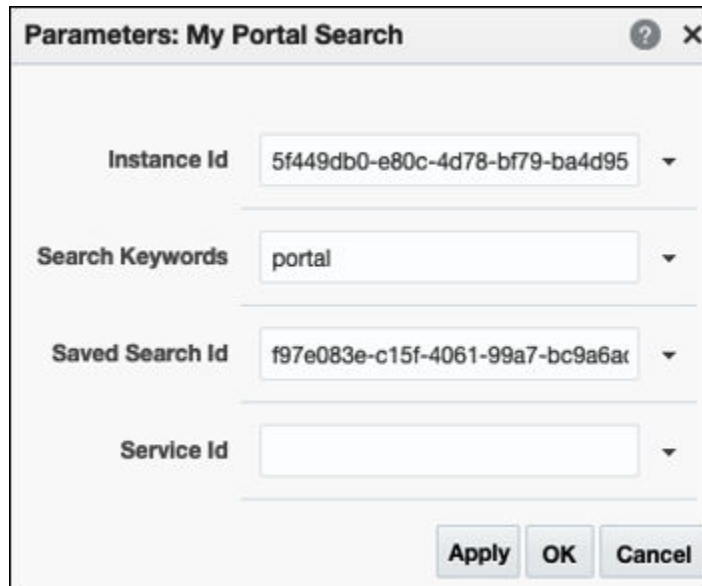
> **Note:**
>
> The presence or location of the Saved Search task flows in the resource catalog depends on how the resource catalog is configured. For example, in the default resource catalog, the Saved Search task flows are included under the **Tagging and Searching** folder.

Working with Saved Search Task Flow Properties

Saved Search task flows have associated properties, which users with sufficient privileges can access through the task flows' View Actions menu. For example, select **Parameters** to display the **Parameters** dialog.

> ✎ **See Also:**
>
> Setting Properties on a Component .

The following sections provide information about properties of Saved Search task flows and describe the task flow parameters:

- Setting Saved Search Task Flow Properties
- Saved Search Task Flow Parameters

Setting Saved Search Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu, which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

To set the Saved Search task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

   - Parameters control the default task flow content. For descriptions of each parameter, see Saved Search Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

   - Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

- The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

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.

> **Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Saved Search Task Flow Parameters

The following table describes the parameters that are unique to the Saved Searches task flow.

> **Note:**
>
> The All Saved Searches task flow does not have any unique properties, and therefore no parameters are shown in the Parameters dialog.

Table 55-1   Saved Searches Task Flow Parameters

Parameter	Description
Instance Id	The unique ID of the instance.
Search Keywords	The keywords or terms used to search.
Save Search Id	The unique ID of the saved search.
Service Id	The unique ID of the service.

Working with Saved Search Task Flows

For information about how users work with Saved Search task flows, see in Saving Your Search Results in *Using Portals in Oracle WebCenter Portal*.

56

Adding Tagging to a Portal

Enable users to add and manage tags on portal pages. Portal users can tag a page to improve search results.

> ✏ **Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permission `Basic Services: Edit Page Access and Structure` (simple permissions) or `Pages: Edit Pages` (advanced permissions).
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- About Tagging on Portal Pages
- Adding a Tags Icon to a Portal Page
- Adding a Tagging Task Flow to a Page
- Working with Tagging Task Flow Properties
- Working with Tagging Features and Task Flows

About Tagging on Portal Pages

For general information about tags and the Tag Center, see About Tags and About the Tag Center in *Using Portals in Oracle WebCenter Portal*.

On a portal page, tagging functionality includes a **Tags** icon and Tagging task flows:

- **Tags icon**. When you include a **Tags** icon (Figure 56-1) on a portal page, users with access to that page can click the icon to apply one or more tags to the page. See Adding a Tags Icon to a Portal Page.

    Figure 56-1   Tags Icon

- **Tagging task flows**. WebCenter Portal includes the following Tagging task flows (views), which you can add to a page to enable users to work with tags (see Adding a Tagging Task Flow to a Page):

Table 56-1   Tagging task flows (views)

Task Flows in Built-In Resource Catalogs	Equivalent Task Flows in Resource Registry (to add to a custom resource catalog)	Description
Tags	Tagging – Personal View	Displays tags created by the current user. A user can sort, filter, rename, and delete tags. Clicking a tag displays the Tag Center, where that tag is selected.
Tag Cloud	Tagging – Tag Cloud Tagging – Tag Selection	Displays the tags that have been created by all users. Clicking a tag displays that tag's resources in the Tag Cloud Related Resources task flow.
Tag Cloud Related Resources	Tags (or Tagging - Personal View) Similarly Tagged Items (or Tagging - Related Links)	Displays tagged items for a tag selected in the Tag Cloud task flow.
Similarly Tagged Items	Similarly Tagged Items (or Tagging - Related Links)	Displays other pages or documents that have at least one tag in common with the current page.
N/A	Tagging – Dialog	

Adding a Tags Icon to a Portal Page

The most typical (recommended) way to add a **Tags** icon to a portal page is to include a Tags component in the page template that is set for the portal (see Changing the Page Template for a Portal). All pages in the portal will then include a **Tags** icon. Alternatively, you can add a Tags component to an individual page. This section describes both methods:

- Adding a Tags Component to a Page Template
- Adding a Tags Component to an Individual Page

Adding a Tags Component to a Page Template

When you include a Tags component in the page template that is used to create pages in the portal, then all pages will include a **Tags** icon, until you change the page template for the portal to one that does not include Tags component.

To add a Tags component to a page template:

1. Create or edit a page template (see Creating a Page Template or Editing a Page Template).

2. In Structure View, add a Tags component to the page template (see Adding a Component in Structure View).

> ✎ **Note:**
>
> In the Default Page Template Catalog, the Tags component is available under **Portal Components**.

When you select this page template in the portal administration settings (see Changing the Page Template for a Portal), then all pages created in the portal will include a **Tags** icon.

Adding a Tags Component to an Individual Page

If you do not want all pages created in a portal to include a **Tags** icon, then instead of adding a Tags component to the page template used to create pages as described in Adding a Tags Component to a Page Template, you can add a Tags component to an individual page.

To add a Tags component to an individual page:

1. Open the page in the page editor (see Opening a Page in the Page Editor).

2. Add a Tags component to the page (see Adding a Component to a Page).

> **Note:**
>
> The presence or location of the Tags component in the resource catalog depends on how the resource catalog is configured. For example, this component is not available in the Default Portal Catalog provided with WebCenter Portal, so you will only see an entry for it if it has been added to the resource catalog that has been made available to the page.
>
> For information about creating a custom resource catalog, see Creating a Resource Catalog; to add the Tags component, see Adding a Resource to a Resource Catalog (in the Add Resource Catalog Item dialog, select **Portal Components**, then scroll to **Tags**). Once you have added the Tags component to a custom resource catalog, you need to make the resource catalog **Available**, then make it active for pages in the portal, as described in Changing the Resource Catalogs in a Portal.

Figure 56-2   Tags Icon
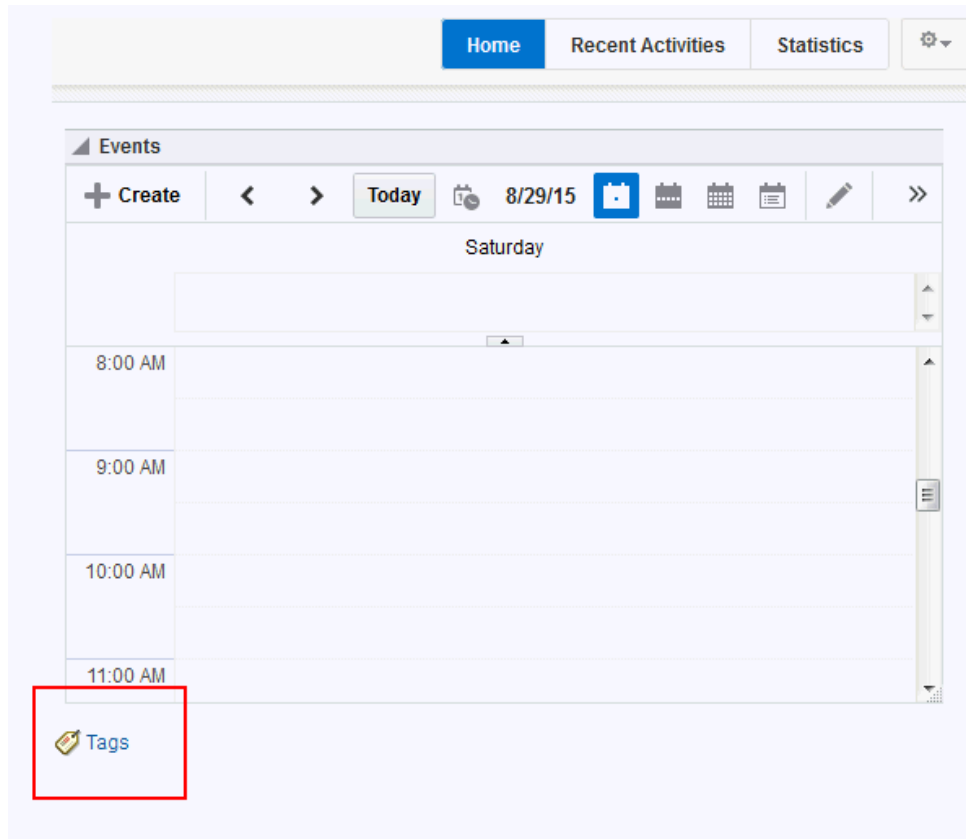
Adding a Tagging Task Flow to a Page

When you add a Tagging task flow to a page, WebCenter Portal users can work with the views provided by the task flows, as described in the following sections in *Using Portals in Oracle WebCenter Portal*:

- Working with Tags in the Tags View

- Working with the Tag Cloud and Tag Cloud Related Resources Views

- Working with the Similarly Tagged Items View

For the steps to add one or more Tagging task flows to a page, see Adding a Component to a Page.

> **Tip:**
>
> The presence or location of the Tagging task flows in the resource catalog depends on how the resource catalog is configured. For example, in the default resource catalog, the Tagging task flows are included under the **Tagging and Searching** folder.

Working with Tagging Task Flow Properties

Tagging task flows have associated properties, which users with sufficient privileges can access through the task flows' **View Actions** menu. For example, select **Parameters** to display the Parameters dialog (Figure 56-3).

Figure 56-3   Similarly Tagged Items Task Flow Properties
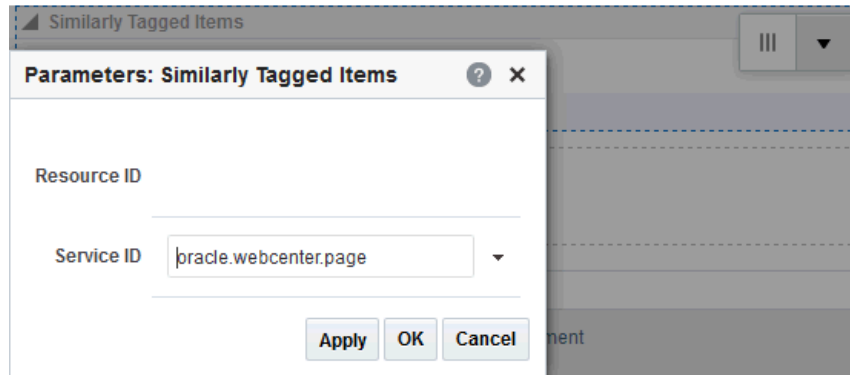
> ✏️ **See Also:**
>
> Setting Properties on a Component

The following sections provide information about properties of Tagging task flows and describe the task flow parameters:

- Setting Tagging Task Flow Properties
- Tagging Task Flow Parameters

Setting Tagging Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 56-4), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 56-4   View Actions Menu on a Tags Task Flow
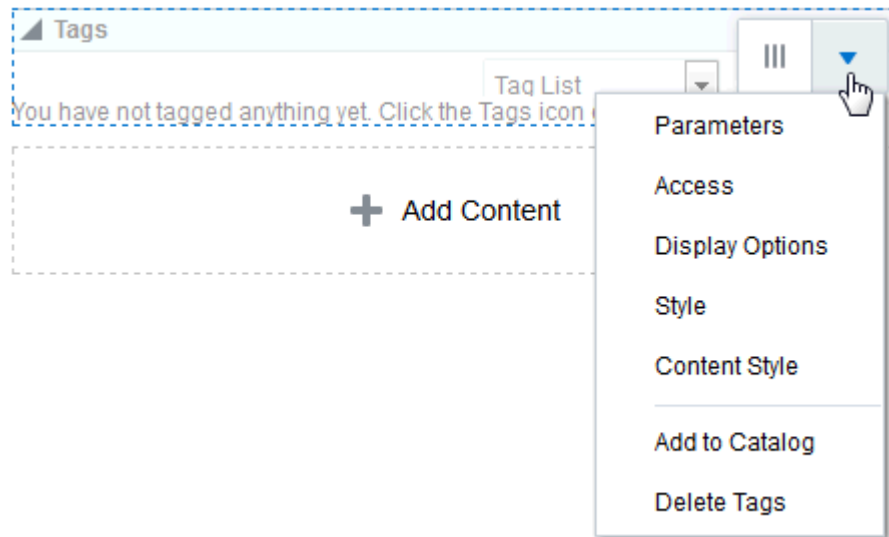
To set Tagging task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, then click the **View Actions** menu and select the properties you want to set:

    *   Parameters control the default task flow content. For descriptions of each parameter, see Tagging Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

    *   Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

    *   The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

    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.

> **Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Tagging Task Flow Parameters

Table 56-2 describes the parameters that are unique to the Tagging task flows.

Table 56-2   Tagging Task Flow Parameters

Parameter	Description	Task Flow
Resource ID	Unique ID of the item or resource within a given tool/service that is used to find similarly tagged items. This value is set automatically. Do not change this value unless you want to show items similar to a different resource.	Similarly Tagged Items (or Tagging - Related Links)
Service ID	This parameter has a different meaning for the Similarly Tagged Items task flow and the Tags task flow. • In Tagging - Related Links, it is a `resourceId/ serviceId` pair that describes what item the listed objects are similar to. This value is set automatically. Do not change this value unless you want to show items similar to a different resource belonging to a different tool/service. • In Tags, it limits the tags and tagged items to this tool/service; for example, `oracle.webcenter.page`.	Tags (or Tagging - Personal View) Similarly Tagged Items (or Tagging - Related Links)
Scope of Tags	Scope of tags. This value is set automatically. Do not change this value.	Tag Cloud (or Tagging - Tag Selection) Tag Cloud Related Resources (or Tagging - Tagged Items)
Redirect URL	Redirection URL for anonymous page login. This must include the `/faces` prefix; for example, `/ faces#{facesContext.viewRoot.viewId}` If null or empty, then no login is displayed.	Tagging - Dialog

> **Note:**
>
> You should not change tags task flow properties unless you want to show items from a different resource or different tool or service.

Working with Tagging Features and Task Flows

For information about how users work with tags they add and the Tagging task flows (views), see Working with Tags in *Using Portals in Oracle WebCenter Portal*.

Part VIII

Managing Shared Resources for All Portals

This part of *Building Portals with Oracle WebCenter Portal* provides information about working with the resources administered by the application specialist that are made available to all portals.

- Managing All Portal Templates
- Working with Shared Assets

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Managing All Portal Templates

With permission to manage all portal templates, you can modify and publish the templates created by others, and import or export templates.

> ✎ **Permissions:**
>
> To perform the tasks in this chapter, you must have 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 this permission can manage *all* portal templates in WebCenter Portal on the **Portal Templates** page in WebCenter Portal administration. Create, rename, set access to, delete, publish, hide, and import or export portal templates.
>
> With the default permissions of the `Authenticated-User` role, or the application-level `Portal Templates: Create Portal Templates` permission, users 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. See Working with Portal Templates.

Topics:

- About Managing Portal Templates
- Viewing All Portal Templates
- Creating a New Portal Template
- Importing and Exporting Portal Templates
- Viewing Information About a Portal Template
- Searching for a Portal Template
- Renaming a Portal Template
- Setting Up Access to a Portal Template
- Publishing or Hiding a Portal Template
- Deleting a Portal Template

About Managing Portal Templates

When creating a portal, users can base it on the built-in portal template, their own custom portal template, or a published portal template created by others. Portal templates provide a consistent look and feel and an efficient way to get started creating a portal that is configured as required by an organization. For more information, see About Portal Templates.

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.

Viewing All Portal Templates

On the **Portal Templates** page in WebCenter Portal administration, you can quickly see who created each portal template, and the date on which it was created.

To see a list of every portal template in WebCenter Portal, together with their description, creator, and other useful information:

1. From the **Portals** menu, select **Administration**.

2. Click the **Portal Templates** tab.

Figure 57-1   Portal Templates Page in WebCenter Portal Administration

Creating a New 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. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

   • In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

   • From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. 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.

Figure 57-2   Create a Portal Template Dialog: Setup Step

3. 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`.

4. 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.

5. 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**.

Figure 57-3   Create a Portal Template Dialog: Portals Step

6. In the **Content** step, select the services that contain data that you want the portal template to inherit from the parent portal.

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> **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).

Figure 57-4   Create a Portal Template Dialog: Content Step
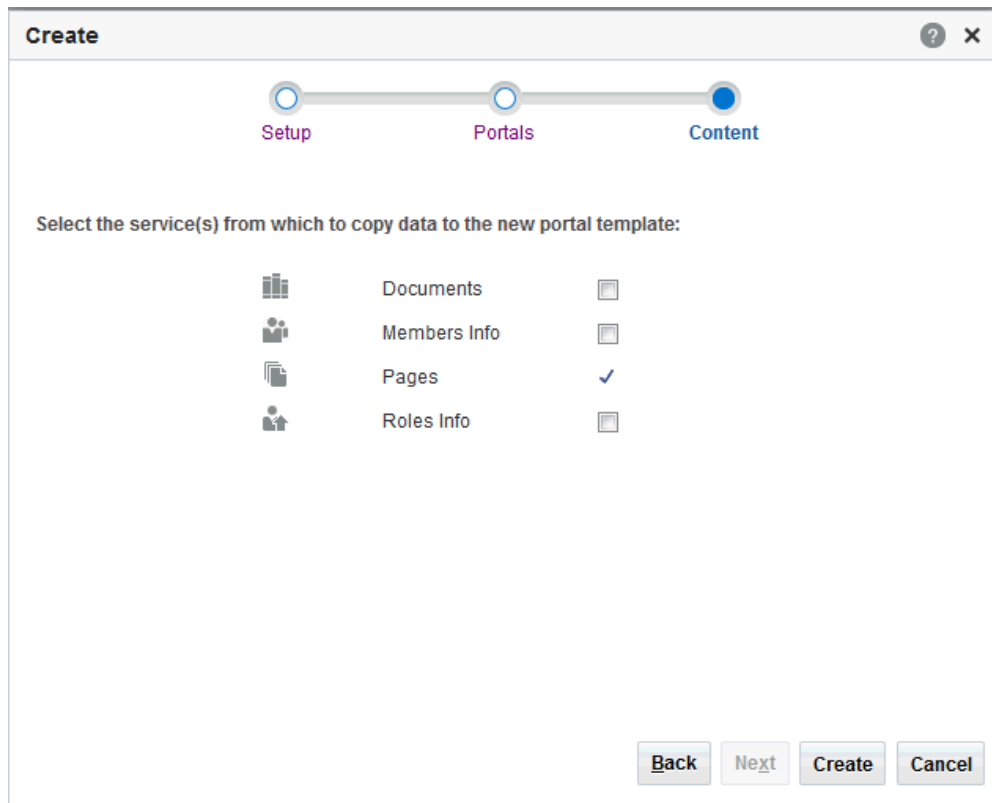
7. Click **Create**.

   • 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.

Importing and Exporting Portal Templates

This section describes how to import and export portal templates:

• Importing Portal Templates

• Exporting Portal Templates

System administrators can also import and export portals and portal templates using WLST commands. To find out more about these WLST commands and how to migrate the back-end data associated with portals, see Deploying Portals, Templates, Assets, and Extensions in *Administering Oracle WebCenter Portal*.

Importing Portal Templates

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.

See Publishing or Hiding a Portal Template.

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.
>
> An option to exclude the content folder is available using the `importWebCenterPortals` WLST command, described in Importing Portal Templates from an Archive Using WLST in *Administering Oracle WebCenter Portal*.

To import one or more portal templates from a `.par` file:

1. On the application-level **Portal Templates** page, click **Import** in the toolbar.

   The Import Portal Templates pane opens.

Figure 57-5   Importing Portal Templates
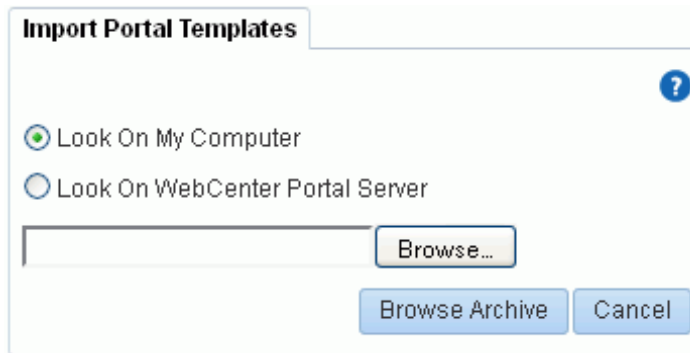
2. Specify the location of your portal template archive (`.par` file):

   • **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.

3. Click **Browse Archive** to review the content available for import.

Figure 57-6   Importing Portal Templates
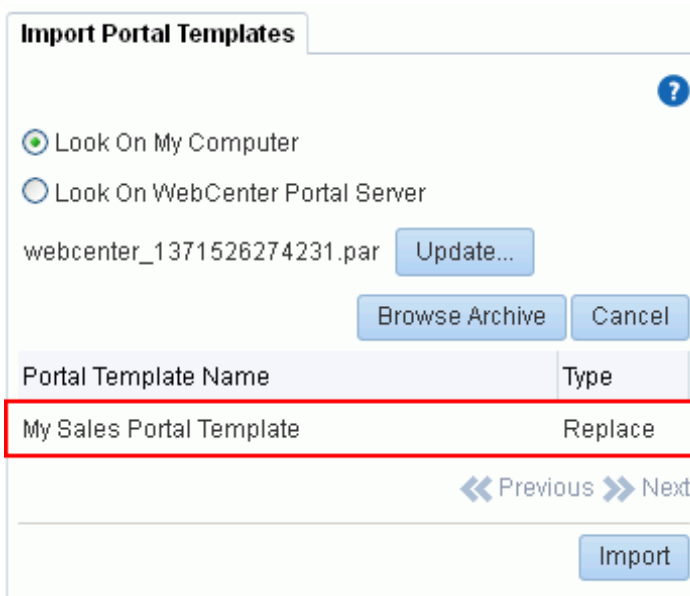
The names of all the WebCenter Portal templates in the specified archive display in the table. The **Type** column indicates when there is a conflict between the portal templates in the archive and those which exist on the target:

   • **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.

4. Click **Import**.

5. 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.

6. Monitor progress in the Import Portal Templates dialog. When the import is complete, click **Close**.

Figure 57-7   Import Portal Templates Progress
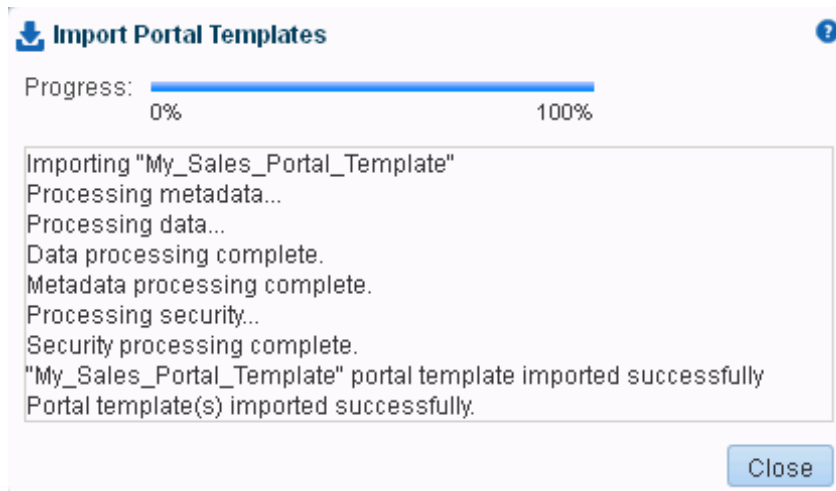
7. To publish the portal template to make it available to all WebCenter Portal users, select the template name, click the **Actions** menu, and select **Make Public**.

   The template is published and displays on the **Portal Templates** page in the Home portal for all users.

Exporting Portal Templates

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. On the application-level **Portal Templates** page, select the portal template to export by highlighting the row in the table.

   Ctrl+click rows to select more than one template.

2. Click **Export** in the toolbar.

   The Export Portal Template pane opens. All the portal templates that you select are listed.

Figure 57-8   Exporting Portal Templates
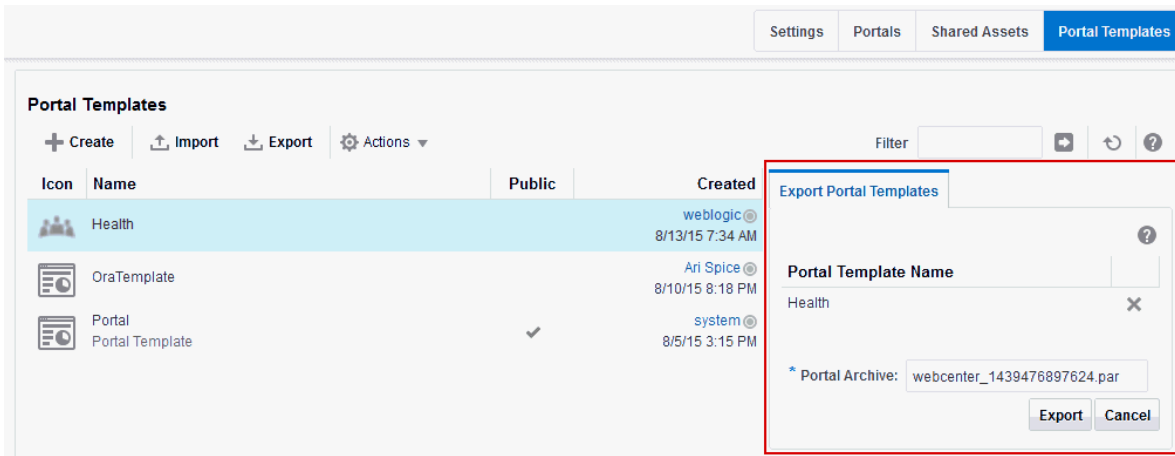
3. If you want to exclude a portal template, click its **Delete** icon.

4. 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`

5. 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
>     ```

6. Monitor progress in the Export Portal Templates dialog.

Figure 57-9   Export Portal Templates Progress
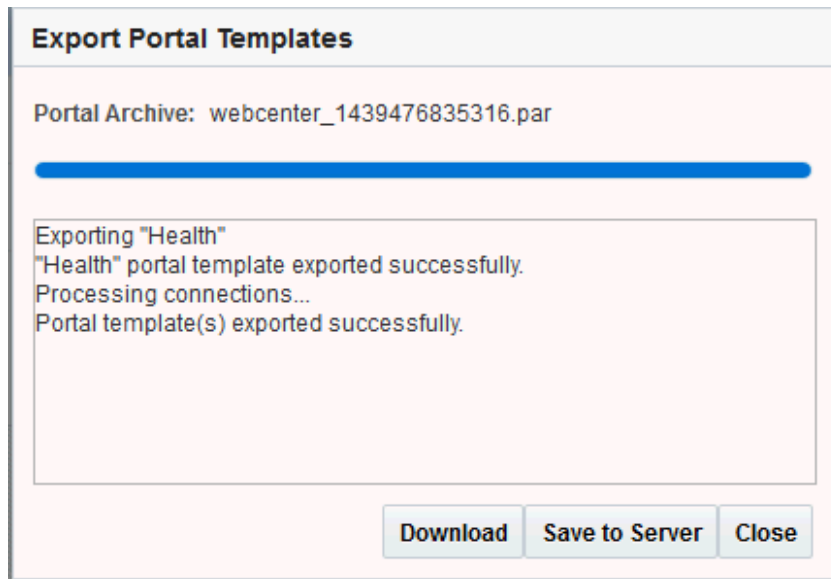
7. When the export process is complete, specify a location for the export archive (`.par`). Select one of:

   • **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**.

8. Click **Close**.

The export archive (`.par`) is saved to the specified location.

Viewing Information About a Portal 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. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

   • In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

   • From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. 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.

Figure 57-10   About Portal Template Dialog

3. 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 an out-of-the-box portal 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, as described in Renaming a Portal Template.

- **Created By**: User name of the portal template creator.

- **Date Created**: Date and time that the portal template was created.

Searching for a Portal Template

Global search does not search portal assets, such as portal templates, page templates, resource catalogs, and so on. The **Filter** field on the **Portal Templates** page is useful for searching for portal template names or descriptions when your application includes a large number of portal templates.

> **Note:**
>
> The `Portal Creator` role does not have default permissions to view or search for portal templates.

To search for a portal template by a string in the **Name** or **Description**:
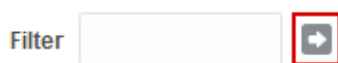
1. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

   - In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

   - From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. In the **Filter** field, enter a search string and click the **Filter** icon.

Figure 57-11   Filter Icon

The **Portal Templates** page displays portal templates where the search string is found in the **Name** or **Description**.

3. To clear the current search string and display all portal templates, click the **Clear Filter** icon.

Figure 57-12   Clear Filter Icon

Renaming a Portal Template

To rename a portal template:

1. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

   - In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

   - From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. Click in the row of the portal template.

3. From the **Actions** menu, select **Rename Portal Template Display Name** to open the Rename Portal Template Display Name dialog.

4. In the **Display Name** field, enter a new name for the portal template.

5. Optionally, enter a **Description**.
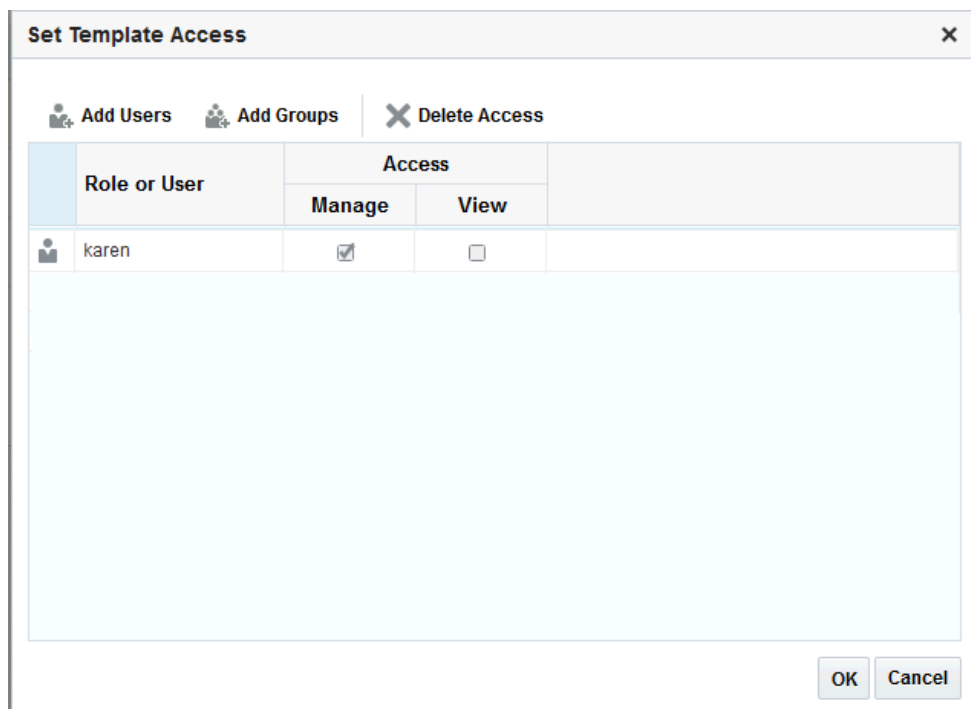
6. Click **OK**.

Setting Up Access to a Portal 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. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

    - In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

    - From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. Click in the row of the portal template.

3. From the **Actions** menu, select **Set Template Access** to open the .Set Template Access dialog

   Figure 57-13   Set Template Access Dialog

4. In the Set Template Access dialog:

    - Click **Add Users** to open the Search Users dialog where you can select from a list of users or search for a user name.

    - Click **Add Groups** to open the Search Groups dialog where you can search for a user group.

   For tips on searching for a user or group in the identity store, see Searching for a User or Group in the Identity Store.

5. 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.

6. Click **OK**.

Publishing or Hiding a Portal 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. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

- In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

- From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. Click in the row of the portal template to publish or hide.

3. 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.

4. 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.

Deleting a Portal 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. Go to the **Portal Templates** page in either the Home portal or WebCenter Portal administration:

    • In the Home portal, click the **Portal Templates** tab. If this tab is not showing, click the **Actions** icon and select **Personalize Pages**, where you can select **Show Page**.

    • From the **Portals** menu, select **Administration**, then click the **Portal Templates** tab.

2. Click in the row of the portal template.

3. From the **Actions** menu, select **Delete Portal Template**.

4. In the confirmation prompt, click **Delete**.

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Working with Shared Assets

Shared assets are available to use across all portals.

For information about assets available to individual portals, see Creating, Editing, and Managing Portal Assets.

> ✏ **Permissions:**
>
> To perform the tasks in this chapter, you must have the default permissions of the `Application Specialist` role, or have the application-level permission `Create, Edit, and Delete` on the asset type with which you want to work.
>
> For information about application-level permissions, see About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.

Topics:

• About Shared Assets

• Accessing Shared Assets

• Creating Shared Assets

• Editing Shared Assets

• Managing Shared Assets

• Setting the Availability of a Shared Asset

• Working with Shared Assets in JDeveloper

About Shared Assets

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

For more information about the different assets available in WebCenter Portal, see About Assets.

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.

Figure 58-1   The Shared Icon

This chapter focuses on tasks specific to shared assets. For information about tasks that apply to both types of assets, and for tasks specific to portal assets, see Creating, Editing, and Managing Portal Assets.

Accessing Shared Assets

You access shared assets using the **Shared Assets** page, which lists all the assets available for use across all portals (Figure 58-2).

Figure 58-2   Shared Assets Page

To access shared assets:

1. From the **Portals** menu, select **Administration**.

   For more information, see Accessing Portal Administration.

2. Click the **Shared Assets** tab to display the **Shared Assets** page (Figure 58-2).

   You can also enter the following URL in your browser to navigate directly to the **Shared Assets** page:

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

   > **See Also:**
   >
   > WebCenter Portal Pretty URLs

Creating Shared Assets

You can create some assets from scratch, and there are some assets that you can create only by making a copy of an existing asset. For example, you can create a navigation model 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 you cannot create in the **Shared Assets** page at all. To create these assets you must use a development tool, such as Oracle JDeveloper.

Creating shared assets follows the same procedure as creating portal assets. For more information, see Creating Assets.

Editing Shared Assets

The **Shared Assets** page enables you to edit shared assets. It provides two options for editing assets:

• **Edit**—Provides a means of editing an asset either with the page editor or in an Edit dialog.

• **Edit Source**—Enables you to work with the source code of an asset.

  You may want to edit an asset's source file to make advanced edits to its code without having to download the file, edit it in JDeveloper, and upload it back into the WebCenter Portal. You can even use the **Edit Source** option to create an asset from scratch; by creating the asset and then replacing its default source code with your own original code. Note, however, that, due to the heavy hand-coding requirement, this scenario is not recommended.

You cannot edit built-in shared assets. If you want to modify a built-in asset, you must first create a copy of the asset and then edit the copy according to your requirements.

WebCenter Portal supports round-trip development of assets. To get enhanced functionality for your assets, you can download the asset, edit it in JDeveloper, and then upload it back into your portal. For more information, see Working with Portal Assets in JDeveloper.

Editing shared assets follows the same procedure as editing portal assets. For more information, see Editing Assets.

Managing Shared Assets

In addition to creating and editing shared assets, there are other operations that you can perform on assets in the **Shared Assets** page.

Mostly, managing shared assets follows the same procedure as managing portal assets. For more information, see Managing Assets.

By default, when you create and publish a shared asset, that asset is available to all portals in WebCenter Portal. However, when you edit the properties of a shared asset, you can choose to exclude the asset from specified portals. For more information, see Setting the Availability of a Shared Asset.

Setting the Availability of a Shared Asset

When a shared asset is marked as available, by default it becomes available to all portals and the Home portal. However, you can control whether a custom shared asset is available in the Home portal and all portals, or only in selected portals, through its properties. Note that you cannot edit the properties of a built-in shared asset,

You can set availability of assets only at the application level through the **Shared Assets** page. Portal assets by definition are available only to the portal in which they are created.

To set the availability of a shared asset:

1. Navigate to the **Shared Assets** page.

   For more information, see Accessing Shared Assets.

2. Click the type of asset that you want to edit, such as**Page Templates**.

3. Select the custom asset that you want to edit.

4. From the **Actions** menu, select **Edit Properties**.

Figure 58-3   Exclude Asset Usage Section of Edit Properties Dialog
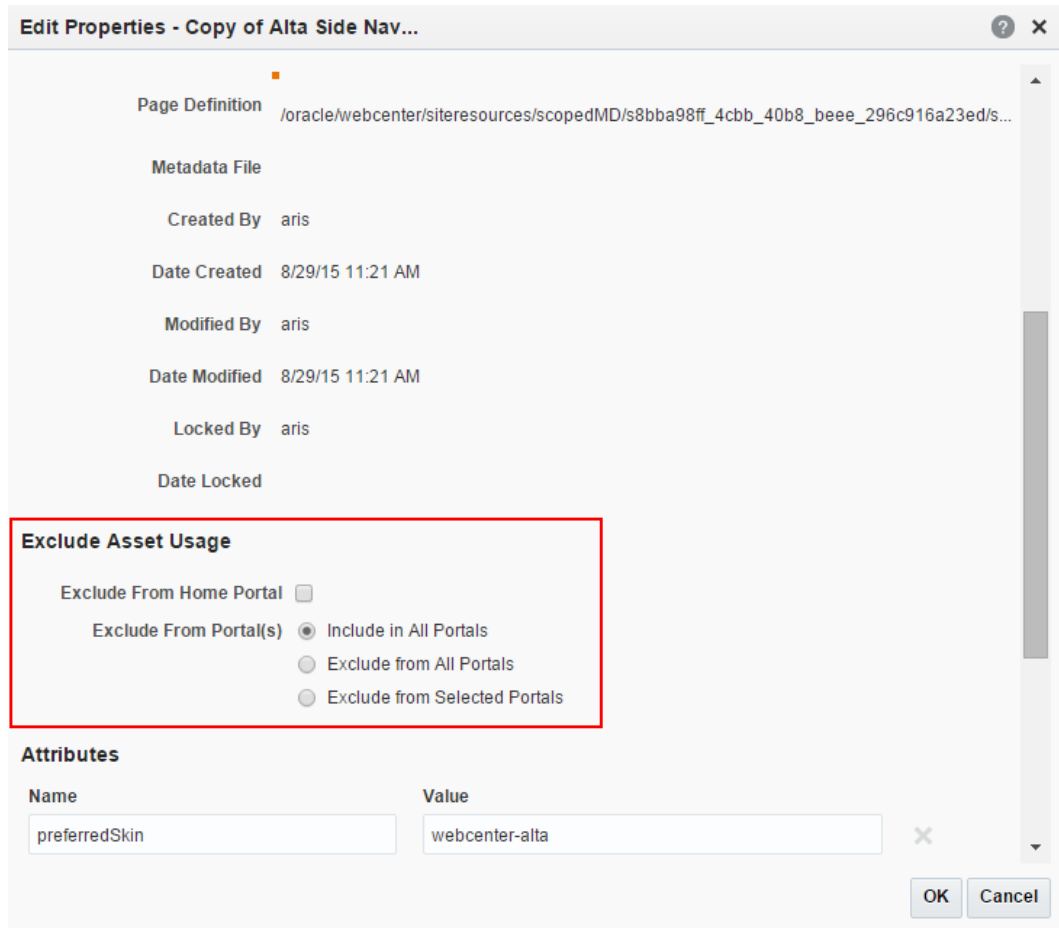
5. In the Edit Properties dialog, under the **Exclude Asset Usage** section:

    •   For the **Exclude From Home Portal** check box:

        –   Select to hide the asset on the **Assets** page of the Home portal

        –   Deselect to show the asset on the **Assets** page of the Home portal

    •   For **Exclude From Portal(s)**, select:

        –   **Include in All Portals** to make the asset available on the **Assets** page of all portals.

        –   **Exclude from All Portals** to exclude the asset from being listed on the **Assets** page of all portals.

        –   **Exclude from Selected Portals** to specify the portals on whose **Assets** page the asset will not be listed.

            When you select this option, an **Add/Choose** link appears. Click this link to display the Add Portal dialog where you can select the portals from which to exclude the asset. Click **OK** when you are done selecting portals.

            A list of the selected portals is displayed in the Edit Properties dialog.

6. Click **OK**.

Working with Shared Assets in JDeveloper

You may find that you want to edit your assets beyond the capabilities of the browser-based interface offered by WebCenter Portal. To this end, WebCenter Portal provides you with the ability to download shared assets and import them into an IDE, such as JDeveloper, for further enhancement. You can then upload these edited assets back into WebCenter Portal. This process is sometimes referred to as round-trip development.

For more information, see the "Working with WebCenter Portal Resources" section in *Developing for Oracle WebCenter Portal*.

> **Note:**
>
> In JDeveloper, assets are referred to as portal resources.

Mostly, working with shared assets inJDeveloper follows the same procedure as working with portal assets. For more information, see Working with Portal Assets in JDeveloper.

Part IX

Enhancing Portals Through Design and Language

This part of *Building Portals with Oracle WebCenter Portal* provides information about how to use the various features available in WebCenter Portal to create the look and feel for a portal and how to translate portals into other languages.

- Creating a Look and Feel for Portals
- Translating Portals into Other Languages

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Creating a Look and Feel for Portals

Work with page templates and skins to create the look and feel for a portal and learn to optimize the design for display on mobile devices.

> ✎ **Permissions:**
>
> This chapter is intended for web developers who want to utilize WebCenter Portal features to create a compelling look and feel to the portals in their organization.
>
> To work with the features that control the look and feel of portals, you must have the application-level `Create, Edit and Delete` permission on the appropriate assets. Users with the `Application Specialist` role automatically have these permissions. For more information about application-level permissions, see About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.

Topics:

- About Creating a Look and Feel
- Tips on Defining Skins
- About Optimizing Portals for Mobile Devices
- About Design Tools

About Creating a Look and Feel

One of the roles of a web developer is to create a compelling corporate look and feel that can be applied across all portals to provide a consistent, branded appearance for an organization's web presence.

There are several technologies involved with creating a look and feel:

- **HyperText Markup Language (HTML)** is the main language for displaying web pages and other information that can be displayed in a web browser.
- **Cascading Style Sheets (CSS)** provide a simple mechanism for ensuring a consistent look and feel or adding style, such as fonts, colors, and spacing, to web documents. CSS allows you to separate content from presentation, improving accessibility, and allowing you to easily render content for different situations (for example, for mobile phones or screen reader devices).
- **JavaScript** is a scripting language commonly implemented as part of a web browser in order to create enhanced user interfaces and dynamic web sites.
- **Oracle Application Development Framework (ADF)** provides a range of technologies aimed at making Java EE application development faster and simpler for developers while at the same time taking advantage of proven software patterns to ensure that the developed application is scalable, performant, and the like.

- **Expression Language (EL)** provides a shorthand way of working with web application data by providing operators for retrieving and manipulating application data residing in a Java EE web container.

WebCenter Portal provides the following features that utilize these technologies to control the look and feel of the application, individual portals, pages, components, and content:

- **Page Templates** define the structure and layout of pages. A page template typically includes a header on top of the page; a navigation structure at the top of the page or in a sidebar to link to important targets; a content area; and footer at the bottom of the page.

  For more information on page templates, see Working with Page Templates.

- **Navigation** provides links to access content in a portal or external resources. For example, a portal might include a series of tabs or menus along the top of each page, a tree structure or list of links on the side of each page, or a trail of breadcrumbs showing the path a user has taken to reach the current location in a portal.

  For more information on navigation, see Customizing Portal Navigation and Adding Navigation to a Page Template.

- **Skins** define colors, fonts, and other aspects to give individual portals or the entire WebCenter Portal application a distinct personality or to provide specific branding.

  For more information on skins, see Working with Skins.

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

  For more information on page styles, see Working with Page Styles.

- **Content Presenter Display Templates** define the style and layout for the selected content.

  For more information on Content Presenter display templates, see Working with Content Presenter Display Templates.

Tips on Defining Skins

When skinning WebCenter Portal, you can look at it from coarse-grain and fine-grain standpoint. At the coarse-grain level many large elements on the page, such as the background and the center of the page, can use very basic styling techniques to impart a look and feel to particular corporate brand with very little effort. At the fine-grain level you can apply the styling to specific components and controls within the page. The most efficient way to develop your skin is to start by defining the coarse-grain elements and then use fine-grain styling to tune your overall look and feel to be inline with your corporate brand.

In many cases a hybrid model of styling works very well. Taking the coarse-grained elements (page background, main portion of the body, and so on) and using traditional CSS approaches with those, but then getting specific using the ADF skinning, will work together to generate the overall appearance for WebCenter Portal.

Expression Language (EL) allows you to access the various objects for navigation within your template design. Looping in EL is simple and coding is done inline with the page template. You can mix regular HTML directly into the looping markup.

Static Assets

When using coarse-grained techniques in addition to ADF styling, it is often helpful to hold various styling assets outside of WebCenter Portal. To do this you can use Content Server to manage all of the unstructured assets for WebCenter Portal. They can include things like CSS and images that you want manage within your environment and provides revision control and workflow. This is a best practice if you want to allow design teams to access and work with WebCenter Portal without involving the development team for each and every change

About Optimizing Portals for Mobile Devices

Responsive Web Design allows web pages to flexibly adapt to different form factors. It has caught fire in the web world as one approach to delivering web content to desktop browsers, tablets, and smart phones.

These techniques enable you to rapidly go from HTML/CSS markup to a portal with similar look and feel. They also improve the experience of using a portal when viewed from mobile devices.

To make WebCenter Portal accessible via smart phones and tablets you can take several approaches:

- The simplest solution is to leverage your existing WebCenter Portal application with a browser-based option that requires no changes other than ensuring that WebCenter Portal renders within the native browsers of devices. However, this solution might not provide the best user experience.

- You can leverage your existing WebCenter Portal application by generating HTML based on device profiles, and configuring device-specific templates and pages. This solution might provide a slightly better user experience.

- For the best user experience, you can create native applications developed using ADF Mobile or native iOS or Android SDK. Although this provides the best user experience, it also requires more up-front development time and more support.

You can use adaptive programming techniques, designing applications to adjust to the available viewport.

When you design a portal, design for a tablet, then scale up the design for the desktop. You should create a separate design for smart phones. Achieve these designs through page templates.

The two most important things to do when designing for mobile devices are:

- Set the `viewport` meta tag, which causes mobile browsers to set a good initial zoom.

  Set the `viewport` parameter in the parameters section of your page template's page definition as follows:

  ```
  <parameter id="viewport" value="width=device-width, initial-scale=1.0"/>
  ```

  For information about how to edit the source code of a page template, see Editing the Source Code of an Asset.

  The value of the `viewport` parameter is used as the value for the `content` attribute of the `viewport` meta tag, so if you set it the recommended value of `"width=device-width, initial-scale=1.0"`, then the following meta tag is added to the page:

  ```
  <meta name="viewport" content="width-device, initial-scale=1.0"/>
  ```

- Set `max-width` on images, which causes images to fit nicely on mobile browsers.

  Add the following code to your CSS:

  ```
  img, object {
       max-width: 100%;
  }
  ```

ADF skins can work with portlets to achieve a common look and feel, but they insert a lot of styles into your HTML, so make sure to create a Reset skin and use the `-tr-inhibit` property.

Your Reset skin should look like the following:

```
body {
     color: inherit;
     font: inherit;
}
```
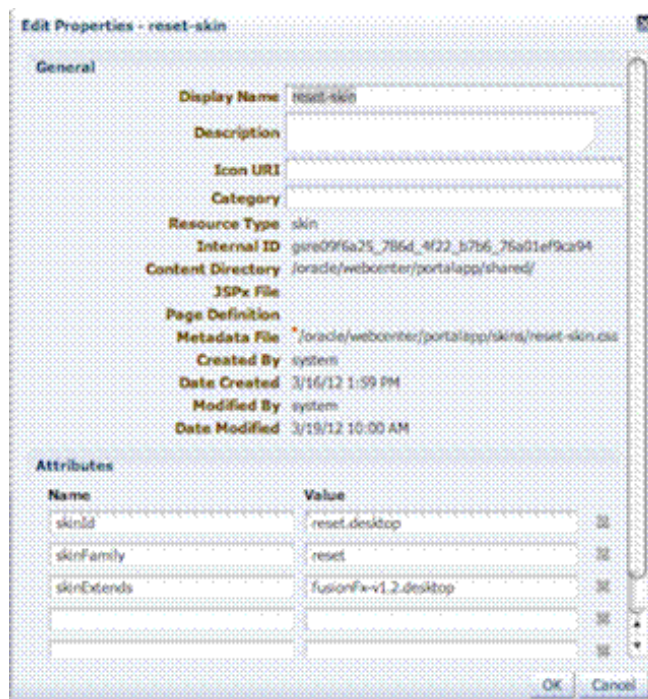
```
af|document {
    -tr-inhibit: all;
}
af|commandLink {
    -tr-inhibit: all;
}
af|goLink {
    -tr-inhibit: all;
}
af|inputText::content {
    font: inherit;
}
```

Set the Reset skin to inherit settings from V1.2 ADF skins as shown in Figure 59-1.

Figure 59-1   Reset Skin Inheritance Setting

CSS3 media queries allow you to write CSS rules specifically for certain situations, such as adapting to small screens or adjusting for orientation. Here is an example of a CSS3 media query:

```
@media only screen and (max-width: 480px) {
    #content {
        margin: 0;
    }

    #navbarright {
        display: none;
    }
}
```

ADF Rich Faces provides the following mobile support:

- Supports iPad

- DVT components render via HTML

- Touch gesture support

- Page size reduced by up to 20%

Although adaptive techniques allow web and tablet design to work, you need to refine your design for phones. Focus on specific smart phone use cases. Build a separate site and separate templates, then build in code to detect smart phones and redirect them to the appropriate design.

Here is an example of a simple JavaScript redirect that can be added to WebCenter Portal's `index.html`:

```
<script>
    car Browser = navigator.userAgent;

    if (Browser.indexOf('iPad') > 0)
    {
        location.replace('http://<host>/CustomerAccount/faces/pages_home');
    }
    else if (Browser.indexOf('iPhone') > 0)
    {
        location.replace('http://<host>/CustomerAccount/faces/PhonePage.jspx');
    }
    else {
        location.replace('http://<host>/CustomerAccount/faces/pages_home');
    }
</script>
```

Here is an example of a manual redirect within the application that displays a message providing a link to the mobile version of WebCenter Portal's welcome page:

```
#{requestContext.agent.platformName=='windows' ? '' :
'Click <A HREF="http://<host>/myApp/faces/PhoneWelcome.jspx">here</A> to view
the mobile site.' }
```

Here is an example of a redirect within the application that automatically redirects a mobile device to the mobile version of WebCenter Portal:

```
#{requestContext.agent.platformName=='windows' ? '' :
'<META HTTP-EQUIV="Refresh" CONTENT="0; URL=http://<host>/myApp/faces/
PhoneWelcome.jspx">' }
```

> **See Also:**
>
> For information about how to create alternative pages designed for display on mobile devices, see Creating a Page Variant for a Device Group.

About Design Tools

Using visualization and inspection features in Google Chrome and Firefox, you are able to work very quickly through the CSS needed to style your work. In addition, CSS3 is very powerful for providing visualizations that previously required images to achieve. For example, you can use a CSS3 generator to expedite designs such as

drop shadows and gradients. Finally, using a tool like JQuery you can manipulate the Document Object Model to achieve any change using client-side technology.

Figure 59-2 shows an example of inspection within Google Chrome. As you hover over the **Login** link in the upper right-hand corner, you can get a good sense of which styles are being applied to this particular element of the page. This makes it easy to go back and adjust your skin for a particular component. This is an example of fine-grained skinning.

Figure 59-2   Google Chrome Inspection

60
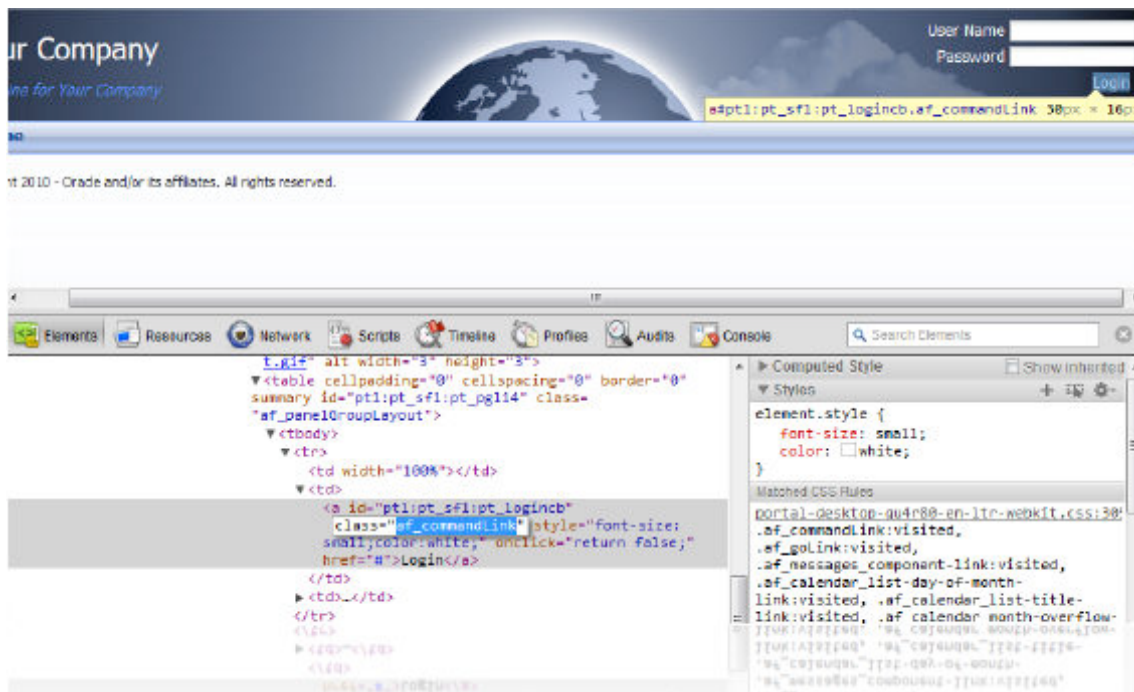
Translating Portals into Other Languages

Translate portals to allow WebCenter Portal users to view portals in their home language at the application, portal, and user levels.

> **✎ Permissions:**
>
> To perform the tasks in this chapter, you must be a portal manager or a portal member with the portal-level permission `Basic Services: Edit Page Access, Structure, and Content` (standard permissions) or `Pages: Edit Pages` (advanced permissions). Users with this permission can create and edit pages, revise page properties, add page content, and delete pages from a portal.
>
> For more information about permissions, see About Roles and Permissions for a Portal.

Topics:

- About Languages in WebCenter Portal
- Configuring Language Options
- Enabling Users to Choose a Language
- Editing Strings or UI Text for a Particular Portal
- Translating Content

About Languages in WebCenter Portal

If your portal will be viewed by users in more than one country, you can configure it to display localized content based on the user's selected language and locale. For example, if you know your page will be viewed in Italy, you can localize your page so that when Italian is selected (in browser, user preferences, portal, or application settings), text strings in the page will appear in Italian.

Additionally, locale selection applies special formatting considerations applicable to the selected locale. For example, those considerations may include whether information is typically viewed from left to right or right to left, how numbers are depicted (such as monetary information), and so on.

This section includes the following subsections:

- Handling Different Information Types For Translation
- Display Language Precedence
- Languages Supported Out-of-the-Box by WebCenter Portal
- Fallback Language Mechanism

Handling Different Information Types For Translation

Three main types of information are displayed in WebCenter Portal, each of which is handled differently for purposes of translation:
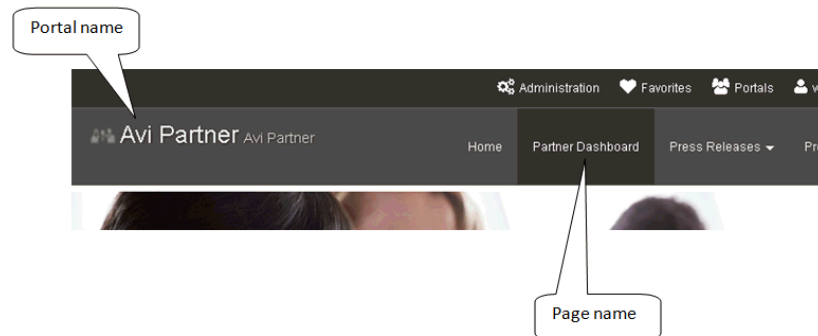
- User interface (UI) elements, like field and link labels and seeded boilerplate text, as shown in Figure 60-1.

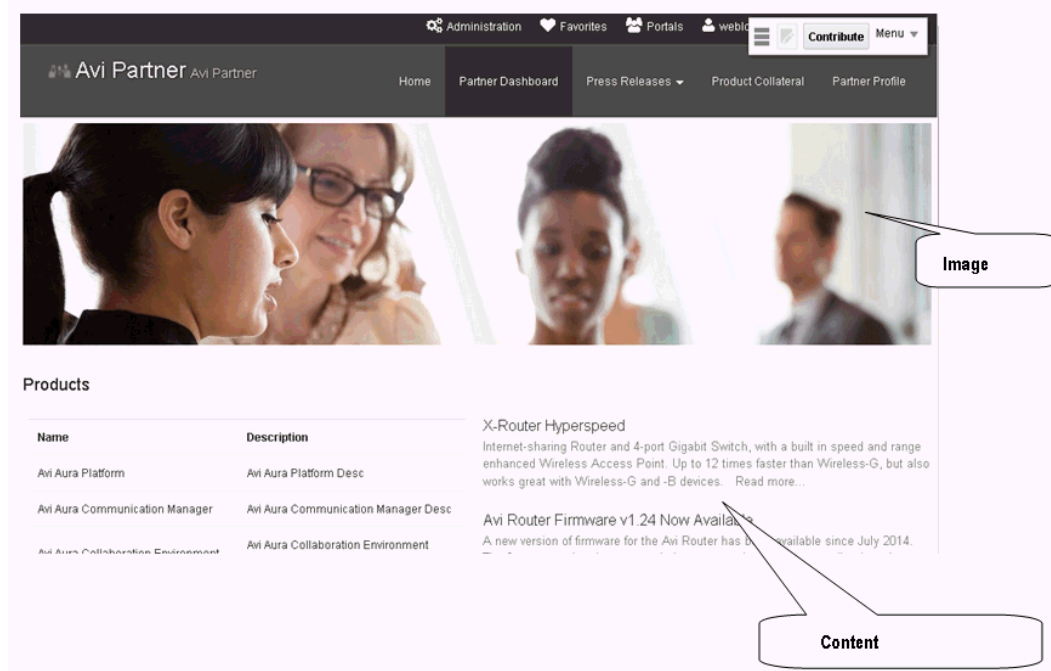**Figure 60-1   User Interface Elements Displayed in WebCenter Portal**
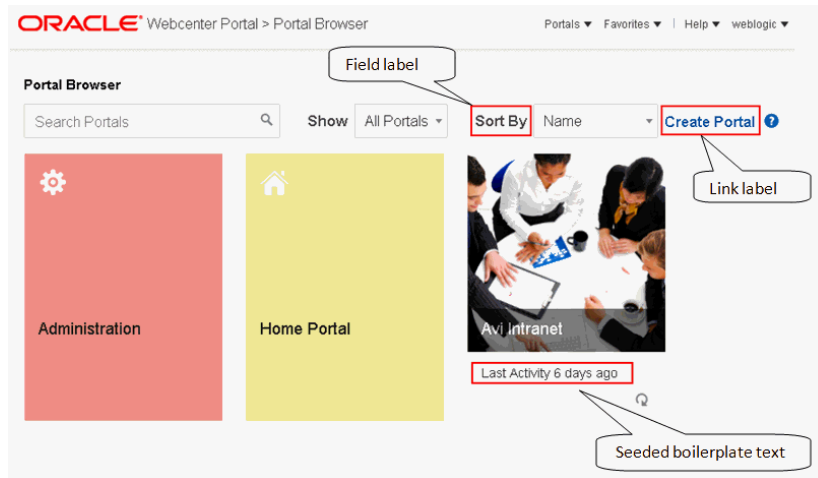
- User-entered metadata, such as portal and page names, as shown in Figure 60-2.

Figure 60-2   Metadata Entered by Users, Including Portal and Page Names

- Content added by users, including published text and images, documents.

Figure 60-3   User-added Content Including Messages

Each type of information is handled differently when it comes to translation:

- UI elements include out-of-the-box translations for 28 languages and 100 different locales. If the default UI text is not suited to your company's needs or if your company needs to support additional languages, your system administrator can edit the string files containing this text.

- User-entered metadata can be translated by your system administrator the same way that UI elements are translated, that is, by editing the string files.

- Content added in content publishing components can be translated, and your system administrator can display translated WebCenter Content items using Content Presenter.

Display Language Precedence

The display language controls the language in which translated information is rendered in your browser.

On the Internet, browser settings normally control the display language used for the various web sites a user visits. However, WebCenter Portal provides additional controls for language selection at the application, portal, and user levels. The order of precedence for WebCenter Portal display language settings from weakest to strongest is as follows:

- **Browser setting**—The language selected in the user's browser preferences. Browser documentation describes how to change this setting.

- **Application setting**—The application default language configured by the system administrator. For more information, see Choosing a Default Display Language in *Administering Oracle WebCenter Portal*.

- **Portal default language**—The language set by the portal manager for a given portal. For more information, see Setting a Portal Display Language. This setting is not considered while determining the display language for the Home portal.

- **User preference setting**—The language that the user selects through the personal Preferences settings. For more information, see Choosing Your Preferred Display Language in *Using Portals in Oracle WebCenter Portal*.

- **Change Language task flow**—The language that the user selects through the Change Language task flow.

- **Global language switcher (Public cookie)**—The session language a public user —that is, a user who is not logged on to WebCenter Portal—can select on your portal's **Welcome** page. A session language is retained for the life of the cookie. If the user clears the browser cookies, the session language is also cleared.

Based on the combination of all these settings, the display language is calculated for portals before login, after login, and after logout.

> **Note:**
>
> There are exceptions for the above precedence when the current scope (that is, the default portal language) has been set.

Languages Supported Out-of-the-Box by WebCenter Portal

WebCenter Portal provides runtime translations for 28 languages and 100 different locales.

Table 60-1 lists all 28 languages available to WebCenter Portal out-of-the-box. Users can also select locales associated with particular languages. For example, a user can change the language to Arabic and, within that language group, select from 20 different locales, including Algeria, Bahrain, Djibouti, and so on.

Table 60-1   Languages Available for WebCenter Portal

A to Ge	Gr to P	Si to T
Arabic	Greek	Simplified Chinese
Brazilian Portuguese	Hebrew	Traditional Chinese
Czech	Hungarian	Romanian
Danish	Italian	Russian
Dutch	Japanese	Slovak
English	Korean	Spanish
Finnish	Norwegian	Swedish
French	Polish	Thai
French-Canada	Portuguese	Turkish
German		

> **Note:**
>
> The administrative tier that offers services to WebCenter Portal, including such tools as Oracle Enterprise Manager, provides a subset of the languages available to WebCenter Portal. These include:
>
> - English
> - Brazilian Portuguese
> - Simplified Chinese
> - Traditional Chinese
> - French
> - German
> - Italian
> - Japanese
> - Korean
> - Spanish

Fallback Language Mechanism

In WebCenter Portal, languages can have county-specific versions. For example the French language has the following variants: French (Belgium), French (Canada), French (Switzerland), and so on. You may want to translate your portal in all variants of a specific language. WebCenter Portal supports fallback mechanism for translations where the translations fall back to the base translation scope resource bundle file. For example, you may want to translate your portal in all variants of French (fr).

- If the WebCenter Portal display language is set to French (Canada), which is represented by the code 'fr_CA', and you have provided translations only for 'fr', then as per the fallback mechanism the translations fall back to 'fr' from 'fr_CA'. In this case, any user-specified metadata will be rendered in the translation picked from the `scope-resource-bundle_fr.xlf` file.

- If the WebCenter Portal display Language is 'fr_CA' and you have not provided any translation for 'fr', then as per the fallback mechanism the translations fall back to base scope resource bundle. In this case, user-specified metadata will be rendered in translation picked from the `scope-resource-bundle.xlf` file.

Configuring Language Options

To configure the language displayed in WebCenter Portal, you can select from the following available options, depending on whether you are an administrator, portal manager, or user:

- System administrators can configure the default language displayed in WebCenter Portal and the languages available to choose from in the WebCenter Portal UI. For more information, see Choosing a Default Display Language in *Administering Oracle WebCenter Portal*.

- Portal managers can configure the language displayed by default in their specific portals and the languages available to choose from in their portal's UI. For more information, see Setting a Portal Display Language.

- Users can select a language preference that applies whenever they are logged on to WebCenter Portal. For more information, see the Choosing Your Preferred Display Language in *Using Portals in Oracle WebCenter Portal*.

> **✎ Note:**
>
> If the server on which WebCenter Portal is running does not support the character set of the language preference set in WebCenter Portal, the output information related to portals becomes garbled or displays as question marks. To work around this issue, users can change the session language or their personal language preference to `English`. This creates new log file information. The log file is typically located at *$WCP_DOMAIN*`/servers/`
> `WC_Portal/logs`.

Enabling Users to Choose a Language

This section describes how to enable users to choose a language by adding a Change Language task flow to a page. It includes the following sections:

- Adding a Change Language Task Flow to a Page
- Working with Change Language Task Flow Properties

Adding a Change Language Task Flow to a Page

You can add the Change Language task flow to any page (in the Home portal, in a portal, or a business role page) to allow users to choose the language in which to display the UI.

To add a Change Language task flow to a page:

1. Open the page in the page editor (see Opening a Page in the Page Editor).

2. Click **Add Content** to expose the resource catalog, and locate the Change Language task flow in the resource catalog. The task flow is under the Web Development folder in the default resource catalog.

> **✎ Note:**
>
> If the Change Language task flow is not listed in the resource catalog, you can add it to the resource catalog. For information, see Adding a Resource to a Resource Catalog.

3. Select the **Change Language** task flow to add it to the page.

4. Click **Save** to save your changes on the page.

Working with Change Language Task Flow Properties

The Change Language task flow has associated properties, which users with sufficient privileges can access through the task flow's View Actions menu. For example, select **Parameters** to display the Parameters dialog (Figure 60-4).

**Figure 60-4   Change Language Task Flow Component Properties**
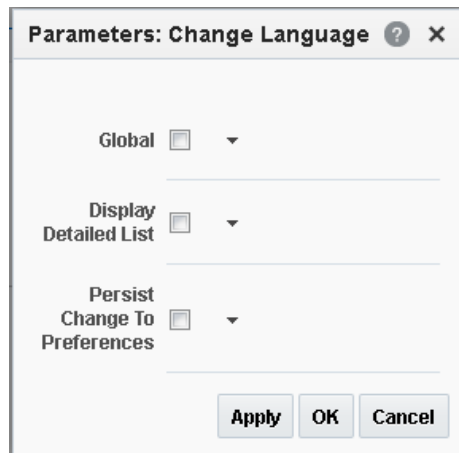
> ✎ **See Also:**
>
> Setting Properties on a Component

The following sections provide information about properties of the Change Language task flow and describe the task flow parameters:

- Setting Change Language Task Flow Properties
- Change Language Task Flow Parameters

Setting Change Language Task Flow Properties

In the page editor, selecting any component exposes a **View Actions** menu (Figure 60-5), which provides access to the component's properties: Parameters, Access, Display Options, Style, and Content Style.

Figure 60-5   View Actions Menu on a Change Language Task Flow
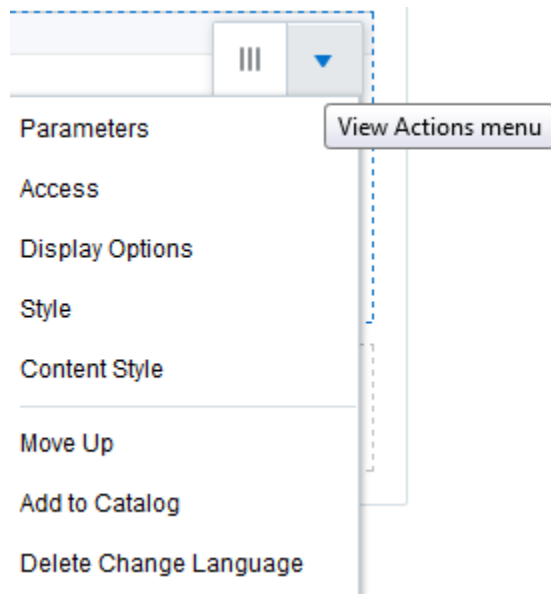
To set Change Language task flow properties:

1. Open the page that contains the task flow in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, click the **View Actions** menu and select the properties you want to set:

    •   Parameters control the default task flow content. For descriptions of the parameters, see Change Language Task Flow Parameters. Parameters can be wired to events, and can be used facilitate the wiring of the task flow to page parameters and page definition variables. For more information, see Wiring Pages and Components.

    •   Access settings show or hide the component to specific roles, users, or groups. For more information, see Setting Component Access.

    •   The Display Options, Style, and Content Style properties affect the appearance and behavior of the task flow for all users. These properties are common to all task flows. For more information, see Modifying Component Properties.

    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.

> **⬥ Note:**
>
> When you enter EL in the Display Options dialog, the parser reports an error only if it detects invalid syntax, such as a missing closing bracket. Validation is performed only on syntax, not on the expression value. Generic Display Options are those cataloged in Table 10-1.
>
> EL validation is not performed on non-generic display options.

If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

3. Save your changes.

Change Language Task Flow Parameters

Table 60-2 describes the parameters that are unique to the Change Language task flow.

Table 60-2   Change Language Task Flow Parameters

Parameter	Description
`Global`	Specifies whether the change is global or limited to the current portal.
	Default: Not selected
`Display Detailed List`	Displays a detailed list of languages, including locales.
	Default: Not selected
`Persist Change to Preferences`	Persists the user's language choice to the user's preferences.
	Default: Not selected

Editing Strings or UI Text for a Particular Portal

This section describes how to edit a particular string or the strings for a particular portal, including how to find the resource key for a string and how to find the GUID for a portal. The section includes the following subsections:

• Editing a Particular String or Portal

• Finding the Resource Key for a String

• Finding the GUID for a Portal

Editing a Particular String or Portal

You might need to edit only a particular string or the strings for a particular portal. To accomplish this task, you need to find the values associated with the string or the portal. Then you need to edit the required strings in the portal-specific resource bundle. For information about editing portal-specific resource bundles, see Managing a Multilanguage Portal in *Administering Oracle WebCenter Portal*.

# Finding the Resource Key for a String

If you want to edit a particular string, you need to know the resource key for the string so you can find it in the string files.

To find the resource key for a string:

1. Open the page or resource in the page editor (see Opening a Page in the Page Editor).

2. Select the task flow, click the **View Actions menu**, and select **Display Options**.

3. In the Display Options dialog, the resource key is the last part of the text in the **Text** box.

   For example, Figure 60-6 shows the resource key for the Announcements component. If you want to edit the string "Announcements" make note of the resource key `ANNOUNCEMENTS.TITLE`.

Figure 60-6   Display Options for Announcements - Resource Key
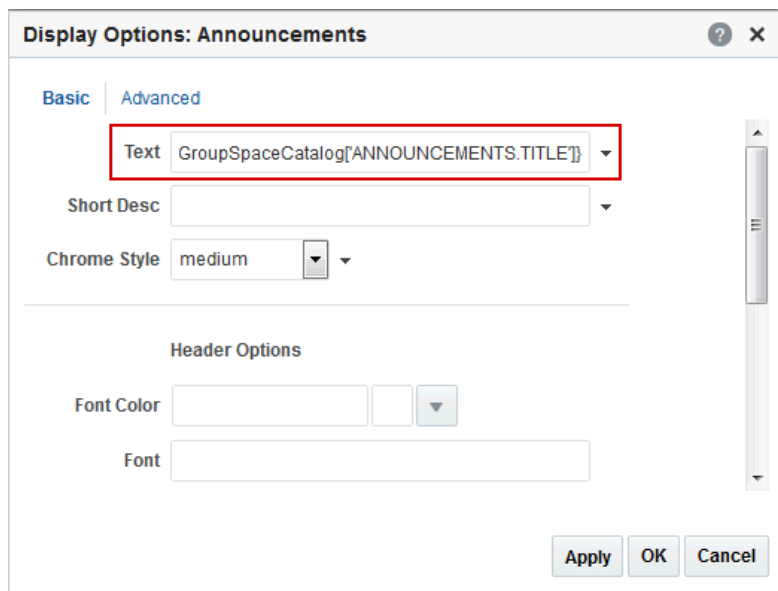
Finding the GUID for a Portal

If you want to edit the UI text for a particular portal or edit user-entered metadata, you need to find the GUID for the portal.

To find the GUID for a portal:

1. Navigate to the portal that includes the strings you want to edit.

2. Click the **Actions** menu, select **About**, then choose **Portal**.

3. In the About Portal dialog, note the **Internal ID** value (Figure 60-7).

Figure 60-7   GUID for a Portal
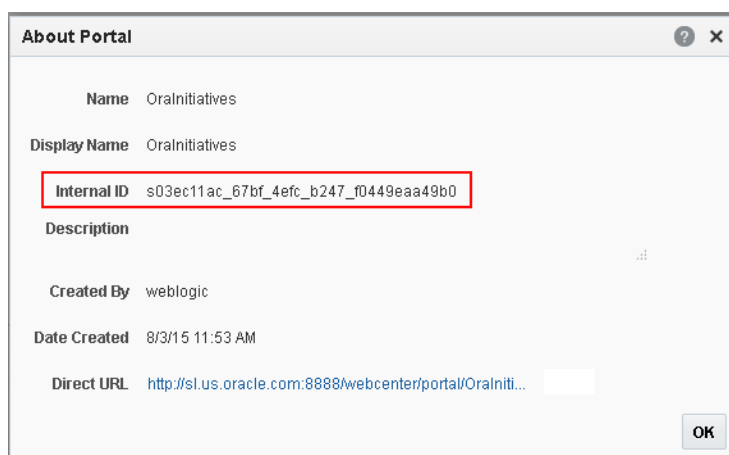
Translating Content

You can provide translations of some of the content in your portal.

- Translating Content in Content Publishing Components
- Presenting Translated Content Server Items Through a Content Presenter Template

Translating Content in Content Publishing Components

You can provide localized content in Content Publishing components by switching to the appropriate language and editing the content.

WebCenter Portal provides several Content Publishing components to enable the quick and easy publication of simple content, such as formatted text, images, and embedded video. After the initial content has been published in the language set as the application-level default language, users can provide a localized version of the content when they access the portal in a different language.

For example, a press release is created in English (the default language set by the WebCenter Portal administrator). To make the press release also available in French, set your preferred language to **French [fr]**, edit the press release, and provide a localized version of the content. You can localize the following:

- Text
- Image
- Image description
- Link destination for text and images

Once the localized content is published, any user with a language preference of French will see the French version of the content. For any other language preference, the content is shown in the default language until a localized version is created for that language.

> **Note:**
>
> If a default language is set for the portal, then everything in the portal will always be published in that language. The portal-level language setting cannot be overridden by user language preferences, but the application-level language setting can be overridden by user language preferences.

For more information, see Contributing and Publishing Content in a Different Language in *Using Portals in Oracle WebCenter Portal*

Presenting Translated Content Server Items Through a Content Presenter Template

If you use Content Presenter to publish WebCenter Content items in your portal, you can use Content Presenter display templates to display items in specific languages depending on the display language.

To display translated content, you must create a Content Presenter display template that looks up the display language and then displays content from a language-specific folder. For information about creating a Content Presenter display template, see Developing Content Presenter Display Templates in *Developing for Oracle WebCenter Portal*.

Part X

Appendixes

This part of *Building Portals with Oracle WebCenter Portal* provides appendixes with supporting information for the chapters in this guide.

- WebCenter Portal Pretty URLs
- Portal Components

A

WebCenter Portal Pretty URLs

Use pretty URLs in your browser to directly access user profiles, pages, and administration screens.

Topics:

Pretty URLs for WebCenter Portal Administration Settings Pages

> **✎ See Also:**
>
> For information about the business role, system, and personal pages managed by the system administrator, see Managing Portals in WebCenter Portal Administration in *Administering Oracle WebCenter Portal*.

Table A-1 lists and describes the syntax for the pretty URLs that provide easy access to the administration **Settings** pages managed by the WebCenter Portal system administrator, including business role, system, and personal pages.

Open the administration **Settings** pages in WebCenter Portal in the following ways:

- From the **Portals** menu, select **Administration**, then click the **Settings** tab.
- In the portal browser, click the **Administration** color tile (Figure A-1), then click the **Settings** tab.

Figure A-1   WebCenter Portal Administration Access from Portal Browser
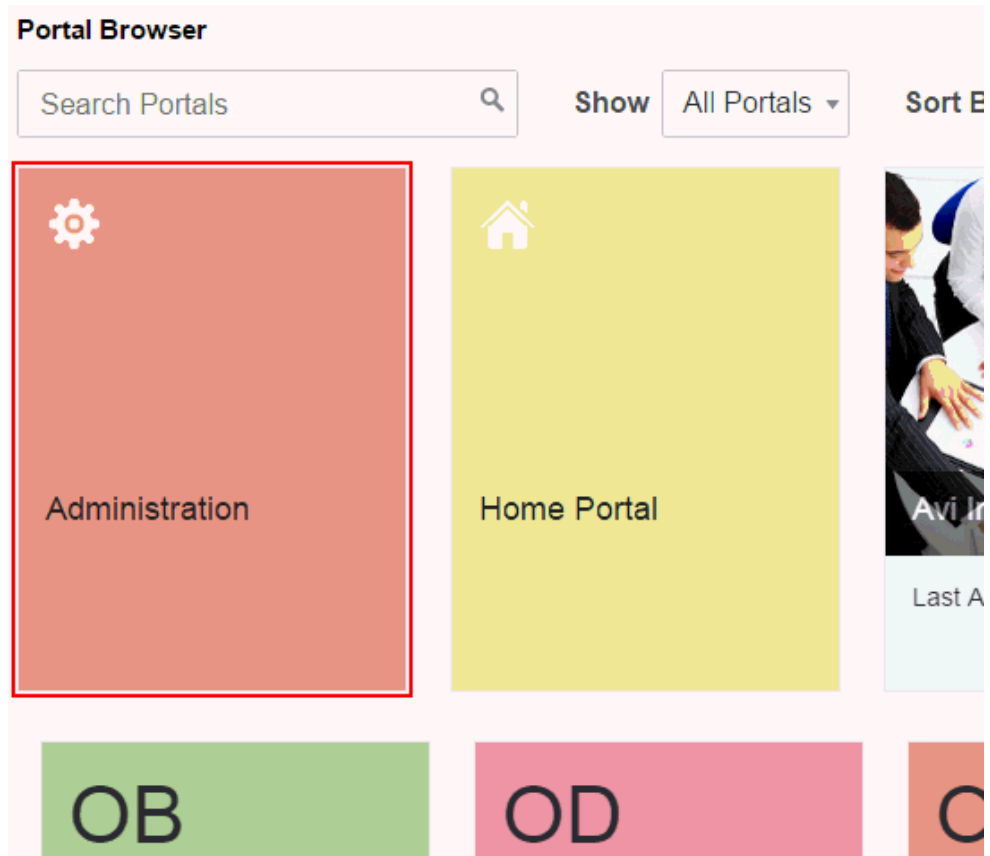
- Enter the following URL in your browser to navigate directly to the **Settings** page:

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

Table A-1   Pretty URLs to Pages for Administering WebCenter Portal

Target	Pretty URL Syntax

General Settings page in WebCenter Portal administration	`http://host:port/webcenter/portal/admin/settings`
	`http://host:port/webcenter/portal/admin/settings/general`
	Shortcut URLs:
	`http://host:port/webcenter/portal/admin`
	`http://host:port/webcenter/portal/admin/general`
	Permission required: Application-level `Portal Server: Manage Configuration`

Security, Users, and Groups page in WebCenter Portal administration	`http://host:port/webcenter/portal/admin/settings/security`
	Shortcut URLs:
	`http://host:port/webcenter/portal/admin/roles`
	`http://host:port/webcenter/portal/admin/users`
	Permission required: Application-level `Portal Server: Manage All`

Table A-1   (Cont.) Pretty URLs to Pages for Administering WebCenter Portal

Target	Pretty URL Syntax
Tools and Services page in WebCenter Portal administration	http://*host:port*/webcenter/portal/admin/settings/tools Shortcut URLs: http://*host:port*/webcenter/portal/admin/services http://*host:port*/webcenter/portal/admin/tools Permission required: Application-level `Portal Server: Manage Configuration`
Attributes page in WebCenter Portal administration	http://*host:port*/webcenter/portal/admin/settings/attributes Shortcut URL: http://*host:port*/webcenter/portal/admin/attributes Permission required: Application-level `Portal Server: Manage Configuration`
System Pages page in WebCenter Portal administration	Listing of all system pages: http://*host:port*/webcenter/portal/admin/settings/systempages Shortcut URL: http://*host:port*/webcenter/portal/admin/systempages Specific system page: http://*host:port*/webcenter/portal/system/*pageName* (see Pretty URLs for System Pages) Permission required: Application-level `Portal Server: Manage Configuration`
Business Role Pages page in WebCenter Portal administration	Listing of all business role pages: http://*host:port*/webcenter/portal/admin/settings/businessrolepages Shortcut URL: http://*host:port*/webcenter/portal/admin/brpages Specific business role page: http://*host:port*/webcenter/portal/system/*pageName* Permission required: Application-level `Portal Server: Manage Configuration`
Personal Pages page in WebCenter Portal administration	http://*host:port*/webcenter/portal/admin/settings/personalpages Shortcut URL: http://*host:port*/webcenter/portal/admin/personalpages Permission required: Application-level `Portal Server: Manage Configuration` To access individual personal pages in the Home portal for a specified user, see Table A-6.
Device Settings page in WebCenter Portal administration	http://*host:port*/webcenter/portal/admin/settings/device Permission required: Application-level `Portal Server: Manage Configuration`

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A-3

Pretty URLs for System Pages

Table A-2 lists and describes the syntax for the pretty URLs that provide easy access to the application-level system pages.

Through the WebCenter Portal user interface, all system pages are listed on the **System Pages** page in WebCenter Portal administration, as shown in Figure A-2. The pretty URLs access the system pages in view mode.

Figure A-2   System Pages

Table A-2   Pretty URLs to Application-Level System Pages

Target	Pretty URL Syntax
Activities	`http://host:port/webcenter/portal/system/Activities`
Activity Stream	`http://host:port/webcenter/portal/system/Activity+Stream`
Analytics	`http://host:port/webcenter/portal/system/Analytics`
Documents	`http://host:port/webcenter/portal/system/Documents`
Error Encountered	`http://host:port/webcenter/portal/system/Error+Encountered`
Events	`http://host:port/webcenter/portal/portalName/system/Events`
Lists	`http://host:port/webcenter/portal/portalName/system/Lists`
Login	`http://host:port/webcenter/portal/system/Login`
Members	`http://host:port/webcenter/portal/portalName/system/Members`

Table A-2   (Cont.) Pretty URLs to Application-Level System Pages

Target	Pretty URL Syntax
No Pages Accessible	`http://host:port/webcenter/portal/system/No+Pages+Accessible`
Page Not Found	`http://host:port/webcenter/portal/system/Page+Not+Found`
Page Viewer	`http://host:port/webcenter/portal/system/Page+Viewer`
Portal Not Found	`http://host:port/webcenter/portal/system/Portal+Not+Found`
Portals	`http://host:port/webcenter/portal/system/Portals`
Portal Templates	`http://host:port/webcenter/portal/system/Portal+Templates`
Profile	`http://host:port/webcenter/portal/system/Profile` Note: this URL accesses the current user's Profile page.
Resource Viewer	`http://host:port/webcenter/portal/system/Resource+Viewer`
Search	`http://host:port/webcenter/portal/system/Search`
Self-Registration	`http://host:port/webcenter/portal/system/Self-Registration` **Note:** While you can access the Self-Registration page using the pretty URL, the fields on the page are not active when accessed in this way. Fields are active only when non-registered users access the page by clicking the **Register** link on the WebCenter Portal Sign In page.
Self-Service Membership	`http://host:port/webcenter/portal/system/Self-Service+Membership`
Tag Center	`http://host:port/webcenter/portal/system/Tag+Center`
Task Flow Editor	`http://host:port/webcenter/portal/system/Task+Flow+Editor`
Task Flow Viewer	`http://host:port/webcenter/portal/system/Task+Flow+Viewer`
Unauthorized	`http://host:port/webcenter/portal/system/Unauthorized`
Unavailable	`http://host:port/webcenter/portal/system/Unavailable`
User Profile	`http://host:port/webcenter/portal/system/User+Profile` To access the User Profile page for an individual user, see Table A-5
WebCenter Portal Welcome Page	`http://host:port/webcenter/portal/system/Welcome+Portal+Welcome+Page`

Pretty URLs for Managing All Portals

Table A-3 lists and describes the syntax for the pretty URLs that provide easy access to the pages used to manage all portals. The tasks available on these pages are dependent on the permissions granted to the current user.

Through the WebCenter Portal user interface, these pages are accessed through tabs that are exposed dependent on permissions, as highlighted in Figure A-3.
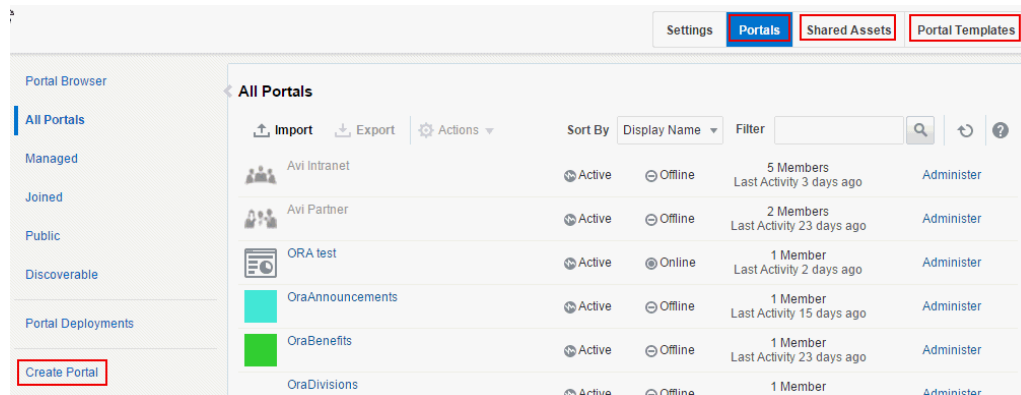
Figure A-3   Pages for Managing All Portals

Table A-3   Pretty URLs to Pages for Managing All Portals

Target	Pretty URL Syntax

Portals page	`http://`*`host:port`*`/webcenter/portal/admin/portals`
	All portals available to you (**All Portals** page):
	`http://`*`host:port`*`/webcenter/portal/admin/portals/all`
	Managed Portals page:
	`http://`*`host:port`*`/webcenter/portal/admin/portals/moderated`
	Joined Portals page:
	`http://`*`host:port`*`/webcenter/portal/admin/portals/joined`
	Public Portals page:
	`http://`*`host:port`*`/webcenter/portal/admin/portals/public`
	Discoverable Portals page:
	`http://`*`host:port`*`/webcenter/portal/admin/portals/discoverable`
	Available actions are dependent on permissions:
	• Application-level `Portal Server: View`: shows list of portals with limited actions.
	• Portal-level `Manage Security and Configuration` or `Manage Configuration`: exposes **Administration** link for portals for which the permission is given.
	• Application-level `Portal Server: Manage Configuration`: exposes all actions on all portals, including import/export.

Create Portal wizard	`http://`*`host:port`*`/webcenter/portal/admin/portals/newportal` Permission required: Application-level `Portals: Create Portals`
Shared Assets page for all portals	`http://`*`host:port`*`/webcenter/portal/admin/assets` Permission required: Application-level *`resource type`*`: Edit` or *`resource type`*`: Create`
Portal Templates page for all portals	`http://`*`host:port`*`/webcenter/portal/admin/templates` Permission required: Application-level `Portal Templates: Manage All` or `Portal Templates: Create`

Pretty URLs for the Default Portal

By default, users see the portal browser when they log in, but the system administrator can configure the initial landing page to be the Home portal, a specific portal, or a specific page. For more information about the default portal, see Choosing a Default Start (or Landing) Page in *Administering Oracle WebCenter Portal*.

Table A-4 lists and describes the syntax for the pretty URLs that provide easy access to the default portal.

Table A-4   Pretty URLs for the Default Portal

Target	Pretty URL Syntax

Default portal	`http://`*host:port*`/webcenter/`
	`http://`*host:port*`/webcenter/portal`
	Note: Pretty URLs cannot be used to navigate directly to a specific page in the default portal.

Pretty URLs for User Profiles and Preferences

Table A-5 lists and describes the syntax for the pretty URLs that provide easy access to user profiles and preferences.

You can view a profile, including your own, by clicking a user name wherever you see it in WebCenter Portal. To view your profile and preferences, click your username in the menu bar and select either Profile or Preferences (Figure A-4).

For more information, see Viewing a Profile and Setting Your Personal Preferences in *Using Portals in Oracle WebCenter Portal*.
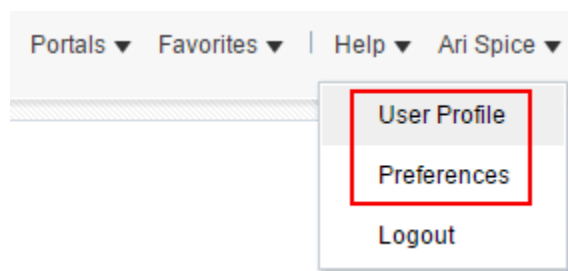
Figure A-4   Home Portal

Table A-5   Pretty URLs to User Profiles in the Home Portal

Target	Pretty URL Syntax
Profile page for the specified user or (if user name omitted) current user in the context of the Home portal	`http://`*host:port*`/webcenter/portal/profile/`*userName* `http://`*host:port*`/webcenter/portal/profile`

Table A-5 (Cont.) Pretty URLs to User Profiles in the Home Portal

Target	Pretty URL Syntax
Profile page for the specified user or (if user name omitted) current user in the context of the specified portal	`http://host:port/webcenter/portal/portalName/profile/userName` `http://host:port/webcenter/portal/portalName/profile`

Preferences page for current user	`http://host:port/webcenter/portal/admin/preferences`
	General Preferences page:
	`http://host:port/webcenter/portal/admin/preferences/prefgeneral`
	Change Password page:
	`http://host:port/webcenter/portal/admin/preferences/password`
	Messaging Preferences page:
	`http://host:port/webcenter/portal/admin/preferences/externalapp`
	My Accounts page:
	`http://host:port/webcenter/portal/admin/preferences/messaging`
	People Connections page:
	`http://host:port/webcenter/portal/admin/preferences/peopleconn`
	Presence page:
	`http://host:port/webcenter/portal/admin/preferences/presence`
	Subscriptions page:
	`http://host:port/webcenter/portal/admin/preferences/subscriptions`
	Search Preferences page:
	`http://host:port/webcenter/portal/admin/preferences/search`
	Mail Preferences page:
	`http://host:port/webcenter/portal/admin/preferences/mail`
	Manage Favorites page:
	`http://host:port/webcenter/portal/admin/preferences/managefavorites`
	Permission required: Application-level `Portal Server: Manage Configuration`

Pretty URLs for the Home Portal

Table A-5 lists and describes the syntax for the pretty URLs that provide easy access to pages in the Home portal.

Through the WebCenter Portal user interface, the Home portal (Figure A-5) can be accessed from the portal browser, the **Portals** menu, or by clicking your user name in the toolbar and selecting **User Profile**.
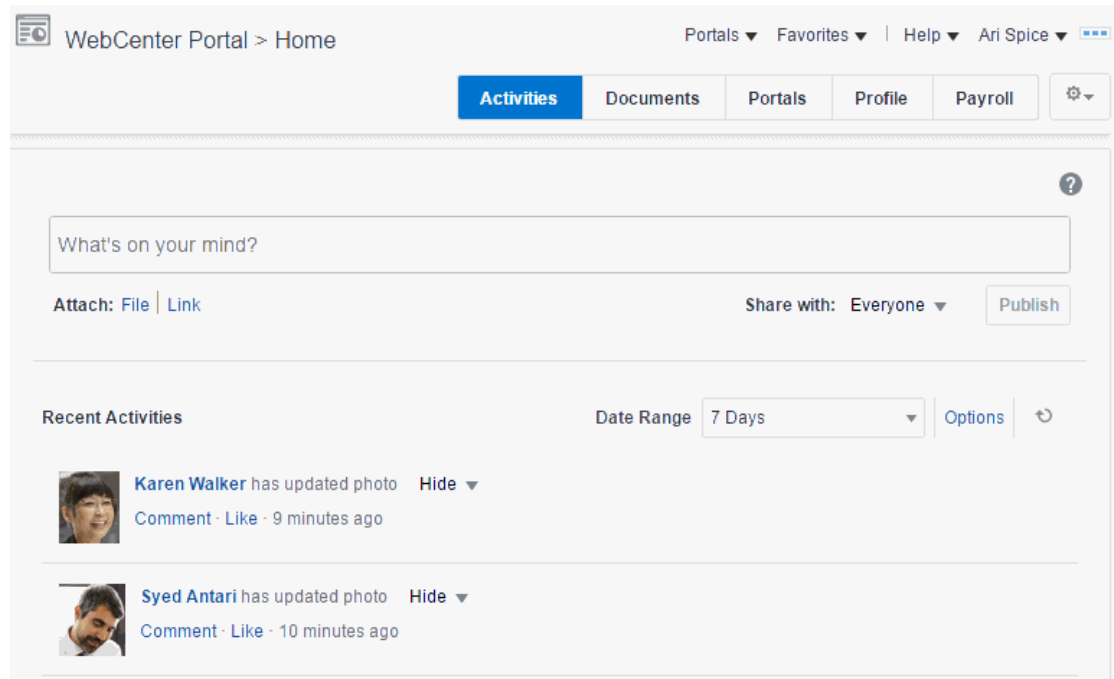
Figure A-5   Home Page in the Home Portal

Table A-6   Pretty URLs to Pages in the Home Portal

Target	Pretty URL Syntax
Profile page for the specified user or (if user name omitted) current user in the Home portal	`http://host:port/webcenter/portal/profile/userName` `http://host:port/webcenter/portal/profile`
Home page in the Home portal for current user (Figure A-5)	`http://host:port/webcenter/portal/home`
A personal page in the Home portal	`http://host:port/webcenter/portal/profile/userName/page/pageName` For example: `http://host:port/webcenter/portal/profile/ari/page/MyPage`

Pretty URLs for Pages in a Specified Portal

Table A-7 lists and describes the syntax for the pretty URLs you can use to directly access a portal and its pages.

> **Note:**
>
> Entering a URL to navigate to another portal from the page editor may display unexpected results. Close the page editor to exit edit mode before navigating to another portal using its URL.

Through the WebCenter Portal user interface, from the **Portals** menu, select **Portal Browser** to display the portal browser (Figure A-6):

Figure A-6 Portal Browser
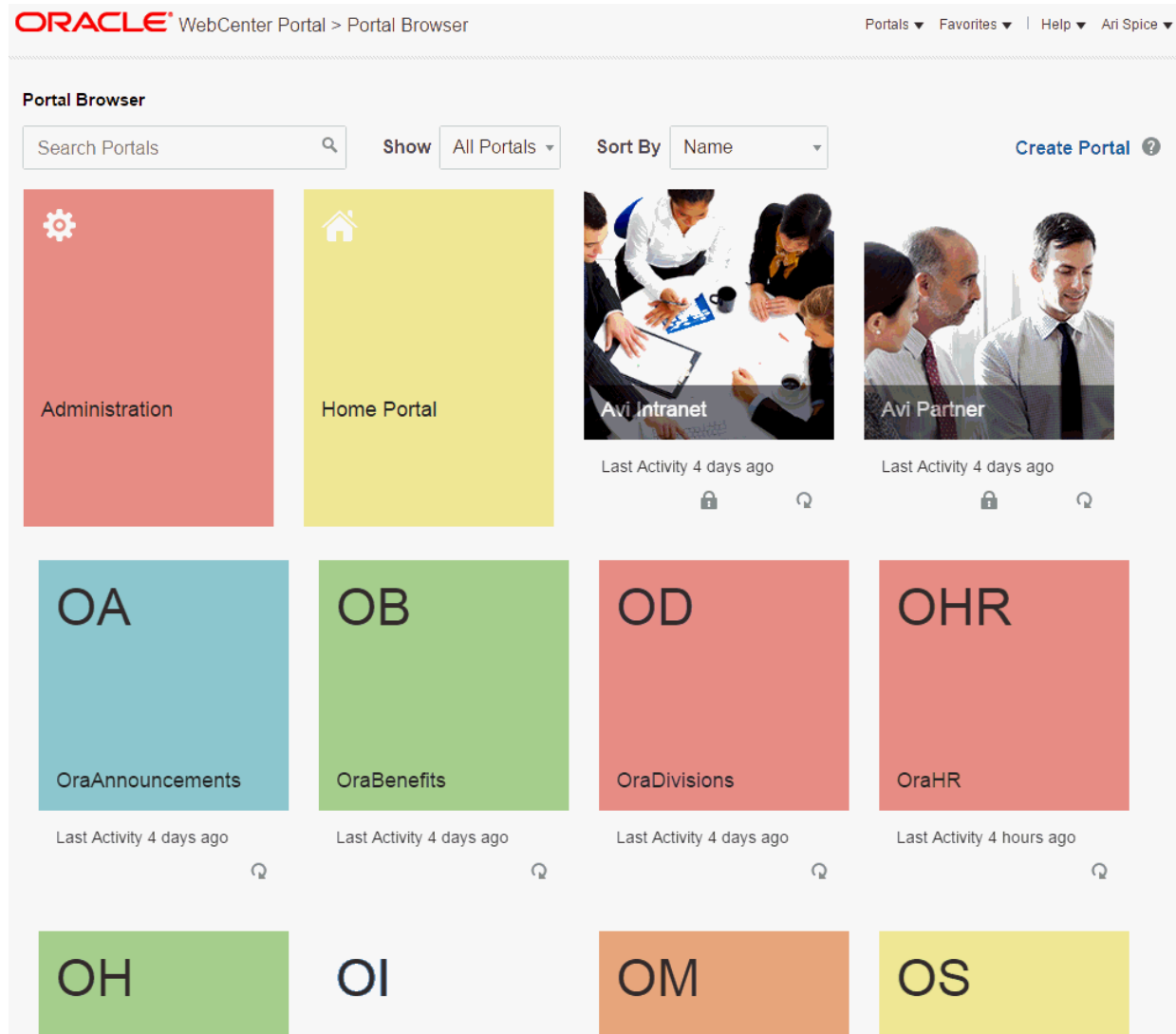
- Click a portal tile to open the Home page of the portal.

- Local the portal you want to administer, then click [icon] to display the portal actions menu and select **Administer** (Figure A-7)

Figure A-7   Administering a Portal

Table A-7   Pretty URLs to Pages in a Specified Portal

Target	Pretty URL Syntax
Home page of specified portal (first navigable node in the portal navigation)	`http://host:port/webcenter/portal/portalName`

Table A-7   (Cont.) Pretty URLs to Pages in a Specified Portal

Target	Pretty URL Syntax
Specified page in a portal (including a portal page, tool console page, system page, and business role page)	You can access any page or subpage in a portal using pretty URLs. Note that multiple pages in a portal may have the same name, and therefore the same URL. In this case, you can also use the unique ID or external ID of a page to access it by its URL. The following pretty URLs can be used to display a target portal page: • `http://host:port/webcenter/portal/portalName/pageName/<subpageName>...` displays the first page named `pageName` found in the page hierarchy of the specified portal. This is the page display name, as specified by the Name property and exposed in the user interface (see Viewing and Modifying Page Settings). If the target is a subpage, you must include the name(s) of the parent page(s) in the path. • `http://host:port/webcenter/portal/portalName/pages_pageID` where `pageID` is the ID property of a page (see Setting Navigation Properties and Display Options for a Page). If the target is a subpage, use the syntax `...pages_parentpageID/subpageID` • `http://host:port/webcenter/portal/portalName/externalID` where `externalID` is the External ID property of a page (see Setting Navigation Properties and Display Options for a Page). If the target is a subpage, there is no need to include the external ID(s) of its parent page(s).

Table A-7   (Cont.) Pretty URLs to Pages in a Specified Portal

Target	Pretty URL Syntax

.	***Example***:
	
	Portal name: `OraHealth`
	
	A page in portal `OraHealth`:
	
	• Name: `Insurance`
	• ID: `ohealthins`
	• External ID: `1800`
	
	A subpage to parent page `Insurance`:
	
	• Name: `Overview`
	• ID: `ohealthinsoview`
	• External ID: `1865`
	
	The following pretty URLs display the subpage named `Overview`:
	
	`http://`*`host:port`*`/webcenter/portal/OraHealth/Insurance/Overview`
	
	`http://`*`host:port`*`/webcenter/portal/OraHealth/pages_ohealthins/ohealthinsoview` (using ID, including parent page ID)
	
	`http://`*`host:port`*`/webcenter/portal/OraHealth/1865` (using external ID)
	
	More examples:
	
	Tool Console page (for full list, see **Tools and Services** page, below):
	
	`http://`*`host:port`*`/webcenter/portal/OraHealth/Documents`
	
	or `http://`*`host:port`*`/webcenter/portal/OraHealth/system/Documents`
	
	System page:
	
	`http://`*`host:port`*`/webcenter/portal/OraHealth/system/Search`
	
	Business role page:
	
	`http://`*`host:port`*`/webcenter/portal/OraHealth/Membership`

Administering a Portal	See Figure A-7.
Security page in portal administration for specified portal	`http://`*`host:port`*`/webcenter/portal/`*`portalName`*`/admin/security` Permission required: Portal-level `Manage Configuration` and `Administration: Manage Membership`

General page in portal administration for specified portal	`http://`*`host:port`*`/webcenter/portal/`*`portalName`*`/admin`
	
	`http://`*`host:port`*`/webcenter/portal/`*`portalName`*`/admin/overview`
	
	`http://`*`host:port`*`/webcenter/portal/admin/portals/admin/`*`portalName`*`/general`
	
	Permission required: Portal-level `Manage Configuration`

Settings page in portal administration for specified portal	`http://`*`host:port`*`/webcenter/portal/`*`portalName`*`/admin/settings` Permission required: Portal-level `Manage Configuration`

Table A-7 (Cont.) Pretty URLs to Pages in a Specified Portal

Target	Pretty URL Syntax
Assets page in portal administration for specified portal	`http://host:port/webcenter/portal/portalName/admin/assets` Permission required: Portal-level `Create, Edit, and Delete Assets` (standard permissions) or `Create, Edit, and Delete` on the asset type with which you want to work (advanced permissions)
Device Settings page in portal administration for specified portal	`http://host:port/webcenter/portal/admin/portals/admin/portalName/device` Permission required: Portal-level `Manage Configuration`.

Tools and Services page in portal administration for specified portal	`http://host:port/webcenter/portal/portalName/admin/services`
	
	`http://host:port/webcenter/portal/admin/portals/admin/portalName/tools`
	
	Permission required: Portal-level `Manage Configuration`
	
	While this page provides access to all available tools and services for the specified portal, you can also access the individual tool consoles through the following pretty URLs:
	
	`http://host:port/webcenter/portal/portalName/Documents`
	
	`http://host:port/webcenter/portal/portalName/Events`
	
	`http://host:port/webcenter/portal/portalName/Lists`
	
	`http://host:port/webcenter/portal/portalName/Search`
	
	`http://host:port/webcenter/portal/portalName/Tags`

Deploy page in portal administration for specified portal	`http://host:port/webcenter/portal/admin/portals/admin/portalName/deploy` Permission required: Application-level `Portal Server-Deploy`

B

Portal Components

Add portal components to custom pages templates (and pages, if desired).

Topics:

- About Portal Components
- Accessing Portal Component Properties

See Table B-1 for a listing of all portal components.

About Portal Components

Portal components are prepackaged, fully functional WebCenter Portal objects, such as the menus and links in the WebCenter Portal user interface, that are available to add to your own pages templates (and pages, if desired). Out-of-the-box, they are available in the Default Page Template Catalog (see About the Built-In Resource Catalogs). To add portal components to a page template, see Editing a Page Template.

Portal components have associated properties that you can use to refine the appearance and behavior of a component instance. See Accessing Portal Component Properties.

Table B-1 lists all available portal components and links to more information about each one.

Table B-1   WebCenter Portal Components

A to C	C to L	L to P	P to U
About Portal	Current User Profile	Login	Privacy URL
About WebCenter Portal	Edit Page	Logout	RSS
Add To Favorites	Favorites Menu	Mail Members	Self-Registration
Administration	Global Help	Mail Portal Managers	Share Resource
Change Membership	Home Portal	Page Links	Status Indicator
Contact Administration	Invite People as Connection	Portal Logo	Subscription Preferences
Copyright Message	Join Portal	Portal Switcher	Tags
Create Page	Leave Portal	Print Preview	User Preferences
Create Portal			

> ✎ **See Also:**
>
> Modifying Component Properties

Accessing Portal Component Properties

You can view and modify the properties of any portal component in a page template. For more information, see Setting Component Properties in Structure View.

> **Note:**
>
> While you can add a portal component to any page, these components are intended for use in page templates. Therefore, properties on these components can be set only when they are in a page template.

About Portal

The About Portal component is a link that opens the About Portal dialog with information about the current portal (Figure B-1).

Figure B-1   About Portal Component

About Portal | About WebCenter Portal | RSS | Administrator | Privacy Statement

Every portal has associated information, called *metadata*. Portal metadata includes such information as display name, internal ID, description, current user membership role, user name of the creator, date created, and pretty URL. Users click the **About Portal** link to access this information.

> **See Also:**
>
> Viewing Information About a Portal in *Using Portals in Oracle WebCenter Portal*.

Table B-1 lists and describes the Display Options properties associated with the About Portal component.

> **See Also:**
>
> The About Portal component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.
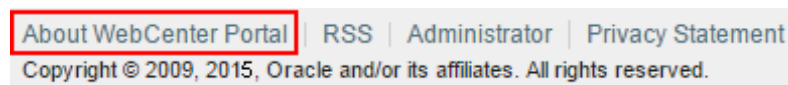
Table B-2   About Portal Component Display Options

Property	Description
Depressed Icon	A URL or relative path to an icon that appears when the component is clicked
	Use any Web-compatible image from any accessible location. That is, do not put in a path to an image on an external server that requires authentication.
	Enter a full URL or a path that is relative to the application root.
Disabled Icon	A URL or relative path to an image that appears when the component is disabled
	See `Depressed Icon` for more information.
Display Type	The render mode of the component:
	• `link`—Show the component as a link
	• `button`—Show the component as a command button
Hover Icon	A URL or relative path to an icon that appears when users hover their mouse pointers over the component
	See `Depressed Icon` for more information.
Icon	A URL or relative path to an icon to represent the active component
	See `Depressed Icon` for more information.
Icon Position	A selection of options for placement of the link's associated icon:
	• `leading`—The icon is positioned at the start of its associated text
	• `trailing`—The icon is positioned at the end of its associated text
Scope Name	The name of the portal to describe in the dialog
	The default value is `null` (`defaultScope`), which provides information about the current portal. You can also enter a portal name in lieu of the default.
	Note: If you enter a portal name, be sure to enter the portal's *internal* name. The portal internal name is the name specified by the **Portal URL** on the **General Settings** page of a portal's administration settings.
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
Text	Display text for the component
	The default is `About Portal`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.TITLE_SHOW_GROUP_SPACE_INFO}`.

About WebCenter Portal

The About WebCenter Portal component is a link that opens the About WebCenter Portal dialog with application version and copyright information (Figure B-2).

Figure B-2   About WebCenter Portal Component

About WebCenter Portal | RSS | Administrator | Privacy Statement
Copyright © 2009, 2015, Oracle and/or its affiliates. All rights reserved.

The About WebCenter Portal component has many of the same Display Options properties as the About Portal component. Table B-3 lists and describes the Display Options properties associated with the About WebCenter Portal component that are not included in Table B-2 or that have different default values.

Table B-3   About WebCenter Portal Component Display Options

Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component.
	The default is `Display WebCenter Portal Information`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ABOUT_DESC}`.
Text	Display text for the component.
	The default is `About WebCenter Portal`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ABOUT}`.
Type	The component type.
	The default is `aboutWebcenter`.

Add To Favorites

The Add To Favorites component is a link that opens the Add To Favorites dialog to enable users to add an item to their Favorites menu (Figure B-3).

Figure B-3   Add to Favorites Component

Add To Favorites | About Portal | About WebCenter Portal | RSS | Administrator | Privacy Statement

For example, users can use this component to add a favorite page, wiki, blog, list, event, task, template, to their **Favorites** menu.

The Add to Favorites component has many of the same Display Options properties as the About Portal component. Table B-4 lists and describes the properties for which Add to Favorites has different default values than those described in Table B-2.

> ✎ **See Also:**
>
> The Add to Favorites component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-4   Add to Favorites Component Display Options

| Property	Description
Favorite Title	The display name of the application object to add as a favorite
Favorite URL	The URL to use to navigate to the application object
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is Add To Favorites. The default is the rendered value of the EL expression #{uib_o_w_w_r_WebCenter.TITLE_ADD_FAVORITE_DIALOG}.
Text	Display text for the component.
	The default is Add to Favorites. The default is the rendered value of the EL expression #{uib_o_w_w_r_WebCenter.TITLE_ADD_FAVORITE_DIALOG}.

> ✎ **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Administration

The Administration component is a link that opens the WebCenter Portal administration **Settings** page (Figure B-4).

Figure B-4   Administration Component
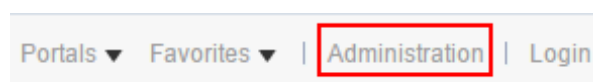
Only users with permissions of the `Administrator` role can see this link once it is placed on a page or page template.

> **See Also:**
>
> For information about WebCenter Portal administration, see About Application Roles and Permissions in *Administering Oracle WebCenter Portal*.

The Administration component has many of the same Display Options properties associated as the About Portal component. Table B-5 lists the properties that have defaults other than those specified in Table B-2.

> **See Also:**
>
> The Administration component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-5   Administration Component Display Options

| Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is `Open WebCenter administration pages`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ADMINISTRATION_DESC}`.
Text	Display text for the component
	The default is `Administration`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_ADMINISTRATION}`.
Type	The component type
	The default is `administration`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Change Membership

The Change Membership component is a link that opens the Change Membership dialog to enable users to request a change to their portal role (Figure B-5).

Figure B-5   Change Membership Component

Change Membership | About Portal | About WebCenter Portal | RSS | Administrator | Privacy Statement
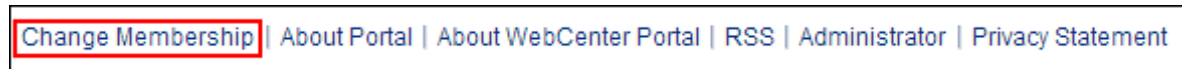
> **See Also:**
>
> Changing Your Role in a Portal in *Using Portals in Oracle WebCenter Portal*

The Change Membership component has many of the same properties as the About Portal component. Table B-6 lists the properties that have defaults other than those specified in Table B-2.

> **See Also:**
>
> The Change Membership component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-6   Change Membership Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default value is `Change Membership`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.COMMUNITY_CHANGE_MEMBERSHIP}`.
`Text`	Display text for the component
	The default is `Change Membership`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.COMMUNITY_CHANGE_MEMBERSHIP}`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Contact Administration

The Contact Administration component is a link that opens the Contact Administration dialog where users can enter and send a workflow notification to members with the `Administrator` role (Figure B-6).

> **Note:**
>
> The Contact Administration component requires a connection to the Oracle BPEL Server included with Oracle SOA Suite. For more information, see Specifying the BPEL Server Hosting WebCenter Portal Workflows in *Administering Oracle WebCenter Portal*.

Figure B-6   Contact Administration Component

About WebCenter Portal | RSS | Administrator | Privacy Statement
Copyright © 2009, 2015, Oracle and/or its affiliates. All rights reserved.

The Contact Administrator component has many of the same properties as the About Portal component. Table B-7 lists the properties that have defaults other than those specified in Table B-2.

> **See Also:**
>
> The Contact Administration component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-7   Contact Administrator Component Display Options

Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default value is `Contact the Administrator`. The default value is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.CONTACT_ADMINISTRATOR_DESC}`.
Text	Display text for the component
	The default is `Administrator`. The default value is represented by the EL expression `#{uib_o_w_w_r_WebCenter.CONTACT_ADMINISTRATOR}`.
Type	The component type
	The default is `contactAdmin`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in I.

Copyright Message

The Copyright Message component renders the following text string:

```
Copyright © 2009, 2015, Oracle and/or its affiliates. All rights reserved.
```

Figure B-7 shows an example of the Copyright Message component rendered within the user interface.

Figure B-7   Copyright Message Component
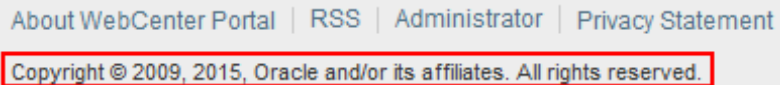
The Copyright Message component has many of the same properties as the About Portal component. Table B-8 lists the properties that have defaults other than those specified in Table B-2.

> **See Also:**
>
> The Copyright Message component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-8   Copyright Message Component Display Options

| Property	Description
Inline Style	A field for entering CSS style values to define the appearance of the component
	The default inline style is `white-space:nowrap;`.
Type	The component type
	The default is `copyrightMessage`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Create Page

The Create Page component is a link that opens the Create Page dialog (Figure B-8).

Figure B-8   Create Page Component

Create Page | About Portal | About WebCenter Portal | RSS | Administrator | Privacy Statement

> **See Also:**
>
> Creating, Editing, and Publishing a Portal Page and Creating and Managing Personal Pages in *Using Portals in Oracle WebCenter Portal*

This component is useful for providing an on-the-spot means of creating pages in the current portal or Home portal. Only authorized users can see and use the **Create Page** link.

The Create Page component has many of the same properties as the About Portal component. Table B-9 lists the properties that have defaults other than those specified in Table B-2.

> **See Also:**
>
> The Create Page component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-9   Create Page Component Display Options

Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is `Create a new page`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.TOOLTIP_MANAGE_PAGES_CREATE_PAGE}`.

Table B-9   (Cont.) Create Page Component Display Options

| Property	Description
`Task Flow Id`	The component's unique identifier, for example `wcdc4082953494`
`Text`	Display text for the component
	The default is `Create Page`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_CREATE_PAGE}`.

> **✎ See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Create Portal

The Create Portal component is a link that opens the Create Portal wizard (Figure B-9).

Figure B-9   Create Portal Component

Create a Portal | About Portal | About WebCenter Portal | RSS | Administrator | Privacy Statement
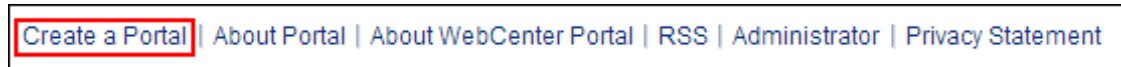
This component is useful for providing an on-the-spot means of creating a portal. Only authorized users can see and use the **Create Portal** link.

> **✎ See Also:**
>
> For information about creating portals, see Getting Started

The Create Portal component shares many of the same properties as the About Portal component. Table B-10 lists the properties that have defaults other than those specified in Table B-2.

> **✎ See Also:**
>
> The Create Portal component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-10   Create Portal Component Display Options

Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is `Create a Portal`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.HEADING_CREATE_COMMUNITY}`.
Text	Display text for the component
	The default is `Create a Portal`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.HEADING_CREATE_COMMUNITY}`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Current User Profile

The Current User Profile component displays the name of the current user linked to the user's **Profile** page (Figure B-10).

Figure B-10   Current User Profile Component
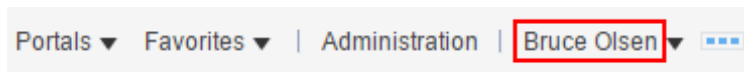
Users click the name to open a Profile page with the user's profile details.

> **See Also:**
>
> The Profile page is a customizable business role page that appears in the Home portal for all authenticated users. For more information about business role pages, see About Business Role Pages in *Administering Oracle WebCenter Portal*. For more information about profiles, see Managing Your Profile in *Using Portals in Oracle WebCenter Portal*.

The Current User Profile component has many of the same properties as the About Portal component. Table B-11 lists the properties that have defaults other than those specified in Table B-2.

Table B-11   Current User Profile Component Display Options

Property	Description
`Short Desc`	A field for entering a tooltip to display when users hover their mouse pointers over the component
	The default is the current user's name. The default is the rendered value of the EL expression `#{security.userDisplayName}`.
`Text`	Display text for the component
	The default is the current user's name. The default is the rendered value of the EL expression `#{security.userDisplayName}`.

Edit Page

The Edit Page component is a link that opens the current page in the page editor (Figure B-11).

Figure B-11   Edit Page Component

Only users who are authorized to edit the current page can see and use the **Edit Page** link.

The Edit Page component has many of the same properties as the About Portal component. Table B-12 lists the properties that have defaults other than those specified in Table B-2.

> **See Also:**
>
> The Edit Page component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-12   Edit Page Component Display Options

Property	Description
Short Desc	A field for entering a tooltip to display when users hover their mouse pointers over the component
	The default is `Edit the Page`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.PAGE_CONTEXT_EDIT_PAGE_DESC}`.
Task Flow Id	The component's unique identifier, for example `wcdc4082953494`
Text	Display text for the component
	The default is `Edit Page`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.PAGE_CONTEXT_EDIT_PAGE}`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Favorites Menu

The Favorites Menu component is a menu with options to open the Add to Favorites and Manage Favorites dialogs (Figure B-12).

Figure B-12   Favorites Menu Component
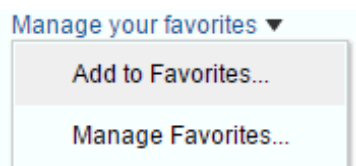
The Favorites Menu component has many of the same properties as the About Portal component. Table B-13 lists the properties that have defaults other than those specified in Table B-2.

Table B-13   Favorites Menu Component Display Options

Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is `Manage your favorites`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_FAVORITES_DESC}`.
Task Flow Id	The component's unique identifier, for example `wcdc4082953494`
Text	Display text for the component
	The default is `Manage your favorites`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_FAVORITES_DESC}`.

Global Help

The Global Help component is a link that opens WebCenter Portal online help (Figure B-13).

Figure B-13   Global Help Component

Help

The Global Help component has many of the same properties as the About Portal component. Table B-14 lists the properties that have defaults other than those specified in Table B-2.

> **See Also:**
>
> The Global Help component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-14   Global Help Component Display Options

| Property	Description
Short Desc	A field for entering a tooltip to display when users hover their mouse pointers over the component The default is `Help for WebCenter Portal`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_HELP_DESC}`.
Text	The component label The default is `Help`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_HELP}`.
Type	The component type The default is `globalHelp`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Home Portal

The Home Portal component is a link to navigate directly to the Home portal (Figure B-14).

Figure B-14   Home Portal Component

Home Portal

The Home Portal component has many of the same properties as the About Portal component. Table B-15 lists the properties that have defaults other than those specified in Table B-2.

Table B-15   Home Portal Component Display Options

Property	Description
Text	Display text for the component
	The default is `Personal Portal`.
Type	The component type
	The default is `personalSpace`.

Invite People as Connection

The Invite People as Connection component is a link that opens a page where users can invite other users to connect (Figure B-15).

Figure B-15   Invite People as Connection Component
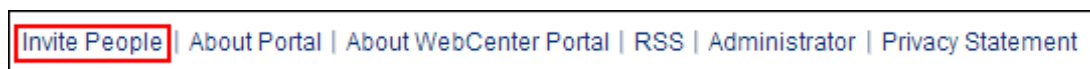
The Invite People as Connection component has many of the same properties as the About Portal component. Table B-16 lists the properties that have defaults other than those specified in Table B-2.

Table B-16   Invite People as Connection Display Options

Property	Description
Short Desc	A field for entering a tooltip to display when users hover their mouse pointers over the component
	The default is `Invite People`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_INVITE_PEOPLE}`.
Text	The component label
	The default is `Invite People`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_INVITE_PEOPLE}`.

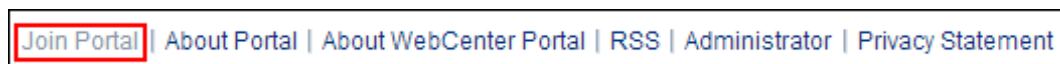## Join Portal

The Join Portal component is a link that opens the **Request Membership** page to initiate the process of becoming a member of a portal, usually the current portal (Figure B-16).

Figure B-16   Join Portal Component

Join Portal | About Portal | About WebCenter Portal | RSS | Administrator | Privacy Statement

The Join Portal component has many of the same properties as the About Portal component. Table B-17 lists the properties that have defaults other than those specified in Table B-2.

Table B-17   Join Portal Component Display Options

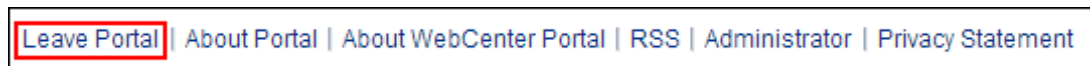| Property	Description
Short Desc	A field for entering a tooltip to display when users hover their mouse pointers over the component
	The default is `Join Portal`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.GROUP_SPACES_MANAGE_JOIN_SPACE}`.
Text	The component label
	The default is `Join Portal`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.GROUP_SPACES_MANAGE_JOIN_SPACE}`.

Leave Portal

The Leave Portal component is a link that opens the Leave Portal dialog to request removal of a user's own membership in the current portal (Figure B-17).

Figure B-17   Leave Portal Component

Leave Portal | About Portal | About WebCenter Portal | RSS | Administrator | Privacy Statement

The Leave Portal component has many of the same properties as the About Portal component. Table B-18 lists the properties that have defaults other than those specified in Table B-2.

Table B-18   Leave Portal Component Display Options

Property	Description
`Short Desc`	A field for entering a tooltip to display when users hover their mouse pointers over the component
	The default is `Leave Portal`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_LEAVE_SPACE}`.
`Text`	The component label
	The default is `Leave Portal`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_LEAVE_SPACE}`.

Login

The Login component is a link for navigating to the WebCenter Portal Login screen (Figure B-18).

Figure B-18   Login Component
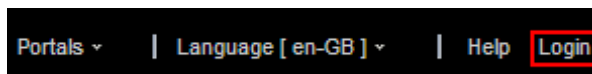
The Login link appears only to users who are not logged in. That is, if a user is logged in this link is hidden.

The Login component has many of the same properties as the About Portal component. Table B-19 lists the properties that have defaults other than those specified in Table B-2.

> ✐ **See Also:**
>
> The Login component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-19   Login Component Display Options

| Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is `Login`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGIN}`.
Text	Display text for the component
	The default is `Login`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGIN}`.
Type	The component type
	The default is `login`.

> ✐ **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Logout

The Logout component is a link for logging out of WebCenter Portal (Figure B-19).

Figure B-19   Logout Component
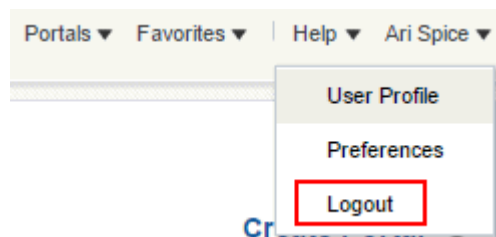
The **Logout** link appears only to logged in users. That is, if a user is logged out, this link is hidden.

The Logout component has many of the same properties as the About Portal component. Table B-20 lists the properties that have defaults other than those specified in Table B-2.

> ✎ **See Also:**
>
> The Logout component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-20   Logout Component Display Options

Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is `Logout of WebCenter Portal`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGOUT_DESC}`.
Text	Display text for the component
	The default is `Logout`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_LOGOUT}`.
Type	The component type
	The default is `logout`.

> ✎ **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Mail Members

The Mail Members component is a link that opens a simple send-mail window with a URL to the portal added in the message body. The **To** field is prepopulated with member addresses, as specified in their user profiles (Figure B-20).

Figure B-20   Mail Members Component

Send Mail to Members

Such messages are sent to the inboxes of all members of the current portal.

The Mail Members component has many of the same properties as the About Portal component. Table B-21 lists the properties that have defaults other than those specified in Table B-2.

Table B-21   Mail Members Component Display Options

| Property	Description
Text	The default is `Send Mail to Members`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_SEND_EMAIL_TO_MEMBERS}`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Mail Portal Managers

The Mail Portal Managers component is a link that opens a simple send-mail window with a URL to the portal added in the message body. The **To** field is prepopulated with portal manager addresses, as specified in their user profiles (Figure B-21).

Figure B-21   Mail Portal Managers Component

Send Mail to Moderators | About Portal | About WebCenter Portal | RSS | Administrator | Privacy Statement
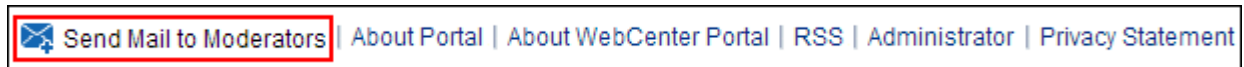
Such messages are sent to the inboxes of all users assigned the role `Portal Manager` for the current portal.

The Mail Portal Managers component shares many of the same properties with the About Portal component. Table B-22 lists the properties that have defaults other than those specified in Table B-2.

> **See Also:**
>
> The Mail Portal Managers component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-22   Mail Portal Managers Component Display Options

| Property	Description
Text	The default is `Send Mail to Managers`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_SEND_EMAIL_TO_MODERATORS}`.

> ✎ **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Page Links

The Page Links component is an icon and a link that opens the Links dialog (Figure B-22).

Figure B-22   Page Links Component
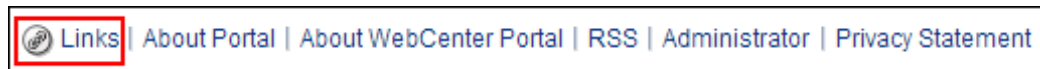
The Links dialog enables users to add personal links to related content to the current page and to navigate to those link targets.

> ✎ **See Also:**
>
> Linking Information in WebCenter Portal in *Using Portals in Oracle WebCenter Portal*

Table B-23 lists and describes the Display Options properties associated with the Page Links component.

Table B-23   Page Links Component Display Options

Property	Description
Task Flow Id	A unique identifier for the component instance **Caution:** Never change this property's default value
Show Label	Display text for the component By default, the Page Links component is labeled `Links`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Portal Logo

The Portal Logo component is a small icon of the current portal's logo. When a page template containing the portal logo component is used to create new pages, the portal logo image shown in Figure B-23 is replaced by the current portal's logo.

Figure B-23   Portal Logo Component

Table B-24 lists the Portal Logo component Display Options properties.

Table B-24   Portal Logo Component Display Options

| Property	Description
Height	The vertical height of the logo.
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component.
	The default is Home.
Type	The component type.
	The default is icon.
Width	The horizontal width of the logo.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressionsin *Developing for Oracle WebCenter Portal*.

Portal Switcher

The Portal Switcher component is a menu where users can select a portal to which to navigate (Figure B-24).

Figure B-24   Portal Switcher Component
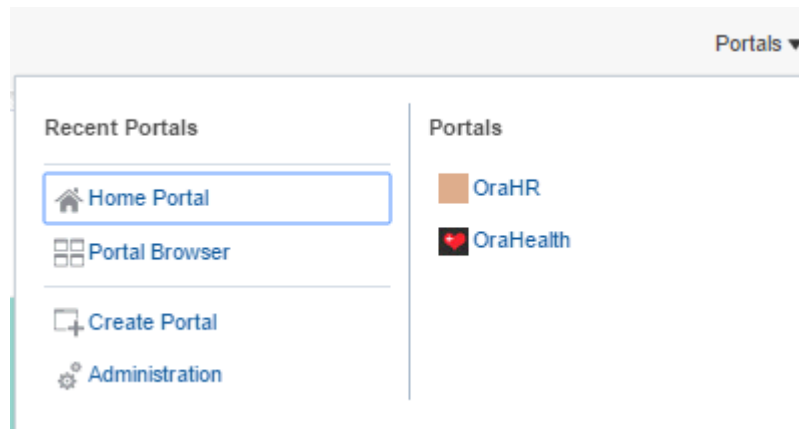
The Portal Switcher component has many of the same properties as the About Portal component. Table B-25 lists the properties that have defaults other than those specified in Table B-2.

Table B-25   Portal Switcher Component Display Options

| Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component.
	The default is `Access portals and create new ones`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_COMMUNITIES_DESC}`.
Text	Display text for the component.
	The default is `Portals`. The default is the rendered value of the EL expression `#{uib_o_w_s_r_Spaces.LABEL_COMMUNITIES}`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Print Preview

The Print Preview component is a link that opens a print preview of the current page in the browser (Figure B-25).

Figure B-25   Print Preview Component

Print Preview | About Portal | About WebCenter Portal | RSS | Administrator | Privacy Statement
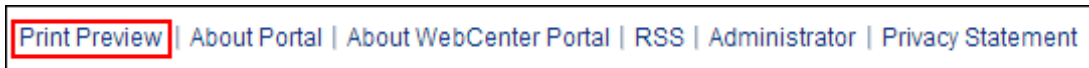
The Print Preview component has many of the same properties as the About Portal component. Table B-26 lists the properties that have defaults other than those specified in Table B-2.

> **✎ See Also:**
>
> The Print Preview component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-26   Print Preview Component Display Options

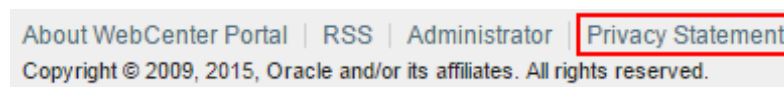| Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is `Print Preview`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_PAGE_PRINT_PREVIEW}`.
Text	Display text for the component
	The default is `Print Preview`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_PAGE_PRINT_PREVIEW}`.

> **✎ See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Privacy URL

The Privacy URL component is a link that renders the privacy statement (Figure B-26).

Figure B-26   Privacy URL Component

About WebCenter Portal | RSS | Administrator | Privacy Statement
Copyright © 2009, 2015, Oracle and/or its affiliates. All rights reserved.

The Privacy URL component has many of the same properties as the About Portal component. Table B-27 lists the properties that have defaults other than those specified in Table B-2.

> **See Also:**
>
> The Privacy URL component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-27   Privacy URL Component Display Options

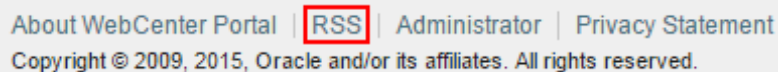| Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is `Display privacy statement`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.PRIVACY_STMT_DESC}`.
Text	Display text for the component
	The default is `Privacy Statement`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.PRIVACY_STMT}`.
Type	The component type
	The default is `privacyURL`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

RSS

The RSS component is a link that opens the RSS Manager (Figure B-27).

Figure B-27   RSS Component

About WebCenter Portal | RSS | Administrator | Privacy Statement
Copyright © 2009, 2015, Oracle and/or its affiliates. All rights reserved.

The RSS Manager enables users to subscribe to news feeds from WebCenter Portal tools and services. For more information, see Adding RSS Feeds to a Portal.

The RSS component has many of the same properties as the About Portal component. Table B-28 lists the properties that have defaults other than those specified in Table B-2.

> **See Also:**
>
> The RSS component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-28   RSS Component Display Options

Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is `Open RSS Manager`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_RSS_DESC}`.
Text	Display text for the component
	The default is `RSS`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_RSS}`.
Type	The component type
	The default is `rss`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Self-Registration

The Self-Registration component is a link that opens the Self-Registration page (Figure B-28).

Figure B-28   Self-Registration Component

Register for an account

> **Note:**
>
> This link displays only to visitors who are not registered WebCenter Portal users, and only when the system administrator has enabled **Allow public users to self-register**.

The Self-Registration page is a system page that enables users to create their own application login credentials. For more information, see Registering Yourself with WebCenter Portal in *Using Portals in Oracle WebCenter Portal*.

The Self-Registration component has many of the same properties as the About Portal component. Table B-29 lists the properties that have defaults other than those specified in Table B-2.

> **✎ See Also:**
>
> The Self-Registration component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-29   Self-Registration Component Display Options

Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component.
	The default is `Register with WebCenter Portal`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_SELFREG_DESC}`.
Text	Display text for the component.
	The default is `Register for an account`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_SELFREG}`.
Type	The component type.
	The default is `selfRegistration`.

> **✎ See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Share Resource

The Share Resource component renders as **Share Link**. Users click this link to open a popup version of the Publisher task flow for publishing messages, links, and documents (Figure B-29).

Figure B-29   Share Resource Component

Share Link | About Portal | About WebCenter Portal | RSS | Administrator | Privacy Statement

Messages, links, and documents are published on the user's own Message Board or a portal Message Board, depending on the selected recipient. In turn, if activities on the user's Message Board are shared with the user's connections via Activity Stream, then the published message, document, or link is shared with all of the user's connections through their Activity Streams. Messages published to a portal are shared with all members of that portal through their Activity Streams.

> **See Also:**
>
> For information about the Publisher task flow, see Sharing Messages, Files, and URLs in *Using Portals in Oracle WebCenter Portal*.

The Share Resource component has many of the same properties as the About Portal component. Table B-30 lists the properties that have defaults other than those specified in Table B-2.

> **See Also:**
>
> The Share Resource component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-30   Share Resource Component Display Options

Property	Description
`Short Desc`	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is `Share Link`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter['NAV_TOOLS_ACTIONS_FOLDER_SHARE.TITLE']}`.
`Text`	Display text for the component
	The default is `Share Link`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter['NAV_TOOLS_ACTIONS_FOLDER_SHARE.TITLE']}`.

> **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Status Indicator

The Status Indicator component is an animated icon that spins when WebCenter Portal is processing information (Figure B-30).

Figure B-30   Status Indicator Component

The Status Indicator component has many of the same properties as the About Portal component. Table B-31 lists the properties that have defaults other than those specified in Table B-2.

> ✏️ **See Also:**
>
> The Status Indicator component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-31   Status Indicator Component Display Options

Property	Description
`Type`	The component type
	The default is `statusIndicator`.

> ✏️ **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

Subscription Preferences

The Subscription Preferences component is a link that opens the Subscribe dialog to enable users to subscribe to notifications about specific types of activities that occur in the context of the portal (Figure B-31).

Figure B-31   Subscription Preferences Component

The Subscription Preferences component has many of the same properties as the About Portal component. Table B-32 lists the properties that have defaults other than those specified in Table B-2.

Table B-32   Subscription Preferences Component Display Options

| Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component
	The default is `Subscribe`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_SUBSCRIBE_TO_GET_NOTIFICATION}`.
Text	Display text for the component
	The default is `Subscribe`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.LABEL_SUBSCRIBE_TO_GET_NOTIFICATION}`.

Tags

The Tags component is an icon and link that opens the Tag This Page dialog (Figure B-32).

Figure B-32   Tags Component
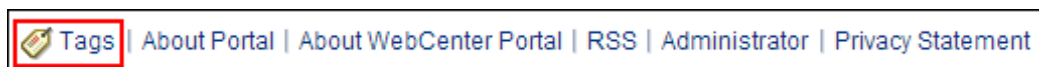
Add tags to associate personally meaningful search terms to a page or a portal item. For more information, see Adding Tagging to a Portal.

Table B-33 lists and describes the Display Options associated with the Tags component.

> ✏️ **See Also:**
>
> The Tags component has Style properties you can use to change the component's look and feel. For more information, see Setting Style and Content Style Properties.

Table B-33   Tags Component Display Options

| Property	Description
Show Label	Display text for the component
	By default, no display text is associated with the **Tag** icon.
Task Flow Id	The component's unique identifier, for example `wcdc4082953494`

> ✏️ **See Also:**
>
> The Display Options dialog provides access to an Expression Language (EL) editor for entering and testing EL values.
>
> If you need EL assistance, an application developer can provide an EL expression; see Expression Language Expressions in *Developing for Oracle WebCenter Portal*.

User Preferences

The User Preferences component is a link that opens the Preferences dialog (Figure B-33).

Figure B-33   User Preferences Component
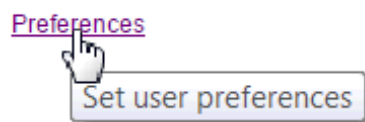
User preferences enable users to configure their views of the application to suit their working styles. For more information, see Setting Your Personal Preferencesin *Using Portals in Oracle WebCenter Portal*.

The User Preferences component has many of the same properties as the About Portal component. Table B-34 lists the properties that have defaults other than those specified in Table B-2.

Table B-34   User Preferences Component Display Options

Property	Description
Short Desc	A field for entering tooltip text to display when users hover their mouse pointers over the component.
	The default is `Set user preferences`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_PREFERENCES_DESC}`.
Text	Display text for the component.
	The default is `Preferences`. The default is the rendered value of the EL expression `#{uib_o_w_w_r_WebCenter.GLOBAL_LINK_PREFERENCES}`.